

Tasmanian Tourism Snapshot

Year ending December 2012

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 2012, there were 904 800 visitors, up 5 per cent from 862 400 for the previous year.
- Total nights increased by 5 per cent to 8.03 million.
- Visitor expenditure decreased by 2 per cent to \$1.426 billion.
- The number of interstate visitors to Tasmania increased by 5 per cent to 785 000 (was 745 800).

Summary:

- In terms of visitor numbers from Tasmania's key markets, Victoria increased by 4 per cent, New South Wales increased by 6 per cent, and Queensland increased by 4 per cent.
- Holiday visitors remained steady for the year ending December 2012, holiday nights remained steady and holiday expenditure decreased by 12 per cent.
- VFR visitors increased by 9% for the year. The number of nights VFR visitors spent in Tasmania increased by 6 per cent while VFR expenditure increased by 22 per cent.
- The total number of visitors holidaying in Tasmania during the year ending December 2012 was 359 200, showing no significant change compared to the previous year (was 360 000).
- The total number of nights spent by holiday visitors to Tasmania for the year ending December 2012 was 3.5 million, showing no significant change from the previous year (was 3.5 million).
- Holiday visitor expenditure for the year was down 12 per cent to \$870 million (was \$984 million).
- Of all visitors, 182,100 (up 19 per cent) were on business while 30 600 (down 14 per cent) were travelling to attend a conference or convention.
- For the year ending December 2012, data from the TVS for the four tourism regions reported the following changes in visitor numbers: Southern, up 8 per cent; East Coast, down 8 per cent; Northern, down 5 per cent; Cradle Coast, down 4 per cent.
- For the year ending December 2012, 88 per cent of all visitors to Tasmania travelled by scheduled air services and 12 per cent travelled by sea. The total number of visitors travelling by scheduled air was up 8 per cent and sea services was down 14 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 2012 was 785 000, up 5 per cent from 745 800 the previous year.
- The total number of nights spent by interstate visitors to Tasmania for the year ending December 2012 was 6.20 million, up 3 per cent from the previous year (was 6.00 million).
- Interstate visitor expenditure decreased by 1 per cent to \$1.22 billion (was \$1.23 billion in the year ending December 2011).
- Of all interstate visitors, 287 800 were on holiday (showing no significant change), 246 300 were visiting friends or relatives (up 8 per cent), 170 800 were on business (up 19 per cent), and 27 700 were travelling to attend a conference or convention (down 14 per cent).
- In terms of visitation to Tasmania from the key interstate markets, Victoria increased by 4 per cent to 350 000, NSW increased by 6 per cent to 184 700, and Queensland increased by 4 per cent to 120 100. Together, these markets accounted for 83 per cent of interstate visitation in the year ending December 2012.

International Visitation (Source: International Visitor Survey)

Summary – Australia

- A total of 5.69 million international visitors visited the country in the year ending December 2012, up 5 per cent from the year ending December 2011.
- Holiday visitors to Australia increased by 5 per cent to 2.51 million, while VFR visitors increased by 7 per cent to 1.44 million.
- International visitor nights spent in Australia increased by 6 per cent to 206.3 million.
- Total expenditure by international visitors in Australia for the year ending December 2012 increased by 2 per cent to \$18.5 billion¹ (including package expenditure). Holiday spend was \$6.3 billion (including package expenditure) for the year, increased by 2 per cent from the year ending December 2011.
- For Australia's largest source markets, the following changes to visitor numbers to Australia were recorded: New Zealand, up 3 per cent; United Kingdom, down 2 per cent; China, up 16 per cent and the USA, up 6 per cent.

Summary – Tasmania

- Tasmania received 142 100 international visitors during the year ending December 2012, down 5 per cent from 150 300 the previous year.
- The number of nights international visitors spent in Tasmania remained steady to 2.93 million, and the average length of stay increased by 6 per cent to 21 nights.
- Expenditure by international visitors increased by 1 per cent to \$257 million².
- Holiday visitors to Tasmania decreased by 10 per cent to 96 100, while VFR visitors increased by 3 per cent to 30 800.
- Holiday nights down 15 per cent to 1.05 million, while the average length of stay for holiday visitors decreased by 6 per cent to 11 nights.
- The average spend per international visitor (including package expenditure) in Tasmania increased by 7 per cent to \$1 809 (was \$1 690) during the year ending December 2012, while spend per night increased by 1 per cent to \$88 (was \$87).

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: United Kingdom, down 19 per cent; New Zealand, down 10 per cent; the USA, up 3 per cent; and China, up 43 per cent.
- Tasmania's share of all international visitors to Australia for the year ending December 2012 was 2.5 per cent, compared with 2.8 per cent for the year ending December 2011.

Intrastate Visitation³ (National Visitor Survey)

- The number of overnight intrastate holiday trips in Tasmania increased by 4 per cent, VFR decreased by 1 per cent, and overnight business trips decreased by 7 per cent in the year ending December 2012.
- In the year ending December 2012, the number of intrastate day trips in Tasmania increased by 15 per cent to 4.88 million, whilst intrastate overnight trips increased by 1 per cent to 1.1 million compared to the year ending December 2011.
- Total spend by overnight intrastate visitors in Tasmania decreased by 2 per cent to \$310 million for the year ending December 2012.

³ Travel undertaken by a visitor in their home state

Total Visitors to Tasmania

	YE Dec 2011	YE Dec 2012	% change
Visitors			
Visitors on scheduled air and sea services	862,400	904,800	↑ 5%

	YE Dec 2011	YE Dec 2012	% change
Visitors			
Day visitors	21,900	25,900	↑ 19%
Overnight visitors	840,500	878,800	↑ 5%
Total visitors	862,400	904,800	↑ 5%
Nights			
Nights (million)	7.67	8.03	↑ 5%
Length of stay (nights)	8.9	8.9	→ 0%
Expenditure			
Expenditure (\$million)	\$1,460	\$1,426	↓ -2%
Average spend per visitor	\$1,693	\$1,576	↓ -7%
Average spend per night	\$190	\$178	↓ -7%
Holiday spend (\$million)	\$984	\$870	↓ -12%
Purpose of Visit			
Holiday	360,000	359,200	→ 0%
Visit friends or relatives (VFR)	250,600	272,100	↑ 9%
Total leisure (Holiday+VFR)	610,500	631,300	↑ 3%
Business or employment	153,600	182,100	↑ 19%
Convention/conference/seminar	35,400	30,600	↓ -14%
Regions Visited			
Southern	672,500	723,400	↑ 8%
East Coast	268,500	246,700	↓ -8%
Northern	524,600	497,400	↓ -5%
Cradle Coast	393,500	379,700	↓ -4%
Mode of departure			
Air visitors	738,200	797,700	↑ 8%
Sea visitors	124,200	107,000	↓ -14%

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 2011	YE Dec 2012		% change
Visitors				
Day visitors	21,200	25,700	↑	21%
Overnight visitors	724,500	759,300	↑	5%
Total visitors	745,800	785,000	↑	5%
Nights				
Nights (million)	6.00	6.20	↑	3%
Length of stay (nights)	8.0	7.9	↓	-2%
Expenditure				
Expenditure (\$million)	\$1,229	\$1,215	↓	-1%
Average spend per visitor	\$1,648	\$1,548	↓	-6%
Average spend per night	\$205	\$196	↓	-4%
Holiday spend (\$million)	\$823	\$727	↓	-12%
Purpose of Visit				
Holiday	286,400	287,800	→	0%
Visit friends or relatives (VFR)	228,000	246,300	↑	8%
Total leisure (Holiday+VFR)	514,400	534,000	↑	4%
Business or employment	143,300	170,800	↑	19%
Convention/conference/seminar	32,200	27,700	↓	-14%
Regions Visited				
Southern	560,900	617,700	↑	10%
East Coast	206,200	193,100	↓	-6%
Northern	440,900	424,200	↓	-4%
Cradle Coast	326,500	319,100	↓	-2%
Mode of departure				
Air visitors	631,200	687,000	↑	9%
Sea visitors	114,500	98,000	↓	-14%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

	YE Dec 2011	YE Dec 2012	% change	
Victoria	337,400	350,000	↑	4%
N.S.W.	173,600	184,700	↑	6%
Queensland	115,700	120,100	↑	4%
South Australia	38,000	42,700	↑	12%
Western Australia	45,100	51,900	↑	15%
A.C.T.	19,900	22,300	↑	12%
N.T.	6,900	7,100	↑	2%
Total interstate visitors	745,800	785,000	↑	5%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

International Visitors to Tasmania

	to Tasmania			to Australia		
	YE Dec 2011	YE Dec 2012	% Change	YE Dec 2011	YE Dec 2012	% Change
Visitors						
International visitors	150,300	142,100	↓ -5%	5,439,300	5,691,800	↑ 5%
Nights						
Nights ('000s)	2,930	2,925	→ 0%	194,998	206,276	↑ 6%
Ave Length of stay (nights)	19	21	↑ 6%	36	36	↑ 1%
Expenditure						
Expenditure (\$million)	\$254	\$257	↑ 1%	\$18,250	\$18,536	↑ 2%
Average spend per visitor	\$1,690	\$1,809	↑ 7%	\$3,355	\$3,257	↓ -3%
Average spend per night	\$87	\$88	↑ 1%	\$94	\$90	↓ -4%
Holiday spend (\$million)	\$123	\$106	↓ -14%	\$6,171	\$6,311	↑ 2%
Purpose of Visit						
Holiday	106,200	96,100	↓ -10%	2,389,400	2,511,500	↑ 5%
Visit friends or relatives (VFR)	30,000	30,800	↑ 3%	1,343,900	1,440,400	↑ 7%
Business	13,400	13,500	↑ 1%	889,400	912,600	↑ 3%
Education	6,700	5,800	↓ -14%	369,000	358,600	↓ -3%
Employment	3,500	2,600	↓ -26%	197,800	218,900	↑ 11%
Other Reason	1,700	500	↓ -73%	249,700	249,800	→ 0%
Total	150,300	142,100	↓ -5%	5,439,300	5,691,800	↑ 5%

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.

	YE Dec 2011	YE Dec 2012	% Change	YE Dec 2011	YE Dec 2012	% Point difference
State/territory visited	Visitors			Market Share		
New South Wales	2,755,800	2,889,200	↑ 5%	51%	51%	→ 0.1%
Victoria	1,747,700	1,815,000	↑ 4%	32%	32%	↓ -0.2%
Queensland	1,913,900	2,016,700	↑ 5%	35%	35%	↑ 0.2%
South Australia	357,200	337,800	↓ -5%	7%	6%	↓ -0.6%
Western Australia	735,900	760,800	↑ 3%	14%	13%	↓ -0.2%
Tasmania	150,300	142,100	↓ -5%	3%	2%	↓ -0.3%
Northern Territory	289,900	254,400	↓ -12%	5%	4%	↓ -0.9%
Australia Capital Territory	169,700	163,500	↓ -4%	3%	3%	↓ -0.2%
Total visitors to Australia	5,439,300	5,691,800	↑ 5%	100%	100%	→ 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 Dec 2011	YE Dec 2012	% Change	YE Dec 2011	YE Dec 2012	% Point difference
Country of origin	Visitors			National Market Share		
New Zealand	13,900	12,500	↓ -10%	1.3%	1.1%	↓ -0.2%
Japan	4,800	3,500	↓ -28%	1.6%	1.1%	↓ -0.5%
Hong Kong	10,200	12,200	↑ 19%	6.7%	7.5%	↑ 0.8%
Singapore	6,100	4,900	↓ -20%	2.2%	1.6%	↓ -0.6%
Malaysia	8,300	5,600	↓ -33%	3.8%	2.4%	↓ -1.5%
Indonesia	2,200	900	↓ -58%	1.8%	0.7%	↓ -1.0%
Taiwan	3,300	1,800	↓ -44%	4.1%	2.1%	↓ -2.1%
Thailand	2,200	2,700	↑ 27%	2.7%	3.5%	↑ 0.8%
Korea	4,100	2,800	↓ -31%	2.2%	1.5%	↓ -0.7%
China	7,900	11,300	↑ 43%	1.5%	1.9%	↑ 0.4%
India	1,900	2,300	↑ 21%	1.4%	1.5%	↑ 0.2%
Other Asia	1,900	3,300	↑ 71%	1.3%	2.1%	↑ 0.8%
USA includes Hawaii	16,800	17,300	↑ 3%	3.9%	3.8%	↓ -0.1%
Canada	7,800	5,900	↓ -25%	6.9%	5.2%	↓ -1.8%
United Kingdom	21,600	17,400	↓ -19%	3.8%	3.1%	↓ -0.7%
Germany	9,200	7,500	↓ -18%	6.2%	5.0%	↓ -1.1%
Scandinavia	3,900	4,300	↑ 10%	4.8%	5.0%	↑ 0.2%
France	4,200	5,300	↑ 27%	4.6%	5.7%	↑ 1.1%
Italy	1,800	1,900	↑ 1%	3.5%	3.2%	↓ -0.3%
Netherlands	1,700	2,000	↑ 17%	3.8%	4.8%	↑ 1.0%
Switzerland	2,500	3,500	↑ 39%	6.2%	8.4%	↑ 2.2%
Other Europe	7,700	7,700	→ 0%	4.4%	4.1%	↓ -0.3%
Other Countries	6,200	5,600	↓ -10%	1.6%	1.4%	↓ -0.2%
Total	150,300	142,100	↓ -5%	2.8%	2.5%	↓ -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 Dec 2011	YE Dec 2012	% change	YE Dec 2011	YE Dec 2012	% change
Visitors						
Overnight visitors ('000s)	1,132	1,144	↑ 1%	48,030	50,591	↑ 5%
Nights						
Nights ('000s)	2,889	2,796	↓ -3%	150,870	160,381	↑ 6%
Length of stay (nights)	2.6	2.4	↓ -4%	3.1	3.2	↑ 1%
Expenditure						
Expenditure (\$million)	\$317	\$310	↓ -2%	\$18,172	\$20,795	↑ 14%
Spend per visitor	\$280	\$271	↓ -3%	\$378	\$411	↑ 9%
Spend per night	\$110	\$111	↑ 1%	\$120	\$130	↑ 8%
Purpose('000s)						
Holiday	553	574	↑ 4%	21,683	22,615	↑ 4%
Visit friends &/or relatives (VFR)	328	324	↓ -1%	16,787	18,252	↑ 9%
Business	182	169	↓ -7%	7,175	7,388	↑ 3%
Other reason	80	81	↑ 1%	2,918	2,983	↑ 2%
Total overnight intrastate visitors	1,132	1,144	↑ 1%	48,030	50,591	↑ 5%

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

	Tasmania			Australia		
	YE Dec 2011	YE Dec 2012	% change	YE Dec 2011	YE Dec 2012	% change
Visitor						
Day visitors ('000s)	4,226	4,876	↑ 15%	149,352	165,931	↑ 11%
Total intrastate Day+Overnight visitors ('000s)	5,358	6,020	↑ 12%	197,382	216,522	↑ 10%
Expenditure						
Expenditure (\$million)	\$424	\$509	↑ 20%	\$16,017	\$18,200	↑ 14%
Spend per visitor	\$100	\$104	↑ 4%	\$107	\$110	↑ 2%
Purpose('000s)						
Holiday	2,190	2,449	↑ 12%	70,590	78,923	↑ 12%
Visit friends &/or relatives (VFR)	1,015	1,180	↑ 16%	45,372	49,670	↑ 9%
Business	396	530	↑ 34%	14,908	16,684	↑ 12%
Other reason	625	716	↑ 15%	18,483	20,655	↑ 12%
Total day intrastate visitors	4,226	4,876	↑ 15%	149,352	165,931	↑ 11%

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

Quarter ending December 2012

The TVS reports the following key findings for visitors during the October-December 2012 quarter.

- The total number of visitors to Tasmania for the December quarter 2012 was 250 300, up 14 per cent from 219 900 the previous year (Fig. 1).
- The total number of nights spent by visitors to Tasmania for the December quarter 2012 increased by 5 per cent to 1.9 (was 1.8) (Fig. 2).
- Visitor expenditure was \$377 million, up 8 per cent from the same quarter of the previous year (was \$350 million) (Fig. 3).
- Of all visitors for the quarter, 99 800 (up 11 per cent) were on holiday, 76 500 (up 16 per cent) were visiting friends or relatives, 44 500 (up 25 per cent) were on business, and 12 400 (down 17 per cent) were travelling to attend a conference or convention (Fig. 4).

Fig. 1. Total Visitors to Tasmania by Quarter*

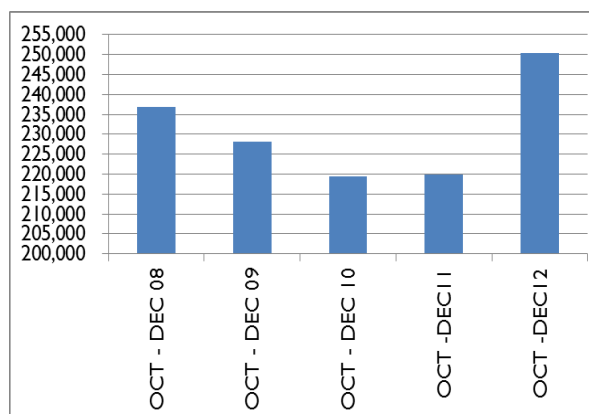


Fig. 2. Total Nights by Quarter*

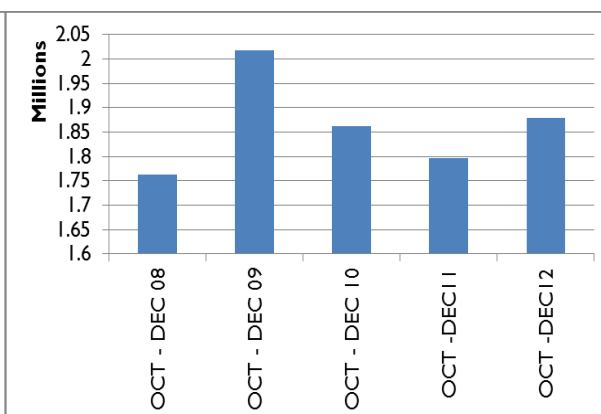


Fig. 3. Total Expenditure (\$ millions) by Quarter*

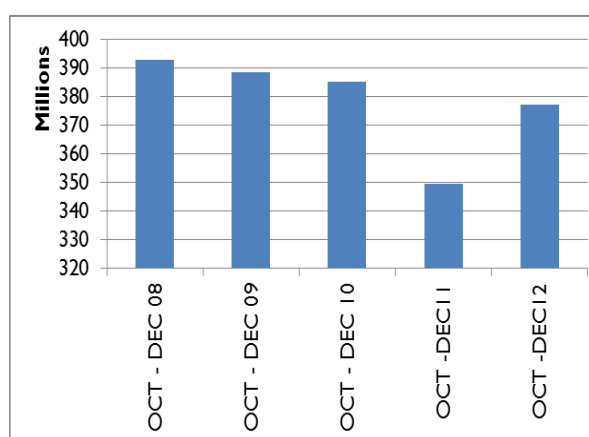
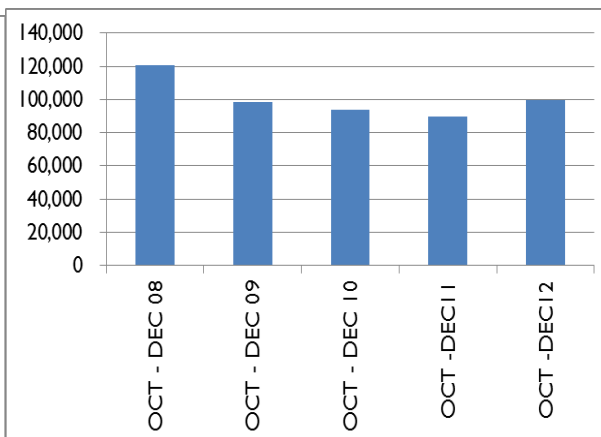


Fig. 4. Total Holiday Visitors by Quarter*



* Graphs present data for 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.