

Tasmanian Tourism Snapshot

Year ending December 2014

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 December 2014, there were 1,068,100 visitors, up 3 per cent from 1,033,600 for the previous year.
- Total nights spent by visitors in the state increased by 4 per cent to 9.31 million.
- Visitor expenditure increased by 11 per cent to \$1.757 billion.
- The number of interstate visitors to Tasmania increased by 2 per cent to 918,600 (was 897,200).

Summary:

- In terms of visitor numbers from Tasmania's key markets, Victoria remained steady, New South Wales remained steady, and Queensland increased by 13 per cent.
- Holiday visitors increased by 16 per cent for the year ending December 2014, holiday nights increased by 13 per cent and holiday expenditure increased by 19 per cent.
- Those who came to visit friends and relatives (VFR) decreased by 1 per cent for the year. The number of nights VFR visitors spent in Tasmania increased by 1 per cent while VFR expenditure increased by 14 per cent.
- The total number of visitors holidaying in Tasmania during the year ending December 2014 was 505,800, up 16 per cent compared to the previous year (was 435,100).
- The total number of nights spent by holiday visitors to Tasmania for the year ending December 2014 was 4.6 million, up 13 per cent from the previous year (was 4.1 million).
- Holiday visitor expenditure for the year was up 19 per cent to \$1 billion (was \$968 million).
- Of all visitors, 174,000 (down 9 per cent) were on business while 28,800 (down 13 per cent) were travelling to attend a conference or convention.
- For the year ending December 2014, data from the TVS for the four tourism regions reported the following changes in visitor numbers: Southern, up 6 per cent; East Coast, up 8 per cent; Northern, up 2 per cent; Cradle Coast, up 6 per cent.
- For the year ending December 2014, 89 per cent of all visitors to Tasmania travelled by scheduled air services and 10 per cent travelled by sea. The total number of visitors travelling by scheduled air was up 3 per cent and sea services was up 4 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 December 2014 was 918,600, up 2 per cent from 897,200 the previous year.
- The total number of nights spent by interstate visitors to Tasmania for the year ending December 2014 was 7.08 million, up 3 per cent from the previous year (was 6.90 million).
- Interstate visitor expenditure increased by 13 per cent to \$1.48 billion (was \$1.31 billion in the year ending December 2013).
- Of all interstate visitors, 398,000 were on holiday (up 16 per cent), 279,000 were visiting friends or relatives (down 2 per cent), 165,000 were on business (down 8 per cent), and 26,000 were travelling to attend a conference or convention (down 13 per cent).
- In terms of visitation to Tasmania from the key interstate markets, Victoria remained steady to 401,700, NSW remained steady to 229,400, and Queensland increased by 13 per cent to 148,600. Together, these markets accounted for 85 per cent of interstate visitation in the year ending December 2014.

International Visitation (Source: International Visitor Survey)

NOTE: The International Visitor Survey results below refer to the year ending September 2014. Due to a delay in finalising results, the year ending December 2014 results will not be published until July 2015.

Summary – Australia

- A total of 6 million international visitors came to Australia in the year ending September 2014, up 8 per cent from the year ending September 2013.
- Holiday visitors to Australia increased by 9 per cent to 2.84 million, while VFR visitors increased by 14 per cent to 1.74 million.
- International visitor nights spent in Australia increased by 3 per cent to 221 million.
- Total expenditure by international visitors in Australia for the year ending September 2014 increased by 5 per cent to \$20 billion¹ (including package expenditure). Holiday spend was \$7 billion (including package expenditure) for the year, increased by 8 per cent from the year ending September 2013.
- For Australia's largest source markets, the following changes to visitor numbers to Australia were recorded: New Zealand, up 4 per cent; China, up 10 per cent; United Kingdom, up 6 per cent and the USA, up 11 per cent.

Summary – Tasmania

- Tasmania received 167,800 international visitors during the year ending September 2014, up 8 per cent from 155,300 the previous year.
- The number of nights that international visitors spent in Tasmania increased by 2 per cent to 2.98 million, and the average length of stay decreased by 6 per cent to 18 nights.
- Expenditure by international visitors increased by 13 per cent to \$254 million².
- Holiday visitors to Tasmania increased by 13 per cent to 125,100, while VFR visitors increased by 6 per cent to 31,600.
- Holiday nights decreased by 3 per cent to 1.44 million, while the average length of stay for holiday visitors decreased by 14 per cent to 12 nights.
- Total expenditure by international holiday visitors increased by 16 per cent to \$144 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 61 per cent; United Kingdom, up 6 per cent; the USA, up 3 per cent; New Zealand, up 14 per cent; Hong Kong, up 5 per cent.
- Tasmania's share of all international visitors to Australia for the year ending September 2014 was 2.7 per cent, showing no significant change compared with 2.7 per cent for the year ending September 2013.

Intrastate Visitation³ (National Visitor Survey)

- The number of overnight intrastate holiday trips in Tasmania increased by 10 per cent, VFR increased by 20 per cent, and overnight business trips increased by 9 per cent in the year ending December 2014
- In the year ending December 2014, the number of intrastate day trips in Tasmania decreased by 2 per cent to 4.65 million, whilst intrastate overnight trips increased by 12 per cent to 1.3 million compared to the year ending December 2013.
- Total spend by overnight intrastate visitors in Tasmania decreased by 2 per cent to \$368 million for the year ending December 2014.

³ Travel undertaken by a visitor in their home state

Total Visitors to Tasmania

	YE Dec 2013	YE Dec 2014	% change	
<i>Visitors</i>				
Visitors on scheduled air and sea services	1,033,600	1,068,100	↑	3%

	YE Dec 2013	YE Dec 2014	% change	
<i>Visitors</i>				
Day visitors	23,000	26,500	↑	15%
Overnight visitors	1,010,500	1,041,500	↑	3%
Total visitors	1,033,600	1,068,100	↑	3%
<i>Nights</i>				
Nights (million)	8.95	9.31	↑	4%
Average length of stay (nights)	8.7	8.7	↑	1%
<i>Expenditure</i>				
Expenditure (\$million)	\$1,582	\$1,757	↑	11%
Average spend per visitor	\$1,530	\$1,645	↑	8%
Average spend per night	\$177	\$189	↑	7%
Holiday spend (\$million)	\$968	\$1,155	↑	19%
<i>Purpose of Visit</i>				
Holiday	435,100	505,800	↑	16%
Visit friends or relatives (VFR)	309,200	305,400	↓	-1%
Total leisure (Holiday+VFR)	744,300	811,300	↑	9%
Business or employment	191,700	174,000	↓	-9%
Convention/conference/seminar	33,200	28,800	↓	-13%
<i>Regions Visited</i>				
Southern	809,900	858,600	↑	6%
East Coast	264,300	284,300	↑	8%
Northern	554,500	565,500	↑	2%
Cradle Coast	401,300	423,400	↑	6%
<i>Mode of departure</i>				
Air visitors	926,200	955,800	↑	3%
Sea visitors	107,400	112,200	↑	4%

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 2013	YE Dec 2014		% change
Visitors				
Day visitors	22,800	26,000	↑	14%
Overnight visitors	874,400	892,600	↑	2%
Total visitors	897,200	918,600	↑	2%
Nights				
Nights (million)	6.90	7.08	↑	3%
Average length of stay (nights)	7.7	7.7	→	0%
Expenditure				
Expenditure (\$million)	\$1,308	\$1,475	↑	13%
Average spend per visitor	\$1,458	\$1,606	↑	10%
Average spend per night	\$190	\$208	↑	10%
Holiday spend (\$million)	\$787	\$939	↑	19%
Purpose of Visit				
Holiday	343,800	398,000	↑	16%
Visit friends or relatives (VFR)	284,600	279,000	↓	-2%
Total leisure (Holiday+VFR)	628,400	677,100	↑	8%
Business or employment	179,700	165,000	↓	-8%
Convention/conference/seminar	30,000	26,000	↓	-13%
Regions Visited				
Southern	684,100	723,000	↑	6%
East Coast	203,900	211,300	↑	4%
Northern	471,600	474,400	↑	1%
Cradle Coast	335,500	348,600	↑	4%
Mode of departure				
Air visitors	796,900	815,800	↑	2%
Sea visitors	100,300	102,800	↑	3%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

	YE Dec 2013	YE Dec 2014		% change
Victoria	399,900	401,700	→	0%
N.S.W.	229,300	229,400	→	0%
Queensland	131,300	148,600	↑	13%
South Australia	45,900	47,600	↑	4%
Western Australia	53,600	55,800	↑	4%
A.C.T.	24,200	22,200	↓	-8%
N.T.	6,300	7,700	↑	22%
Total interstate visitors	897,200	918,600	↑	2%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

International Visitors to Tasmania

NOTE: The International Visitor Survey results below) refer to the year ending September 2014. Due to a delay in finalising results, the year ending December 2014 results will not be published until July 2015.

	to Tasmania			to Australia		
	YE Sep 2013	YE Sep 2014	% Change	YE Sep 2013	YE Sep 2014	% Change
Visitors						
International visitors	155,300	167,800	↑ 8%	5,789,900	6,263,000	↑ 8%
Nights						
Nights ('000s)	2,924	2,980	↑ 2%	213,866	220,565	↑ 3%
Average length of stay (nights)	19	18	↓ -6%	37	35	↓ -5%
Expenditure						
Expenditure (\$million)	\$225	\$254	↑ 13%	\$19,067	\$20,091	↑ 5%
Average spend per visitor	\$1,449	\$1,512	↑ 4%	\$3,293	\$3,208	↓ -3%
Average spend per night	\$77	\$85	↑ 11%	\$89	\$91	↑ 2%
Holiday spend (\$million)	\$125	\$144	↑ 16%	\$6,878	\$7,411	↑ 8%
Purpose of Visit						
Holiday	111,000	125,100	↑ 13%	2,597,800	2,841,300	↑ 9%
Visit friends or relatives (VFR)	29,700	31,600	↑ 6%	1,523,900	1,739,000	↑ 14%
Business	12,200	11,200	↓ -8%	811,700	835,200	↑ 3%
Education	4,700	5,300	↑ 11%	368,700	367,300	→ 0%
Employment	3,700	3,300	↓ -11%	225,600	223,900	↓ -1%
Other Reason	1,200	1,400	↑ 18%	262,100	256,300	↓ -2%
Total	155,300	167,800	↑ 8%	5,789,900	6,263,000	↑ 8%

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.

Table 6. International visitors to States/Territories							
	YE Sep 2013	YE Sep 2014	% Change	YE Sep 2013	YE Sep 2014	% Point difference	
State/territory visited	Visitors			Market Share			
New South Wales	2,959,500	3,156,200	↑ 7%	51%	50%	↓	-1%
Victoria	1,900,300	2,098,200	↑ 10%	33%	34%	↑	1%
Queensland	2,046,800	2,120,600	↑ 4%	35%	34%	↓	-1%
South Australia	363,000	390,300	↑ 8%	6%	6%	→	0%
Western Australia	751,000	807,000	↑ 7%	13%	13%	→	0%
Tasmania	155,300	167,800	↑ 8%	3%	3%	→	0%
Northern Territory	258,300	280,100	↑ 8%	4%	4%	→	0%
Australia Capital Territory	177,000	180,700	↑ 2%	3%	3%	→	0%
Total visitors to Australia	5,789,900	6,263,000	↑ 8%	100%	100%	→	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)

Country of origin	Visitors			National Market Share			% Point difference
	YE Sep 2013	YE Sep 2014	% Change	YE Sep 2013	YE Sep 2014		
New Zealand	14,900	16,900	↑ 14%	1%	2%	⇒	0%
Japan	4,400	6,600	↑ 49%	1%	2%	↑	1%
Hong Kong	15,400	16,300	↑ 5%	10%	9%	↓	-1%
Singapore	5,200	8,500	↑ 61%	2%	3%	↑	1%
Malaysia	5,500	7,000	↑ 25%	2%	2%	⇒	0%
Indonesia	900	400	↓ -57%	1%	0%	⇒	0%
Taiwan	3,800	4,200	↑ 9%	4%	4%	⇒	0%
Thailand	1,100	1,700	↑ 59%	2%	2%	↑	1%
Korea	900	1,900	↑ 115%	0%	1%	↑	1%
China	12,900	20,800	↑ 61%	2%	3%	↑	1%
India	3,800	1,900	↓ -51%	2%	1%	↓	-1%
Other Asia	3,400	1,600	↓ -52%	2%	1%	↓	-1%
USA includes Hawaii	18,400	19,000	↑ 3%	4%	4%	⇒	0%
Canada	3,900	5,200	↑ 34%	3%	4%	↑	1%
United Kingdom	18,800	20,000	↑ 6%	3%	3%	⇒	0%
Germany	7,900	8,500	↑ 7%	5%	5%	⇒	0%
Scandinavia	3,500	1,500	↓ -56%	4%	2%	↓	-2%
France	6,300	4,700	↓ -25%	6%	4%	↓	-2%
Italy	2,300	2,700	↑ 16%	4%	4%	⇒	0%
Netherlands	2,200	1,700	↓ -23%	5%	4%	↓	-1%
Switzerland	4,000	2,800	↓ -29%	9%	6%	↓	-3%
Other Europe	9,900	6,100	↓ -38%	5%	3%	↓	-2%
Other Countries	6,000	8,100	↑ 37%	2%	2%	⇒	0%
Total	155,300	167,800	↑ 8%	3%	3%	⇒	0%

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 2013	YE Dec 2014	% change	YE Dec 2013	YE Dec 2014	% change
Visitors						
Overnight visitors ('000s)	1,138	1,270	↑ 12%	51,281	55,509	↑ 8%
Nights						
Nights ('000s)	2,770	3,055	↑ 10%	160,254	178,527	↑ 11%
Average length of stay (nights)	2.4	2.4	↓ -1%	3.1	3.2	↑ 3%
Expenditure						
Expenditure (\$million)	\$377	\$368	↓ -2%	\$21,411	\$22,710	↑ 6%
Spend per visitor	\$331	\$290	↓ -12%	\$418	\$409	↓ -2%
Spend per night	\$136	\$121	↓ -11%	\$134	\$127	↓ -5%
Purpose('000s)						
Holiday	582	639	↑ 10%	23,653	23,282	↓ -2%
Visit friends &/or relatives (VFR)	315	377	↑ 20%	17,831	20,304	↑ 14%
Business	177	193	↑ 9%	7,383	9,284	↑ 26%
Other reason	72	69	↓ -4%	3,004	3,199	↑ 6%
Total overnight intrastate visitors	1,138	1,270	↑ 12%	51,281	55,509	↑ 8%

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

	Tasmania			Australia		
	YE Dec 2013	YE Dec 2014	% change	YE Dec 2013	YE Dec 2014	% change
Visitor						
Day visitors ('000s)	4,745	4,648	↓ -2%	155,465	155,611	→ 0%
Total intrastate Day+Overnight visitors ('000s)	5,883	5,918	↑ 1%	206,746	211,120	↑ 2%
Expenditure						
Expenditure (\$million)	\$497	\$517	↑ 4%	\$18,276	\$17,969	↓ -2%
Spend per visitor	\$105	\$111	↑ 6%	\$118	\$115	↓ -2%
Purpose('000s)						
Holiday	2,387	2,306	↓ -3%	72,967	71,937	↓ -1%
Visit friends &/or relatives (VFR)	1,205	1,175	↓ -2%	47,866	47,402	↓ -1%
Business	469	472	↑ 1%	15,366	16,031	↑ 4%
Other reason	683	695	↑ 2%	19,266	20,242	↑ 5%
Total day intrastate visitors	4,745	4,648	↓ -2%	155,465	155,611	→ 0%

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

Quarter ending December 2014

The TVS reports the following key findings for visitors during the October - December 2014 quarter.

- The total number of visitors to Tasmania for the December quarter 2014 was 282,000, up 2 per cent from 276,900 the previous year (Fig. 1).
- The total number of nights spent by visitors to Tasmania for the December quarter 2014 decreased by 1 per cent to 2.17 million (was 2.20 million) (Fig. 2).
- Visitor expenditure was \$460 million, up 4 per cent from the same quarter of the previous year (was \$444.5 million) (Fig. 3).
- Of all visitors for the quarter, 137,900 (up 11 per cent) were on holiday, 80,000 (up 1 per cent) were visiting friends or relatives, 43,200 (down 7 per cent) were on business, and 9,400 (down 24 per cent) were travelling to attend a conference or convention (Fig. 4).

Fig. 1. Total Visitors to Tasmania by Quarter*

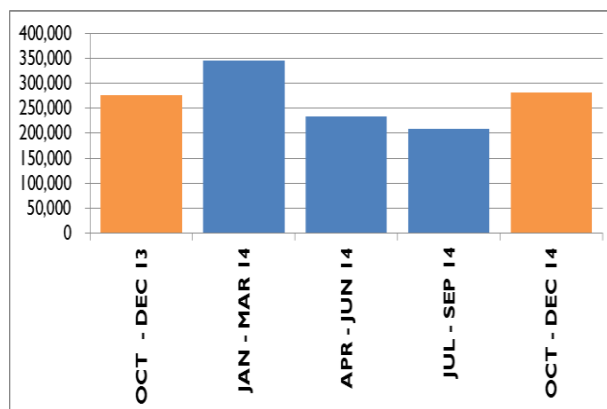


Fig. 2. Total Nights by Quarter*

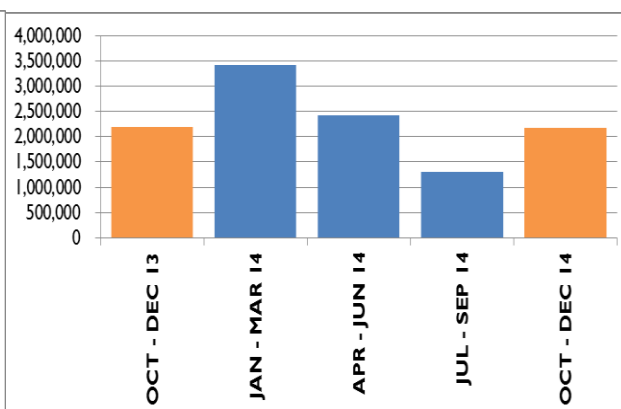


Fig. 3. Total Expenditure (\$ millions) by Quarter*

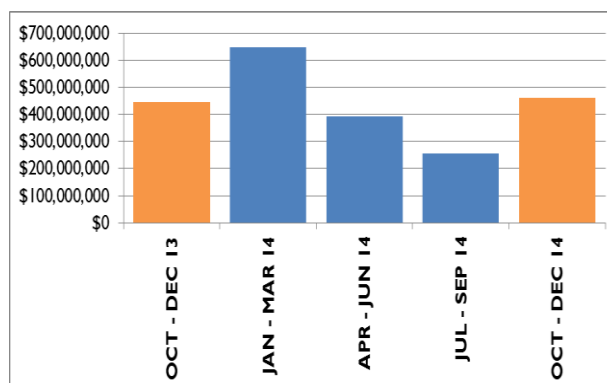
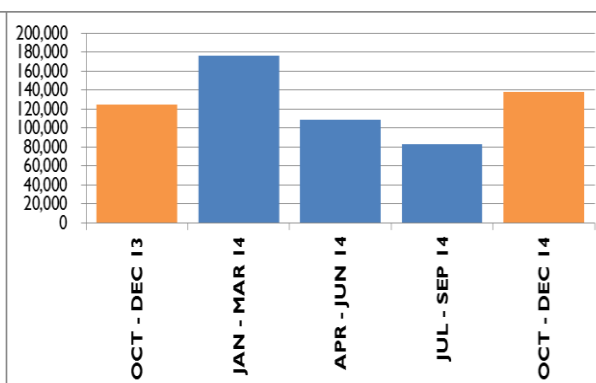


Fig. 4. Total Holiday Visitors by Quarter*



* Graphs present data for the last five quarters, 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.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.