

Tasmanian Tourism Snapshot

Year ending June 2012

Introduction

The Tasmanian Tourism Snapshot is published every quarter, using the latest figures from the Tasmanian Visitor Survey, the International Visitor Survey and the National Visitor Survey, to provide you with a statistical overview about international and interstate visitors to Tasmania, as well as intrastate travel by Tasmanians. Information about these three surveys is contained at the back of the Snapshot. A commentary on the data is provided as a separate document on Tourism Tasmania's website.

While the Tasmanian Tourism Snapshot provides a useful overview of visitors to Tasmania, more detailed statistics are available at Tourism Tasmania's corporate website at <http://www.tourismtasmania.com.au/research/tvs>. The TVS database service provides you with easy online access to a range of other useful statistics and tables about our visitors which you can investigate and print for your own use.

Total Visitation to Tasmania (Source: Tasmanian Visitor Survey)

Important Note:

The total visitor numbers for the Year Ending March 2012 were underestimated by 8 355. An adjustment has been made to the dataset to rectify this error.

Key Results:

- For the year ending June 2012, there were 855,200 visitors, down 4% from 895,400 for the previous year.
- Total nights decreased by 2% to 7.86 million.
- Visitor expenditure decreased by 12% to \$1.372 billion.
- The number of interstate visitors to Tasmania decreased by 5% to 736,000 (was 774,600).

Summary:

- In terms of visitor numbers from Tasmania's key markets, Victoria decreased by 7%, New South Wales decreased by 8%, and Queensland increased by 6%.
- Holiday visitors decreased by 9% for the year ending June 2012, holiday nights decreased by 10% and holiday expenditure decreased by 15%.
- VFR visitors decreased by 3% for the year. The number of nights VFR visitors spent in Tasmania increased by 12% while VFR expenditure increased by 10%.
- The total number of visitors holidaying in Tasmania during the year ending June 2012 was 345,700, down 9% compared to the previous year (was 379,100).
- The total number of nights spent by holiday visitors to Tasmania for the year ending June 2012 was 3.5 million, down 10% from the previous year (was 3.8 million).
- Holiday visitor expenditure for the year was down 15% to \$874 million (was \$1.03 billion).
- Of all visitors, 167,800 (up 3%) were on business while 31,900 (down 5%) were travelling to attend a conference or convention.
- For the year ending June 2012, data from the TVS for the five marketing areas reported the following changes in visitor numbers: Hobart and Surrounds, down 3%; Launceston, Tamar Valley and the North, down 12%; Western Wilderness, down 14%; North West, down 13%; and East Coast, down 12%.

- For the year ending June 2012, 87% of all visitors to Tasmania travelled by scheduled air services and 13% travelled by sea. The total number of visitors travelling by scheduled air was down 2% and sea services was down 16% from the previous year.

Interstate Visitation to Tasmania (Source: Tasmanian Visitor Survey)

- The total number of interstate visitors to Tasmania for the year ending June 2012 was 736,000, down 5% from 774,600 the previous year.
- The total number of nights spent by interstate visitors to Tasmania for the year ending June 2012 was 6.11 million, down 4% from the previous year (was 6.38 million).
- Interstate visitor expenditure decreased by 13% to \$1.15 billion (was \$1.32 billion in the year ending June 2011).
- Of all interstate visitors, 271,000 were on holiday (down 10%), 227,000 were visiting friends or relatives (down 4%), 157,500 were on business (up 4%), and 28,800 were travelling to attend a conference or convention (down 7%).
- In terms of visitation to Tasmania from the key interstate markets, Victoria decreased by 7% to 317,500, NSW decreased by 8% to 173,400, and Queensland increased by 6% to 122,200 (Table 4). Together, these markets accounted for 83% of interstate visitation in the year ending June 2012.

International Visitation (Source: International Visitor Survey)

Summary – Australia

- A total of 5.54 million international visitors visited the country in the year ending June 2012, up 1% from the year ending June 2011.
- Holiday visitors to Australia decreased by 1% to 2.44 million, while VFR visitors increased by 3% to 1.38 million.
- International visitor nights spent in Australia increased by 4% to 197.2 million.
- Total expenditure by international visitors in Australia for the year ending June 2012 increased by 2% to \$18.0 billion¹ (including package expenditure). Holiday spend was \$6.2 billion (including package expenditure) for the year, showing no significant change from the year ending June 2011.
- For Australia's largest source markets, the following changes to visitor numbers to Australia were recorded: New Zealand, up 1%; United Kingdom, down 6%; China, up 16% and the USA, up 1%.

Summary – Tasmania

- Tasmania received 141,200 international visitors during the year ending June 2012, down 5% from 149,000 the previous year.
- The number of nights international visitors spent in Tasmania increased by 1% to 2.87 million, and the average length of stay increased by 7% to 20 nights.
- Expenditure by international visitors increased by 4% to \$253 million².
- Holiday visitors to Tasmania decreased by 2% to 100,900, while VFR visitors increased by 4% to 30,400.
- Holiday nights remained steady to 1.09 million, while the average length of stay for holiday visitors increased by 2% to 11 nights.
- The average spend per international visitor (including package expenditure) in Tasmania increased by 10% to \$1,792 (was \$1,631) during the year ending June 2012, while spend per night increased by 3% to \$88 (was \$86).

¹ Expenditure for Total Australia (not modelled) includes small amounts that cannot be allocated to a particular state/territory

² Modelled expenditure (includes package expenditure)

- For Tasmania's largest source markets, the following changes to visitor numbers to the State were recorded: United Kingdom, down 20%; New Zealand, down 12%; the USA, up 9%; and China, up 38%.
- Tasmania's share of all international visitors to Australia for the year ending June 2012 was 2.55%, compared with 2.7% for the year ending June 2011.

Intrastate Visitation³ (National Visitor Survey)

Important note:

Tourism Research Australia has found errors in the weighting data for the Year Ending June and September 2012 results in March 2013. Subsequently, the results for the Year Ending June and September 2012 have been revised to rectify these errors.

- In the year ending June 2012, the number of intrastate day trips in Tasmania increased by 17% to 4.87 million, whilst intrastate overnight trips increased by 11% to 1.1 million compared to the year ending June 2011.
- The number of overnight intrastate holiday trips in Tasmania increased by 8%, VFR increased by 29%, and overnight business trips increased by 3% in the year ending June 2012.
- Total spend by overnight intrastate visitors in Tasmania decreased by 14% to \$426 million for the year ending June 2012.

³ Travel undertaken by a visitor in their home state

Total Visitors to Tasmania

	YE Jun 2011	YE Jun 2012	% change	
<i>Visitors</i>				
Visitors on scheduled air and sea services	895,400	855,200	↓	-4%

	YE Jun 2011	YE Jun 2012	% change	
<i>Visitors</i>				
Day visitors	22,300	23,400	↑	5%
Overnight visitors	873,100	831,800	↓	-5%
Total visitors	895,400	855,200	↓	-4%
<i>Nights</i>				
Nights (million)	8.05	7.86	↓	-2%
Length of stay (nights)	9.0	9.2	↑	2%
<i>Expenditure</i>				
Expenditure (\$million)	\$1,558	\$1,372	↓	-12%
Average spend per visitor	\$1,740	\$1,605	↓	-8%
Average spend per night	\$194	\$175	↓	-10%
Holiday spend (\$million)	\$1,027	\$874	↓	-15%
<i>Purpose of Visit</i>				
Holiday	379,100	345,700	↓	-9%
Visit friends or relatives (VFR)	258,600	250,700	↓	-3%
Total leisure (Holiday+VFR)	637,700	596,400	↓	-6%
Business or employment	162,400	167,800	↑	3%
Convention/conference/seminar	33,800	31,900	↓	-5%
<i>Regions Visited</i>				
Hobart & Surrounds	695,500	675,900	↓	-3%
Launceston, Tamar Valley & North	558,400	490,000	↓	-12%
Western Wilderness	250,000	215,400	↓	-14%
North West	374,900	325,200	↓	-13%
East Coast	287,800	253,500	↓	-12%
<i>Mode of departure</i>				
Air visitors	761,300	742,800	↓	-2%
Sea visitors	134,100	112,400	↓	-16%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

Interstate Visitors to Tasmania

Table 3. Interstate visitors to Tasmania on scheduled air and sea services				
	YE Jun 2011	YE Jun 2012		% change
<i>Visitors</i>				
Day visitors	21,600	23,100	↑	7%
Overnight visitors	753,000	712,900	↓	-5%
Total visitors	774,600	736,000	↓	-5%
<i>Nights</i>				
Nights (million)	6.38	6.11	↓	-4%
Length of stay (nights)	8.2	8.3	↑	1%
<i>Expenditure</i>				
Expenditure (\$million)	\$1,319	\$1,152	↓	-13%
Average spend per visitor	\$1,703	\$1,566	↓	-8%
Average spend per night	\$207	\$189	↓	-9%
Holiday spend (\$million)	\$858	\$717	↓	-16%
<i>Purpose of Visit</i>				
Holiday	300,500	271,000	↓	-10%
Visit friends or relatives (VFR)	236,700	227,000	↓	-4%
Total leisure (Holiday+VFR)	537,300	498,000	↓	-7%
Business or employment	150,800	157,500	↑	4%
Convention/conference/seminar	31,100	28,800	↓	-7%
<i>Regions Visited</i>				
Hobart & Surrounds	581,100	565,100	↓	-3%
Launceston, Tamar Valley & North	470,300	412,600	↓	-12%
Western Wilderness	190,200	167,400	↓	-12%
North West	317,400	278,000	↓	-12%
East Coast	222,100	193,400	↓	-13%
<i>Mode of departure</i>				
Air visitors	650,600	633,700	↓	-3%
Sea visitors	124,000	102,300	↓	-17%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

	YE Jun 2011	YE Jun 2012	% change	
Victoria	340,700	317,500	↓	-7%
N.S.W.	189,400	173,400	↓	-8%
Queensland	114,800	122,200	↑	6%
South Australia	44,000	39,400	↓	-10%
Western Australia	45,600	48,200	↑	6%
A.C.T.	22,200	21,700	↓	-2%
N.T.	8,100	6,500	↓	-20%
Total interstate visitors	774,600	736,000	↓	-5%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

International Visitors to Tasmania

	to Tasmania			to Australia		
	YE Jun 2011	YE Jun 2012	% Change	YE Jun 2011	YE Jun 2012	% Change
Visitors						
International visitors	149,000	141,200	↓ -5%	5,461,400	5,537,000	↑ 1%
Nights						
Nights ('000s)	2,838	2,869	↑ 1%	189,549	197,241	↑ 4%
Ave Length of stay (nights)	19	20	↑ 7%	35	36	↑ 3%
Expenditure						
Expenditure (\$million)	\$243	\$253	↑ 4%	\$17,595	\$17,962	↑ 2%
Average spend per visitor	\$1,631	\$1,792	↑ 10%	\$3,222	\$3,244	↑ 1%
Average spend per night	\$86	\$88	↑ 3%	\$93	\$91	↓ -2%
Holiday spend (\$million)	\$108	\$123	↑ 14%	\$6,186	\$6,199	↑ 0%
Purpose of Visit						
Holiday	103,100	100,900	↓ -2%	2,449,900	2,436,200	↓ -1%
Visit friends or relatives (VFR)	29,200	30,400	↑ 4%	1,338,900	1,380,700	↑ 3%
Business	12,400	10,200	↓ -18%	873,000	897,900	↑ 3%
Education	4,600	1,900	↓ -59%	367,800	360,500	↓ -2%
Employment	7,200	5,500	↓ -23%	191,100	213,500	↑ 12%
Other Reason	3,800	400	↓ -89%	240,700	248,200	↑ 3%
Total	149,000	141,200	↓ -5%	5,461,400	5,537,000	↑ 1%

Source: International Visitor Survey (IVS), Tourism Research Australia

* Modelled expenditure including package expenditure

** The sum of the reasons for visiting Tasmania may be greater than the total as a visitor can give more than one reason for their visit.

Table 6. International visitors to States/Territories

	YE Jun 2011	YE Jun 2012	% Change	YE Jun 2011	YE Jun 2012	% Point difference
<i>State/territory visited</i>	<i>Visitors</i>			<i>Market Share</i>		
New South Wales	2,810,000	2,795,000	↓ -1%	51%	50%	↓ -1.0%
Victoria	1,715,800	1,776,800	↑ 4%	31%	32%	↑ 0.7%
Queensland	2,000,800	1,950,600	↓ -3%	37%	35%	↓ -1.4%
South Australia	369,200	331,700	↓ -10%	7%	6%	↓ -0.8%
Western Australia	723,500	741,600	↑ 3%	13%	13%	↑ 0.1%
Tasmania	149,000	141,200	↓ -5%	3%	3%	↓ -0.2%
Northern Territory	304,100	262,700	↓ -14%	6%	5%	↓ -0.8%
Australia Capital Territory	159,600	163,400	↑ 2%	3%	3%	→ 0.0%
Total visitors to Australia	5,461,400	5,537,000	↑ 1%	100%	100%	→ 0.0%

Source: International Visitor Survey (IVS), Tourism Research Australia

% point difference - the difference between two percentages (i.e. the difference between 3% and 3.5% is 0.5 percentage points)

Table 7. Origin of international visitors to Tasmania

	YE Jun 2011	YE Jun 2012	% Change	YE Jun 2011	YE Jun 2012	% Point difference
Country of origin	Visitors			National Market Share		
New Zealand	14,400	12,700	↓ -12%	1.3%	1.2%	↓ -0.2%
Japan	6,100	3,300	↓ -46%	1.8%	1.0%	↓ -0.8%
Hong Kong	10,800	9,100	↓ -16%	7.0%	5.9%	↓ -1.1%
Singapore	6,700	6,500	↓ -4%	2.4%	2.3%	↓ -0.1%
Malaysia	6,300	6,800	↑ 9%	2.8%	3.1%	↑ 0.3%
Indonesia	3,700	1,000	↓ -73%	3.1%	0.8%	↓ -2.3%
Taiwan	2,500	2,500	↓ -3%	3.3%	2.9%	↓ -0.4%
Thailand	2,500	2,900	↑ 15%	3.0%	3.8%	↑ 0.8%
Korea	4,600	3,300	↓ -28%	2.4%	1.8%	↓ -0.6%
China	7,700	10,600	↑ 38%	1.6%	1.9%	↑ 0.3%
India	2,400	700	↓ -69%	1.7%	0.5%	↓ -1.2%
Other Asia	1,700	2,200	↑ 29%	1.2%	1.4%	↑ 0.3%
USA includes Hawaii	17,100	18,700	↑ 9%	3.9%	4.3%	↑ 0.3%
Canada	6,400	6,900	↑ 8%	5.7%	6.1%	↑ 0.4%
United Kingdom	21,300	17,100	↓ -20%	3.6%	3.0%	↓ -0.5%
Germany	8,000	7,300	↓ -8%	5.2%	5.0%	↓ -0.2%
Scandinavia	2,100	5,400	↑ 152%	2.6%	6.6%	↑ 4.0%
France	3,800	5,100	↑ 33%	4.3%	5.6%	↑ 1.3%
Italy	1,500	2,100	↑ 46%	2.7%	3.9%	↑ 1.2%
Netherlands	2,800	1,700	↓ -41%	6.1%	3.8%	↓ -2.3%
Switzerland	2,500	2,600	↑ 2%	6.0%	6.5%	↑ 0.5%
Other Europe	5,000	7,400	↑ 47%	2.9%	4.1%	↑ 1.1%
Other Countries	9,100	5,500	↓ -39%	2.3%	1.3%	↓ -0.9%
Total	149,000	141,200	↓ -5%	2.7%	2.6%	↓ -0.2%

Source: International Visitor Survey, Tourism Research Australia

np - not published as the sample size is too small to be reliable.

% point difference - the difference between two percentages (i.e. the difference between 3% and 3.5% is 0.5 percentage points)

Intrastate Visitors

	Tasmania			Australia		
	YE Jun 2011	YE Jun 2012	% change	YE Jun 2011	YE Jun 2012	% change
Visitors						
Overnight visitors ('000s)	1,026	1,141	↑ 11%	47,046	50,021	↑ 6%
Nights						
Nights ('000s)	2,692	2,830	↑ 5%	146,250	159,937	↑ 9%
Length of stay (nights)	2.6	2.5	↓ -5%	3.1	3.2	↑ 3%
Expenditure						
Expenditure (\$million)	\$498	\$426	↓ -14%	\$28,435	\$29,192	↑ 3%
Spend per visitor	\$485	\$373	↓ -23%	\$604	\$584	↓ -3%
Spend per night	\$185	\$151	↓ -19%	\$194	\$183	↓ -6%
Purpose('000s)						
Holiday	522	565	↑ 8%	21,790	22,069	↑ 1%
Visit friends &/or relatives (VFR)	264	341	↑ 29%	15,776	18,037	↑ 14%
Business	171	176	→ 3%	6,983	7,573	↑ 8%
Other reason	74	66	↓ -11%	2,940	3,010	↑ 2%
Total overnight intrastate visitors	1,026	1,141	↑ 11%	47,046	50,021	↑ 6%

Source: National Visitor Survey (NVS), Tourism Research Australia

	Tasmania			Australia		
	YE Jun 2011	YE Jun 2012	% change	YE Jun 2011	YE Jun 2012	% change
Visitor						
Day visitors ('000s)	4,168	4,870	↑ 17%	148,477	160,164	↑ 8%
Total intrastate Day+Overnight visitors ('000s)	5,194	6,011	↑ 16%	195,523	210,185	↑ 7%
Expenditure						
Expenditure (\$million)	\$409	\$462	↑ 13%	\$15,158	\$17,544	↑ 16%
Spend per visitor	\$98	\$95	↓ -3%	\$102	\$110	↑ 7%
Purpose('000s)						
Holiday	2,200	2,470	↑ 12%	70,905	74,923	↑ 6%
Visit friends &/or relatives (VFR)	1,002	1,200	↑ 20%	45,493	46,783	↑ 3%
Business	344	544	↑ 58%	14,002	17,868	↑ 28%
Other reason	622	656	↑ 5%	18,077	20,590	↑ 14%
Total day intrastate visitors	4,168	4,878	↑ 17%	148,477	160,164	↑ 8%

Source: National Visitor Survey (NVS), Tourism Research Australia

Quarter ending June 2012

The TVS reports the following key findings for visitors during the April-June 2012 quarter.

- The total number of visitors to Tasmania for the June quarter 2012 was 203,600, up 5% from 194,200 the previous year (Fig. 1).
- The total number of nights spent by visitors to Tasmania for the June quarter 2012 increased by 8% to 1.87 million (was 1.73 million) (Fig. 2).
- Visitor expenditure was \$314 million, down 4% from the same quarter of the previous year (was \$328.8 million) (Fig. 3).
- Of all visitors for the quarter, 76,300 (down 5%) were on holiday, 59,900 (up 18%) were visiting friends or relatives, 48,800 (up 25%) were on business, and 7,000 (down 22%) were travelling to attend a conference or convention (Fig. 4).

Fig. 1. Total Visitors to Tasmania by Quarter*

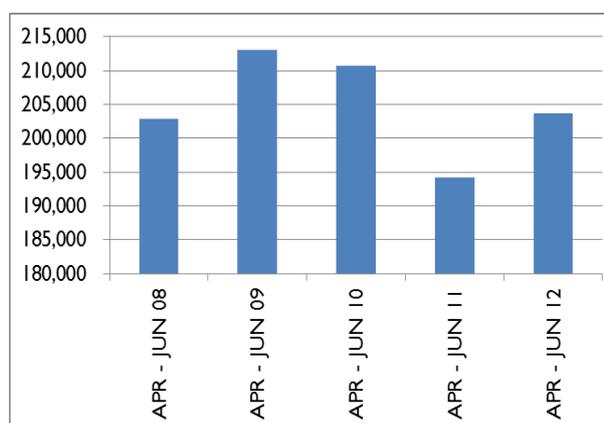


Fig. 2. Total Nights by Quarter*

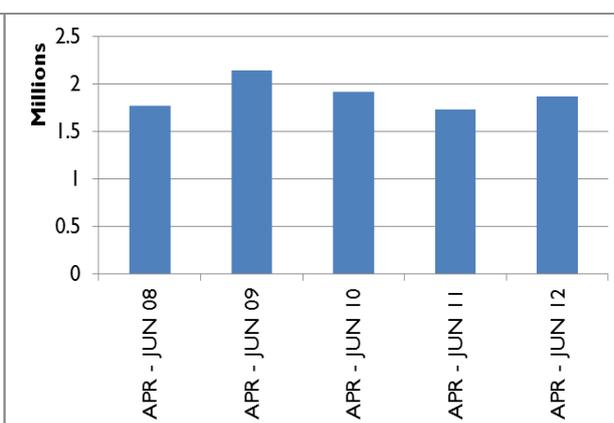


Fig. 3. Total Expenditure (\$ millions) by Quarter*

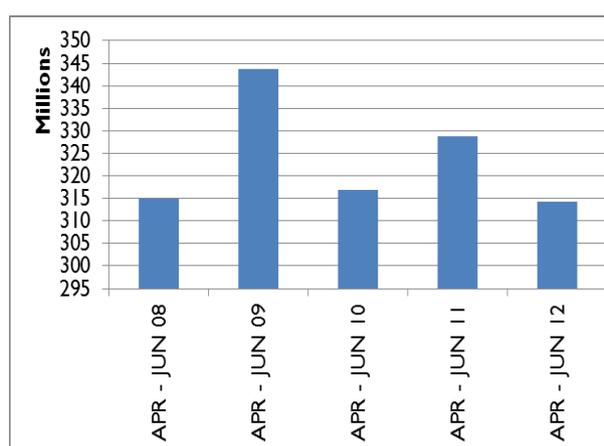
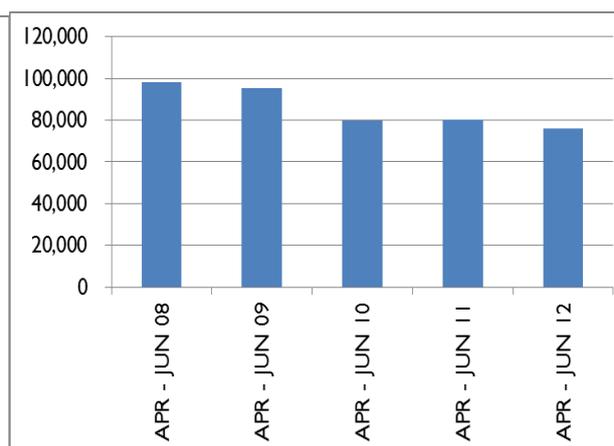


Fig. 4. Total Holiday Visitors by Quarter*



* Graphs present data for every quarter for the last five years, on visitors travelling to Tasmania via scheduled services. Data source: Tasmanian Visitor Survey.

Where do the statistics come from?

Tasmanian Visitor Survey (TVS)

The TVS is an exit survey designed to provide a profile of the characteristics, travel behaviour and expenditure of international and domestic visitors to Tasmania. It is nationally acknowledged as the most reliable source of statistical data about visitors to Tasmania, being based on a sample of more than 9,000 visitors per year. As an island, Tasmania has a natural advantage over other destinations when it comes to surveys of this type, because visitors can be more accurately counted as they depart via air and sea ports.

More detailed statistics from the TVS are also available through Tourism Tasmania's corporate website at www.tourismtasmania.com.au/research/webreporter. The webreporter service provides you with easy online access to a range of other useful visitor statistics and tables from the TVS which you can investigate and print for your own use.

International Visitor Survey (IVS)

The IVS is administered by Tourism Research Australia. The IVS is the most comprehensive source of information on international visitors to Australia. The survey gathers information from visitors about, among other things; the number of nights they stayed in Australia, travel arrangements, reasons for visiting, places visited, information sources they used to find out about Australia prior to leaving home, impressions of aspects of Australia, income earned and expenditure on the trip. The IVS samples 40,000 departing, short-term international travellers in the departure lounges of eight international airports across Australia - Sydney, Melbourne, Brisbane, Cairns, Perth, Adelaide, Darwin and the Gold Coast.

National Visitor Survey (NVS)

The NVS is also administered by Tourism Research Australia. The NVS measures the characteristics and travel patterns of domestic tourists within Australia, including intrastate day and overnight travel. The survey results come from telephone interviews conducted with an annual sample of 120,000 Australian residents. The survey collects details about their recent travel for day trips, trips involving overnight stays and overseas travel. The NVS provides the only source of information about day and overnight travel by Tasmanians in their own state.

Why the TVS and IVS figures don't match up

Each survey is conducted by a different organisation which uses different sampling and 'weighting' methods to determine total numbers. As a result, the statistics from each survey will give differing results for identical subjects and are unlikely to tally if added together.

Caution: You are advised to exercise care when interpreting figures contained in this report or webreporter. These figures are collected from a sample of visitors. They may be different from the real figure if data from 100% of all visitors could have been collected. Therefore, these estimates may be subject to chance variation, or sampling error. Smaller estimates under 1000 must be treated with greater caution.