

Tasmanian Tourism Snapshot

Year ending September 2015

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 September 2015 there were 1.14 million visitors, up 7 per cent from 1.06 million for the same period the previous year.
- Total nights spent by visitors in the state increased by 5 per cent to 9.80 million.
- Visitor expenditure increased by 10 per cent to \$1.92 billion.
- The number of interstate visitors to Tasmania increased by 7 per cent to 982,000 (was 914,900).

Summary:

- In terms of visitor numbers from Tasmania's key markets, Victoria increased by 5 per cent, New South Wales increased by 14 per cent, and Queensland increased by 3 per cent.
- Holiday visitors increased by 7 per cent for the year ending September 2015, holiday nights increased by 10 per cent and holiday expenditure increased by 15 per cent.
- Those who came to visit friends and relatives (VFR) increased by 6 per cent for the year. The number of nights VFR visitors spent in Tasmania decreased by 1 per cent and VFR expenditure decreased by 3 per cent.
- The total number of visitors holidaying in Tasmania during the year ending September 2015 was 528,800, up 7 per cent compared to the previous year (was 492,500).
- The total number of nights spent by holiday visitors to Tasmania for the year ending September 2015 was 5.0 million, up 10 per cent from the previous year (was 4.5 million).
- Holiday visitor expenditure for the year was up 15 per cent to \$1.29 billion (was \$1.12 billion).
- Of all visitors, 190,900 were travelling on business while 29,000 indicated that their main reason for travelling to Tasmania was to attend a conference or convention.
- For the year ending September 2015, data from the TVS for the four tourism regions reported the following changes in visitor numbers: South up 10 per cent; East Coast up 14 per cent; North up 8 per cent; Cradle Coast up 11 per cent.
- During this period, 89 per cent of all visitors to Tasmania travelled by scheduled air services and 11 per cent travelled by sea. The number of visitors travelling by air increased 7 per cent and the number of visitors travelling by sea increased 9 per cent from the previous year.

Interstate Visitation to Tasmania (Source: Tasmanian Visitor Survey)

- The total number of interstate visitors to Tasmania for the year ending September 2015 was 982,000, up 7 per cent from 914,900 the previous year.
- The total number of nights spent by interstate visitors to Tasmania for the year ending September 2015 was 7.66 million, up 7 per cent from the previous year (was 7.17 million).
- Interstate visitor expenditure increased by 11 per cent to \$1.62 billion (was \$1.45 billion in the year ending September 2014).
- Of all interstate visitors, 413,500 were on holiday (up 7 per cent), 299,000 were visiting friends or relatives (up 8 per cent), 176,500 were on business (up 5 per cent), and 26,600 were travelling to attend a conference or convention (down 8 per cent).
- In terms of visitation to Tasmania from the key interstate markets, Victoria increased by 5 per cent to 422,000, NSW increased by 14 per cent to 258,600, and Queensland increased by 3 per cent to 156,100. Together, these markets accounted for 85 per cent of interstate visitation in the year ending September 2015.

International Visitation (Source: International Visitor Survey)

Summary – Australia

- A total of 6.68 million international visitors came to Australia in the year ending September 2015, up 7 per cent from the year ending September 2014.
- Holiday visitors to Australia increased by 3 per cent to 2.93 million, while VFR visitors increased by 8 per cent to 1.88 million.
- International visitor nights spent in Australia increased by 10 per cent to 242 million.
- Total expenditure by international visitors in Australia for the year ending September 2015 increased by 15 per cent to \$23 billion¹ (including package expenditure). Holiday spend was \$8 billion (including package expenditure) for the year, increased by 11 per cent from the year ending September 2014.
- For Australia's largest source markets, the following changes to visitor numbers to Australia were recorded: New Zealand, up 5 per cent; China, up 22 per cent; United Kingdom, up 1 per cent and the USA, up 8 per cent.

Summary – Tasmania

- Tasmania received 199,100 international visitors during the year ending September 2015, up 19 per cent from 167,800 the previous year.
- The number of night's international visitors spent in Tasmania increased by 10 per cent to 3.29 million, and the average length of stay decreased by 7 per cent to 16 nights.
- Expenditure by international visitors increased by 26 per cent to \$317 million².
- Holiday visitors to Tasmania increased by 22 per cent to 152,600, while VFR visitors increased by 4 per cent to 32,900.
- Holiday nights increased by 10 per cent to 1.59 million, while the average length of stay for holiday visitors decreased by 10 per cent to 10 nights.
- Total expenditure by international holiday visitors increased by 31 per cent to \$186 million.

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: China, up 40 per cent; United Kingdom, up 27 per cent; the USA, up 26 per cent; New Zealand, down 11 per cent; Hong Kong, down 4 per cent.
- Tasmania's share of all international visitors to Australia for the year ending September 2015 was 3.0 per cent, up from 2.7 per cent for the year ending September 2014.

Intrastate Visitation³ (National Visitor Survey)

- The number of overnight intrastate holiday trips in Tasmania increased by 3 per cent, VFR increased by 5 per cent, and overnight business trips increased by 16 per cent in the year ending September 2015.
- In the year ending September 2015, the number of intrastate day trips taken in Tasmania increased by 22 per cent to 5.40 million, whilst intrastate overnight trips increased by 10 per cent to 1.3 million compared to the year ending September 2014.
- Total spend by overnight intrastate visitors in Tasmania increased by 20 per cent to \$391 million for the year ending September 2015.

³ Travel undertaken by a visitor in their home state

Total Visitors to Tasmania

Table 1. Total visitors to Tasmania on scheduled air and sea services			
	YE Sept 2014	YE Sept 2015	% change
Visitors			
Visitors on scheduled air and sea services	1,063,000	1,142,500	↑ 7%

Table 2. Total visitors to Tasmania on scheduled air and sea services			
	YE Sept 2014	YE Sept 2015	% change
Visitors			
Day visitors	23,100	31,700	↑ 37%
Overnight visitors	1,039,800	1,110,800	↑ 7%
Total visitors	1,063,000	1,142,500	↑ 7%
Nights			
Nights (million)	9.34	9.80	↑ 5%
Average length of stay (nights)	8.8	8.6	↓ -2%
Expenditure			
Expenditure (\$million)	\$1,741	\$1,915	↑ 10%
Average spend per visitor	\$1,638	\$1,676	↑ 2%
Average spend per night	\$187	\$195	↑ 5%
Holiday spend (\$million)	\$1,117	\$1,285	↑ 15%
Purpose of Visit			
Holiday	492,500	528,800	↑ 7%
Visit friends or relatives (VFR)	304,400	323,500	↑ 6%
Total leisure (Holiday+VFR)	796,900	852,300	↑ 7%
Business or employment	177,400	190,900	↑ 8%
Convention/conference/seminar	31,700	29,000	↓ -9%
Regions Visited			
Southern	849,200	932,900	↑ 10%
East Coast	283,800	323,200	↑ 14%
Northern	562,300	610,000	↑ 8%
Cradle Coast	421,900	469,900	↑ 11%
Mode of departure			
Air visitors	948,900	1,018,000	↑ 7%
Sea visitors	114,000	124,500	↑ 9%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

Interstate Visitors to Tasmania

Table 3. Interstate visitors to Tasmania on scheduled air and sea services				
	YE Sept 2014	YE Sept 2015		% change
Visitors				
Day visitors	22,600	30,300	↑	34%
Overnight visitors	892,300	951,700	↑	7%
Total visitors	914,900	982,000	↑	7%
Nights				
Nights (million)	7.17	7.66	↑	7%
Average length of stay (nights)	7.8	7.8	→	0%
Expenditure				
Expenditure (\$million)	\$1,453	\$1,615	↑	11%
Average spend per visitor	\$1,588	\$1,644	↑	4%
Average spend per night	\$203	\$211	↑	4%
Holiday spend (\$million)	\$900	\$1,052	↑	17%
Purpose of Visit				
Holiday	386,500	413,500	↑	7%
Visit friends or relatives (VFR)	277,200	299,000	↑	8%
Total leisure (Holiday+VFR)	663,700	712,500	↑	7%
Business or employment	168,100	176,500	↑	5%
Convention/conference/seminar	29,000	26,600	↓	-8%
Regions Visited				
Southern	712,200	785,600	↑	10%
East Coast	211,300	243,800	↑	15%
Northern	469,000	512,700	↑	9%
Cradle Coast	346,800	386,600	↑	11%
Mode of departure				
Air visitors	809,600	868,700	↑	7%
Sea visitors	105,300	113,300	↑	8%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

Table 4. Origin of interstate visitors to Tasmania				
	YE Sept 2014	YE Sept 2015		% change
Victoria	401,600	422,000	↑	5%
N.S.W.	226,700	258,600	↑	14%
Queensland	151,300	156,100	↑	3%
South Australia	47,900	50,700	↑	6%
Western Australia	53,600	56,600	↑	6%
A.C.T.	21,200	25,100	↑	18%
N.T.	6,300	7,300	↑	17%
Total interstate visitors	914,900	982,000	↑	7%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

International Visitors to Tasmania

	to Tasmania			to Australia		
	YE Sept 2014	YE Sept 2015	% Change	YE Sept 2014	YE Sept 2015	% Change
Visitors						
International visitors	167,800	199,100	↑ 19%	6,263,000	6,678,300	↑ 7%
Nights						
Nights ('000s)	2,980	3,286	↑ 10%	220,565	241,886	↑ 10%
Average length of stay (nights)	18	16	↓ -7%	35	36	↑ 3%
Expenditure						
Expenditure (\$million)	\$252	\$317	↑ 26%	\$20,091	\$23,143	↑ 15%
Average spend per visitor	\$1,503	\$1,593	↑ 6%	\$3,208	\$3,465	↑ 8%
Average spend per night	\$85	\$97	↑ 14%	\$91	\$96	↑ 5%
Holiday spend (\$million)	\$143	\$186	↑ 31%	\$7,410	\$8,244	↑ 11%
Purpose of Visit						
Holiday	125,100	152,600	↑ 22%	2,841,300	2,932,700	↑ 3%
Visit friends or relatives (VFR)	31,600	32,900	↑ 4%	1,739,000	1,879,100	↑ 8%
Business	11,200	13,200	↑ 18%	835,200	810,100	↓ -3%
Education	3,300	3,500	↑ 5%	367,300	437,800	↑ 19%
Employment	5,300	6,700	↑ 28%	223,900	323,200	↑ 44%
Other Reason	500	500	→ 0%	256,300	295,400	↑ 15%
Total	167,800	199,100	↑ 19%	6,263,000	6,678,300	↑ 7%

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 state/territory.

** 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.

State/territory visited	YE Sept 2014	YE Sept 2015	% Change	YE Sept 2014	YE Sept 2015	% Point difference
	Visitors			Market Share		
New South Wales	3,006,200	3,208,200	↑ 7%	51.6%	51.3%	↓ -0.4%
Victoria	1,958,800	2,133,200	↑ 9%	33.6%	34.1%	↑ 0.4%
Queensland	2,035,200	2,147,500	↑ 6%	34.9%	34.3%	↓ -0.6%
South Australia	378,000	372,700	↓ -1%	6.5%	6.0%	↓ -0.5%
Western Australia	765,400	826,700	↑ 8%	13.1%	13.2%	→ 0.1%
Tasmania	159,400	177,100	↑ 11%	2.7%	2.8%	→ 0.1%
Northern Territory	261,200	279,000	↑ 7%	4.5%	4.5%	↓ 0.0%
ACT	182,100	176,600	↓ -3%	3.1%	2.8%	↓ -0.3%
Total visitors to Australia	5,823,400	6,259,800	↑ 7%	100.0%	100.0%	→ 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 Sept 2014	YE Sept 2015	% Change	YE Sept 2014	YE Sept 2015	% Point difference
Country of origin	Visitors			National Market Share		
New Zealand	16,900	15,000	↓ -11%	1.5%	1.3%	↓ -0.2%
Japan	6,600	6,200	↓ -6%	2.2%	2.1%	↓ -0.1%
Hong Kong	16,300	15,600	↓ -4%	8.9%	8.1%	↓ -0.8%
Singapore	8,500	9,500	↑ 12%	2.6%	2.8%	↑ 0.2%
Malaysia	7,000	6,900	↓ -1%	2.4%	2.3%	↓ -0.1%
Indonesia	400	1,700	↑ 346%	0.3%	1.2%	↑ 1.0%
Taiwan	4,200	4,700	↑ 13%	3.7%	4.0%	↑ 0.3%
Thailand	1,700	2,100	↑ 24%	2.4%	2.9%	↑ 0.6%
Korea	1,900	1,600	↓ -12%	1.0%	0.8%	↓ -0.2%
China	20,800	29,000	↑ 40%	2.8%	3.2%	↑ 0.4%
India	1,900	4,100	↑ 117%	1.1%	1.9%	↑ 0.9%
Other Asia	1,600	3,200	↑ 97%	0.9%	1.4%	↑ 0.6%
USA includes Hawaii	19,000	24,000	↑ 26%	3.7%	4.3%	↑ 0.6%
Canada	5,200	6,300	↑ 21%	4.1%	4.7%	↑ 0.6%
United Kingdom	20,000	25,400	↑ 27%	3.2%	4.0%	↑ 0.8%
Germany	8,500	10,500	↑ 24%	4.8%	5.8%	↑ 1.0%
Scandinavia	1,500	3,900	↑ 154%	1.6%	4.1%	↑ 2.5%
France	4,700	6,500	↑ 39%	4.2%	5.7%	↑ 1.5%
Italy	2,700	1,800	↓ -32%	3.7%	2.6%	↓ -1.1%
Netherlands	1,700	2,400	↑ 44%	3.6%	5.4%	↑ 1.8%
Switzerland	2,800	3,500	↑ 25%	5.8%	6.9%	↑ 1.0%
Other Europe	6,100	6,800	↑ 10%	2.9%	3.2%	↑ 0.3%
Other Countries	8,100	8,500	↑ 4%	2.0%	1.9%	↔ 0.0%
Total	167,800	199,100	↑ 19%	2.7%	3%	↔ 0.3%

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 Sept 2014	YE Sept 2015	% change	YE Sept 2014	YE Sept 2015	% change
Visitors						
Overnight visitors ('000s)	1,176	1,298	↑ 10%	54,186	57,549	↑ 6%
Nights						
Nights ('000s)	2,927	3,107	↑ 6%	174,949	179,473	↑ 3%
Average length of stay (nights)	2.5	2.4	↓ -4%	3.2	3.1	↓ -3%
Expenditure						
Expenditure (\$million)	\$326	\$391	↑ 20%	\$22,520	\$23,329	↑ 4%
Spend per visitor	\$277	\$301	↑ 9%	\$416	\$405	↓ -2%
Spend per night	\$111	\$126	↑ 13%	\$129	\$130	↑ 1%
Purpose('000s)						
Holiday	24,047	24,865	↑ 3%	23,315	24,143	↑ 4%
Visit friends &/or relatives (VFR)	20,173	21,102	↑ 5%	19,802	20,701	↑ 5%
Business	8,575	9,966	↑ 16%	8,417	9,806	↑ 17%
Other reason	3,147	3,347	↑ 6%	3,098	3,306	↑ 7%
Total overnight intrastate visitors	55,624	59,045	↑ 6%	54,186	57,549	↑ 6%

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

	Tasmania			Australia		
	YE Sept 2014	YE Sept 2015	% change	YE Sept 2014	YE Sept 2015	% change
Visitor						
Day visitors ('000s)	4,420	5,397	↑ 22%	154,243	165,715	↑ 7%
Total intrastate Day+Overnight visitors ('000s)	5,596	6,695	↑ 20%	208,429	223,264	↑ 7%
Expenditure						
Expenditure (\$million)	\$473	\$579	↑ 22%	\$17,629	\$19,052	↑ 8%
Spend per visitor	\$107	\$107	→ 0%	\$114	\$115	↑ 1%
Purpose('000s)						
Holiday	2,239	2,753	↑ 23%	70,853	76,102	↑ 7%
Visit friends &/or relatives (VFR)	1,108	1,251	↑ 13%	47,405	49,764	↑ 5%
Business	442	592	↑ 34%	15,967	16,503	↑ 3%
Other reason	631	801	↑ 27%	20,018	23,345	↑ 17%
Total day intrastate visitors	4,420	5,397	↑ 22%	154,243	165,715	↑ 7%

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

Quarter ending September 2015

The TVS reports the following key findings for visitors during the July - September 2015 quarter.

- The total number of visitors to Tasmania for the September quarter 2015 was 203,900, down 2 per cent from 208,000 the previous year (Fig. 1).
- The total number of nights spent by visitors to Tasmania for the September quarter 2015 increased by 6 per cent to 1.39 million (was 1.30 million) (Fig. 2).
- Visitor expenditure was \$287 million, up 12 per cent from the same quarter of the previous year (was \$257 million) (Fig. 3).
- Of all visitors for the quarter, 70,400 (down 15 per cent) were on holiday, 65,500 (up 5 per cent) were visiting friends or relatives, 50,000 (down 7 per cent) were on business, and 9,000 (up 89 per cent) were travelling to attend a conference or convention (Fig. 4).

Fig. 1. Total Visitors to Tasmania by Quarter*

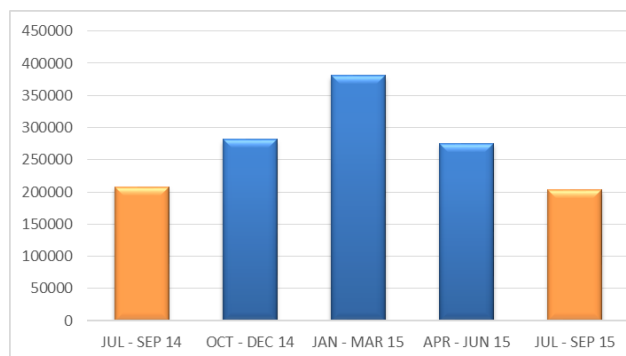


Fig. 2. Total Nights by Quarter*

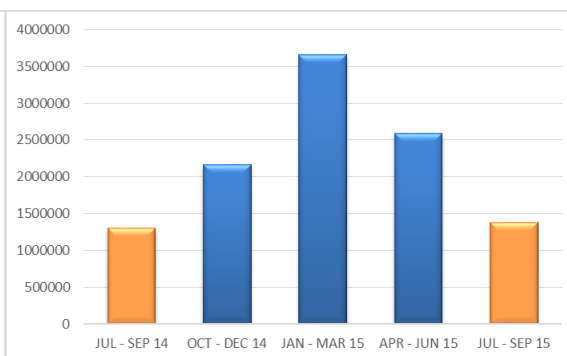


Fig. 3. Total Expenditure (\$ millions) by Quarter*

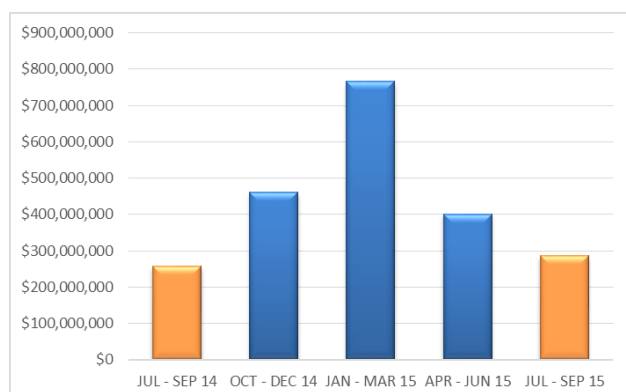
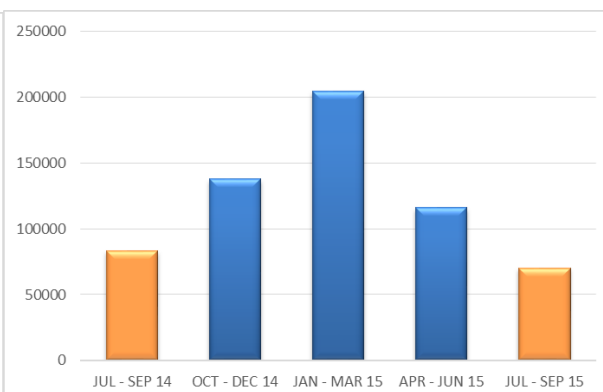


Fig. 4. Total Holiday Visitors by Quarter*



* Graphs present data on visitors travelling to Tasmania via scheduled services for the last five quarters. 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.tvsanalyser.com.au. The TVS Analyser 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 TVS Analyser. These figures are collected from a sample of visitors. They may be different from the real figure if data from 100 per cent 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.