

Tasmanian Tourism Snapshot

Year ending March 2009

Total Visitation to Tasmania

According to the latest results of the Tasmanian Visitor Survey (TVS), Tasmania continues to defy the national trend of a deteriorating domestic travel climate, having now posted strong visitation growth three quarters in a row. In the 12 months to March 2009, visitor numbers to Tasmania increased by 7% (896,800), visitor nights increased by 4% (7.45 million) and expenditure levels by 7% (\$1.434 billion). These results are consistent with reports from across Tasmania's tourism industry and signal a strong performance by Tasmania, particularly in the context of the global financial crisis.

Significantly, the year to March 2009 did not contain an Easter holiday, whereas the year to March 2008 did. Therefore, even in the absence of an Easter holiday period, Tasmania continued to perform strongly as a holiday destination with influential growth in holiday visitor numbers (+14%) recorded over the year. There was also pleasing growth (+22%) in the conference/convention market which contributed 32,700 visitors, due almost entirely to an improvement in the March quarter 2009. In contrast, however, business visitor numbers declined 9% to 134,300, which likely reflects a curtailing of business activity in response to the global financial crisis.

Interstate Visitation (Tasmanian Visitor Survey)

There was a 4% growth in the number of interstate visitors to Tasmania in the year ending March 2009, resulting in an estimated 770,200 visitors to the State. Growth was strongest in the number of interstate holiday visitors (+11%), which is more impressive when it is considered that the year ending March 2009 did not contain an Easter holiday period. Travel for VFR¹ purposes increased marginally (+1%), resulting in an increase in leisure visitation of 7%. Convention/conference visitation increased 17% (28,700) in comparison with the year ending March 2008, while business visitor numbers declined 8% to 127,700.

Interstate visitor nights increased 2% to 6.11 million, and the average length of stay of interstate visitors was 7.9 nights, slightly less than the average length of stay of 8.1 nights in the year ending March 2008. Despite significant growth in visitors (+11%) and nights (+10%), the average stay of interstate holiday visitors declined marginally to 8.8 nights (was 8.9 nights).

An estimated \$1.23 billion was spent in Tasmania by interstate visitors in the year ending March 2009, an increase of 5% on the previous year. The average spend by each interstate visitor was unchanged at \$1596, while the average spend per night increased by 2% to \$201. The average spend per holiday visitor was \$2448, a marginal decline (-1%) compared with the year ending March 2008; while the amount spent per night was unchanged at \$278.

Growth in interstate visitors in the year ending March 2009 was from Tasmania's three most important markets: Victoria (+7%), New South Wales (+16%) and Queensland (+7%). In comparison there were declines in visitor numbers from the smaller markets: South Australia (-10%), Western Australia (-19%) and the Australian Capital Territory (-24%).

International Visitation (International Visitor Survey)

International tourism demand for Australia has deteriorated further due to the impact of the global economic recession. International visitor numbers into Australia declined by 2% over the year to March 2009, leaving the overall volume at the lowest level recorded in three years. Following the national trend, Tasmania recorded a 5% decline in international visitors over the year to March 2009 with 147,400 visitors recorded during the period. Consequently Tasmania's share of all international visitors to Australia dropped marginally from 3.0% to 2.9%. Total visitor nights stayed in the State also decreased over the year, down 2% to 2.92 million nights. Total spend by international

¹ VFR – Visiting friends and/or relatives

visitors decreased 4% over the year to \$237 million, the first negative growth posted after four consecutive positive performances. Despite fewer international visitors, nights and expenditure, the average spend per visitor and per night in the year to March 2009 remained relatively stable at \$1,608 (+1%) and \$81 (-2%) respectively.

Visitors from Asia, Europe, North America, and the United Kingdom (UK) continued to be Tasmania's largest sources of international visitors during the year to March 2009. A strong rebound in demand from the USA (+7% to 21,600) saw the gap closing on the UK's lead. Meanwhile, recovery from the UK market (+1% to 26,900) has just started to ease, although Tasmania is still holding up much better than Australia (-7%). Visitation from New Zealand was also positive over the year to March 2009, up 8%. However, strong declines recorded out of Germany (-16%), Japan (-39%), Canada (-4%) and Other Europe (-10%) negated any overall growth in international visitors for Tasmania.

Intrastate Visitation (National Visitor Survey)

The year to March 2009 saw a 6% drop in total trips (5.1 million) taken by Tasmanians in their home state. This was due to a decrease in both the number of day trips and overnight trips taken compared with the previous year. Of the 5.1 million intrastate trips taken in Tasmania, 70% were day trips and the remaining 30% were overnight trips. The total number of overnight intrastate trips declined to 1.0 million (-13%). The total spend of overnight intrastate visitors also decreased to \$286 million (-9%). Half of all overnight intrastate travel (501,000 visitors) was for holiday purposes, down 17% from the year ending March 2008. VFR² travel also decreased by 17%, while travel for business increased 9%.

Intrastate travel dominates the day visitor market in Tasmania, accounting for 99% of all day trips. The number of day trips taken by Tasmanians in the year to March 2009 declined to 4.1 million trips (-4%), with the bulk of the decline coming out of the holiday (-13%) and VFR (-4%) day travel markets. Day travel for business purposes, although representing only 12% of all day travel, increased 30% over the year. Total day travel expenditure reached \$405 million, up 2% on the previous year.

Marketing Performance (Holiday Tracking Survey)

Without any prompting on advertising for holidays and travel, 16.0% of all Australians (interstate and intrastate residents) had read, seen or heard some form of Tasmanian holiday/travel advertising in the year ending March 2009, up from 15.8% of all Australians recorded in 2007. Tasmania had the second highest level of prompted advertising awareness for the year at 29.3%, following Queensland (50.8%).

When asked where you would like to go on holidays in the next two years, 16.5% of all Australians had a preference to travel to/within Tasmania (a slight decrease on the previous year 16.9%), whilst 3.7% of all Australians intended to travel to/within the State in the next two years (down from 4.3% to the year ending March 2008). An estimated 12.1% of all Australians indicated they had an awareness of Tasmania's current advertising tagline 'Island of Inspiration', launched in January 2007.

²VFR – Visiting friends and/or relatives

Interstate Visitors to Tasmania

TABLE 1 : INTERSTATE VISITATION – SUMMARY

	12 months ending Mar 08	12 months ending Mar 09	% Change
Interstate Visitors			
Day Visitors	16,200	15,200	-6
Overnight Visitors	723,800	755,000	4
Total Visitors	740,000	770,200	4
Interstate Nights			
Total Nights	5,970,400	6,105,500	2
Average Length of Stay (nights)	8.1	7.9	
Interstate Expenditure			
Interstate spend per visitor	\$1,176,000	\$1,229,000	5
Interstate spend per night	\$1,589	\$1,596	0
Interstate spend per night	\$197	\$201	2
Interstate Market Share*			
Visitors	3.9%	3.5%	
Nights	4.9%	4.8%	
Expenditure	5.2%	4.9%	
Interstate Mode of Departure			
Air Visitors	623,800	658,000	5
Sea Visitors	116,200	112,200	-3
Total Visitors	740,000	770,200	4
Purpose for visiting Tasmania			
Holiday	317,700	353,700	11
Visit friends or relatives (VFR)	216,100	217,900	1
Total leisure (Holiday & VFR)	533,800	571,700	7
Business or employment	139,300	127,700	-8
Convention / conference / seminar	24,500	28,700	17
Event / festival (incl sporting event)	28,600	28,000	-2
Other (incl medical and education)	4,300	7,600	77
No Response	9,600	6,600	-31
Total Interstate Visitors	740,000	770,200	4

Source: Tasmanian Visitor Survey, Tourism Tasmania

* Source: National Visitor Survey, Tourism Research Australia

TABLE 2 : INTERSTATE VISITORS TO TASMANIA – ORIGIN OF VISITOR

State/territory of residence	ALL VISITORS			LEISURE VISITORS*		
	12 months ending Mar 08	12 months ending Mar 09	% Change	12 months ending Mar 08	12 months ending Mar 09	% Change
Victoria	341,300	363,600	7	239,500	266,600	11
N.S.W.	134,300	155,200	16	105,200	117,900	12
Queensland	111,900	120,000	7	89,100	93,900	5
South Australia	56,600	50,700	-10	42,000	39,300	-6
Western Australia	49,300	40,000	-19	36,400	32,900	-10
A.C.T.	21,900	16,700	-24	13,900	11,600	-17
N.T.	5,600	5,500	-2	4,200	4,400	5
Australia - no state given	19,000	18,400	-3	3,500	5,100	46
Total Australia	740,000	770,200	4	533,800	571,700	7

Source: Tasmanian Visitor Survey, Tourism Tasmania

* Leisure Visitors: Visitors whose main purpose of visit is for a holiday or to visit friends and relatives

TABLE 3 : INTERSTATE VISITOR NIGHTS SPENT IN TASMANIA – ORIGIN OF VISITOR

State/territory of residence	ALL NIGHTS			LEISURE VISITOR* NIGHTS		
	12 months ending Mar 08	12 months ending Mar 09	% Change	12 months ending Mar 08	12 months ending Mar 09	% Change
Victoria	2,221,300	2,140,700	-4	1,593,600	1,615,700	1
N.S.W.	1,136,600	1,348,800	19	926,900	1,121,100	21
Queensland	1,184,600	1,316,500	11	1,024,500	1,091,600	7
South Australia	479,700	471,300	-2	377,000	369,200	-2
Western Australia	547,400	473,900	-13	417,700	430,100	3
A.C.T.	149,200	128,200	-14	116,300	106,200	-9
N.T.	64,800	59,500	-8	55,000	53,800	-2
Australia - no state given	186,700	166,600	-11	51,000	63,800	25
Total Australia	5,970,400	6,105,500	2	4,562,000	4,851,500	6
Average Stay (nights)	8.1	7.9		8.5	8.5	

Source: Tasmanian Visitor Survey, Tourism Tasmania

* Leisure Visitors: Visitors whose main purpose of visit is for a holiday or to visit friends and relatives

TABLE 4 : INTERSTATE VISITOR EXPENDITURE IN TASMANIA – ORIGIN OF VISITOR

State/territory of residence	ALL EXPENDITURE (\$'000s)			LEISURE VISITOR* EXPENDITURE (\$'000s)		
	12 months ending Mar 08	12 months ending Mar 09	% Change	12 months ending Mar 08	12 months ending Mar 09	% Change
Victoria	\$425,700	\$487,500	15	\$345,000	\$405,500	18
N.S.W.	\$238,500	\$284,900	19	\$204,700	\$245,100	20
Queensland	\$248,500	\$237,400	-4	\$204,000	\$202,500	-1
South Australia	\$92,000	\$81,600	-11	\$72,600	\$71,600	-1
Western Australia	\$112,300	\$92,400	-18	\$84,000	\$81,800	-3
A.C.T.	\$28,800	\$24,900	-14	\$22,900	\$21,300	-7
N.T.	\$11,100	\$8,200	-26	\$9,700	\$6,100	-37
Australia - no state given	\$18,700	\$12,300	-34	\$5,800	\$7,200	24
Total Australia	\$1,175,500	\$1,229,100	5	\$948,700	\$1,041,100	10
Average spend per visitor	\$1,589	\$1,596	0	\$1,777	\$1,821	2
Average spend per night	\$197	\$201	2	\$208	\$215	3

Source: Tasmanian Visitor Survey, Tourism Tasmania

* Leisure Visitors: Visitors whose main purpose of visit is for a holiday or to visit friends and relatives

International Visitors to Tasmania

TABLE 5 : INTERNATIONAL VISITATION – SUMMARY

	12 months ending Mar 08	12 months ending Mar 09	% Change
International Visitors	155,100	147,400	-5
International Nights	2,977,900	2,920,700	-2
Average Length of Stay (nights)	19	20	3
International expenditure (\$million) ¹	\$247	\$237	-4
Average spend per international visitor	\$1,593	\$1,608	1
Average spend per international visitor night	\$83	\$81	-2
International Market Share			
Visitors	3.0%	2.9%	
Nights	1.9%	1.7%	
Expenditure	1.6%	1.5%	
International Purpose of visit ²			
Holiday	106,300	102,100	-4
Visit friends or relatives	31,500	29,400	-7
Business	20,700	11,600	-44
Education	9,200	8,100	-12
Employment	np	3,500	np
Other reason	np	2,800	np
Total international visitors	155,100	147,400	-5

Source: International Visitor Survey, Tourism Research Australia

¹ Modelled expenditure excluding package expenditure

² Sum of components for Tasmania may be greater than the total as a visitor can give more than one reason for visiting Tasmania

np: not published due to data reliability

TABLE 6 : INTERNATIONAL VISITORS TO TASMANIA – ORIGIN OF VISITOR

ALL INTERNATIONAL VISITORS			
Country of residence	12 months ending Mar 08	12 months ending Mar 09	% Change
United Kingdom	26,700	26,900	1
New Zealand	14,600	15,800	8
Total Asia	43,500	37,300	-14
Japan	9,600	5,900	-39
Other Asia	33,900	31,400	-7
North America	29,500	30,700	4
USA	20,100	21,600	7
Canada	9,500	9,100	-4
Total Europe	32,900	29,100	-12
Germany	9,300	7,800	-16
Other Europe	23,600	21,300	-10
Other Countries	7,900	7,700	-3
Total international visitors	155,100	147,400	-5

Source: International Visitor Survey, Tourism Research Australia

TABLE 7 : INTERNATIONAL VISITOR NIGHTS SPENT IN TASMANIA – ORIGIN OF VISITOR

ALL NIGHTS				
Country of residence	12 months ending Mar 08	12 months ending Mar 09	% Change	Average length of stay (nights) - Mar 09
United Kingdom	337,600	369,000	9	13.7
New Zealand	156,600	217,200	39	13.7
Total Asia	1,386,700	1,375,500	-1	36.9
Japan	301,300	175,100	-42	29.7
Other Asia	1,085,400	1,200,400	11	38.2
North America	297,100	279,500	-6	9.1
USA	188,200	150,500	-20	7.0
Canada	108,900	129,000	18	14.2
Total Europe	589,400	452,600	-23	15.6
Germany	182,000	153,000	-16	19.6
Other Europe	407,400	299,600	-26	14.1
Other Countries	210,400	226,900	8	29.5
Total international nights	2,977,900	2,920,700	-2	19.8

Source: International Visitor Survey, Tourism Research Australia

TABLE 8 : INTERNATIONAL VISITOR EXPENDITURE IN TASMANIA – ORIGIN OF VISITOR

ALL EXPENDITURE*					
Country of residence	12 mths ending Mar 08 (\$million)	12 mths ending Mar 09 (\$million)	% Change	Average spend per visitor - Mar 09	Average spend per night - Mar 09
United Kingdom	\$24	\$28	17	\$1,041	\$76
New Zealand	\$17	\$18	6	\$1,139	\$83
Total Asia	np	np	np	np	np
Japan	\$14	\$12	-14	\$2,034	\$69
Other Asia	np	np	np	np	np
North America	\$29	\$28	-3	\$912	\$100
USA	\$20	\$20	0	\$926	\$133
Canada	\$9	\$8	-11	\$879	\$62
Total Europe	np	np	np	np	np
Germany	\$15	\$9	-40	\$1,154	\$59
Other Europe	np	np	np	np	np
Other Countries	\$19	\$21	11	\$2,727	\$93
Total international expenditure	\$247	\$237	-4	\$1,608	\$81

Source: International Visitor Survey, Tourism Research Australia

* Modelled expenditure **excluding** package expenditure

np: not published due to data reliability

Intrastate Travel in Tasmania

TABLE 9 : INTRASTATE OVERNIGHT TRAVEL*

	12 months ending Mar 08	12 months ending Mar 09	% Change
Intrastate Visitors ('000s)			
Day Visitors	4,287	4,110	-4
Overnight Visitors	1,167	1,010	-13
Total Visitors (day + o'night visitors)	5,454	5,120	-6
Intrastate Nights ('000s)			
Total Nights	3,058	2,444	-20
Average Length of Stay (nights)	2.6	2.4	
Intrastate Expenditure			
Overnight intrastate expenditure (\$million)	\$313	\$286	-9
Average spend per overnight visitor	\$268	\$283	6
Average spend per night	\$102	\$117	14
Overnight Intrastate Market Share			
Visitors	2.3%	2.2%	
Nights	1.9%	1.7%	
Expenditure	1.7%	1.6%	
Purpose of Overnight Trip ('000s)			
Holiday	602	501	-17
Visit friends or relatives	342	284	-17
Business	159	173	9
Other	69	52	-25
Total Overnight Intrastate Visitors	1,167	1,010	-13

Source: National Visitor Survey, Tourism Research Australia

*Intrastate travel refers to travel undertaken in Tasmania by Tasmanian residents

TABLE 10 : INTRASTATE DAY TRAVEL*

	12 months ending Mar 08	12 months ending Mar 09	% Change
Intrastate Visitors ('000s)	4,287	4,110	-4
Intrastate Day Trip Expenditure (\$million)¹	\$398	\$405	2
Average Spend Per Day Visitor	\$91	\$98	7
Intrastate Day Trip Market Share			
Visitors	3.2%	3.2%	1
Expenditure	2.8%	2.9%	4
Purpose of Intrastate Trip ('000s)			
Holiday	2,454	2,131	-13
Visit friends or relatives	1,016	980	-4
Business	378	491	30
Other	439	508	16
Total Day Trip Intrastate Visitors	4,287	4,110	-4

Source: National Visitor Survey, Tourism Research Australia

*Intrastate travel refers to travel undertaken in Tasmania by Tasmanian residents

¹Day Trip expenditure consists of 1% interstate and 99% intrastate expenditure which cannot be separated

Marketing Performance

TABLE 11 : MARKETING PERFORMANCE - INTERSTATE RESIDENTS

	12 months ending Mar 08	12 months ending Mar 09	% pt Change
¹ Advertising Awareness (Unprompted)	15.8	16.0	0.2
¹ Advertising Awareness (Prompted)	31.2	29.3	-1.9
² Preference to visit Tasmania	16.9	16.5	-0.4
³ Intention to visit Tasmania	4.3	3.7	-0.6
⁴ Behaviour	3.8	4.0	0.2
⁵ Tagline Awareness – 'Island of Inspiration'	13.2	12.1	-1.1

Source: Holiday Tracking Survey, Roy Morgan Research

TABLE 12 : MARKETING PERFORMANCE - INTRASTATE RESIDENTS

	12 months ending Mar 08	12 months ending Mar 09	% pt Change
¹ Advertising Awareness (Unprompted)	34.9	26.1	-8.8
¹ Advertising Awareness (Prompted)	65.7	62.2	-3.5
² Preference to visit Tasmania	36.5	43.1	6.6
³ Intention to visit Tasmania	27.8	30.9	3.1
⁴ Behaviour	41.9	43.3	1.4
⁵ Tagline Awareness – 'Island of Inspiration'	22.3	22.4	0.1

Source: Holiday Tracking Survey, Roy Morgan Research

TABLE 13 : MARKETING PERFORMANCE SUMMARY - TOTAL AUSTRALIANS

	12 months ending Mar 08	12 months ending Mar 09	% pt Change
¹ Advertising Awareness (Unprompted)	16.3	16.2	-0.1
¹ Advertising Awareness (Prompted)	32.0	30.0	-2
² Preference to visit Tasmania	17.3	17.1	-0.2
³ Intention to visit Tasmania	4.9	4.4	-0.5
⁴ Behaviour	4.7	4.9	0.2
⁵ Tagline Awareness – 'Island of Inspiration'	13.4	12.3	-1.1

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 January 2007.

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 interstate visitor figures;
- 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); and
- Holiday Tracking Survey (Roy Morgan Research) for information on Tasmania's marketing performance and preference and intention of Australians to visit Tasmania.

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