

Three Capes Track
Tasman Peninsula



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**THE TASMANIAN TOURISM INDUSTRY
SPRING 2015 BUSINESS SENTIMENT SURVEY
OCTOBER 2015**

About this survey

Tourism Industry Council Tasmania undertakes two industry-wide surveys each year measuring business performance, expectations and industry confidence.

An Autumn Survey is undertaken in March/April, asking operators to report on their business performance over the preceding peak Summer visitor season and their expectations coming into the traditionally quieter autumn and winter months.

A Spring Survey is conducted in September, asking operators to report on actual activity over the Autumn/Winter period, and their expectations based on forward bookings and inquiries coming into the peak summer visitor season.

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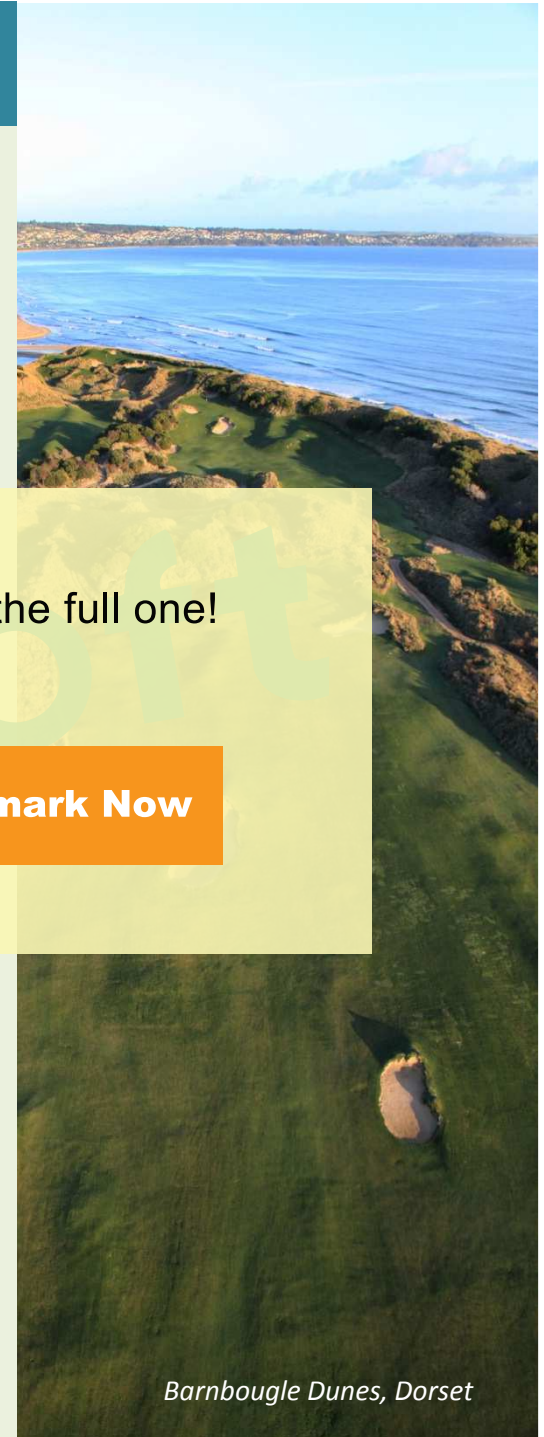
From October 19 – October 29 2015, Tourism Industry Council Tasmania conducted a survey of all Tasmania's tourism operators listed on the 'Tiger Tour' Database.

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The survey asks operators about their business performance over the preceding period, business expectations coming into the spring and summer season, as well as their general outlook for the Tasmanian tourism industry over the 12 months. This is a widely recognised measure of business confidence.

The results are compared across Tasmania's four tourism regions, and with past TICT business confidence survey.



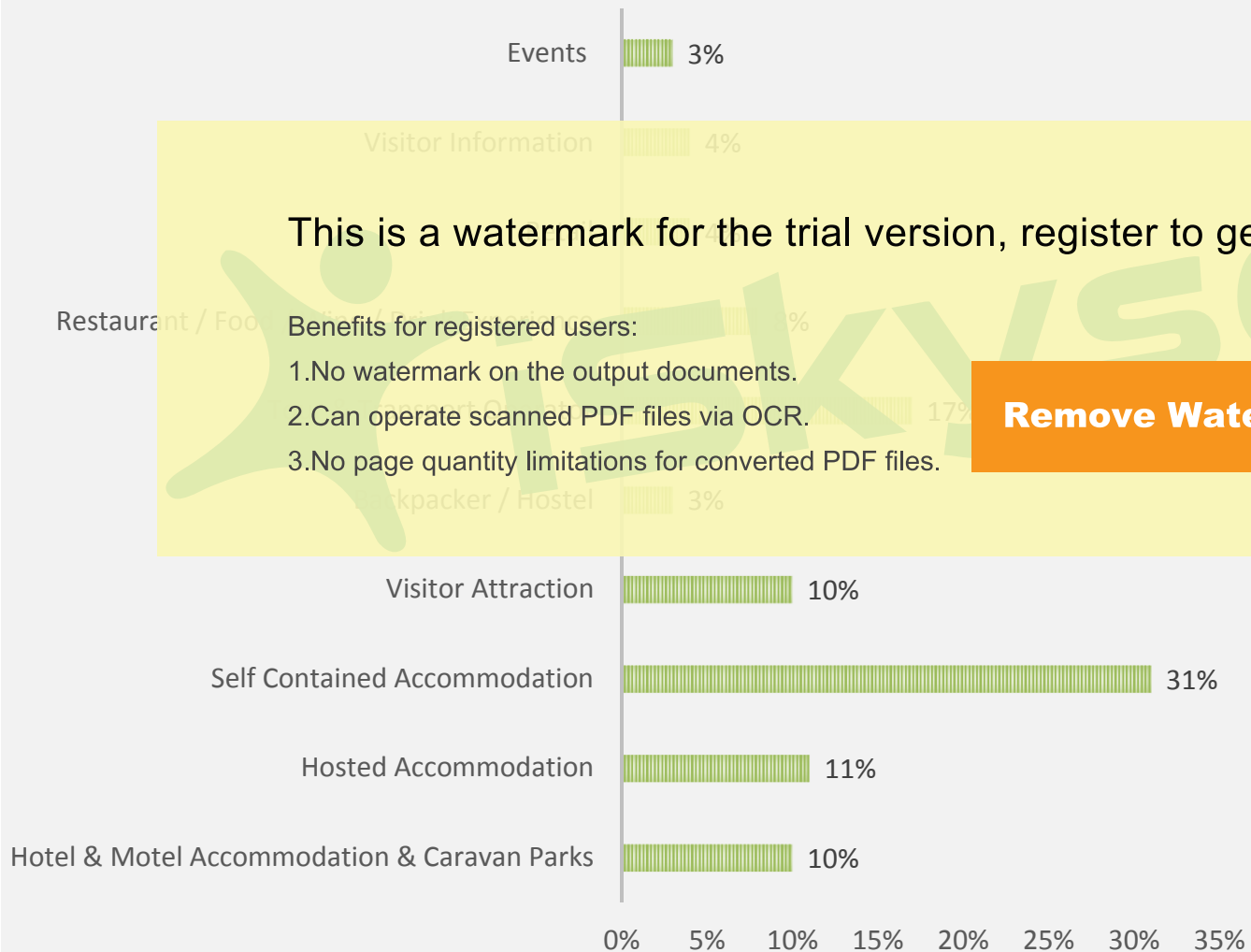
Barnbougle Dunes, Dorset

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Sample size by business type

208 operators completed the survey covering a broad cross section of the industry.

Which of the following best describes your business?



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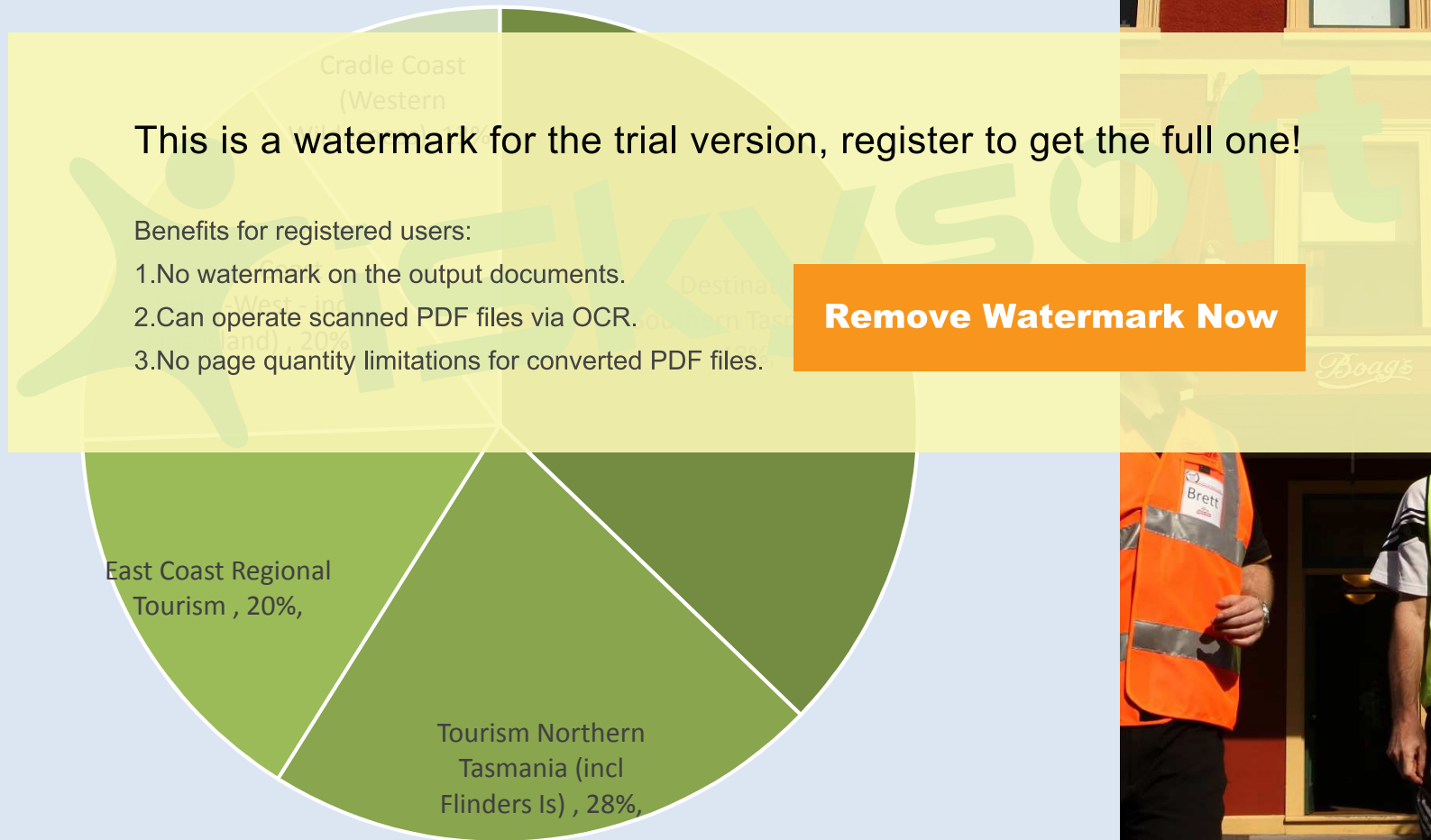
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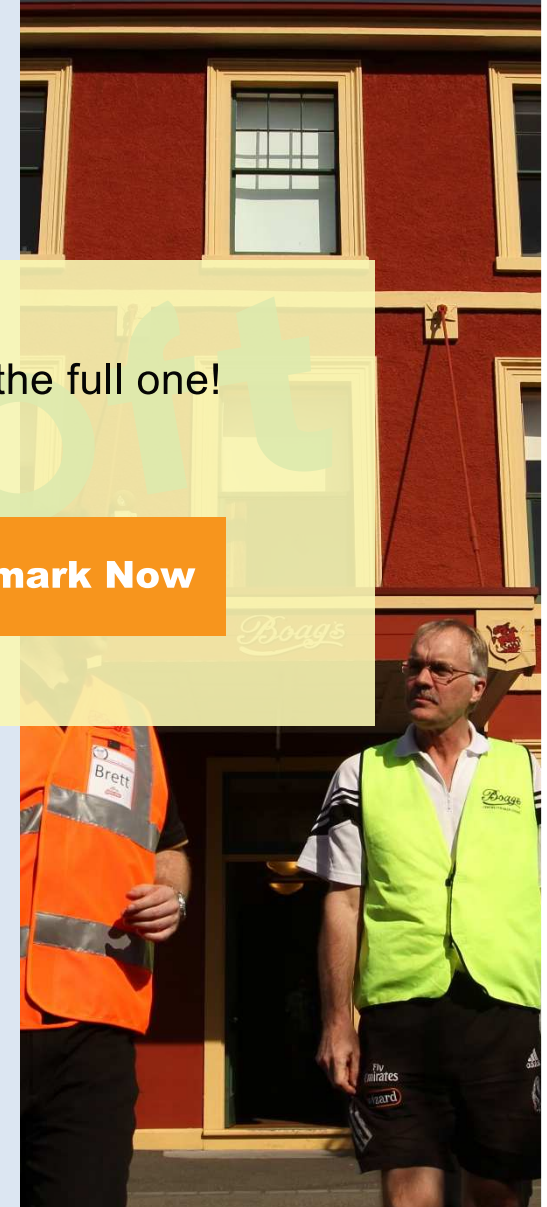
Sample size by region

A strong response rate was achieved from across Tasmania's four tourism regions.

Note; Western Wilderness & North West Coast together make up the Cradle Coast Region.



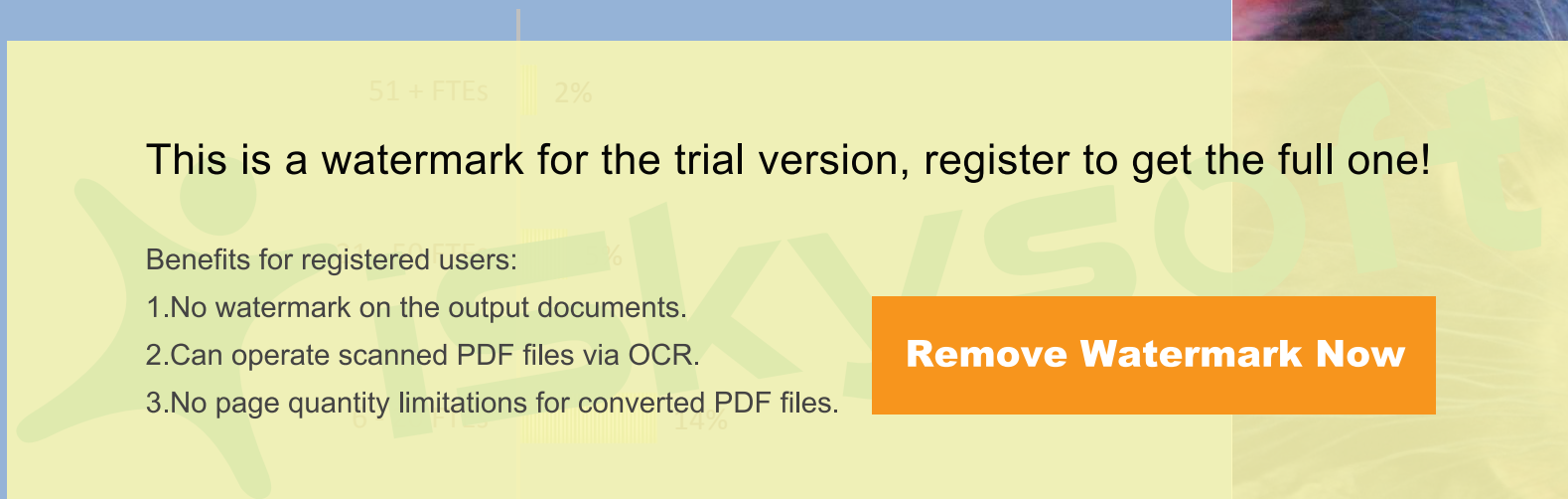
Boag's Brewery, Launceston



Sample by business size

80% of respondents were small and micro businesses employing less than 5 Full Time Equivalent Employees. This is broadly representative of the make-up of the Tasmanian tourism industry.

How many Full Time Equivalent Employees does your business currently employ?

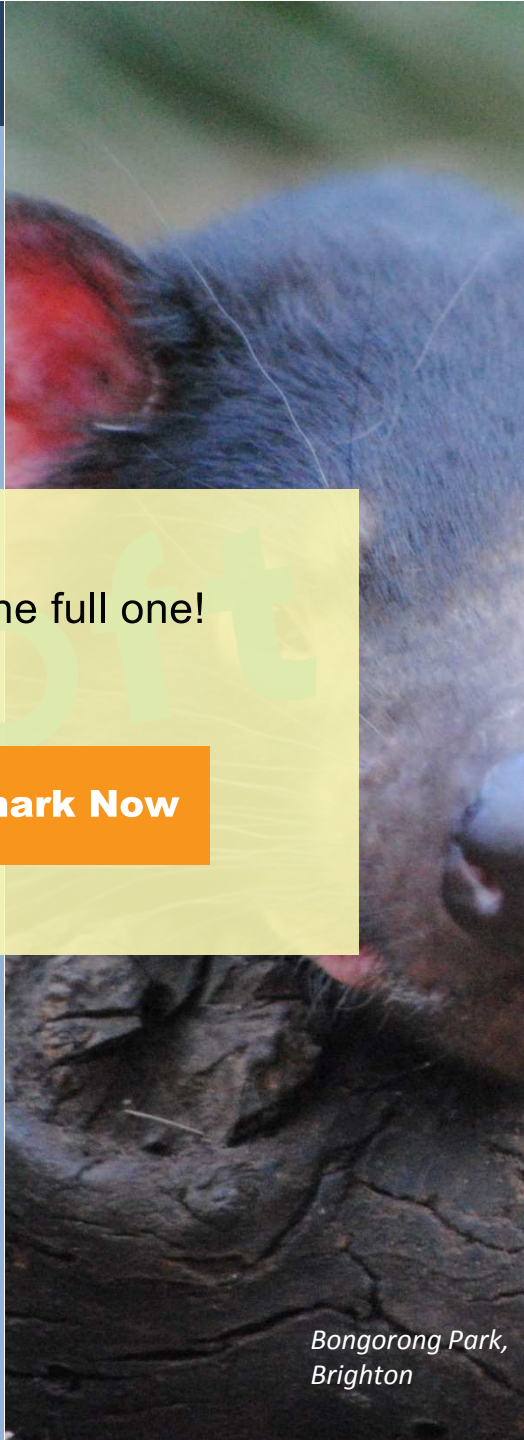
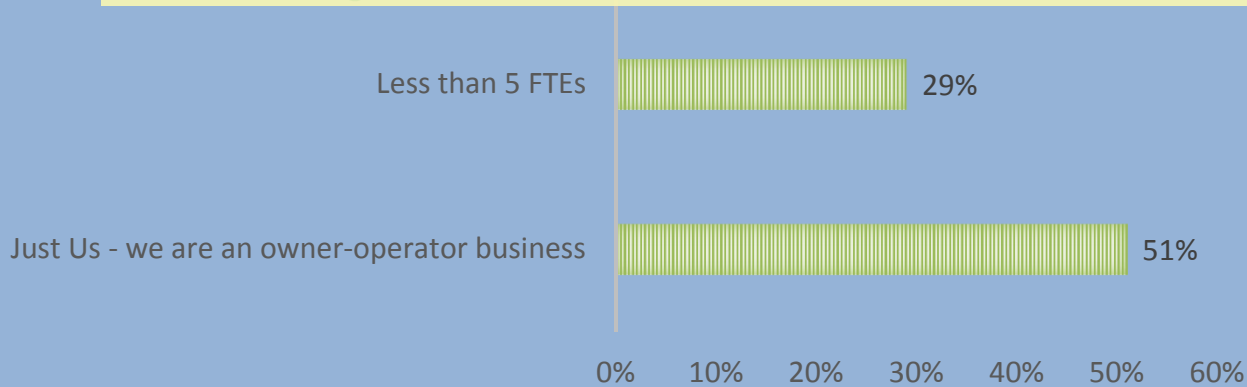


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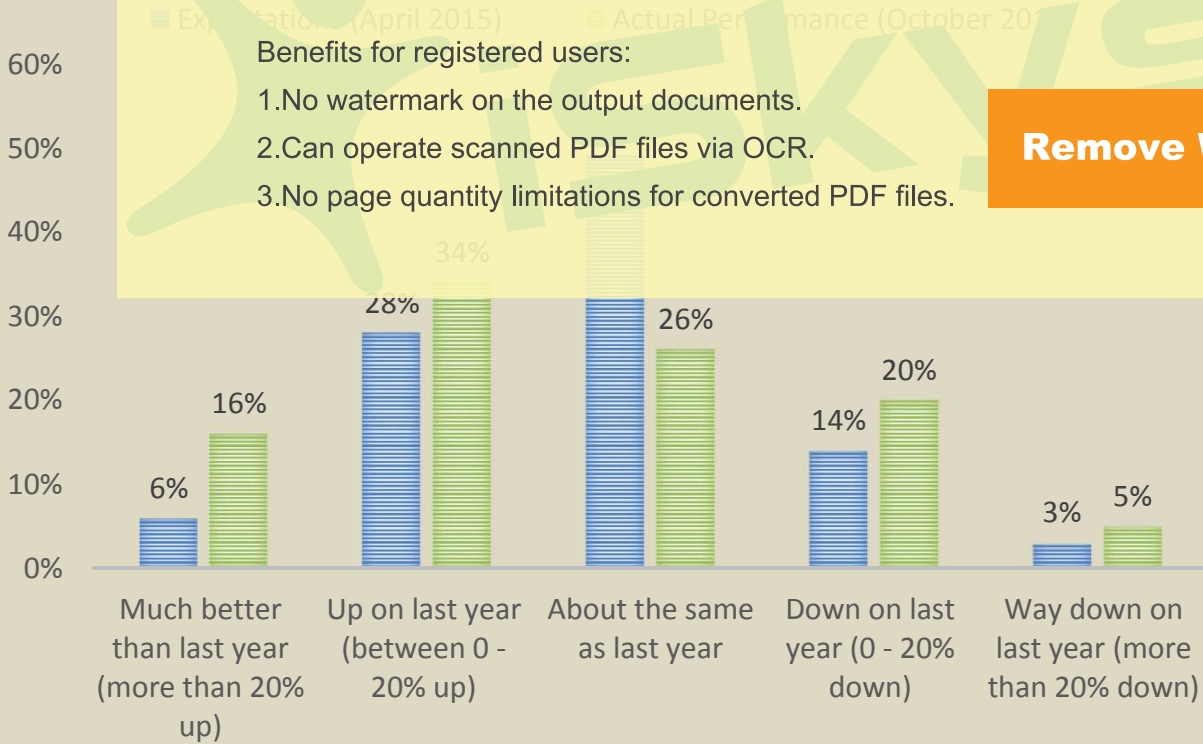
Bongorong Park, Brighton

Business Performance vs Expectations

In April 2015, operators were asked to record how they expected their business to perform over the upcoming 2015 Autumn/Winter off-peak visitor season. 34% reported they were expecting business to be up on the same time the previous year (2014), while 49% expected business to be about the same, and 17% expected business to be down on the corresponding period the previous year.

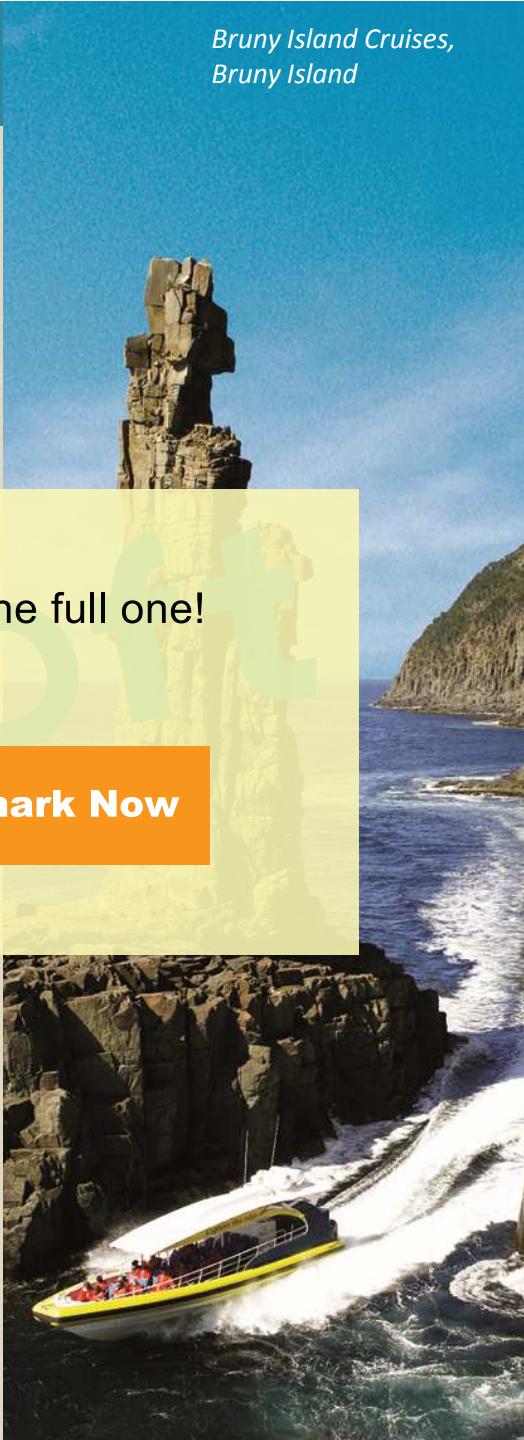
In this survey, 50% of operators have reported actual business performance over that period to be up on the same time last year, while 26% report similar business performance, and 25% report business being down on last year, indicating industry performance exceeded expectations.

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Business Performance across the Regions

There was minimal variation from operators across the four tourism regions reporting actual business performance over the peak visitor period compared to the corresponding period the previous year.

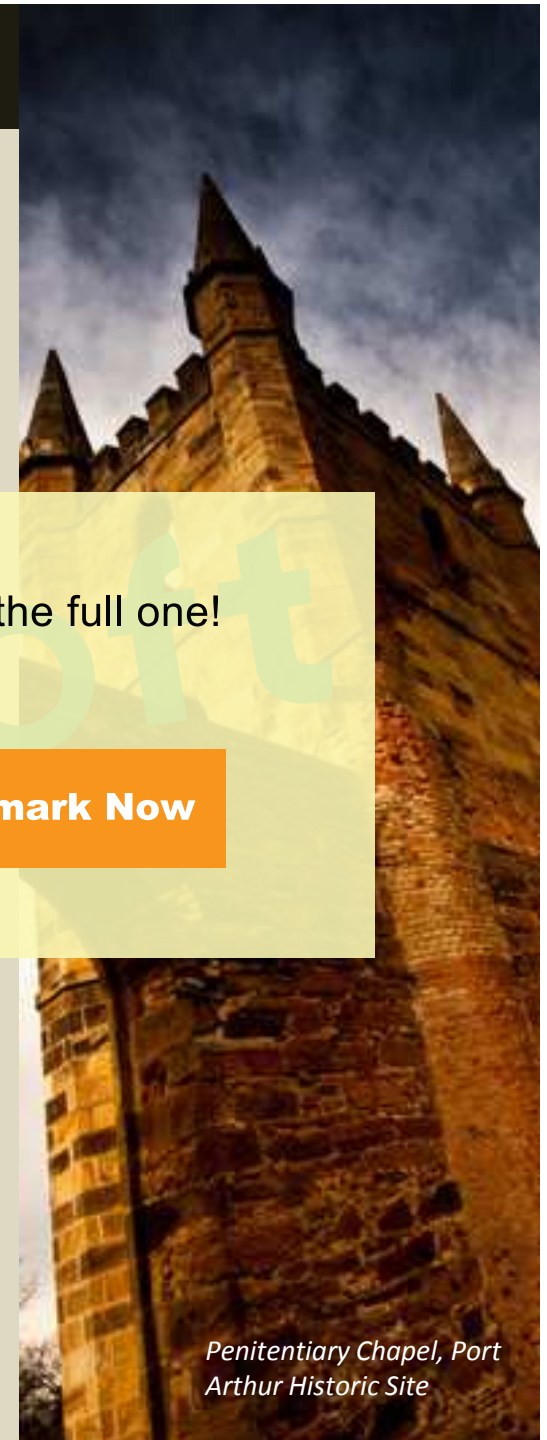


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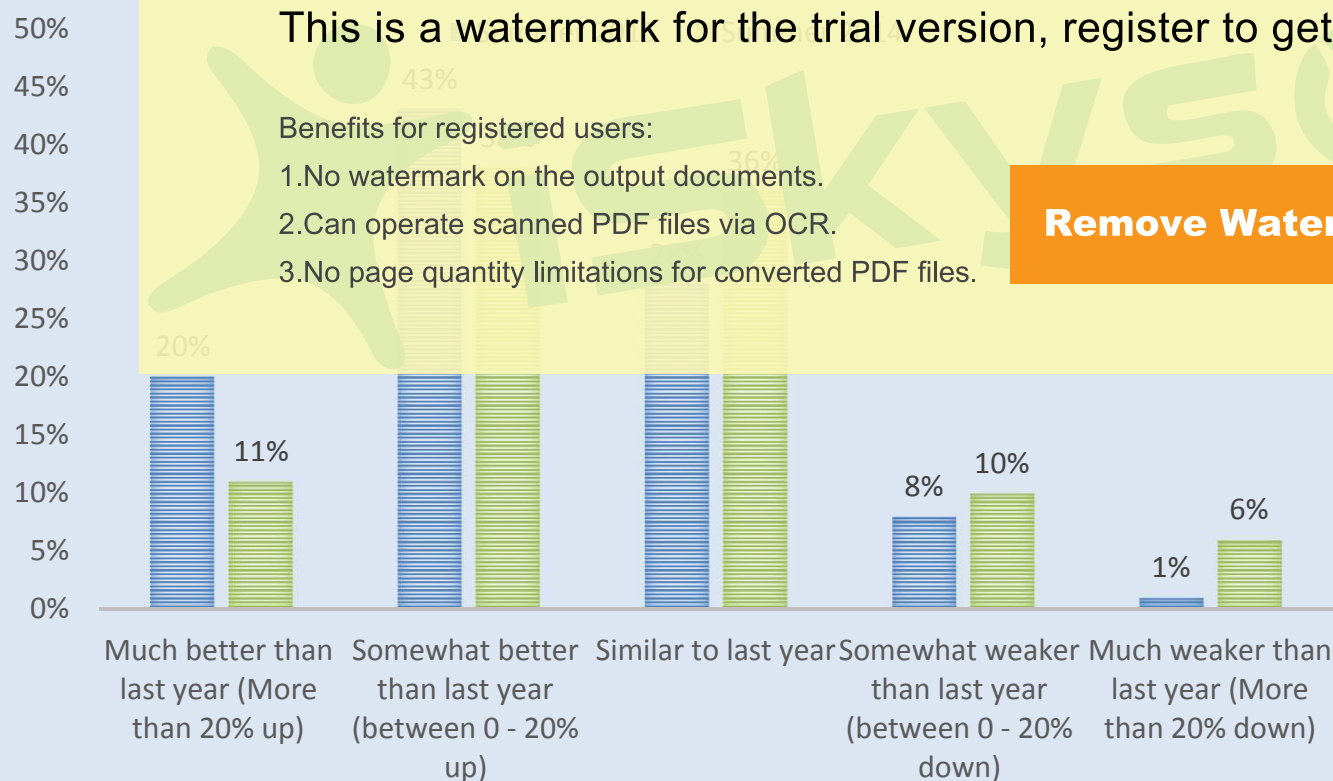


Penitentiary Chapel, Port Arthur Historic Site

Expectations for Summer

Looking ahead to the forthcoming Spring/Summer Season, 63% of operators expect business to be up on the same time last year. 28% expect similar business conditions to last year, and 9% expect business to be down on last year.

These expectations are a further improvement on the response to the same question at the same time last year.



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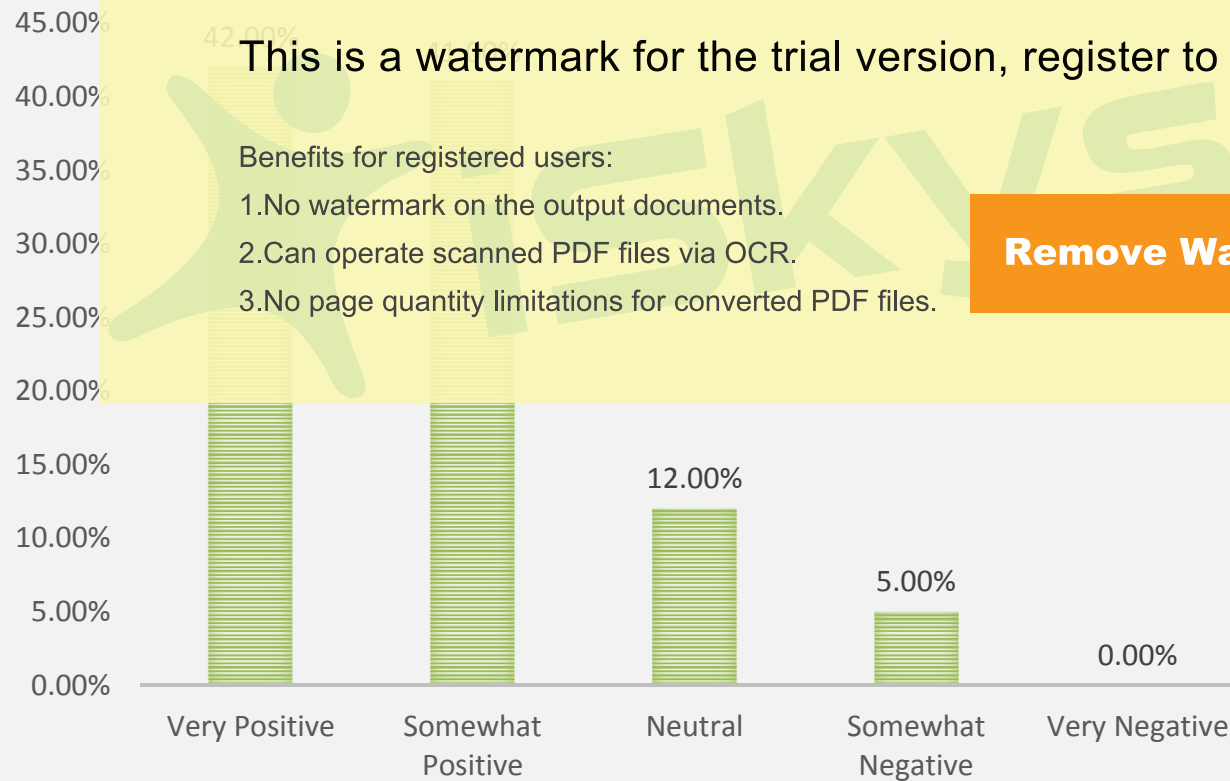
Wineglass Bay,
Freycinet National Park

Industry Outlook

Avalon City Retreat,
Hobart

Industry-wide, operators continue to maintain an extremely positive and optimistic outlook for the Tasmanian tourism industry over the short-term.

LOOKING AHEAD OVER THE NEXT 12-MONTHS,
WHAT IS YOUR OUTLOOK FOR THE
TASMANIAN TOURISM INDUSTRY GENERALLY?

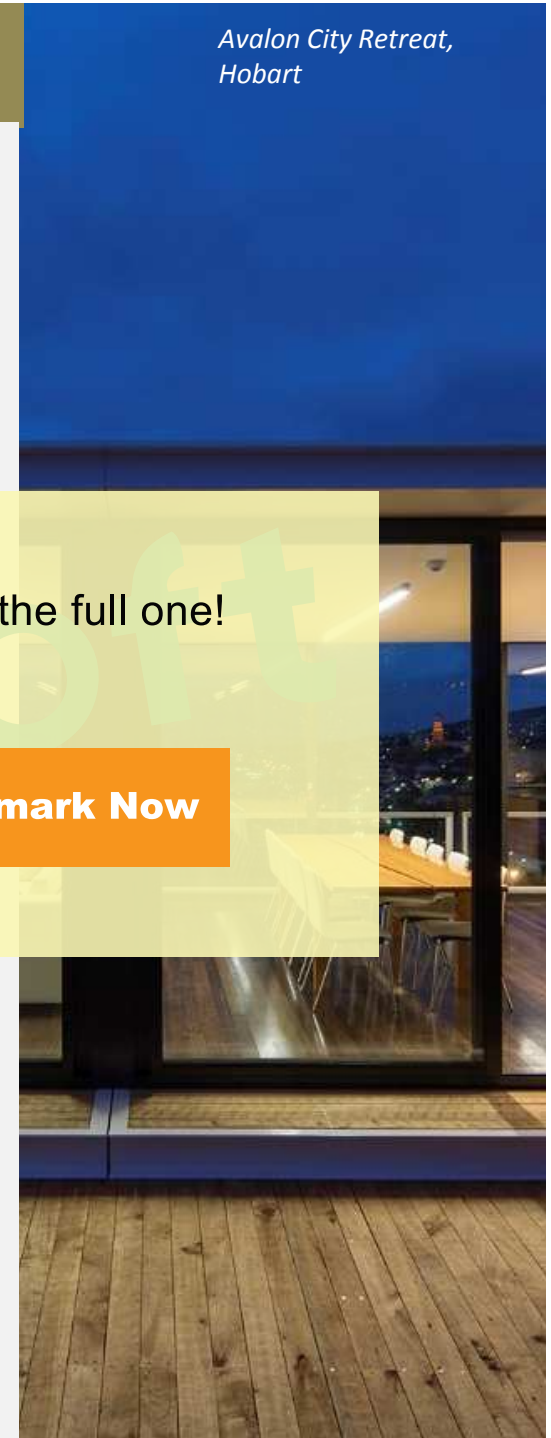


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Tourism Industry Confidence Index

Based on the Tasmanian Chamber of Commerce and Industry (TCCI) Business Confidence Index, asking the same question and weighting, to achieve an index score between 0 – 100. An index score above 50 Points represents a positive general industry outlook, below 50 Points represents a negative general outlook. A consistent index score above 50 Point represents conditions encouraging sustained business growth and investment.

The Tasmanian Tourism Industry Business Confidence Index for October 2015 is 109 Points – which surpasses the conventional index scale. In October 2014 it was 93 Points.

This continues a sustained period of very high industry confidence and positivity over the past two years, and represents a dramatic turnaround in the Tasmanian tourism industry's outlook from when this survey first commenced in 2011.

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