

Tasmanian Tourism Snapshot

Year ending March 2013

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)

Key Results:

- For the year ending March 2013, there were 931,100 visitors, up 10% from 845,800 for the previous year. ***This is a record number of visitors to the State on scheduled air and sea services.***
- Total nights increased by 5% to 8.14 million.
- Visitor expenditure increased by 6% to \$1.464 billion.
- The number of interstate visitors to Tasmania increased by 11% to 809,200 (was 730,500).

Summary:

- In terms of visitor numbers from Tasmania's key markets, Victoria increased by 17%, New South Wales increased by 12%, and Queensland decreased by 4%.
- Holiday visitors increased by 6% for the year ending March 2013, holiday nights increased by 6% and holiday expenditure increased by 2%.
- VFR visitors increased by 16% for the year. The number of nights VFR visitors spent in Tasmania increased by 4% while VFR expenditure increased by 14%.
- The total number of visitors holidaying in Tasmania during the year ending March 2013 was 370,000, up 6% compared to the previous year (was 349,900).
- The total number of nights spent by holiday visitors to Tasmania for the year ending March 2013 was 3.6 million, up 6% from the previous year (was 3.4 million).
- Holiday visitor expenditure for the year was up 2% to \$913 million (was \$895 million).
- Of all visitors, 186,500 (up 18%) were on business while 31,200 (down 8%) were travelling to attend a conference or convention.
- For the year ending March 2013, data from the TVS for the four tourism regions reported the following changes in visitor numbers: Southern, up 12%; East Coast, down 8%; Northern, showing no significant change; Cradle Coast, up 2%.
- For the year ending March 2013, 89% of all visitors to Tasmania travelled by scheduled air services and 11% travelled by sea. The total number of visitors travelling by scheduled air was up 14% and sea services was down 12% from the previous year.

Interstate Visitation to Tasmania (Source: Tasmanian Visitor Survey)

- The total number of interstate visitors to Tasmania for the year ending March 2013 was 809,200, up 11% from 730,500 the previous year.
- The total number of nights spent by interstate visitors to Tasmania for the year ending March 2013 was 6.26 million, up 3% from the previous year (was 6.09 million).
- Interstate visitor expenditure increased by 6% to \$1.23 billion (was \$1.16 billion in the year ending March 2012).
- Of all interstate visitors, 297,500 were on holiday (up 8%), 254,800 were visiting friends or relatives (up 16%), 174,700 were on business (up 18%), and 27,300 were travelling to attend a conference or convention (down 12%).
- In terms of visitation to Tasmania from the key interstate markets, Victoria increased by 17% to 371,200, NSW increased by 12% to 191,700, and Queensland decreased by 4% to 116,400. Together, these markets accounted for 84% of interstate visitation in the year ending March 2013.

International Visitation (Source: International Visitor Survey)

Summary – Australia

- A total of 5.77 million international visitors visited the country in the year ending March 2013, up 5% from the year ending March 2012.
- Holiday visitors to Australia increased by 6% to 2.56 million, while VFR visitors increased by 6% to 1.46 million.
- International visitor nights spent in Australia increased by 7% to 210.6 million.
- Total expenditure by international visitors in Australia for the year ending March 2013 increased by 5% to \$18.9 billion¹ (including package expenditure). Holiday spend was \$6.6 billion (including package expenditure) for the year, increased by 5% from the year ending March 2012.
- For Australia's largest source markets, the following changes to visitor numbers to Australia were recorded: New Zealand, up 2%; United Kingdom, down 3%; China, up 17% and the USA, up 7%.

Summary – Tasmania

- Tasmania received 157,600 international visitors during the year ending March 2013, up 10% from 142,700 the previous year.
- The number of nights international visitors spent in Tasmania increased by 6% to 3.20 million, and the average length of stay decreased by 4% to 20 nights.
- Expenditure by international visitors increased by 10% to \$273 million².
- Holiday visitors to Tasmania increased by 5% to 106,500, while VFR visitors increased by 4% to 31,800.
- Holiday nights up 24% to 1.40 million, while the average length of stay for holiday visitors increased by 18% to 13 nights.
- The average spend per international visitor (including package expenditure) in Tasmania remained steady to \$1,732 (was \$1,740) during the year ending March 2013, while spend per night increased by 3% to \$85 (was \$82).
- For Tasmania's largest source markets, the following changes to visitor numbers to the State were recorded: United Kingdom, up 16%; New Zealand, up 21%; the USA, down 4%; and China, up 54%.

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)

- Tasmania's share of all international visitors to Australia for the year ending March 2013 was 2.7%, compared with 2.6% for the year ending March 2012.

Intrastate Visitation³ (National Visitor Survey)

- The number of overnight intrastate holiday trips in Tasmania decreased by 2%, VFR increased by 7%, and overnight business trips decreased by 16% in the year ending March 2013.
- In the year ending March 2013, the number of intrastate day trips in Tasmania increased by 2% to 4.76 million, whilst intrastate overnight trips remained steady at 1.1 million compared to the year ending March 2012.
- Total spend by overnight intrastate visitors in Tasmania increased by 4% to \$268 million for the year ending March 2013.

³ Travel undertaken by a visitor in their home state

Total Visitors to Tasmania

	YE Mar 2012	YE Mar 2013	% change	
Visitors				
Visitors on scheduled air and sea services	845,800	931,100	↑	10%

	YE Mar 2012	YE Mar 2013	% change	
Visitors				
Day visitors	20,800	28,000	↑	35%
Overnight visitors	825,000	903,100	↑	9%
Total visitors	845,800	931,100	↑	10%
Nights				
Nights (million)	7.72	8.14	↑	5%
Average length of stay (nights)	9.1	8.7	↓	-4%
Expenditure				
Expenditure (\$million)	\$1,387	\$1,464	↑	6%
Average spend per visitor	\$1,640	\$1,573	↓	-4%
Average spend per night	\$180	\$180	→	0%
Holiday spend (\$million)	\$895	\$913	↑	2%
Purpose of Visit				
Holiday	349,900	370,000	↑	6%
Visit friends or relatives (VFR)	241,700	279,900	↑	16%
Total leisure (Holiday+VFR)	591,700	649,900	↑	10%
Business or employment	158,100	186,500	↑	18%
Convention/conference/seminar	33,900	31,200	↓	-8%
Regions Visited				
Southern	663,600	744,100	↑	12%
East Coast	262,700	240,600	↓	-8%
Northern	503,600	505,000	→	0%
Cradle Coast	380,700	386,700	↑	2%
Mode of departure				
Air visitors	729,600	828,600	↑	14%
Sea visitors	116,200	102,400	↓	-12%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

Interstate Visitors to Tasmania

Table 3. Interstate visitors to Tasmania on scheduled air and sea services				
	YE Mar 2012	YE Mar 2013		% change
Visitors				
Day visitors	20,500	27,700	↑	35%
Overnight visitors	710,100	781,500	↑	10%
Total visitors	730,500	809,200	↑	11%
Nights				
Nights (million)	6.09	6.26	↑	3%
Average length of stay (nights)	8.3	7.7	↓	-7%
Expenditure				
Expenditure (\$million)	\$1,164	\$1,233	↑	6%
Average spend per visitor	\$1,594	\$1,523	↓	-4%
Average spend per night	\$191	\$197	↑	3%
Holiday spend (\$million)	\$738	\$761	↑	3%
Purpose of Visit				
Holiday	276,600	297,500	↑	8%
Visit friends or relatives (VFR)	220,400	254,800	↑	16%
Total leisure (Holiday+VFR)	497,000	552,200	↑	11%
Business or employment	147,800	174,700	↑	18%
Convention/conference/seminar	31,100	27,300	↓	-12%
Regions Visited				
Southern	555,100	633,100	↑	14%
East Coast	202,900	189,400	↓	-7%
Northern	426,200	432,500	↑	1%
Cradle Coast	317,500	326,100	↑	3%
Mode of departure				
Air visitors	623,200	714,000	↑	15%
Sea visitors	107,300	95,200	↓	-11%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

	YE Mar 2012	YE Mar 2013	% change	
Victoria	316,500	371,200	↑	17%
N.S.W.	170,500	191,700	↑	12%
Queensland	120,700	116,400	↓	-4%
South Australia	39,700	44,500	↑	12%
Western Australia	46,900	50,000	↑	7%
A.C.T.	21,000	22,100	↑	5%
N.T.	6,600	7,700	↑	16%
Total interstate visitors	730,500	809,200	↑	11%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

International Visitors to Tasmania

	to Tasmania			to Australia		
	YE Mar 2012	YE Mar 2013	% Change	YE Mar 2012	YE Mar 2013	% Change
Visitors						
International visitors	142,700	157,600	↑ 10%	5,499,000	5,766,000	↑ 5%
Nights						
Nights ('000s)	3,011	3,205	↑ 6%	196,610	210,606	↑ 7%
Average length of stay (nights)	21	20	↓ -4%	36	37	↑ 2%
Expenditure						
Expenditure (\$million)	\$248	\$273	↑ 10%	\$17,926	\$18,909	↑ 5%
Average spend per visitor	\$1,740	\$1,732	→ 0%	\$3,260	\$3,279	↑ 1%
Average spend per night	\$82	\$85	↑ 3%	\$91	\$90	↓ -2%
Holiday spend (\$million)	\$117	\$129	↑ 10%	\$6,264	\$6,591	↑ 5%
Purpose of Visit						
Holiday	101,600	106,500	↑ 5%	2,424,800	2,562,600	↑ 6%
Visit friends or relatives (VFR)	30,600	31,800	↑ 4%	1,376,300	1,464,000	↑ 6%
Business	10,100	15,900	↑ 57%	884,900	905,900	↑ 2%
Education	6,800	6,700	↓ -1%	363,000	355,000	↓ -2%
Employment	2,000	3,400	↑ 66%	205,500	221,600	↑ 8%
Other Reason	800	1,000	↑ 32%	244,500	257,000	↑ 5%
Total	142,700	157,600	↑ 10%	5,499,000	5,766,000	↑ 5%

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

* Modelled expenditure including package expenditure. The total expenditure in Australia does not include small amounts that cannot be allocated to a particular purpose.

** 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.

	YE Mar 2012	YE Mar 2013	% Change	YE Mar 2012	YE Mar 2013	% Point difference
<i>State/territory visited</i>	<i>Visitors</i>			<i>Market Share</i>		
New South Wales	2,765,200	2,927,700	↑ 6%	50%	51%	↑ 0.5%
Victoria	1,766,500	1,852,500	↑ 5%	32%	32%	→ 0.0%
Queensland	1,946,300	2,051,800	↑ 5%	35%	36%	↑ 0.2%
South Australia	337,900	356,700	↑ 6%	6%	6%	→ 0.0%
Western Australia	739,000	761,000	↑ 3%	13%	13%	↓ -0.2%
Tasmania	142,700	157,600	↑ 10%	3%	3%	↑ 0.1%
Northern Territory	276,700	255,000	↓ -8%	5%	4%	↓ -0.6%
Australia Capital Territory	162,200	177,100	↑ 9%	3%	3%	→ 0.1%
Total visitors to Australia	5,499,000	5,766,000	↑ 5%	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 Mar 2012	YE Mar 2013	% Change	YE Mar 2012	YE Mar 2013	% Point difference
Country of origin	Visitors			National Market Share		
New Zealand	13,000	15,700	↑ 21%	1.2%	1.4%	↑ 0.2%
Japan	4,100	4,300	↑ 5%	1.3%	1.4%	→ 0.0%
Hong Kong	9,000	17,200	↑ 90%	5.8%	10.3%	↑ 4.5%
Singapore	5,800	5,600	↓ -5%	2.1%	1.8%	↓ -0.3%
Malaysia	7,500	6,200	↓ -17%	3.5%	2.6%	↓ -0.9%
Indonesia	1,500	1,200	↓ -17%	1.1%	0.9%	↓ -0.2%
Taiwan	3,200	2,700	↓ -18%	3.9%	2.9%	↓ -1.1%
Thailand	3,000	2,000	↓ -34%	3.8%	2.5%	↓ -1.3%
Korea	3,900	1,700	↓ -57%	2.1%	0.9%	↓ -1.2%
China	8,400	12,900	↑ 54%	1.6%	2.1%	↑ 0.5%
India	1,100	3,000	↑ 165%	0.8%	2.0%	↑ 1.2%
Other Asia	1,700	3,800	↑ 122%	1.1%	2.4%	↑ 1.2%
USA includes Hawaii	18,500	17,700	↓ -4%	4.3%	3.8%	↓ -0.5%
Canada	8,200	4,700	↓ -43%	7.3%	4.1%	↓ -3.1%
United Kingdom	16,800	19,400	↑ 16%	2.9%	3.5%	↑ 0.6%
Germany	7,700	8,200	↑ 6%	5.2%	5.4%	↑ 0.2%
Scandinavia	5,100	3,900	↓ -24%	6.1%	4.5%	↓ -1.6%
France	4,800	5,700	↑ 19%	5.3%	6.0%	↑ 0.8%
Italy	2,000	2,200	↑ 10%	3.7%	3.7%	↓ -0.1%
Netherlands	1,700	2,000	↑ 15%	3.8%	4.8%	↑ 1.0%
Switzerland	2,600	3,500	↑ 35%	6.5%	8.2%	↑ 1.7%
Other Europe	8,100	8,300	↑ 3%	4.5%	4.4%	↓ -0.1%
Other Countries	5,100	6,100	↑ 19%	1.3%	1.5%	↑ 0.2%
Total	142,700	157,600	↑ 10%	2.6%	2.7%	→ 0.1%

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 Mar 2012	YE Mar 2013	% change	YE Mar 2012	YE Mar 2013	% change
Visitors						
Overnight visitors ('000s)	1,124	1,127	⇒ 0%	49,732	50,242	↑ 1%
Nights						
Nights ('000s)	2,852	2,744	↓ -4%	158,755	160,552	↑ 1%
Average length of stay (nights)	2.5	2.4	↓ -4%	3.2	3.2	⇒ 0%
Expenditure						
Expenditure (\$million)	\$258	\$268	↑ 4%	\$15,822	\$16,541	↑ 5%
Spend per visitor	\$229	\$238	↑ 4%	\$318	\$329	↑ 3%
Spend per night	\$90	\$98	↑ 8%	\$100	\$103	↑ 3%
Purpose('000s)						
Holiday	578	568	↓ -2%	22,217	22,999	↑ 4%
Visit friends &/or relatives (VFR)	307	330	↑ 7%	17,575	17,843	↑ 2%
Business	181	152	↓ -16%	7,518	7,203	↓ -4%
Other reason	69	83	↑ 20%	3,035	2,835	↓ -7%
Total overnight intrastate visitors	1,124	1,127	⇒ 0%	49,732	50,242	↑ 1%

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

	Tasmania			Australia		
	YE Mar 2012	YE Mar 2013	% change	YE Mar 2012	YE Mar 2013	% change
Visitor						
Day visitors ('000s)	4,681	4,764	↑ 2%	157,645	162,757	↑ 3%
Total intrastate Day+Overnight visitors ('000s)	5,805	5,891	↑ 1%	207,377	212,999	↑ 3%
Expenditure						
Expenditure (\$million)	\$438	\$515	↑ 18%	\$17,105	\$18,107	↑ 6%
Spend per visitor	\$94	\$108	↑ 16%	\$109	\$111	↑ 3%
Purpose('000s)						
Holiday	2,355	2,336	↓ -1%	73,318	77,783	↑ 6%
Visit friends &/or relatives (VFR)	1,193	1,197	⇒ 0%	46,677	48,996	↑ 5%
Business	471	524	↑ 11%	17,109	16,198	↓ -5%
Other reason	662	707	↑ 7%	20,541	19,781	↓ -4%
Total day intrastate visitors	4,681	4,764	↑ 2%	157,645	162,757	↑ 3%

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

Quarter ending March 2013

The TVS reports the following key findings for visitors during the January-March 2013 quarter.

- The total number of visitors to Tasmania for the March quarter 2013 was 319,600, up 9% from 293,300 the previous year (Fig. 1).
- The total number of nights spent by visitors to Tasmania for the March quarter 2013 increased by 4% to 3.2 (was 3.1) (Fig. 2).
- Visitor expenditure was \$573.50, up 7% from the same quarter of the previous year (was \$535.00) (Fig. 3).
- Of all visitors for the quarter, 151,400 (up 8%) were on holiday, 89,500 (up 9%) were visiting friends or relatives, 47,900 (up 10%) were on business, and 5000 (up 13%) were travelling to attend a conference or convention (Fig. 4).

Fig. 1. Total Visitors to Tasmania by Quarter*

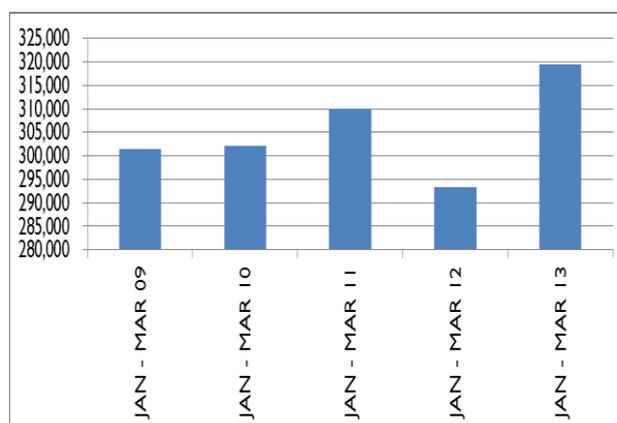


Fig. 2. Total Nights by Quarter*

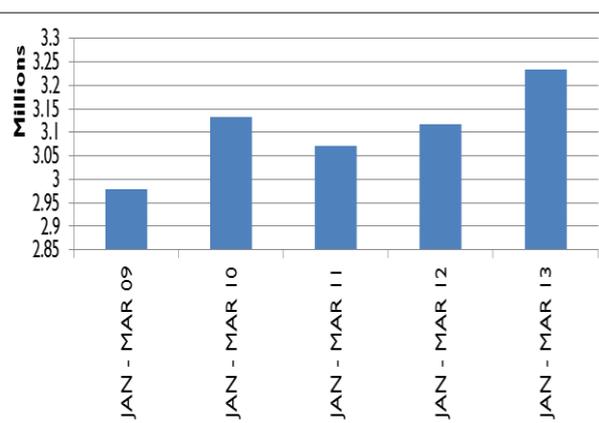


Fig. 3. Total Expenditure (\$ millions) by Quarter*

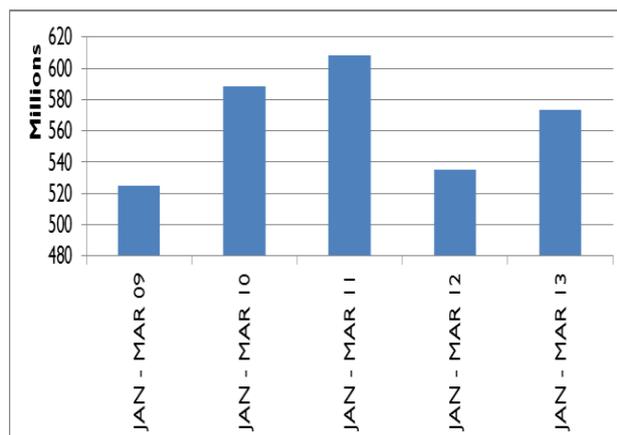
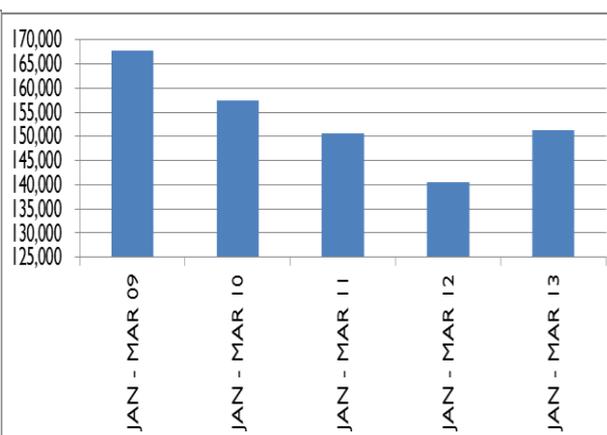


Fig. 4. Total Holiday Visitors by Quarter*



* 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.