

# Tasmanian Tourism Snapshot

## Year ending September 2009

### Total Visitation to Tasmania

Tasmania's visitor boom continues, with the State recording record visitor growth for the year ending September 2009, according to the latest Tasmanian Visitor Survey (TVS) results. Overall visitor numbers to Tasmania increased by 4% compared to the same period last year, with 917,100 visitors arriving on scheduled air or sea services. When combined with the number of cruise and navy visitors, Tasmania welcomed 1.024 million visitors during the year ending September 2009. Visitors to Tasmania on scheduled air and sea services are also staying longer and spending more in the State, with the total number of visitor nights up 14% to 8.31 million nights, the average length of stay up to 9.1 nights, and total spending up 4% to \$1.468 billion. In contrast, the year ending September 2009 results of the National Visitor Survey (NVS) reveal that across Australia there has been a decline in interstate overnight visitors (-7%), visitor nights (-8%) and visitor spend (-6%).

Tasmania also continues to grow its appeal as a holiday and leisure destination, with holiday visitors accounting for 48% (438,200) of all visitors to the State, an increase of 6% on the previous year. During the 12 months to September 2009, holiday visitors spent 8% more nights in the state to 3.95 million nights and increased their expenditure by 2% to over \$1 billion. In addition, both the business and conference/convention sectors have revealed positive results and when aggregated, these two sectors contributed an additional 20,400 visitors (+12%) for the year ending September 2009. The number of business visitors to the state rebounded strongly in the September quarter 2009, after a decline in the September quarter of 2008 in response to the emergence of the global financial crisis. These results signal a strong performance for Tasmania and the tourism industry, which continues to show its resilience in a volatile global economy, and its ability to respond to the demands of a dynamic tourism market.

### Interstate Visitation (Tasmanian Visitor Survey)

There was 3% growth in the number of people from interstate who visited Tasmania in the year ending September 2009, resulting in 781,200 interstate visitors to the State. The increase was driven by visitation growth in the holiday (+3%), business or employment (+11%) and convention/conference/seminar (+30%) markets. Despite a decrease in the number of VFR<sup>1</sup> visitors (-3%), overall leisure<sup>2</sup> visitation increased 1% over the year in comparison with the year ending September 2008.

Interstate visitor nights increased 10% to 6.58 million, and the average length of stay of interstate visitors was 8.4 nights compared to 7.9 for the year ending September 2008. Expenditure by interstate visitors increased 2% to \$1.25 billion for the year ending September 2009. The average spend by each interstate visitor declined slightly to \$1,599 (was \$1,607) while the average spend per night decreased to \$190 (was \$204). The average spend per interstate holiday visitor was \$2,461, down 4% from \$2,562 during the year ending September 2008.

The growth in the number of interstate visitors (+3%) has been underpinned by the recovery of the New South Wales (NSW) market which has now regained its share of the interstate visitors to the state, increasing by 27% to 192,300. NSW visitors now make up 25% of all interstate visitors to Tasmania. Meanwhile, the key markets of Victoria (no change) and Queensland (-0.1%) remained stable during the period, whilst the number of visitors from the Northern Territory, grew by 1,200 to 6,600. Visitation from Western Australia (WA, -15%), South

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<sup>1</sup> VFR – Visiting friends and/or relatives

<sup>2</sup> Leisure Visitation – visitation for holiday or VFR purposes.

Australia (SA, -13%) and the Australian Capital Territory (ACT, -4%) declined during the year to September 2009. The bulk of these declines came from holiday visitors, particularly during the September quarter 2009.

## International Visitation (International Visitor Survey)

The number of international visitors to Australia continues to trend downward due to the impact of the global economic recession. In the year ending September 2009 there were 5.1 million visitors to the country, down 2% on the previous year. Tasmania has recorded a more significant decline in international visitors (-9%) than the national result, with the number of visitors to the state dropping to 143,600. In line with declining visitor numbers, visitor nights (-11%) spent in Tasmania were also down over the year. Despite this, the total spend of international visitors increased 8% over the year to September 2009 to \$275 million (includes package expenditure). The fall in the Australian dollar, which was below US\$0.75 between September 2008 and April 2009, may have contributed to the increase in expenditure flowing from increased buying power of visitors from the United States during that period.

International holiday (-5%) and business (-15%) travel to Australia continue to be the sectors most affected by the global economic downturn, while VFR (+7%) travel remains the most resilient to the crisis. In Tasmania, international business travel (-44%) was also the sector most affected by the global economic crisis; but in contrast to the national trends the impact on holiday visitors to Tasmania was marginal (-2%) and the impact on VFR visitors significant (-22%).

Visitors from Asia, Europe, North America, the United Kingdom (UK) and New Zealand remain Tasmania's largest sources of international visitors for the year to September 2009. Year on year increases were recorded in visitors from Hong Kong (+35%), Malaysia (+28%), Indonesia and Taiwan (+92%). However, these increases were offset by declines out of Korea (-49%), China (-42%) and Japan (-35%), and hence a key influence in the fall in total international visitors from Asia to Tasmania. Similarly, there were decreases out of the UK (-7%), the USA (-6%) and Canada (-21%). Despite fewer visitors, the UK and the USA each recorded a significant increase in the total spend by their visitors in the state (+15% and +50% respectively), along with visitors from New Zealand (+13%).

## Intrastate Visitation (National Visitor Survey)

Nationally, all overnight intrastate trips across Australia are at record low levels, down 7% in the year ending September 2009. In contrast, the number of national intrastate day trips were up 5% on the previous year, resulting in a 5% overall increase in total trips taken by Australians in their home states. Total trips (5.3 million) taken by Tasmanians in their home state increased 2% in the year to September 2009 compared with the previous year. This was due to an increase in day trips (+7%), while the number of overnight trips taken by Tasmanians in the State decreased by 15% over the period. Most of the decline in overnight intrastate travel in Tasmania was from the holiday (-15%) and VFR (-25%) markets, while the overnight business travel market increased slightly by (+1%). The increase in Tasmanians undertaking day travel in the state was a result of growth in the VFR (+11%) and business (+16%) markets in particular.

Along with a decrease in visitor numbers (-15%) and nights (-20%), the total spend of overnight intrastate visitors also decreased to \$284 million (-8%). Total day travel expenditure reached \$426 million in the year to September 2009, up 14% on the previous year.

## Cruise and Navy Ship Visitation

The 2008-09 Tasmanian cruise ship season commenced at the start of November 2008 and finished in early April 2009. During that time there were over 105,400 cruise ship passengers and crew who visited the State, an increase of 27% or 22,400 more visitors than the 2007-08 cruise ship season. Around 70% of cruise ship visitors were passengers and 30% were crew members. Of the visitors surveyed by Tourism Tasmania 75% were from overseas, of which 36% were from the USA and 12% from the United Kingdom. In addition to cruise ship visitors, there were 1,660 navy ship passengers that came to Tasmania in the year to September 2009, a decrease from the previous year (4,040).

## Marketing Performance (Holiday Tracking Survey)

Without any prompting on advertising for holidays and travel, 16.1% of all Australians (interstate and intrastate residents) had read, seen or heard some form of Tasmanian holiday/travel advertising in the year ending September 2009, down from 16.8% of all Australians recorded in the previous year. Tasmania had the second highest level of prompted advertising awareness for the year at 26.3%, following Queensland (49.1%).

When asked where you would like to go on holidays in the next two years, 17.9% of all Australians had a preference to travel to/within Tasmania an increase of 0.3% on the previous year, whilst 4.9% of all Australians intended to travel to/within the State in the next two years an increase of 0.3% on the previous year. An estimated 12.1% 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.

## Interstate Visitors to Tasmania

	12 months ending Sept 08	12 months ending Sept 09	% Change	
<b>Interstate Visitor</b>				
Day visitors	16,800	15,500	▼	-8%
Overnight visitors	745,200	765,700	▲	3%
Total visitors	762,000	781,200	▲	3%
<b>Interstate Nights</b>				
Total nights	6,003,682	6,581,287	▲	10%
Average length of stay	7.9	8.4	▲	7%
<b>Expenditure (\$'000s)</b>				
All expenditure	\$1,224,600	\$1,249,500	▲	2%
Average spend per visitor	\$1,607	\$1,599	▶	0%
Average spend per night	\$204	\$190	▼	-7%
<b>Market Share *</b>				
Visitor market share	3.9%	3.9%	▶	
Nights market share	5.0%	5.2%	▲	
Expenditure market share	5.2%	4.9%	▼	
<b>Mode of departure</b>				
Air visitors	648,200	663,100	▲	2%
Sea visitors	113,800	118,100	▲	4%
<b>Purpose for visiting</b>				
Holiday	337,000	346,300	▲	3%
Visit friends or relatives (VFR)	223,900	218,100	▼	-3%
Total Leisure (Holiday & VFR)	560,800	564,400	▲	1%
Business or employment	136,200	150,700	▲	11%
Convention / conference /	23,100	30,000	▲	30%
Event / festival (incl sporting	27,200	25,800	▼	-5%
Some other	7,400	3,900	▼	-47%
No Response	7,300	6,400	▼	-12%
<b>Total interstate visitors to Ta:</b>	<b>762,000</b>	<b>781,200</b>	<b>▲</b>	<b>3%</b>

Source: Tasmanian Visitor Survey, Tourism Tasmania

\* Market share source: National Visitor Survey, Tourism Research Australia

▲ Increase on year ending Sept 08, ▼ Decrease on year ending Sept 08, ▶ No change on year ending Sept 08

## Interstate Visitors to Tasmania

**Table 2. Origin of Interstate Visitors to Tasmania**

State of origin	All Visitors			Leisure Visitors (Holiday + VFR)*		
	12 months ending Sept 08	12 months ending Sept 09	% Change	12 months ending Sept 08	12 months ending Sept 09	% Change
Victoria	351,900	352,600	▶ 0%	252,800	250,600	▼ -1%
N.S.W.	151,300	192,300	▲ 27%	116,700	141,600	▲ 21%
Queensland	113,700	112,500	▼ -1%	91,300	86,800	▼ -5%
South Australia	52,600	45,700	▼ -13%	40,600	33,600	▼ -17%
Western Australia	47,000	40,100	▼ -15%	38,400	30,500	▼ -21%
A.C.T.	18,900	18,000	▼ -4%	12,300	11,300	▼ -8%
N.T.	5,400	6,600	▲ 24%	4,300	5,300	▲ 23%
Australia - no state given	21,400	13,400	▼ -37%	4,500	4,800	▲ 7%
<b>Total interstate visitors to Ta:</b>	<b>762,000</b>	<b>781,200</b>	<b>▲ 3%</b>	<b>560,800</b>	<b>564,400</b>	<b>▲ 1%</b>

Source: Tasmanian Visitor Survey, Tourism Tasmania

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

▲ Increase on year ending Sept 08, ▼ Decrease on year ending Sept 08, ▶ No change on year ending Sept 08

**Table 3. Origin of Interstate Visitor Nights**

State of origin	All Nights			Leisure Nights (Holiday + VFR)*		
	12 months ending Sept 08	12 months ending Sept 09	% Change	12 months ending Sept 08	12 months ending Sept 09	% Change
Victoria	2,169,500	2,212,200	▲ 2%	1,618,400	1,605,200	▼ -1%
N.S.W.	1,201,700	1,634,300	▲ 36%	1,016,700	1,282,000	▲ 26%
Queensland	1,270,200	1,315,500	▲ 4%	1,077,000	1,045,200	▼ -3%
South Australia	459,400	444,600	▼ -3%	367,900	341,000	▼ -7%
Western Australia	513,200	603,400	▲ 18%	451,500	427,400	▼ -5%
A.C.T.	138,600	148,100	▲ 7%	110,600	107,700	▼ -3%
N.T.	57,300	85,600	▲ 49%	50,300	70,300	▲ 40%
Australia - no state given	193,800	137,600	▼ -29%	61,400	60,900	▼ -1%
<b>Total interstate visitors to Tasmania</b>	<b>6,003,700</b>	<b>6,581,300</b>	<b>▲ 10%</b>	<b>4,753,900</b>	<b>4,939,700</b>	<b>▲ 4%</b>
<b>Average Length of Stay (nights)</b>	<b>7.9</b>	<b>8.4</b>	<b>▲ 7%</b>	<b>8.5</b>	<b>8.8</b>	<b>▲ 3%</b>

Source: Tasmanian Visitor Survey, Tourism Tasmania

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

▲ Increase on year ending Sept 08, ▼ Decrease on year ending Sept 08, ▶ No change on year ending Sept 08

## Interstate Visitors to Tasmania

State of origin	All Expenditure			Leisure Expenditure (Holiday +		
	12 months ending Sept	12 months ending Sept 09	% Change	12 months ending Sept 08	12 months ending Sept 09	% Change
	(\$'000s)					
Victoria	\$451,100	\$484,300	▲ 7%	\$374,300	\$391,000	▲ 4%
N.S.W.	\$270,100	\$341,200	▲ 26%	\$237,000	\$279,400	▲ 18%
Queensland	\$263,000	\$205,200	▼ -22%	\$220,900	\$174,300	▼ -21%
South Australia	\$76,000	\$85,700	▲ 13%	\$66,800	\$74,500	▲ 12%
Western Australia	\$115,300	\$84,100	▼ -27%	\$100,400	\$68,000	▼ -32%
A.C.T.	\$25,700	\$27,300	▲ 6%	\$22,100	\$23,000	▲ 4%
N.T.	\$9,100	\$12,000	▲ 32%	\$8,200	\$8,400	▲ 2%
Australia - no state given	\$14,300	\$9,700	▼ -32%	\$6,100	\$6,000	▼ -2%
Total interstate visitors to Tasmani:	\$1,224,600	\$1,249,500	▲ 2%	\$1,035,800	\$1,024,700	▼ -1%
Average spend per visitor	\$1,607	\$1,599	▶ 0%	\$1,847	\$1,816	▼ -2%
Average spend per night	\$204	\$190	▼ -7%	\$218	\$207	▼ -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

▲ Increase on year ending Sept 08, ▼ Decrease on year ending Sept 08, ▶ No change on year ending Sept 08

## International Visitors to Tasmania

	12 months ending Sept 08	12 months ending Sept 09	% Change	
International visitors	158,300	143,600	▼	-9
International nights	3,090,200	2,753,800	▼	-11
Average Length of Stay (nights)	20	19	▼	-2
Expenditure - <u>excluding</u> package expenditure (\$million)	\$243	\$257	▲	6
Expenditure - <u>including</u> package expenditure (\$million)	\$255	\$275	▲	8
Average expenditure per visit	\$1,535	\$1,790	▲	17
Average expenditure per night	\$79	\$93	▲	19
<b>Market Share</b>				
Visitors	3.0%	2.8%	▼	
Nights	1.9%	1.6%	▼	
Expenditure <sup>1</sup>	1.6%	1.6%	▶	
<b>International Purpose of visit <sup>2</sup></b>				
Holiday	106,800	104,700	▼	-2
Visit friends or relatives	33,800	26,200	▼	-22
Business	18,400	10,300	▼	-44
Education	8,800	8,700	▼	-1
Employment	1,800	2,800	▲	56
Other reason	2,000	3,000	▲	50
<b>Total international visitors</b>	<b>158,300</b>	<b>143,600</b>	<b>▼</b>	<b>-9</b>

Source: International Visitor Survey, Tourism Research Australia

<sup>1</sup> Average spend per visitor, spend per night and expenditure market share is calculated using expenditure excluding package spend

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

▲ Increase on year ending Sept 08, ▼ Decrease on year ending Sept 08, ▶ No change on year ending Sept 08

## International Visitors to Tasmania

Country of residence	Visitors		
	12 months ending Sept 08	12 months ending Sept 09	% Change
United Kingdom	28,300	26,200	▼ -7
New Zealand	14,800	13,400	▼ -9
Total Asia:	43,400	39,900	▼ -8
Japan	8,200	5,300	▼ -35
Other Asia	35,200	34,600	▼ -2
North America:	30,700	27,400	▼ -11
USA	20,700	19,500	▼ -6
Canada	10,000	7,900	▼ -21
Total Europe:	32,100	29,100	▼ -9
Germany	8,700	8,500	▼ -2
Other Europe	23,300	20,600	▼ -12
Other Countries	9,100	7,500	▼ -18
<b>Total international visitors</b>	<b>158,300</b>	<b>143,600</b>	<b>▼ -9</b>

Source: International Visitor Survey, Tourism Research Australia

▲ Increase on year ending Sept 08, ▼ Decrease on year ending Sept 08, ► No change on year ending Sept 08

Country of residence	Nights					
	12 months ending Sept 08	12 months ending Sept 09	% Change	Average Stay Sept 08	Average Stay Sept 09	
United Kingdom	390,600	354,000	▼ -9	13.8	13.5	▼
New Zealand	152,500	192,200	▲ 26	10.3	14.3	▲
Total Asia:	1,461,700	1,359,800	▼ -7	33.7	34.1	▲
Japan	290,200	108,600	▼ -63	35.4	20.5	▼
Other Asia	1,171,500	1,251,200	▲ 7	33.3	36.2	▲
North America:	299,700	246,700	▼ -18	9.8	9.0	▼
USA	166,200	152,300	▼ -8	8.0	7.8	▼
Canada	133,500	94,400	▼ -29	13.4	11.9	▼
Total Europe:	508,200	446,600	▼ -12	15.8	15.3	▼
Germany	172,100	149,300	▼ -13	19.8	17.6	▼
Other Europe	336,100	297,300	▼ -12	14.4	14.4	►
Other Countries	277,500	154,700	▼ -44	30.5	20.6	▼
<b>Total international visitors</b>	<b>3,090,200</b>	<b>2,753,800</b>	<b>▼ -11</b>	<b>19.5</b>	<b>19.2</b>	<b>▼</b>

Source: International Visitor Survey, Tourism Research Australia

▲ Increase on year ending Sept 08, ▼ Decrease on year ending Sept 08, ► No change on year ending Sept 08



## International Visitors to Tasmania

**Table 8. Expenditure of international visitors in Tasmania**

Country of residence	12 months		% Change	Expenditure						
	ending Sept	ending Sept		Average	Average	Average	Average	Average	Average	
	08	09		spend per	spend per	spend per	spend per	spend per	spend per	
	\$million	\$million	%	08	09	08	09	08	09	
United Kingdom	\$27	\$31	▲	15	\$954	\$1,183	▲	\$69	\$88	▲
New Zealand	\$15	\$17	▲	25	\$1,014	\$1,269	▲	\$98	\$88	▼
Total Asia:	np	np		np	np	np	np	np	np	np
Japan	\$15	\$8	▼	-21	\$1,829	\$1,509	▼	\$52	\$74	▲
Other Asia	np	np		np	np	np	np	np	np	np
North America:	\$26	\$31	▶	0	\$847	\$1,131	▲	\$87	\$126	▲
USA	\$16	\$24	▲	22	\$773	\$1,231	▲	\$96	\$158	▲
Canada	\$10	\$7	▼	-40	\$1,000	\$714	▼	\$75	\$74	▼
Total Europe:	np	np		np	np	np	np	np	np	np
Germany	\$10	\$10	▼	-9	\$1,149	\$1,176	▲	\$58	\$67	▲
Other Europe	np	np		np	np	np	np	np	np	np
Other Countries	\$19	\$15	▼	-11	\$2,088	\$2,000	▼	\$68	\$97	▲
<b>Total international visitor</b>	<b>\$243</b>	<b>\$257</b>	<b>▲</b>	<b>3</b>	<b>\$1,535</b>	<b>\$1,790</b>	<b>▲</b>	<b>\$79</b>	<b>\$93</b>	<b>▲</b>

Source: International Visitor Survey, Tourism Research Australia

n.p. not published due to data reliability

▲ Increase on year ending Sept 08, ▼ Decrease on year ending Sept 08, ▶ No change on year ending Sept 08

## Intrastate Travel in Tasmania

	12 months ending Sept 08	12 months ending Sept 09		% Change
<b>Intrastate Visitors ('000s)</b>				
Day Visitors	4,103	4,377	▲	7
Overnight Visitors	1,137	967	▼	-15
Total intrastate visitors	5,240	5,344	▲	2
<b>Intrastate Nights ('000s)</b>				
Total Nights	2,937	2,362	▼	-20
Average Length of Stay (nights)	2.6	2.4	▼	-5
<b>Intrastate Expenditure</b>				
Expenditure (\$million)	\$308	\$284	▼	-8
Average spend per overnight visitor	\$271	\$294	▲	8
Average spend per night	\$105	\$120	▲	15
<b>Overnight Intrastate Market Share</b>				
Visitors	2.3%	2.1%	▼	-9
Nights	1.9%	1.7%	▼	-11
Expenditure	1.7%	1.6%	▼	-6
<b>Purpose of Overnight Trip ('000s)</b>				
Holiday	576	492	▼	-15
Visit friends or relatives	324	244	▼	-25
Business	183	184	▲	1
Other	58	45	▼	-22
<b>Total Overnight Intrastate Visitors</b>	<b>1,137</b>	<b>967</b>	<b>▼</b>	<b>-15</b>

Source: National Visitor Survey, Tourism Research

Intrastate travel refers to travel undertaken in Tasmania by Tasmanian residents

▲ Increase on year ending Sept 08, ▼ Decrease on year ending Sept 08, ► No change on year ending Sept 08

## Intrastate Travel in Tasmania

	12 months ending Sept 08	12 months ending Sept 09	% Change	
Intrastate Day Visitors	4,103	4,377	▲	7
Intrastate Day Trip	\$373	\$426	▲	14
Average spend per day	\$91	\$97	▲	7
<b>Intrastate Day Trip</b>				
Visitors	3.2%	3.2%	▶	0
Expenditure	2.6%	2.9%	▲	12
<b>Purpose of Intrastate Day</b>				
Holiday	2,279	2,309	▲	1
Visit friends or relatives	943	1,047	▲	11
Business	408	472	▲	16
Other	473	549	▲	16
<b>Total Day Trip Intrastate</b>	<b>4,103</b>	<b>4,377</b>	<b>▲</b>	<b>7</b>

Source: National Visitor Survey, Tourism Research Australia

Intrastate travel refers to travel undertaken in Tasmania by Tasmanian residents

1. Expenditure consists of 1% interstate and 99% intrastate expenditure

▲ Increase on year ending Sept 08, ▼ Decrease on year ending Sept 08, ▶ No change on year ending Sept 08

## Marketing Performance

	12 months ending Sept 08	12 months ending Sept 09	% pt change	
<sup>1</sup> Advertising Awareness (Unprompted)	16.5	15.6	▼	-1
<sup>1</sup> Advertising Awareness (Prompted)	31.3	25.5	▼	-6
<sup>2</sup> Preference to visit Tasmania	16.5	17.2	▲	0.7
<sup>3</sup> Intention to visit Tasmania	4.0	4.3	▲	0.3
<sup>4</sup> Behaviour	4.0	4.1	▲	0.1
<sup>5</sup> Tagline Awareness - 'Island of Inspiration'	12.7	11.7	▼	-1.0

	12 months ending Sept 08	12 months ending Sept 09	% pt change	
<sup>1</sup> Advertising Awareness (Unprompted)	30.1	35.2	▲	5.1
<sup>1</sup> Advertising Awareness (Prompted)	63.9	61.5	▼	-2.4
<sup>2</sup> Preference to visit Tasmania	39.5	45.6	▲	6.1
<sup>3</sup> Intention to visit Tasmania	29.5	31.9	▲	2.4
<sup>4</sup> Behaviour	42.0	44.8	▲	2.8
<sup>5</sup> Tagline Awareness - 'Island of Inspiration'	23.5	25.0	▲	1.5

	12 months ending Sept 08	12 months ending Sept 09	% pt change	
<sup>1</sup> Advertising Awareness (Unprompted)	16.8	16.1	▼	-0.7
<sup>1</sup> Advertising Awareness (Prompted)	32.1	26.3	▼	-5.8
<sup>2</sup> Preference to visit Tasmania	17.0	17.9	▲	0.9
<sup>3</sup> Intention to visit Tasmania	4.6	4.9	▲	0.3
<sup>4</sup> Behaviour	4.9	5.1	▲	0.2
<sup>5</sup> Tagline Awareness - 'Island of Inspiration'	13.0	12.1	▼	-0.9

Source: Holiday Tracking Survey, Roy Morgan Research

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

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

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

<sup>4</sup> Behaviour - Percentage of Australians that visited Tasmania in the last 12 months.

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

▲ Increase on year ending Sept 08, ▼ Decrease on year ending Sept 08, ► No change on year ending Sept 08

## Cruise and Navy Visitors

	12 months ending Sept 08	12 months ending Sept 09	% Change
(passengers and crew)*	83,000	105,400	▲ 27
Navy ship visitors**	4,039	1,660	▼ -59

\*Source: Tasmanian Ports Corporation

\*\*Source: Navy Headquarters - Tasmania

▲ Increase on year ending Sept 08, ▼ Decrease on year ending Sept 08, ► No change on year ending Sept 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 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);
- 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.

## For further information please contact:

Research Unit, Tourism Tasmania, Email: [statistics@tourism.tas.gov.au](mailto:statistics@tourism.tas.gov.au), Ph: (03) 62308231