

Tasmanian Tourism Snapshot

Year ending December 2011

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.

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 www.tourismtasmania.com.au/research/webreporter. The webreporter 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 December 2011 there were 862,400 visitors, down 5% from 904,000 for the previous year.
- Total nights decreased by 8% to 7.67 million.
- Visitor expenditure decreased by 4% to \$1.460 billion.
- The number of interstate visitors to Tasmania decreased by 4% to 745,800 (was 779,900).

Summary:

- In terms of visitor numbers from Tasmania's key markets, Victoria decreased by 2%, New South Wales decreased by 6%, and Queensland increased by 2%.
- Holiday visitors decreased by 7% for the year ending December 2011, holiday nights decreased by 8% and holiday expenditure remained steady.
- VFR visitors decreased by 4% for the year. The number of nights VFR visitors spent in Tasmania decreased by 1% while VFR expenditure decreased by 8%.
- The total number of visitors holidaying in Tasmania during the year ending December 2011 was 360,000, down 7% compared to the previous year (was 385,500).
- The total number of nights spent by holiday visitors to Tasmania for the year ending December 2011 was 3.5 million, down 8% from the previous year (was 3.8 million).
- Holiday visitor expenditure remained steady to \$986.80 million (was \$988.40 million).
- Of all visitors, 360,000 (down 7%) were on holiday, 250,600 (down 4%) were visiting friends or relatives, 153,600 (down 10%) were on business, and 35,400 (up 9%) were travelling to attend a conference or convention.
- For the year ending December 2011, data from the TVS for the five marketing zones reported the following changes in visitor numbers: Hobart and Surrounds, down 6%; Launceston, Tamar Valley and the North, down 5%; Western Wilderness, down 10%; North West, down 12%; and East Coast, down 10%.
- For the year ending December 2011, 86% of all visitors to Tasmania travelled by scheduled air services

and 14% travelled by sea. The total number of visitors travelling by scheduled air was down 4% and sea services was down 8% from the previous year.

Interstate Visitation to Tasmania (Source: Tasmanian Visitor Survey)

- The total number of interstate visitors to Tasmania for the year ending December 2011 was 745,800, down 4% from 779,900 the previous year.
- The total number of nights spent by interstate visitors to Tasmania for the year ending December 2011 was 6.00 million, down 8% from the previous year (was 6.53 million).
- Interstate visitor expenditure decreased by 5% to \$1.23 billion (was \$1.29 billion in the year ending December 2010).
- Of all interstate visitors, 286,400 were on holiday (down 6%), 228,000 were visiting friends or relatives (down 4%), 143,300 were on business (down 10%), and 32,200 were travelling to attend a conference or convention (up 8%).
- In terms of visitation to Tasmania from the key interstate markets, Victoria decreased by 2% to 337,400, NSW decreased by 6% to 173,600, and Queensland increased by 2% to 115,700 (Table 4). Together, these markets accounted for 84% of interstate visitation in the year ending December 2011.

International Visitation (Source: International Visitor Survey)

Summary – Australia:

- A total of 5.44 million international visitors visited the country in the year ending December 2011, showing no significant change from the year ending December 2010.
- Holiday visitors to Australia decreased by 4% to 2.39 million, while VFR visitors increased by 1% to 1.34 million.
- International visitor nights spent in Australia increased by 4% to 194.7 million.
- Total expenditure by international visitors in Australia for the year ending December 2011 increased by 4% to \$18.3 billion¹ (including package expenditure). Holiday spend was \$6.2 billion (including package expenditure) for the year, down 1% from the year ending December 2010.
- For Australia's three largest source markets, the following changes to visitor numbers to Australia were recorded: New Zealand, up 1%; United Kingdom, down 6%; and the USA, down 3%.

Summary – Tasmania:

- Tasmania received 149,800 international visitors during the year ending December 2011, up 6% from 142,000 the previous year.
- The number of nights international visitors spent in Tasmania decreased by 4% to 2.86 million.
- Expenditure by international visitors decreased by 9% to \$254 million².
- Holiday visitors to Tasmania increased by 10% to 105,700, while VFR visitors increased by 2% to 29,900.
- Visitor nights decreased by 4% to 2.86 million, and the average length of stay for international visitors in Tasmania decreased by 9% to 19 nights. Holiday nights increased by 23% to 1.20 million, while the average length of stay for holiday visitors increased by 12% to 11 nights.

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)

- The average spend per international visitor (including package expenditure) in Tasmania decreased by 14% to \$1,696 (was \$1,965) during the year ending December 2011, while spend per night decreased by 5% to \$89 (was \$94).
- For Tasmania's three largest source markets, the following changes to visitor numbers to the State were recorded: United Kingdom, up 7%; New Zealand, down 5%; and the USA, down 1%.
- Tasmania's share of all international visitors to Australia for the year ending December 2011 was 2.8%, compared with 2.6% for the year ending December 2010.

Intrastate Visitation³ (National Visitor Survey)

- In the year ending December 2011, the number of intrastate day trips in Tasmania increased by 1% to 4.34 million, whilst intrastate overnight trips increased by 9% to 1.1 million compared to the same period in the previous year.
- The number of overnight intrastate holiday trips in Tasmania increased by 5%, VFR increased by 13%, and overnight business trips increased by 9% in the year ending December 2011.
- Total spend by overnight intrastate visitors in Tasmania increased by 7% to \$317 million for the year ending December 2011.

³ Travel undertaken by a visitor in their home state

Total Visitors to Tasmania

	YE Dec 2010	YE Dec 2011	% change
<i>Visitors</i>			
Visitors on scheduled air and sea services	904,000	862,400	-5%

	YE Dec 2010	YE Dec 2011		% change
<i>Visitors</i>				
Day visitors	23,400	21,900	↓	-6%
Overnight visitors	880,600	840,500	↓	-5%
Total visitors	904,000	862,400	↓	-5%
<i>Nights</i>				
Nights (million)	8.30	7.67	↓	-8%
Length of stay (nights)	9.2	8.9	↓	-3%
<i>Expenditure</i>				
Expenditure (\$million)	\$1,526	\$1,460	↓	-4%
Average spend per visitor	\$1,688	\$1,693	→	0%
Average spend per night	\$184	\$190	↑	3%
Holiday spend (\$million)	\$988	\$987	→	0%
<i>Purpose of Visit</i>				
Holiday	385,500	360,000	↓	-7%
Visit friends or relatives (VFR)	260,600	250,600	↓	-4%
Total leisure (Holiday+VFR)	646,200	610,500	↓	-6%
Business or employment	170,900	153,600	↓	-10%
Convention/conference/seminar	32,500	35,400	↑	9%
<i>Regions Visited</i>				
Hobart & Surrounds	717,200	672,300	↓	-6%
Launceston, Tamar Valley & North	551,100	524,600	↓	-5%
Western Wilderness	261,100	233,700	↓	-10%
North West	390,300	343,500	↓	-12%
East Coast	297,100	268,500	↓	-10%
<i>Mode of departure</i>				
Air visitors	768,800	738,200	↓	-4%
Sea visitors	135,200	124,200	↓	-8%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

Interstate Visitors to Tasmania

Table 3. Interstate visitors to Tasmania on scheduled air and sea services				
	YE Dec 2010	YE Dec 2011		% change
<i>Visitors</i>				
Day visitors	23,100	21,200	↓	-8%
Overnight visitors	756,800	724,500	↓	-4%
Total visitors	779,900	745,800	↓	-4%
<i>Nights</i>				
Nights (million)	6.53	6.00	↓	-8%
Length of stay (nights)	8.4	8.0	↓	-4%
<i>Expenditure</i>				
Expenditure (\$million)	\$1,294	\$1,229	↓	-5%
Average spend per visitor	\$1,660	\$1,648	↓	-1%
Average spend per night	\$198	\$205	↑	3%
Holiday spend (\$million)	\$817	\$826	↑	1%
<i>Purpose of Visit</i>				
Holiday	304,800	286,400	↓	-6%
Visit friends or relatives (VFR)	238,500	228,000	↓	-4%
Total leisure (Holiday+VFR)	543,300	514,400	↓	-5%
Business or employment	159,900	143,300	↓	-10%
Convention/conference/seminar	29,900	32,200	↑	8%
<i>Regions Visited</i>				
Hobart & Surrounds	600,300	560,700	↓	-7%
Launceston, Tamar Valley & North	467,000	440,900	↓	-6%
Western Wilderness	202,000	179,000	↓	-11%
North West	335,900	291,400	↓	-13%
East Coast	229,500	206,200	↓	-10%
<i>Mode of departure</i>				
Air visitors	652,800	631,200	↓	-3%
Sea visitors	127,100	114,500	↓	-10%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

	YE Dec 2010	YE Dec 2011	% change	
Victoria	343,000	337,400	↓	-2%
N.S.W.	184,000	173,600	↓	-6%
Queensland	112,900	115,700	↑	2%
South Australia	50,500	38,000	↓	-25%
Western Australia	42,700	45,100	↑	6%
A.C.T.	24,900	19,900	↓	-20%
N.T.	9,000	6,900	↓	-23%
Total interstate visitors	779,900	745,800	↓	-4%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

International Visitors to Tasmania

	to Tasmania			to Australia		
	YE Dec 2010	YE Dec 2011	% Change	YE Dec 2010	YE Dec 2011	% Change
<i>Visitors</i>						
International visitors	142,000	149,800	↑ 6%	5,440,900	5,439,300	→ 0%
<i>Nights</i>						
Nights ('000s)	2,980	2,863	↓ -4%	187,192	194,655	↑ 4%
Ave Length of stay (nights)	21	19	↓ -9%	34.4	35.8	↑ 4%
<i>Expenditure</i>						
Expenditure (\$million)	\$279	\$254	↓ -9%	\$17,607	\$18,250	↑ 4%
Average spend per visitor	\$1,965	\$1,696	↓ -14%	\$3,236	\$3,355	↑ 4%
Average spend per night	\$94	\$89	↓ -5%	\$94	\$94	→ 0%
Holiday spend (\$million)	\$102	\$123	↑ 21%	\$6,246	\$6,171	↓ -1%
<i>Purpose of Visit</i>						
Holiday	96,500	105,700	↑ 10%	2,488,600	2,389,400	↓ -4%
Visit friends or relatives (VFR)	29,300	29,900	↑ 2%	1,325,900	1,343,900	↑ 1%
Business	9,900	13,700	↑ 38%	868,100	909,400	↑ 5%
Education	8,800	7,000	↓ -21%	431,300	429,400	→ 0%
Employment	3,300	2,500	↓ -25%	122,200	138,900	↑ 14%
Other Reason	3,800	1,700	↓ -55%	204,700	228,300	↑ 11%
Total	142,000	149,800	↑ 6%	5,440,900	5,439,300	→ 0%

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

* Modelled expenditure including package expenditure

** 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.

Table 6. International visitors to States/Territories

	YE Dec 2010	YE Dec 2011	% Change	YE Dec 2010	YE Dec 2011	% Point difference
<i>State/territory visited</i>	<i>Visitors</i>			<i>Market Share</i>		
New South Wales	2,838,600	2,756,400	↓ -3%	52.2%	50.7%	↓ -1.5%
Victoria	1,649,300	1,759,800	↑ 7%	30.3%	32.4%	↑ 2.0%
Queensland	2,048,200	1,896,800	↓ -7%	37.6%	34.9%	↓ -2.8%
South Australia	362,800	353,700	↓ -3%	6.7%	6.5%	↓ -0.2%
Western Australia	689,500	738,100	↑ 7%	12.7%	13.6%	↑ 0.9%
Tasmania	142,000	149,800	↑ 5%	2.6%	2.8%	↑ 0.1%
Northern Territory	299,600	289,300	↓ -3%	5.5%	5.3%	↓ -0.2%
Australia Capital Territory	154,800	172,900	↑ 12%	2.8%	3.2%	↑ 0.3%
Total visitors to Australia	5,440,900	5,439,300	→ 0%	100%	100%	

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

Country of origin	YE Dec 2010	YE Dec 2011	% Change		YE Dec 2010	YE Dec 2011	% Point difference
	Visitors			National Market Share			
New Zealand	14,700	13,900	↓	-5%	1.4%	1.3%	↓ -0.1%
Japan	6,200	4,900	↓	-22%	1.7%	1.6%	↓ -0.1%
Hong Kong	8,000	10,500	↑	32%	5.4%	6.9%	↑ 1.6%
Singapore	6,600	6,400	↓	-3%	2.5%	2.3%	↓ -0.1%
Malaysia	6,600	8,900	↑	36%	3.1%	4.1%	↑ 1.0%
Indonesia	2,100	1,500	↓	-31%	1.9%	1.2%	↓ -0.7%
Taiwan	2,200	2,600	↑	16%	2.7%	3.2%	↑ 0.5%
Thailand	3,000	2,300	↓	-24%	3.9%	2.9%	↓ -1.0%
Korea	3,100	4,100	↑	32%	1.6%	2.3%	↑ 0.7%
China	7,200	8,000	↑	11%	1.7%	1.6%	↓ -0.1%
India	1,400	1,900	↑	34%	1.1%	1.4%	↑ 0.3%
Other Asia	1,600	1,500	↓	-7%	1.1%	1.0%	↓ -0.1%
USA includes Hawaii	17,900	17,800	↓	-1%	4.1%	4.2%	↑ 0.1%
Canada	4,500	8,100	↑	81%	3.9%	7.3%	↑ 3.4%
United Kingdom	20,500	21,900	↑	7%	3.4%	3.8%	↑ 0.5%
Germany	7,100	8,300	↑	17%	4.6%	5.5%	↑ 1.0%
Scandinavia	4,000	4,000	↓	-1%	4.8%	4.9%	→ 0.0%
France	4,400	4,300	↓	-2%	4.7%	4.7%	→ 0.0%
Italy	2,100	2,000	↓	-7%	3.9%	3.7%	↓ -0.2%
Netherlands	3,000	1,600	↓	-46%	6.3%	3.5%	↓ -2.7%
Switzerland	2,200	2,600	↑	16%	5.3%	6.4%	↑ 1.1%
Other Europe	4,500	6,300	↑	39%	2.6%	3.6%	↑ 1.0%
Other Countries	9,000	6,500	↓	-28%	2.2%	1.6%	↓ -0.6%
Total	142,000	149,800	↑	6%	2.6%	2.8%	↑ 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 Dec 2010	YE Dec 2011	% change	YE Dec 2010	YE Dec 2011	% change
<i>Visitors</i>						
Overnight visitors ('000s)	1,011	1,097	↑ 9%	44,496	46,522	↑ 5%
<i>Nights</i>						
Nights ('000s)	2,581	2,793	↑ 8%	142,033	146,796	↑ 3%
Length of stay (nights)	2.6	2.5	→ 0%	3.2	3.2	↓ -1%
<i>Expenditure</i>						
Expenditure (\$million)	\$296	\$317	↑ 7%	\$17,629	\$18,172	↑ 3%
Spend per visitor	\$293	\$289	↓ -1%	\$396	\$391	↓ -1%
Spend per night	\$115	\$113	↓ -1%	\$124	\$124	→ 0%
<i>Purpose('000s)</i>						
Holiday	511	539	↑ 5%	20,736	21,096	↑ 2%
Visit friends &/or relatives (VFR)	278	314	↑ 13%	14,757	16,055	↑ 9%
Business	163	178	↑ 9%	6,886	7,047	↑ 2%
Other reason	62	77	↑ 24%	2,605	2,842	↑ 9%
Total overnight intrastate visitors	1,011	1,097	↑ 9%	44,496	46,522	↑ 5%

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

	Tasmania			Australia		
	YE Dec 2010	YE Dec 2011	% change	YE Dec 2010	YE Dec 2011	% change
<i>Visitor</i>						
Day visitors ('000s)	4,298	4,339	↑ 1%	143,275	148,071	↑ 3%
Total intrastate Day+Overnight visitors ('000s)	5,309	5,436	↑ 2%	187,771	194,593	↑ 4%
<i>Expenditure</i>						
Expenditure (\$million)	\$422	\$424	→ 0%	\$14,969	\$16,017	↑ 7%
Spend per visitor	\$98	\$98	→ 0%	\$104	\$108	↑ 4%
<i>Purpose('000s)</i>						
Holiday	2,317	2,147	↓ -7%	69,759	68,501	↓ -2%
Visit friends &/or relatives (VFR)	1,017	1,126	↑ 11%	42,132	44,318	↑ 5%
Business	398	414	↑ 4%	14,214	15,668	↑ 10%
Other reason	566	652	↑ 15%	17,169	19,584	↑ 14%
Total day intrastate visitors	4,298	4,339	↑ 1%	143,275	148,071	↑ 3%

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

Quarter ending December 2011

The TVS reports the following key findings for visitors during the October-December 2011 quarter.

- The total number of visitors to Tasmania for the December quarter 2011 was 219,900, showing no significant change from 219,300 the previous year (Fig. 1).
- The total number of nights spent by visitors to Tasmania for the December quarter 2011 decreased by 4% to 1.80 million (was 1.86 million) (Fig. 2).
- Visitor expenditure was \$350 million, down 9% from the same quarter of the previous year (was \$385.3 million) (Fig. 3).
- Of all visitors for the quarter, 89,600 (down 4%) were on holiday, 65,700 (up 4%) were visiting friends or relatives, 35,700 (down 12%) were on business, and 15,000 (up 83%) were travelling to attend a conference or convention (Fig. 4).

Fig. 1. Total Visitors to Tasmania by Quarter*

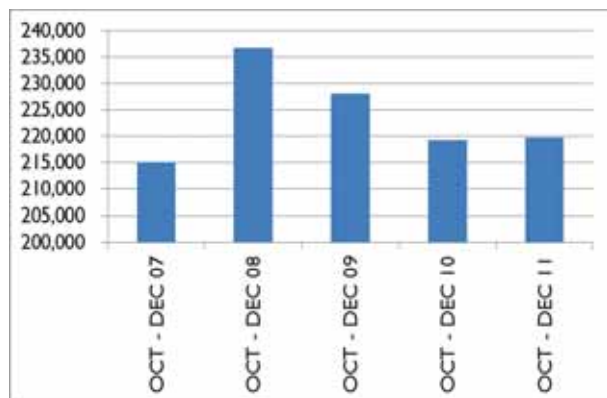


Fig. 2. Total Nights by Quarter*

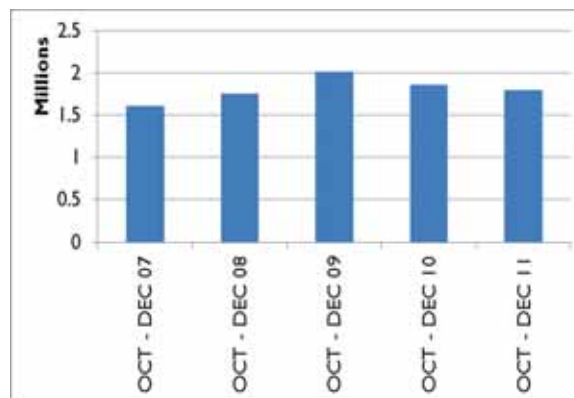


Fig. 3. Total Expenditure (\$ millions) by Quarter*

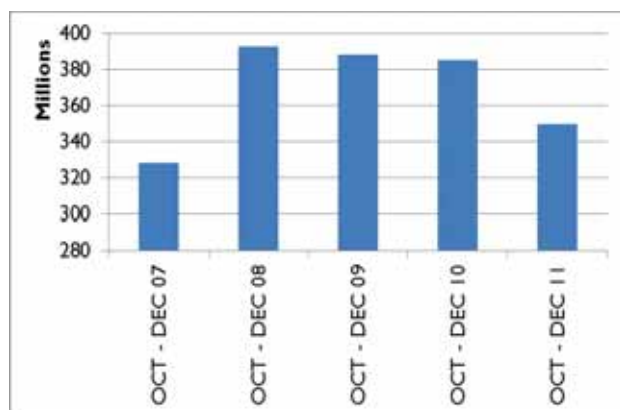
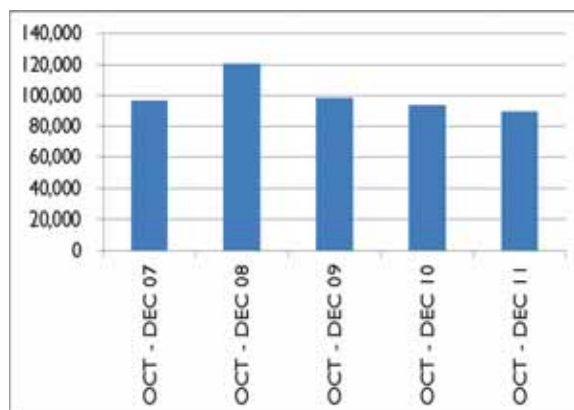


Fig. 4. Total Holiday Visitors by Quarter*



* 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.