

Tasmanian Tourism Snapshot

Year ending December 2009

Total Visitation to Tasmania (Tasmanian Visitor Survey)

Key Messages:

- There was a 2% increase in total visitors to Tasmania on scheduled air and sea services in the year ending December 2009 compared with the previous year, resulting in 912,100 visitors to the state.
- When combined with navy and cruise ship visitors (+4% to 103,200), the total number of visitors to Tasmania increased by 2%, once again exceeding over a million visitors (1,015,300).
- For the December quarter 2009, the Tasmanian Visitor Survey (TVS) reported the first quarterly decline in total visitation since the September quarter 2007 (-2% to 228,700). Despite this, both nights (+16%) and expenditure (+1%) increased over the December quarter 2009.
- The average length of stay lifted to 9.4 nights (was 8.2), the highest average duration recorded since year ending September 2004. This increase is largely the result of a small number of visitors in 2009 stating their length of stay was more than 3 months.
- The average length of stay for holiday visitors recovered to 9.2 nights, after a dip during 2008 (8.7 nights).
- These positive results have been achieved during a year where air capacity to the state decreased (-4%). Whilst air capacity in the March quarter remained unchanged, decreases were recorded in the June (-6%), September (-4%) and December (-5%) quarters.

Summary:

- The total number of nights spent by visitors in Tasmania increased to 8.59 million nights (+16%), and the average length of stay rose to 9.4 nights (was 8.2). The increase in nights was largely driven by growth in overall business (+43%) and convention (+38%) nights, mainly out of New South Wales, Victoria, and Queensland.
- Visitor expenditure in Tasmania grew marginally to \$1.47 billion (+1%). A sharp increase in nights (+16%) contributed to the average spend per night decreasing by 13% (\$172). Despite this, the average spend per visitor remained stable (-1% to \$1,615).
- In terms of visitor numbers Tasmania's largest market, holiday travel (-3%), decreased over the year along with visiting friends and/or relatives (VFR) travel (-3%). However, the business (+15%) and convention (+24%) markets both performed strongly helping to offset the decline in leisure travel.
- Despite a modest increase for the number of nights spent by Leisure (holiday and VFR) visitors (+2%), the number of visitors and expenditure declined 3% and 6% respectively.
- Hobart and Surrounds was the only Zone¹ to record an increase in visitation (+3%), each of the other four zones recorded declines of between 1% and 2%.

Interstate Visitation to Tasmania (Tasmanian Visitor Survey)

Key Messages:

- Interstate visitor numbers to the state remained steady over 2009, resulting in 779,500 (+1%) visitors to Tasmania.
- Interstate visitor nights increased 8% to 6.63 million, with the average length of stay increasing to 8.5 nights compared to 8.0 for the year ending December 2008.
- Expenditure by interstate visitors remained stable at \$1.26 billion for the year ending December 2009.
- The average spend by each interstate visitor was unchanged at \$1,620; while the average spend per night decreased to \$190 (was \$204).

¹ Zones are based on Tourism Tasmania's Zone Marketing Strategy

Summary:

- Interstate visitor numbers were kept afloat by a very strong New South Wales visitor market (+35%). Declines for visitor numbers were recorded for the states: Victoria (-5%), Queensland (-10%), South Australia (-9%), Western Australia (-15%).
- Decreases in interstate visitor numbers were recorded in both the holiday (-5%) and VFR (-5%) markets, while the business (+15%) and convention (+28%) markets both performed strongly over the year.
- The decline of sea travel by interstate visitors in previous years has now arrested, with a small increase of 2% to 117,100 recorded for 2009. Interstate visitors departing by air was steady at 662,500.
- Hobart and Surrounds was the only Zone to record an increase in interstate visitation (+3%), each of the other four zones recorded declines of between 1% and 4%.

International Visitation (International Visitor Survey)

Key Messages:

- International visitor arrivals to Australia have stabilised following almost two years of declines.
- For the first time since the Global Financial Crisis began there was a slight rise in the number of international visitors to Australia, with visitor numbers increasing by 8,000 arrivals (+0.2%). A total of 5.18 million tourists visited the country in the year ending December 2009.
- The numbers of nights international travellers spend in Australia is growing (+6%) and is contributing to growth in expenditure (+5%).
- In contrast to the positive national trend, international visitor arrivals into Tasmania continue to decline, with arrivals down 8% to 139,500 and nights down 12% to 2.6 million. Despite fewer visitors and nights, expenditure is up 13% to \$274 million².

Summary:

- Tasmania received 139,500 international visitors in 2009, 8% fewer visitors than in 2008.
- Tasmania's share of all international visitors to Australia fell to 2.7% in 2009 (was 2.9%).
- Visitor nights spent in Tasmania fell by 12% in 2009, the largest decline in six years. Average length of stay has decreased from 19.7 nights to 18.9 nights, the shortest duration of stay recorded since the year ending December 2005.
- Despite the significant drop in visitor numbers and nights, the spending of international visitors in Tasmania grew by 13% to \$274 million (including package expenditure) during 2009.
- Average spend per visitor is up from \$1,600 in 2008 to \$1,966 in 2009. Similarly, spend per night increased to \$104 (was \$81).³
- Declines were recorded in all reasons for visiting Tasmania: Holiday (-9%), VFR (-12%), Business (-11%), Education (-3%) and Employment (-12%).
- Despite the decrease in overall nights (-12%), holiday nights remained unchanged over the year. A decrease in Education (-17%) and VFR (-23%) nights were largely responsible for the state-wide decline in nights.
- Tasmania's only source target markets to record positive growth in 2009 were Germany (+12%), and whilst only based on small visitor numbers, China (+103%), Hong Kong (+15%), Taiwan (+29%), Scandinavia (+59%) and Malaysia (+17%) also increased.
- The number of visitors from the USA travelling to Tasmania showed the sharpest fall in visitors, dropping by 31% to 21,900. Other key target markets recording negative figures in 2009 included: UK (-22%), New Zealand (-6%), Canada (-31%), Singapore (-14%) and Japan (-16%).

² Includes package expenditure

³ Average spend per visitor and night includes package expenditure

Intrastate Visitation⁴ (National Visitor Survey)

Key Messages:

- Nationally, all overnight intrastate trips across Australia are at record low levels, down 6% in the year ending December 2009.
- In contrast, national intrastate day trip travel is proving more resilient in the current downturn, increasing 7% on the previous year.
- Total trips (5.5 million) taken by Tasmanians in their home state increased 5% in the year to December 2009 compared with the previous year. This was due to an increase in day trips (+9%), while the number of overnight trips taken by Tasmanians in the State decreased (-11%) over the period.

Summary:

- The overall decline in overnight intrastate travel in Tasmania was from all purposes: holiday (-10%) and VFR (-14%) and business (-8%).
- The increase in Tasmanians undertaking day travel in the state was a result of growth in the holiday (+11%), and VFR (+12%) markets, whilst same day business travel decreased (-4%).
- Along with a decrease in visitor numbers (-11%) and nights (-9%), the total spend of overnight intrastate visitors also decreased to \$290 million (-5%).
- In contrast, total day travel expenditure reached \$434 million in 2009, up 11% on 2008.

Cruise and Navy Ship Visitation

Key Messages:

- The 2009-10 Tasmanian cruise ship season commenced at the start of November 2009 and is set to finish in early April 2010. As a result, only cruise ship visitor numbers are available to report at this stage.
- During the period January 2009 to December 2009 over 101,000 cruise ship passengers and crew visited the State, an increase of 6% over the previous corresponding period.
- In addition to cruise ship visitors, there were 2,200 navy ship passengers that came to Tasmania in 2009, a decrease on the previous year (4,300 passengers).

Marketing Performance (Holiday Tracking Survey)

Key Messages:

- Without any prompting on advertising for holidays and travel, 15.7% of all Australians (interstate and intrastate residents) had read, seen or heard some form of Tasmanian holiday/travel advertising in the year ending December 2009, down from 16.6% of all Australians recorded in the previous year.
- Tasmania had the third highest level of prompted advertising awareness for the year at 24.6%, following Queensland (48.1%) and Victoria (25.8%).
- When asked where you would like to go on holidays in the next two years, 17.5% of all Australians had a preference to travel to/within Tasmania, an increase of 0.5% on the previous year.
- 4.8% of all Australians intend to travel to/within the State in the next two years, an increase of 0.4% on the previous year.
- An estimated 11.3% of all Australians indicated they had an awareness of Tasmania's previous advertising tagline 'Island of Inspiration', launched in January 2007.
- Results are yet to be gathered for Tasmania's new tagline "A world apart not a world away" released in August 2009.

⁴ Travel undertaken by a visitor in their home state

Total Visitors to Tasmania

| Total visitors to Tasmania from all sources | | | |
|--|----------------|------------------|-------------|
| | Jan 08- Dec 08 | Jan 09- Dec 09 | % change |
| <i>Visitors</i> | | | |
| Cruise ship visitors | 95,100 | 101,000 | ↑ 6% |
| Navy ship visitors | 4,300 | 2,200 | ↓ -49% |
| Visitors on scheduled air and sea services | 897,100 | 912,100 | ↑ 2% |
| Total visitors to Tasmania from all sources | 996,500 | 1,015,300 | ↑ 2% |

Total Visitors to Tasmania continued

| Total visitors to Tasmania on scheduled air and sea services | | | |
|--|----------------|----------------|----------|
| | Jan 08- Dec 08 | Jan 09- Dec 09 | % change |
| <i>Visitors</i> | | | |
| Day visitors | 17,000 | 18,500 | ↑ 9% |
| Overnight visitors | 880,100 | 893,600 | ↑ 2% |
| Total visitors | 897,100 | 912,100 | ↑ 2% |
| <i>Nights</i> | | | |
| Nights (million) | 7.40 | 8.59 | ↑ 16% |
| Length of stay (nights) | 8.2 | 9.4 | ↑ 14% |
| <i>Expenditure</i> | | | |
| Expenditure (\$million) | \$1,465 | \$1,473 | ↑ 1% |
| Average spend per visitor | \$1,633 | \$1,615 | ↓ -1% |
| Average spend per night | \$198 | \$172 | ↓ -13% |
| Holiday spend (\$million) | \$1,058 | \$994 | ↓ -6% |
| <i>Purpose</i> | | | |
| Holiday | 433,900 | 420,000 | ↓ -3% |
| Visit friends or relatives (VFR) | 247,500 | 241,000 | ↓ -3% |
| Total leisure (Holiday+VFR) | 681,400 | 660,900 | ↓ -3% |
| Business or employment | 143,100 | 163,900 | ↑ 15% |
| Convention/conference/seminar | 27,000 | 33,500 | ↑ 24% |
| <i>Zones Visited*</i> | | | |
| Hobart & Surrounds | 709,200 | 733,200 | ↑ 3% |
| Launceston, Tamar Valley & North | 504,900 | 498,700 | ↓ -1% |
| Western Wilderness | 274,500 | 269,900 | ↓ -2% |
| North West | 348,200 | 342,000 | ↓ -2% |
| East Coast | 297,100 | 291,800 | ↓ -2% |
| <i>Mode of departure</i> | | | |
| Air visitors | 773,600 | 784,600 | ↑ 1% |
| Sea visitors | 123,500 | 127,500 | ↑ 3% |

source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

* Zones are based on Tourism Tasmania's Zone Marketing Strategy

Total Interstate Visitors to Tasmania

| Interstate visitors to Tasmania on scheduled air and sea services | | | | |
|---|----------------|----------------|----------|-----|
| | Jan 08- Dec 08 | Jan 09- Dec 09 | % change | |
| <i>Visitors</i> | | | | |
| Day visitors | 16,700 | 18,000 | ↑ | 8% |
| Overnight visitors | 757,300 | 761,600 | ↑ | 1% |
| Total visitors | 774,000 | 779,500 | ↑ | 1% |
| <i>Nights</i> | | | | |
| Nights (million) | 6.16 | 6.63 | ↑ | 8% |
| Length of stay (nights) | 8.0 | 8.5 | ↑ | 7% |
| <i>Expenditure</i> | | | | |
| Expenditure (\$million) | \$1,255 | \$1,261 | → | 0% |
| Average spend per visitor | \$1,622 | \$1,618 | ↓ | -7% |
| Average spend per night | \$204 | \$190 | → | 0% |
| Holiday spend (\$million) | \$896 | \$838 | ↓ | -7% |
| <i>Purpose</i> | | | | |
| Holiday | 351,200 | 335,100 | ↓ | -5% |
| Visit friends or relatives (VFR) | 225,500 | 215,000 | ↓ | -5% |
| Total leisure (Holiday+VFR) | 576,700 | 550,100 | ↓ | -5% |
| Business or employment | 134,500 | 155,000 | ↑ | 15% |
| Convention/conference/seminar | 23,500 | 30,100 | ↑ | 28% |
| <i>Zones Visited*</i> | | | | |
| Hobart & Surrounds | 598,500 | 615,600 | ↑ | 3% |
| Launceston, Tamar Valley & North | 428,978 | 421,822 | ↓ | -2% |
| Western Wilderness | 218,200 | 213,300 | ↓ | -2% |
| North West | 301,729 | 288,754 | ↓ | -4% |
| East Coast | 235,500 | 232,600 | ↓ | -1% |
| <i>Mode of departure</i> | | | | |
| Air visitors | 659,300 | 662,500 | → | 0% |
| Sea visitors | 114,700 | 117,100 | ↑ | 2% |

source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

* Zones are based on Tourism Tasmania's Zone Marketing Strategy

| Origin of interstate visitors to Tasmania | | | |
|---|----------------|----------------|----------|
| | Jan 08- Dec 08 | Jan 09- Dec 09 | % change |
| Victoria | 365,300 | 346,800 | ↓ -5% |
| N.S.W. | 149,000 | 201,700 | ↑ 35% |
| Queensland | 117,600 | 106,200 | ↓ -10% |
| South Australia | 53,500 | 48,600 | ↓ -9% |
| Western Australia | 46,800 | 39,600 | ↓ -15% |
| A.C.T. | 16,000 | 17,500 | ↑ 10% |
| N.T. | 5,100 | 6,700 | ↑ 31% |
| Total interstate visitors | 774,000 | 779,500 | ↑ 1% |

source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

Total International Visitors to Tasmania

| International visitors | to Tasmania | | | to Australia | | |
|----------------------------------|----------------|----------------|----------|----------------|----------------|----------|
| | Jan 08- Dec 08 | Jan 09- Dec 09 | % change | Jan 08- Dec 08 | Jan 09- Dec 09 | % change |
| Visitors | | | | | | |
| International visitors | 152,000 | 139,500 | ↓ -8% | 5,166,800 | 5,174,700 | → 0% |
| Nights | | | | | | |
| Nights ('000s) | 2,988 | 2,639 | ↓ -12% | 167,845 | 177,128 | ↑ 6% |
| Length of stay (nights) | 20 | 19 | ↓ -4% | 32 | 34 | ↑ 6% |
| Expenditure | | | | | | |
| Expenditure (\$million) | \$243 | \$274 | ↑ 13% | \$16,306 | \$17,146 | ↑ 5% |
| Average spend per visitor | \$1,600 | \$1,966 | ↑ 23% | \$3,231 | \$3,307 | ↑ 2% |
| Average spend per night | \$81 | \$104 | ↑ 28% | \$100 | \$97 | ↓ -3% |
| Holiday spend (\$million) | \$101 | \$113 | ↑ 12% | \$6,622 | \$6,601 | → 0% |
| Purpose | | | | | | |
| Holiday | 108,900 | 98,800 | ↓ -9% | 2,436,800 | 2,398,200 | ↓ -2% |
| Visit friends or relatives (VFR) | 31,900 | 28,200 | ↓ -12% | 1,145,400 | 1,293,800 | ↑ 13% |
| Business | 10,800 | 9,600 | ↓ -11% | 878,000 | 756,100 | ↓ -14% |
| Education | 8,700 | 8,400 | ↓ -3% | 372,400 | 411,300 | ↑ 10% |
| Employment | 2,500 | 2,200 | ↓ -12% | 119,700 | 116,500 | ↓ -3% |
| Other reason | 2,300 | 2,600 | ↑ 13% | 214,600 | 199,000 | ↓ -7% |

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

| International Visitors to States/Territories | | | | | | |
|--|----------------|----------------|----------|----------------|----------------|--------------------|
| | Visitors | | | Market Share | | |
| | Jan 08- Dec 08 | Jan 09- Dec 09 | % change | Jan 08- Dec 08 | Jan 09- Dec 09 | % point difference |
| New South Wales | 2,768,500 | 2,711,000 | ↓ -2% | 53.6% | 52.4% | ↓ -1.2% |
| Victoria | 1,479,400 | 1,530,600 | ↑ 3% | 28.6% | 29.6% | ↑ 1.0% |
| Queensland | 2,050,700 | 1,968,200 | ↓ -4% | 39.7% | 38.0% | ↓ -1.7% |
| South Australia | 356,100 | 360,600 | ↑ 1% | 6.9% | 7.0% | ↑ 0.1% |
| Western Australia | 675,800 | 694,100 | ↑ 3% | 13.1% | 13.4% | ↑ 0.3% |
| Tasmania | 152,000 | 139,500 | ↓ -8% | 2.9% | 2.7% | ↓ -0.2% |
| Northern Territory | 327,600 | 336,100 | ↑ 3% | 6.3% | 6.5% | ↑ 0.2% |
| Australia Capital Territory | 157,200 | 155,300 | ↓ -1% | 3.0% | 3.0% | → 0.0% |
| Total visitors to Australia | 5,166,800 | 5,174,700 | → 0% | 100.0% | 100.0% | → 0.0% |

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

| Origin of international visitors to Tasmania | | | | | | |
|--|----------------|----------------|----------|----------------|----------------|--------------------|
| | Visitors | | | Market Share | | |
| | Jan 08- Dec 08 | Jan 09- Dec 09 | % change | Jan 08- Dec 08 | Jan 09- Dec 09 | % point difference |
| United Kingdom | 28,200 | 21,900 | ↓ -22% | 4.5% | 3.5% | ↓ -1.0% |
| USA includes Hawaii | 23,500 | 16,100 | ↓ -31% | 5.5% | 3.6% | ↓ -1.9% |
| New Zealand | 14,100 | 13,300 | ↓ -6% | 1.4% | 1.3% | ↓ -0.1% |
| Germany | 8,400 | 9,400 | ↑ 12% | 5.4% | 6.0% | ↑ 0.6% |
| Scandinavia | 3,700 | 5,900 | ↑ 59% | 4.6% | 7.3% | ↑ 2.8% |
| China | 2,900 | 5,900 | ↑ 103% | 0.9% | 1.7% | ↑ 0.8% |
| Canada | 8,300 | 5,700 | ↓ -31% | 7.0% | 4.9% | ↓ -2.1% |
| Hong Kong | 4,800 | 5,500 | ↑ 15% | 3.6% | 3.8% | ↑ 0.2% |
| Malaysia | 4,600 | 5,400 | ↑ 17% | 3.0% | 2.8% | ↓ -0.2% |
| Singapore | 6,300 | 5,400 | ↓ -14% | 2.7% | 2.1% | ↓ -0.5% |
| Japan | 6,300 | 5,300 | ↓ -16% | 1.5% | 1.6% | ↑ 0.1% |
| Taiwan | 3,100 | 4,000 | ↑ 29% | 4.3% | 4.3% | → 0.0% |
| France | 4,800 | 3,600 | ↓ -25% | 5.9% | 4.1% | ↓ -1.8% |
| Netherlands | 3,100 | 3,500 | ↑ 13% | 5.9% | 7.1% | ↑ 1.1% |
| Italy | np | 3,300 | np | 1.9% | 6.2% | ↑ 4.3% |
| Korea | 4,600 | 3,200 | ↓ -30% | 2.3% | 1.9% | ↓ -0.3% |
| Switzerland | np | 2,800 | np | 5.2% | 6.9% | ↑ 1.7% |
| Thailand | np | 2,300 | np | 1.5% | 3.0% | ↑ 1.5% |
| Other Europe | 8,200 | 5,600 | ↓ -32% | 4.3% | 3.1% | ↓ -1.2% |
| Other Countries | 13,000 | 11,500 | ↓ -12% | 1.9% | 1.6% | ↓ -0.3% |
| Total | 152,000 | 139,500 | ↓ -8% | 2.9% | 2.7% | ↓ -0.2% |

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

np: not published due to data reliability

Total Intrastate Visitors

| Intrastate OVERNIGHT Travel | | | | | | |
|---|----------------|----------------|----------|----------------|----------------|----------|
| | Tasmania | | | Australia | | |
| | Jan 08- Dec 08 | Jan 09- Dec 09 | % change | Jan 08- Dec 08 | Jan 09- Dec 09 | % change |
| <i>Visitors</i> | | | | | | |
| Day visitors | 4,117,000 | 4,476,000 | ↑ 9% | 128,359,000 | 137,074,000 | ↑ 7% |
| Overnight visitors | 1,094,000 | 978,000 | ↓ -11% | 46,680,000 | 43,779,000 | ↓ -6% |
| Total intrastate visitors | 5,211,000 | 5,454,000 | ↑ 5% | 175,039,000 | 180,853,000 | ↑ 3% |
| <i>Nights</i> | | | | | | |
| Nights | 2,684,000 | 2,439,000 | ↓ -9% | 148,934,000 | 140,232,000 | ↓ -6% |
| Length of stay (nights) | 2.5 | 2.5 | → 0% | 3.2 | 3.2 | → 0% |
| <i>Expenditure</i> | | | | | | |
| Expenditure (\$million) | \$305 | \$290 | ↓ -5% | \$18,751 | \$17,411 | ↓ -7% |
| Spend per visitor | \$279 | \$297 | ↑ 6% | \$402 | \$398 | ↓ -1% |
| Spend per night | \$114 | \$119 | ↑ 5% | \$126 | \$124 | ↓ -1% |
| <i>Purpose</i> | | | | | | |
| Holiday | 552,000 | 499,000 | ↓ -10% | 23,088,000 | 21,763,000 | ↓ -6% |
| Visiting friends and/or relatives (VFR) | 296,000 | 256,000 | ↓ -14% | 16,325,000 | 14,926,000 | ↓ -9% |
| Business | 191,000 | 175,000 | ↓ -8% | 6,922,000 | 6,446,000 | ↓ -7% |
| Other reason | 57,000 | 46,000 | ↓ -19% | 2,374,000 | 2,534,000 | ↑ 7% |
| Purpose not asked | 5,000 | 6,000 | ↑ 20% | 106,000 | 41,000 | ↓ -61% |
| Total overnight intrastate visitors | 1,094,000 | 978,000 | ↓ -11% | 48,187,000 | 45,115,000 | ↓ -6% |

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

Total Intrastate Visitors continued

| Intrastate DAY Travel | | | | | | |
|---|----------------|----------------|----------|----------------|----------------|----------|
| | Tasmania | | | Australia | | |
| | Jan 08- Dec 08 | Jan 09- Dec 09 | % change | Jan 08- Dec 08 | Jan 09- Dec 09 | % change |
| <i>Visitor</i> | | | | | | |
| Day visitors | 4,117,000 | 4,476,000 | ↑ 9% | 128,359,000 | 137,074,000 | ↑ 7% |
| Overnight visitors | 1,094,000 | 978,000 | ↓ -11% | 46,680,000 | 43,779,000 | ↓ -6% |
| Total intrastate visitors | 5,211,000 | 5,454,000 | ↑ 5% | 175,039,000 | 180,853,000 | ↑ 3% |
| <i>Expenditure</i> | | | | | | |
| Expenditure (\$million) | \$392 | \$434 | ↑ 11% | \$14,414 | \$14,683 | ↑ 2% |
| Spend per visitor | \$95 | \$97 | ↑ 2% | \$112 | \$107 | ↓ -5% |
| <i>Purpose</i> | | | | | | |
| Holiday | 2,194,000 | 2,433,000 | ↑ 11% | 66,467,000 | 70,067,000 | ↑ 5% |
| Visiting friends and/or relatives (VFR) | 946,000 | 1,064,000 | ↑ 12% | 37,500,000 | 39,289,000 | ↑ 5% |
| Business | 463,000 | 445,000 | ↓ -4% | 12,191,000 | 13,066,000 | ↑ 7% |
| Other reason | 513,000 | 534,000 | ↑ 4% | 12,202,000 | 14,653,000 | ↑ 20% |
| Total day intrastate visitors | 4,117,000 | 4,476,000 | ↑ 9% | 128,359,000 | 137,074,000 | ↑ 7% |

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

Marketing Performance

| Marketing Performance - interstate residents | | | |
|--|----------------------------|----------------------------|-------------|
| | 12 months ending Dec 08 | 12 months ending Dec 09 | % Change |
| ¹ Advertising Awareness (Unprompted) | 16.4 | 15.3 | ↓ - 1.1 |
| ¹ Advertising Awareness (Prompted) | 31.2 | 23.7 | ↓ - 7.5 |
| ² Preference to visit Tasmania | 16.5 | 16.9 | ↑ 0.4 |
| ³ Intention to visit Tasmania | 3.8 | 4.2 | ↑ 0.4 |
| ⁴ Behaviour | 4.0 | 4.1 | ↑ 0.1 |
| ⁵ Tagline Awareness - 'Island of Inspiration' | 12.7 | 10.9 | ↓ - 1.8 |

| Marketing Performance - intrastate residents | | | |
|--|----------------------------|----------------------------|-------------|
| | 12 months ending Dec 08 | 12 months ending Dec 09 | % Change |
| ¹ Advertising Awareness (Unprompted) | 25.6 | 33.0 | ↑ 7.4 |
| ¹ Advertising Awareness (Prompted) | 60.2 | 60.4 | ↑ 0.2 |
| ² Preference to visit Tasmania | 40.9 | 45.6 | ↑ 4.7 |
| ³ Intention to visit Tasmania | 29.9 | 32.4 | ↑ 2.5 |
| ⁴ Behaviour | 41.3 | 45.9 | ↑ 4.6 |
| ⁵ Tagline Awareness - 'Island of Inspiration' | 21.9 | 26.4 | ↑ 4.5 |

| Marketing Performance - total Australians | | | |
|--|----------------------------|----------------------------|-------------|
| | 12 months ending Dec 08 | 12 months ending Dec 09 | % Change |
| ¹ Advertising Awareness (Unprompted) | 16.6 | 15.7 | ↓ - 0.9 |
| ¹ Advertising Awareness (Prompted) | 31.8 | 24.6 | ↓ - 7.2 |
| ² Preference to visit Tasmania | 17.0 | 17.5 | ↑ 0.5 |
| ³ Intention to visit Tasmania | 4.4 | 4.8 | ↑ 0.4 |
| ⁴ Behaviour | 4.9 | 5.0 | ↑ 0.1 |
| ⁵ Tagline Awareness - 'Island of Inspiration' | 13.0 | 11.3 | ↓ - 1.7 |

Source: Holiday Tracking Survey, Roy Morgan Research

¹ Advertising Awareness - Percentage of Australians with un-prompted & prompted advertising awareness for holidays in Tasmania.

² Preference - Percentage of Australians that would like to visit Tasmania in the next 2 years.

³ Intention - Percentage of Australians planning or intending to visit Tasmania on their next trip.

⁴ Behaviour - Percentage of Australians that visited Tasmania in the last 12 months.

⁵ Tagline Awareness - Percentage of Australians with an awareness of Tasmania's advertising tagline "Island of Inspiration" launched in Jan 07.

↑ Increase on year ending Dec 08, ↓ Decrease on year ending Dec 08, → No change on year ending Dec 08

Where do the statistics come from?

The primary sources of information on visitors to Tasmania published in this document are:

- Tasmanian Visitor Survey (Tourism Tasmania) for total and interstate visitor figures. Note: while the NVS provides valuable data on interstate travel at the national level, the Tasmanian Visitor Survey (TVS), conducted by Tourism Tasmania, continues to be the key source of detailed information about interstate visitation to Tasmania;
- International Visitor Survey (Tourism Research Australia) for international visitor figures;
- National Visitor Survey (Tourism Research Australia) for intrastate visitor figures (travel by Tasmanians in Tasmania);
- Holiday Tracking Survey (Roy Morgan Research) for information on Tasmania's marketing performance and preference and intention of Australians to visit Tasmania;
- Tasmanian Ports Corporation for cruise ship visitor figures;
- Navy Head Quarters Tasmania for navy ship visitor figures.

Note

Figures in the text may vary from figures in the tables due to rounding.

For further information please contact:

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