

Tasmanian Tourism Snapshot

Year ending March 2010

Total Visitation to Tasmania (Tasmanian Visitor Survey)

Key Messages:

- There was a 2% increase (to 912,600) in total visitors to Tasmania on scheduled air and sea services in the year ending March 2010 compared with the previous year.
- When combined with navy and cruise ship visitors, the total number of visitors to Tasmania decreased by 1% to 994,700. This decrease was due to a 23% decline in passengers arriving via cruise and navy ships during the year to March 2010. During the year to March 2010, 82,100 people visited Tasmania via cruise and navy ships, compared to 106,700 the year before. Early indications are that a similar downturn in cruise ship passenger numbers has been experienced at a national level, and particularly at Australia's south eastern ports.
- The TVS reports an increase in the number of interstate visitors (+3%) to the state during the year to March 2010. This result contrasts the overall national decrease of 3% in domestic travel as reported by the NVS (National Visitor Survey) for the year ending March 2010.
- The average length of stay lifted to 9.6 nights (was 8.3) and is the highest average duration recorded since year ending March 2004. This increase is largely the result of a small number of visitors during the year to March 2010 stating their length of stay was more than 3 months.
- The average length of stay for holiday visitors increased to 9.4 nights during the year to March 2010, after a dip the previous year (8.7 nights).

TVS SUMMARY

- In the year ending March 2010 total visitor numbers to Tasmania on scheduled air and sea services increased by 2% to 912,600.
- The total number of nights spent by visitors in Tasmania increased to 8.72 million nights (+17%), and the average length of stay rose to 9.6 nights (was 8.3).
- Visitor expenditure in Tasmania grew to \$1.53 billion (+8%). A sharp increase in nights (+17%) contributed to the average spend per night decreasing by 7% to \$176 per night. Despite this, the average spend per visitor increased (+6% to \$1,680).
- In terms of visitor numbers Tasmania's largest market, holiday travel, decreased (-8%) over the year, while VFR (+5%) and business travel (+27%) performed strongly helping to offset the decline in leisure travel. Travel for conventions/conferences/seminars declined over the period (-8%).
- While the number of Leisure visitors declined (-3% to 656,300) during the year to March 2010, compared to the previous year, the number of nights and expenditure both increased by 3%.
- Hobart and Surrounds (+3%) and the East Coast (+3%) were the only Zones to record increases in visitation. Visitor numbers to Launceston, Tamar Valley and the North, and the North West zones remained stable during the year to March 2010 while the Western Wilderness was the only zone to record a decrease (-4%).

Interstate Visitation to Tasmania (Tasmanian Visitor Survey)

Key Messages:

- Interstate visitor numbers increased to 785,400 (+3%) for the year ending March 2010.
- Interstate visitor nights increased 12% to 6.75 million, with the average length of stay increasing from 7.9 to 8.6 nights for the year ending March 2010.
- Expenditure by interstate visitors also increased to \$1.3 billion (+8%) for the year ending March 2010.
- Furthermore, the average spend by each interstate visitor increased by 5% to \$1,658; although the average spend per night decreased to \$193 (was \$201).

Summary:

- Interstate visitor numbers grew by 3% over the year, with increases from Victoria (+2%), South Australia (+26%), Western Australia (+15%), the ACT (+21%) and the Northern Territory (+64%). Only New South Wales (-1%) and Queensland (-1%) recorded declines.
- The number of interstate visitors on holiday declined 7%, while VFR increased 5%. Business or employment visitors from interstate have increased by 26% although convention/conference visitors declined by 6% for the year.
- The improving trend toward travel on the Spirit of Tasmania by interstate visitors has continued with an increase of 13% to 126,500 for the year to March 2010. Interstate visitors departing by air also increased, albeit by 1% representing 658,900.
- Hobart and Surrounds was the only Zone to record an increase in interstate visitation (+4%), each of the other four zones were stable aside from Western Wilderness which declined by 3%.

International Visitation (International Visitor Survey)

Key Messages:

- International visitor arrivals to Australia have increased 3% following almost two years of declines.
- A total of 5.26 million international travellers visited the country in the year ending March 2010.
- The number of nights international travellers spent in Australia also grew (+5%), contributing to growth in expenditure (+4%).
- In contrast, international visitor arrivals into Tasmania continued to decline, with arrivals down 5% to 140,600 and nights down 6% to 2.7 million. Despite fewer international visitors and nights, expenditure grew 9% to \$273 million¹.

SUMMARY – AUSTRALIA

- 5.26 million international travellers visited Australia in the year ending March 2010 (+3%). Nearly all of the growth was from the VFR² market (+14%), followed by the education market (+13%), whilst the holiday market remained stable (+1%).
- Visitor nights spent in Australia grew by 5% to 181.3 million, with growth coming from the VFR (+12%), holiday (+4%) and the education (+10%) sectors. Average length of stay remained stable at 34 nights.
- Total expenditure in Australia for the year ending March 2010 increased 4% to \$17.3 billion (including package expenditure).
- Larger source markets recording positive growth over the year included: USA (+9%), UK (+2%), China (+2%), Singapore (+9%), and Malaysia (+22%).
- New Zealand visitor numbers remained stable, along with arrivals from Canada.
- The only key source markets to record a decline included: Japan (-15%) and Korea (-7%).
- New South Wales (+1%), Victoria (+4%), South Australia (+3%), Western Australia (+2%) and the Northern Territory (+3%) all recorded increases in international visitors. Meanwhile, Tasmania recorded the biggest decline in visitor numbers (-5%), followed by Qld (-2%) and the ACT (-1%).
- International visitors on a return visit to Australia increased 8% over the year to March 2010, whilst first time visitors decreased by 5% on the previous year.

¹ Includes package expenditure

² Visiting Friends and/or Relatives

Intrastate Visitation³ (National Visitor Survey)

Key Messages:

- Overnight intrastate travel decreased by just 1% to 996,000 trips compared to the previous year. While the number of overnight intrastate trips for holiday purposes in Tasmania remained unchanged, overnight intrastate VFR travel decreased by 9% and business travel increased 8% during the year to March 2010 compared to the year before.
- Day trip travel in Tasmania has followed the national trend increasing by 9% over the year to 4.5 million trips for Tasmania and 140.1 million nationally.
- Total spend by overnight intrastate visitors remained steady at \$285 million (-0%) for the year to March 2010.
- In contrast, total day travel expenditure reached \$436 million, up 8% on the previous year.

Cruise and Navy Ship Visitation

Key Messages:

- During the year to March 2010, 82,100 people visited Tasmania via cruise and navy ships, compared to 106,700 in the previous year representing a decline of 23%.
- The main contributor to this decline was a reduction in the number of cruise ship vessels which came to a Tasmanian port, down from 47 last season to 35 ships during the 12 months to March 2010. Early indications are that a similar downturn in cruise ship passenger numbers has been experienced at a national level, and particularly at Australia's south eastern ports.

Marketing Performance (Holiday Tracking Survey)

Key Messages:

- 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 2010, down from 16.2% of all Australians recorded in the previous year.
- When respondents were prompted about which States or Territories they had read, seen or heard some form of holiday advertising, Tasmania's performance has declined to 24.5% of the Australian population, down from 30.0% on the 12 months to March 2009.
- When asked where you would like to go on holidays in the next two years, 17.5% of all Australians had a preference to travel to/within Tasmania, an increase of 0.4% on the previous year.
- 4.7% of all Australians intend to travel to/within the State in the next two years, an increase of 0.4% on the previous year.

³ Travel undertaken by a visitor in their home state

Total Visitors to Tasmania

Total visitors to Tasmania from all sources			
	April 2008 - Mar 2009	April 2009 - Mar 2010	% change
<i>Visitors</i>			
Cruise ship visitors	102,400	79,800	↓ -22%
Navy ship visitors	4,300	2,300	↓ -47%
Visitors on scheduled air and sea services	897,100	912,600	↑ 2%
Total visitors to Tasmania from all sources	1,003,800	994,700	↓ -1%

Note: Due to enhanced procedures some Tasmanian Visitor Survey estimates (to Dec 2009) have been subject to revision to ensure comparability.

Total visitors to Tasmania on scheduled air and sea services			
	April 2008 - Mar 2009	April 2009 - Mar 2010	% change
Visitors			
Day visitors	16,100	20,900	↑ 30%
Overnight visitors	881,000	891,800	↑ 1%
Total visitors	897,100	912,600	↑ 2%
Nights			
Nights (million)	7.48	8.72	↑ 17%
Length of stay (nights)	8.3	9.6	↑ 15%
Expenditure			
Expenditure (\$million)	\$1,416	\$1,533	↑ 8%
Average spend per visitor	\$1,578	\$1,680	↑ 6%
Average spend per night	\$189	\$176	↓ -7%
Holiday spend (\$million)	\$1,015	\$1,032	↑ 2%
Purpose			
Holiday	442,600	409,000	↓ -8%
Visit friends or relatives (VFR)	235,500	247,400	↑ 5%
Total leisure (Holiday+VFR)	678,100	656,300	↓ -3%
Business or employment	135,700	171,900	↑ 27%
Convention/conference/seminar	33,500	30,700	↓ -8%
Zones Visited*			
Hobart & Surrounds	707,500	730,800	↑ 3%
Launceston, Tamar Valley & North	501,400	501,800	→ 0%
Western Wilderness	278,800	268,800	↓ -4%
North West	350,900	349,300	→ 0%
East Coast	288,700	296,200	↑ 3%
Mode of departure			
Air visitors	774,200	777,900	→ 0%
Sea visitors	123,000	134,700	↑ 10%

source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

* Zones are based on Tourism Tasmania's Zone Marketing Strategy

Note: Due to enhanced procedures some Tasmanian Visitor Survey estimates (to Dec 2009) have been subject to revision to ensure comparability.

Interstate Visitors to Tasmania

Interstate visitors to Tasmania on scheduled air and sea services			
	April 2008 - Mar 2009	April 2009 - Mar 2010	% change
Visitors			
Day visitors	15,400	20,600	↑ 34%
Overnight visitors	747,200	764,800	↑ 2%
Total visitors	762,700	785,400	↑ 3%
Nights			
Nights (million)	6.01	6.75	↑ 12%
Length of stay (nights)	7.9	8.6	↑ 9%
Expenditure			
Expenditure (\$million)	\$1,208	\$1,302	↑ 8%
Average spend per visitor	\$1,584	\$1,658	↑ 5%
Average spend per night	\$201	\$193	↓ -4%
Holiday spend (\$million)	\$851	\$864	↑ 2%
Purpose			
Holiday	352,200	327,900	↓ -7%
Visit friends or relatives (VFR)	213,300	223,200	↑ 5%
Total leisure (Holiday+VFR)	565,400	551,100	↓ -3%
Business or employment	127,700	161,400	↑ 26%
Convention/conference/seminar	29,100	27,400	↓ -6%
Zones Visited*			
Hobart & Surrounds	588,900	614,700	↑ 4%
Launceston, Tamar Valley & North	425,269	424,638	→ 0%
Western Wilderness	218,800	213,000	↓ -3%
North West	301,564	297,741	↓ -1%
East Coast	229,100	230,100	→ 0%
Mode of departure			
Air visitors	650,400	658,900	↑ 1%
Sea visitors	112,200	126,500	↑ 13%

source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

* Zones are based on Tourism Tasmania's Zone Marketing Strategy

Note: Due to enhanced procedures some Tasmanian Visitor Survey estimates (to Dec 2009) have been subject to revision to ensure comparability.

Origin of interstate visitors to Tasmania			
	April 2008 - Mar 2009	April 2009 - Mar 2010	% change
Victoria	345,300	352,000	↑ 2%
N.S.W.	183,600	181,200	↓ -1%
Queensland	111,400	110,400	↓ -1%
South Australia	44,300	55,900	↑ 26%
Western Australia	38,700	44,600	↑ 15%
A.C.T.	16,600	20,100	↑ 21%
N.T.	5,100	8,400	↑ 64%
Total interstate visitors	762,700	785,400	↑ 3%

source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

Note: Due to enhanced procedures some Tasmanian Visitor Survey estimates (to Dec 2009) have been subject to revision to ensure comparability.

International Visitors to Tasmania

International visitors						
	to Tasmania			to Australia		
	April 2008 - Mar 2009	April 2009 - Mar 2010	% change	April 2008 - Mar 2009	April 2009 - Mar 2010	% change
Visitors						
International visitors	147,400	140,600	↓ -5%	5,122,700	5,256,800	↑ 3%
Nights						
Nights ('000s)	2,921	2,747	↓ -6%	172,197	181,336	↑ 5%
Length of stay (nights)	19.8	19.5	↓ -1%	33.6	34.5	↑ 3%
Expenditure						
Expenditure (\$million)*	\$250	\$273	↑ 9%	\$16,670	\$17,331	↑ 4%
Average spend per visitor	\$1,696	\$1,942	↑ 14%	\$3,254	\$3,297	↑ 1%
Average spend per night	\$86	\$99	↑ 16%	\$97	\$96	↓ -1%
Holiday spend (\$million)	\$100	\$110	↑ 10%	\$6,707	\$6,462	↓ -4%
Purpose						
Holiday	102,100	98,400	↓ -4%	2,397,400	2,415,500	↑ 1%
Visit friends or relatives (VFR)	29,400	32,200	↑ 10%	1,158,200	1,320,700	↑ 14%
Business	11,600	7,900	↓ -32%	845,600	775,900	↓ -8%
Education	8,100	8,100	→ 0%	381,600	430,200	↑ 13%
Employment	3,500	1,800	↓ -49%	123,800	112,700	↓ -9%
Other reason	147,400	140,600	↓ -5%	216,100	201,900	↓ -7%

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

*includes package expenditure

International Visitors to States/Territories						
	Visitors			Market Share		
	April 2008 - Mar 2009	April 2009 - Mar 2010	% change	April 2008 - Mar 2009	April 2009 - Mar 2010	% point difference
New South Wales	2,739,600	2,753,700	↑ 1%	53.5%	52.4%	↓ -1.1%
Victoria	1,476,700	1,539,300	↑ 4%	28.8%	29.3%	↑ 0.5%
Queensland	2,018,700	1,985,500	↓ -2%	39.4%	37.8%	↓ -1.6%
South Australia	350,100	361,100	↑ 3%	6.8%	6.9%	→ 0.0%
Western Australia	674,200	688,500	↑ 2%	13.2%	13.1%	→ -0.1%
Tasmania	147,400	140,600	↓ -5%	2.9%	2.7%	↓ -0.2%
Northern Territory	323,300	333,200	↑ 3%	6.3%	6.3%	→ 0.0%
Australia Capital Territory	156,900	155,300	↓ -1%	3.1%	3.0%	↓ -0.1%
Total visitors to Australia	5,122,700	5,256,800	↑ 3%	100.0%	100.0%	→ 0.0%

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

Origin of international visitors to Tasmania						
	Visitors			Market Share		
	April 2008 - Mar 2009	April 2009 - Mar 2010	% change	April 2008 - Mar 2009	April 2009 - Mar 2010	% point difference
New Zealand	15,800	13,500 ↓	-15%	1.6%	1.3% ↓	-0.2%
Japan	5,900	4,900 ↓	-17%	1.5%	1.5% ↓	0.0%
Hong Kong	5,000	6,100 ↑	22%	3.8%	4.3% ↑	0.5%
Singapore	6,600	5,300 ↓	-20%	2.8%	2.1% ↓	-0.7%
Malaysia	4,100	6,200 ↑	51%	2.5%	3.2% ↑	0.7%
Indonesia	np	np	np	1.4%	1.5% ↑	0.1%
Taiwan	3,200	3,400 ↑	6%	4.1%	3.7% ↓	-0.4%
Thailand	np	2,700	np	1.8%	3.5% ↑	1.7%
Korea	2,600	3,100 ↑	19%	1.4%	1.8% ↑	0.4%
China	3,700	7,100 ↑	92%	1.1%	2.0% ↑	0.9%
India	2,200	np	np	2.0%	1.3% ↓	-0.8%
Other Asia	np	np	np	1.2%	0.6% ↓	-0.5%
USA includes Hawaii	21,600	15,800 ↓	-27%	5.1%	3.4% ↓	-1.7%
Canada	9,100	4,200 ↓	-54%	7.8%	3.6% ↓	-4.2%
United Kingdom	26,900	20,100 ↓	-25%	4.4%	3.2% ↓	-1.2%
Germany	7,800	10,100 ↑	29%	5.1%	6.3% ↑	1.2%
Scandinavia	3,600	6,100 ↑	69%	4.6%	7.3% ↑	2.7%
France	4,400	4,600 ↑	5%	5.4%	4.9% ↓	-0.4%
Italy	np	3,400	np	2.2%	6.3% ↑	4.1%
Netherlands	3,300	3,000 ↓	-9%	6.5%	6.1% ↓	-0.4%
Switzerland	np	2,800	np	3.8%	6.6% ↑	2.8%
Other Europe	7,200	6,000 ↓	-17%	3.8%	3.3% ↓	-0.5%
Other Countries	7,700	8,200 ↑	6%	2.0%	2.1% →	0.1%
Total	147,400	140,600 ↓	-5%	2.9%	2.7% ↓	-0.2%

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

np: not published due to data reliability

Intrastate Visitors

Intrastate OVERNIGHT Travel						
	Tasmania			Australia		
	April 2008 - Mar 2009	April 2009 - Mar 2010	% change	April 2008 - Mar 2009	April 2009 - Mar 2010	% change
<i>Visitors</i>						
Overnight visitors ('000s)	\$1,010	\$996	↓ -1%	44,705	43,565	↓ -3%
<i>Nights</i>						
Nights ('000s)	2,444	2,570	→ 5%	142,078	140,227	↓ -1%
Length of stay (nights)	2.4	2.6	↑ 7%	3.2	3.2	→ 0%
<i>Expenditure</i>						
Expenditure (\$million)	\$286	\$285	→ 0%	\$18,036	\$17,390	↓ -4%
Spend per visitor	\$283	\$286	↑ 1%	\$403	\$399	↓ -1%
Spend per night	\$117	\$111	↓ -5%	\$127	\$124	↓ -2%
<i>Purpose('000s)</i>						
Holiday	501	502	→ 0%	21,896	21,405	↓ -2%
Visit friends &/or relatives (VFR)	284	259	↓ -9%	15,485	14,831	↓ -4%
Business	173	186	↑ 8%	6,847	6,613	↓ -3%
Other reason	52	50	↓ -4%	2,461	2,553	↑ 4%
Purpose not asked	6	4	↓ -33%			
Total overnight intrastate visitors	1,010	996	↓ -1%	44,705	43,565	↓ -3%

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

Intrastate DAY Travel						
	Tasmania			Australia		
	April 2008 - Mar 2009	April 2009 - Mar 2010	% change	April 2008 - Mar 2009	April 2009 - Mar 2010	% change
<i>Visitor</i>						
Day visitors ('000s)	4,110	4,499	↑ 9%	128,495	140,062	↑ 9%
Day+Overnight visitors ('000s)	5,120	5,495	↑ 7%	174,647	184,906	↑ 6%
<i>Expenditure</i>						
Expenditure (\$million)	\$405	\$436	↑ 8%	\$14,109	\$15,095	↑ 7%
Spend per visitor	\$99	\$97	↓ -2%	\$110	\$108	↓ -2%
<i>Purpose('000s)</i>						
Holiday	2,131	2,451	↑ 15%	66,356	70,705	↑ 7%
Visit friends &/or relatives (VFR)	980	1,063	↑ 8%	37,202	39,965	↑ 7%
Business	491	419	↓ -15%	12,608	13,494	↑ 7%
Other reason	508	566	↑ 11%	12,330	15,898	↑ 29%
Total day intrastate visitors	4,110	4,499	↑ 9%	128,495	140,062	↑ 9%

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

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 total and interstate visitor figures. Note: while the NVS provides valuable data on interstate travel at the national level, the Tasmanian Visitor Survey (TVS), conducted by Tourism Tasmania, continues to be the key source of detailed information about interstate visitation to Tasmania;
- 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.

Note

Figures in the text may vary from figures in the tables due to rounding.

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