

*Overland Track,  
Tasmanian Wilderness  
World Heritage Area*



**THE TASMANIAN TOURISM INDUSTRY  
AUTUMN 2016 BUSINESS SENTIMENT SURVEY  
APRIL 2016**



# 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/October, 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.

From **MARCH 30 – APRIL 14 2016**, Tourism Industry Council Tasmania conducted a survey of all Tasmanian tourism operators listed on the 'Tiger Tour' Database.

The survey asked operators about their business performance over the past-6 months period, business expectations coming into the business spring and summer period, as well as their general outlook for the Tasmanian tourism industry over the 12 months. This is a widely recognised measure of business confidence.

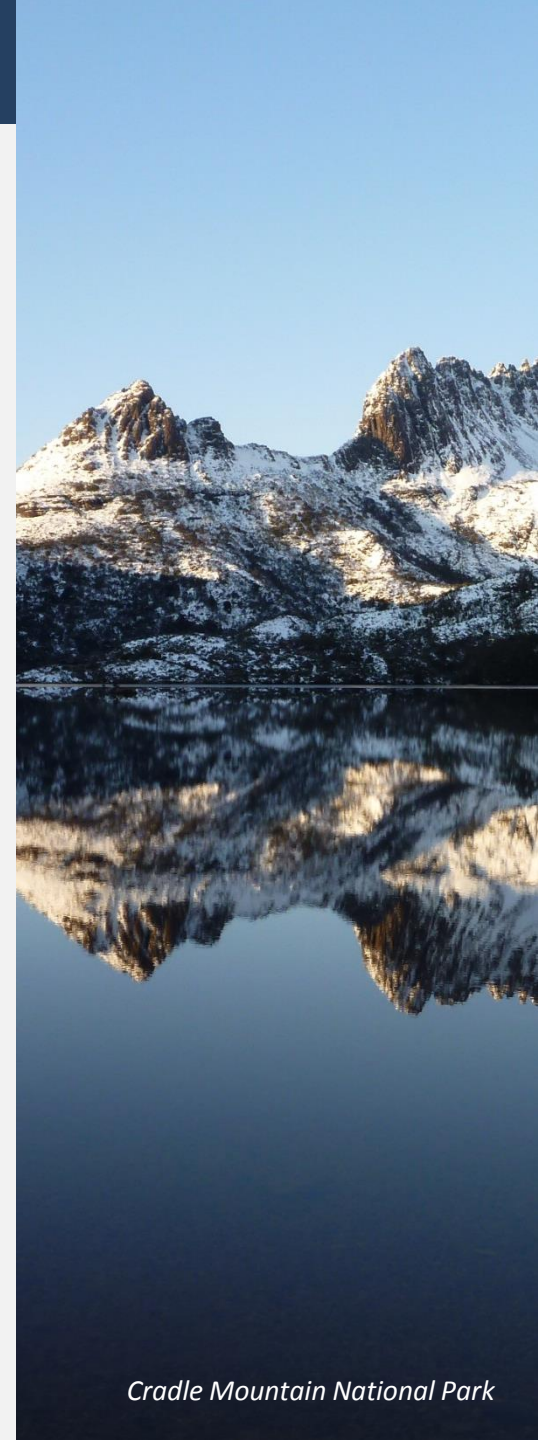
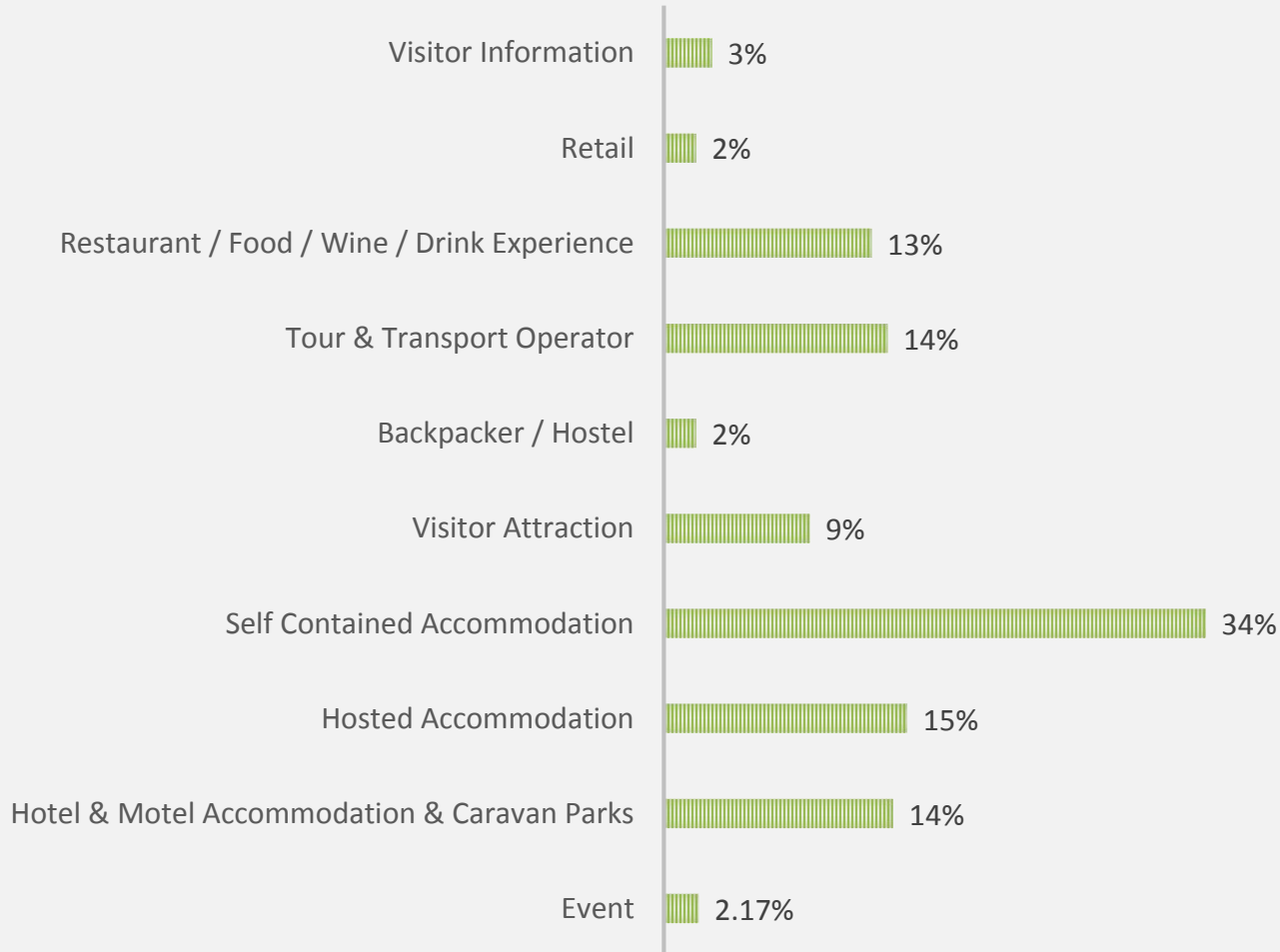
The results are compared across Tasmania's four tourism regions, and with past TICT business confidence survey.



# Sample size by business type

302 operators completed the survey covering a broad cross section of the industry. This represents a 20% response rate.

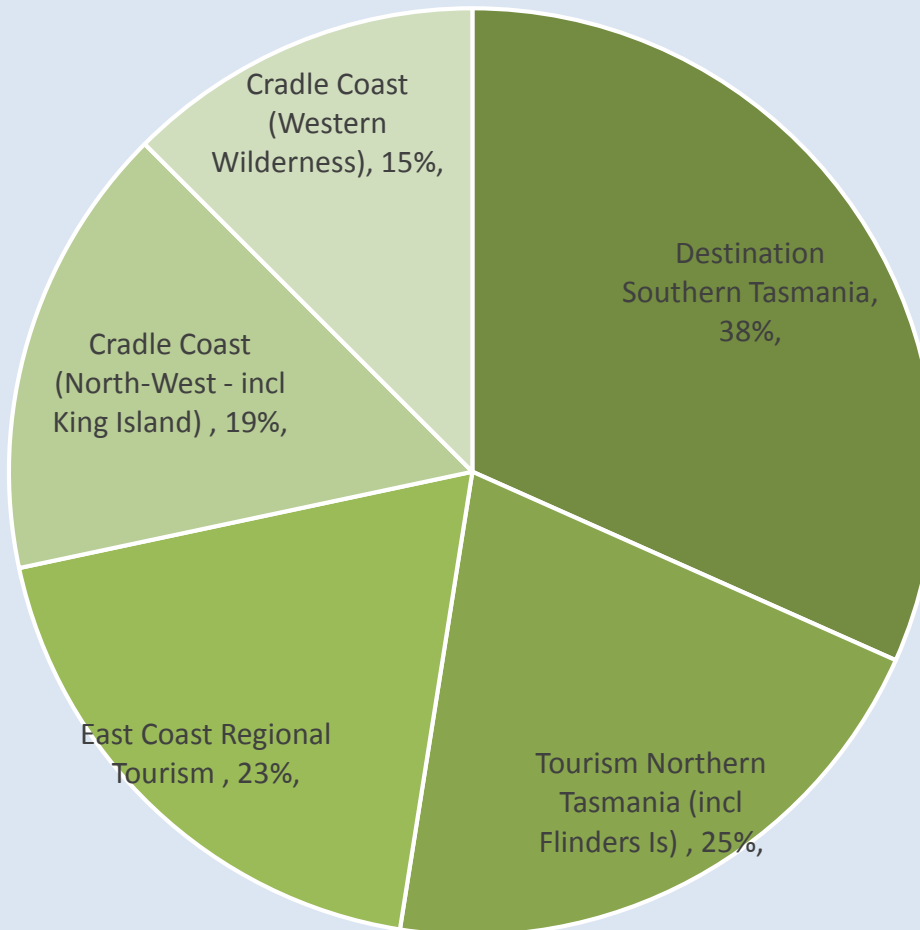
## Which of the following best describes your business?



# 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.

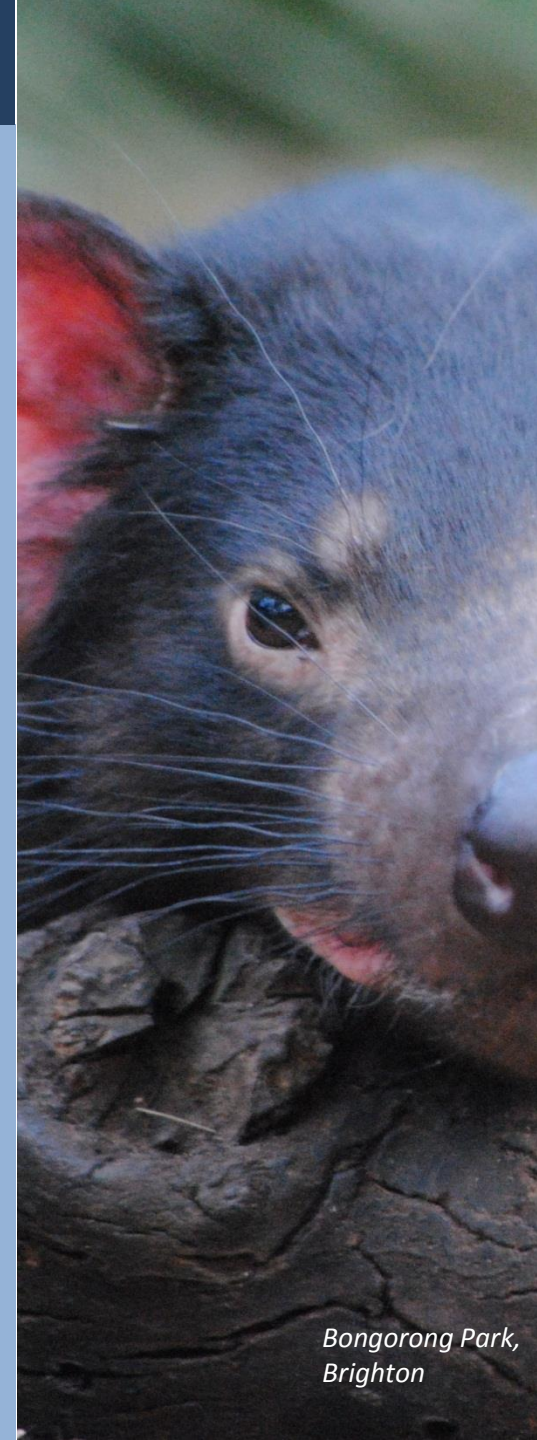
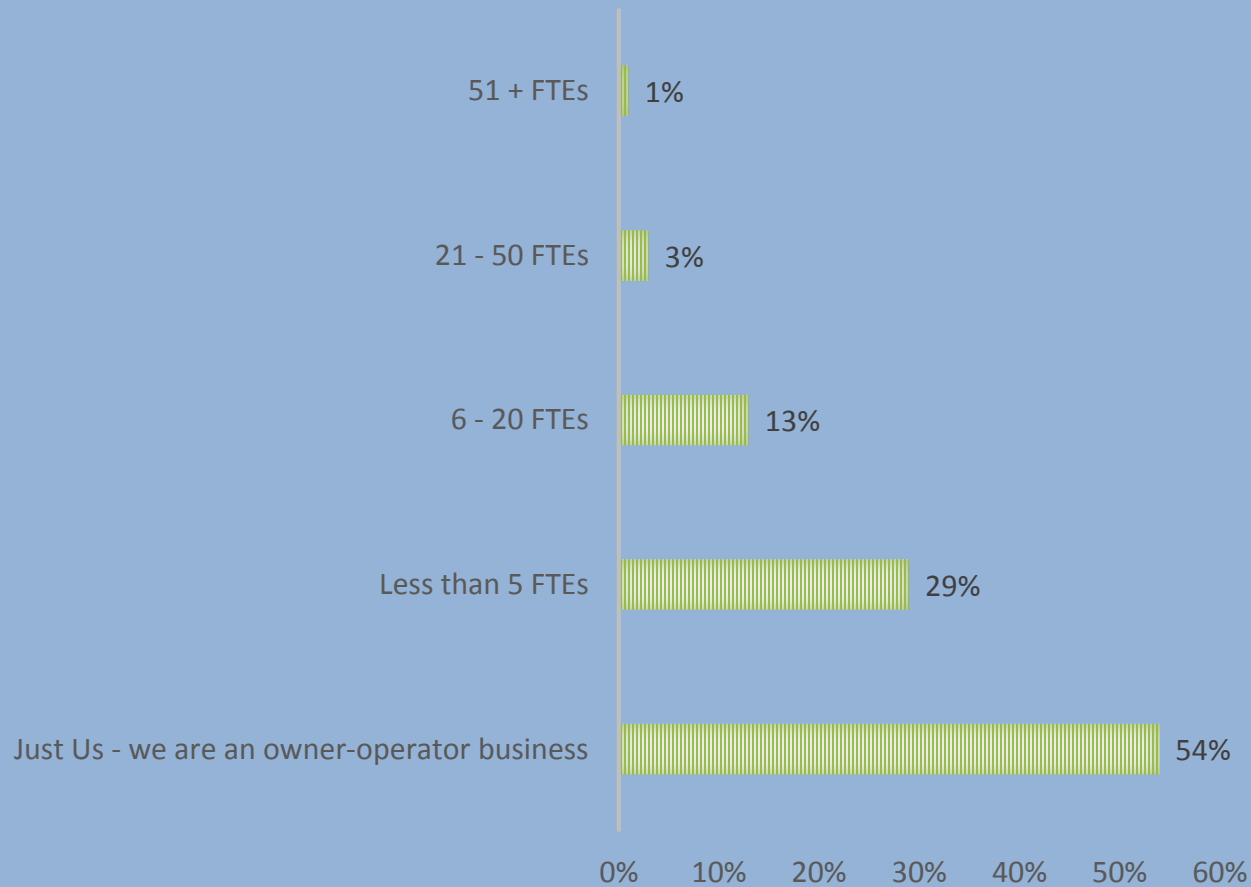




# Sample by business size

83% 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?

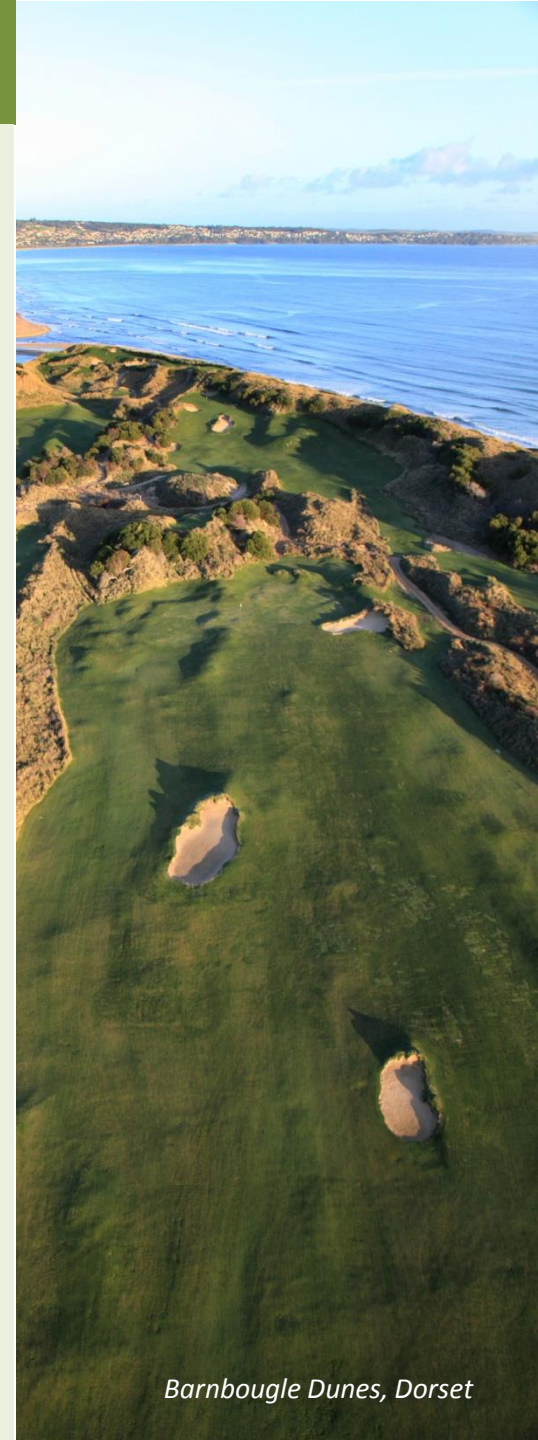
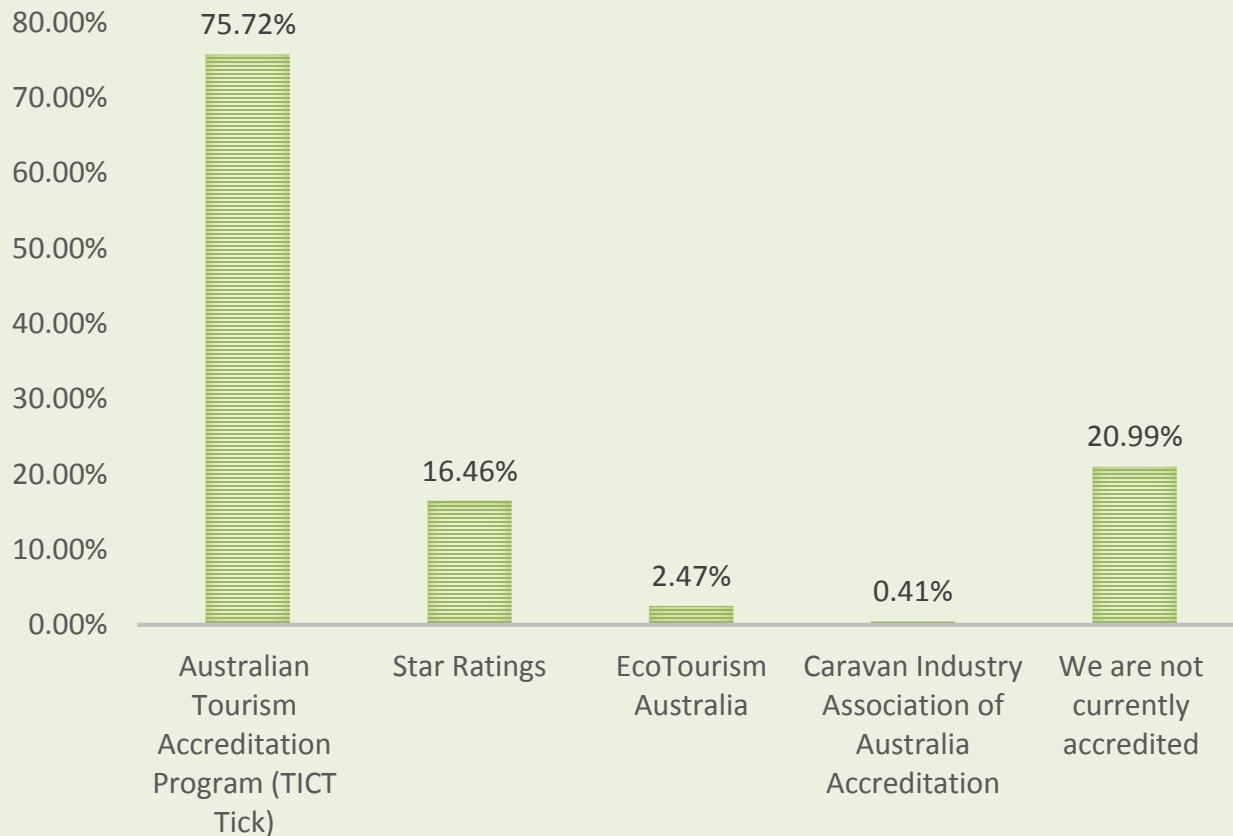


Bongorong Park,  
Brighton

# Accreditation

80% of respondents said they were currently accredited with at least one recognised industry quality assurance and accreditation program.

IS YOUR BUSINESS TOURISM ACCREDITED WITH ONE OF MORE OF THE FOLLOWING PROGRAM?

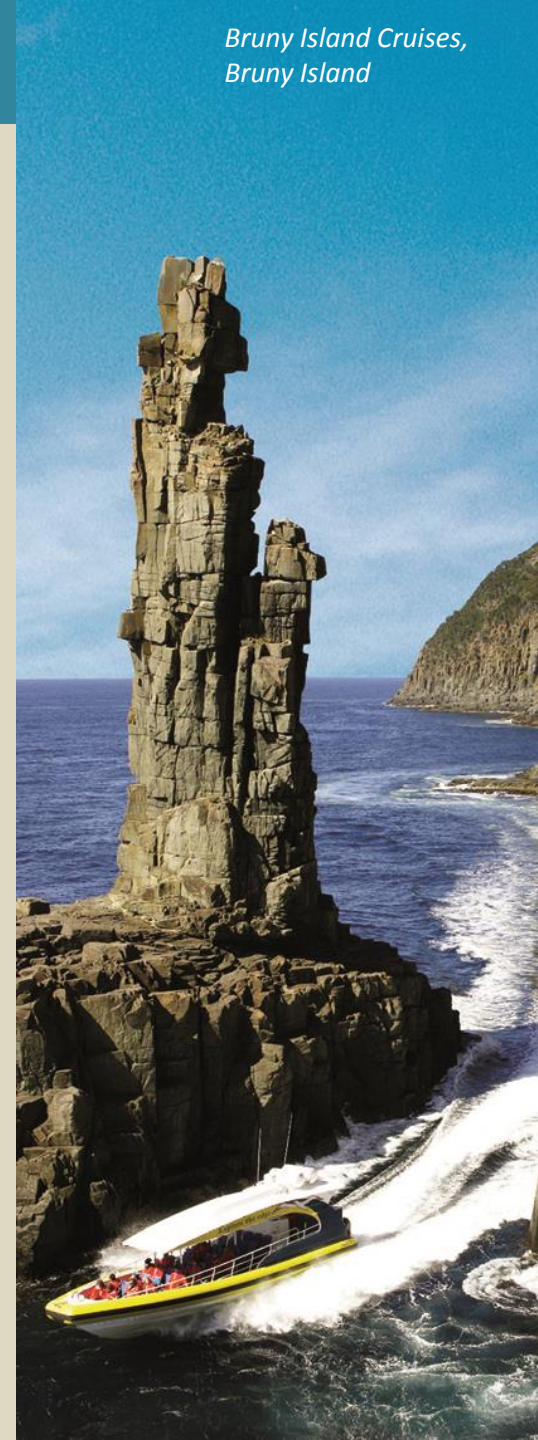
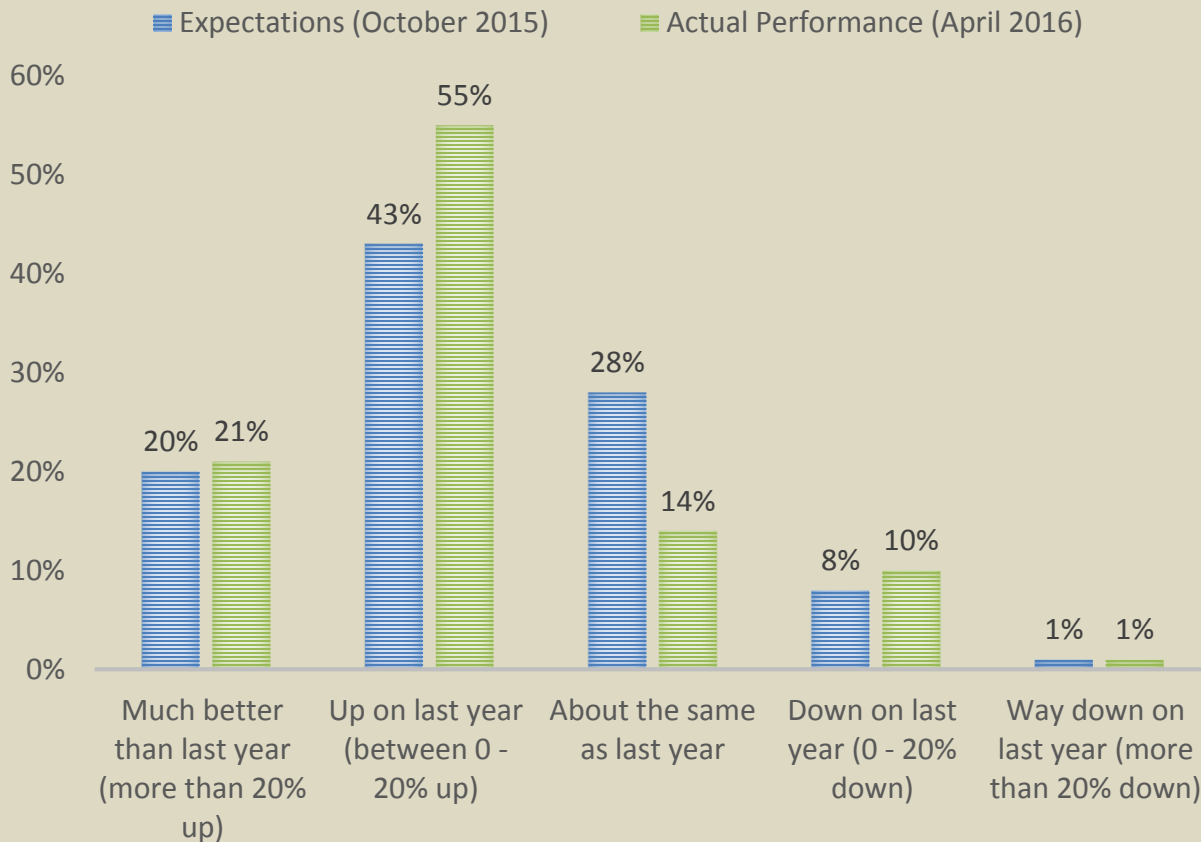


*Barnbough Dunes, Dorset*

# Business Performance vs Expectations

76% of respondents Statewide report business being up on last year over the recent spring/summer peak visitor season.

These results represent a slight improvement on what operators were expecting in October, when 63% were anticipating a strong period than the previous year.

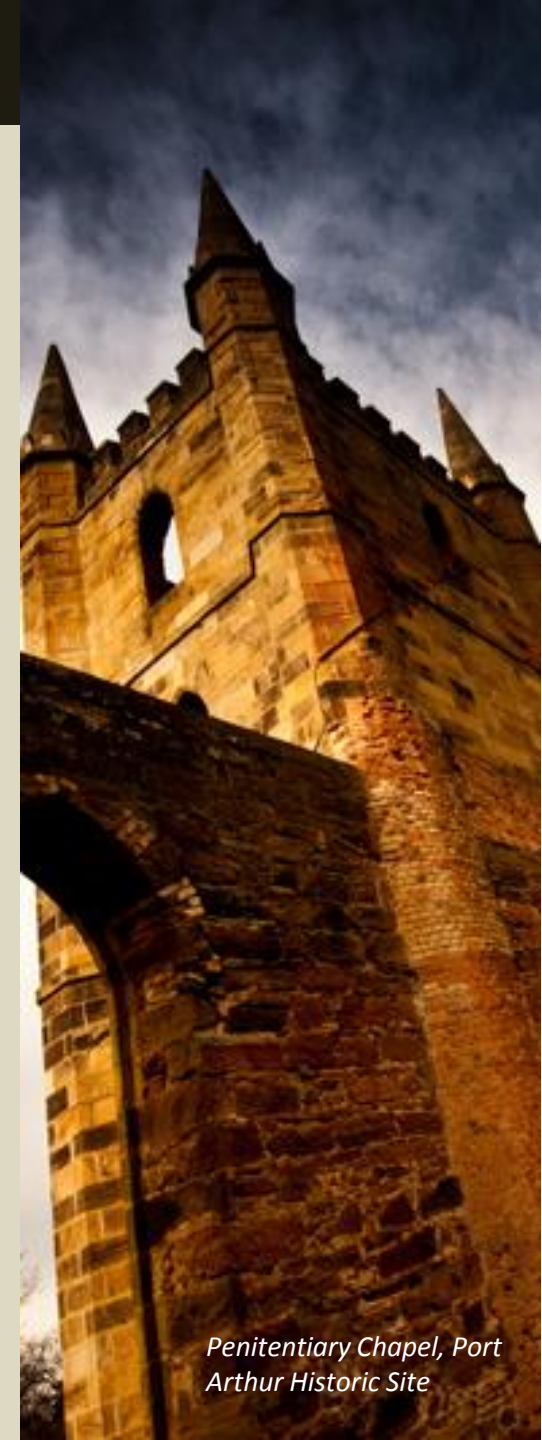
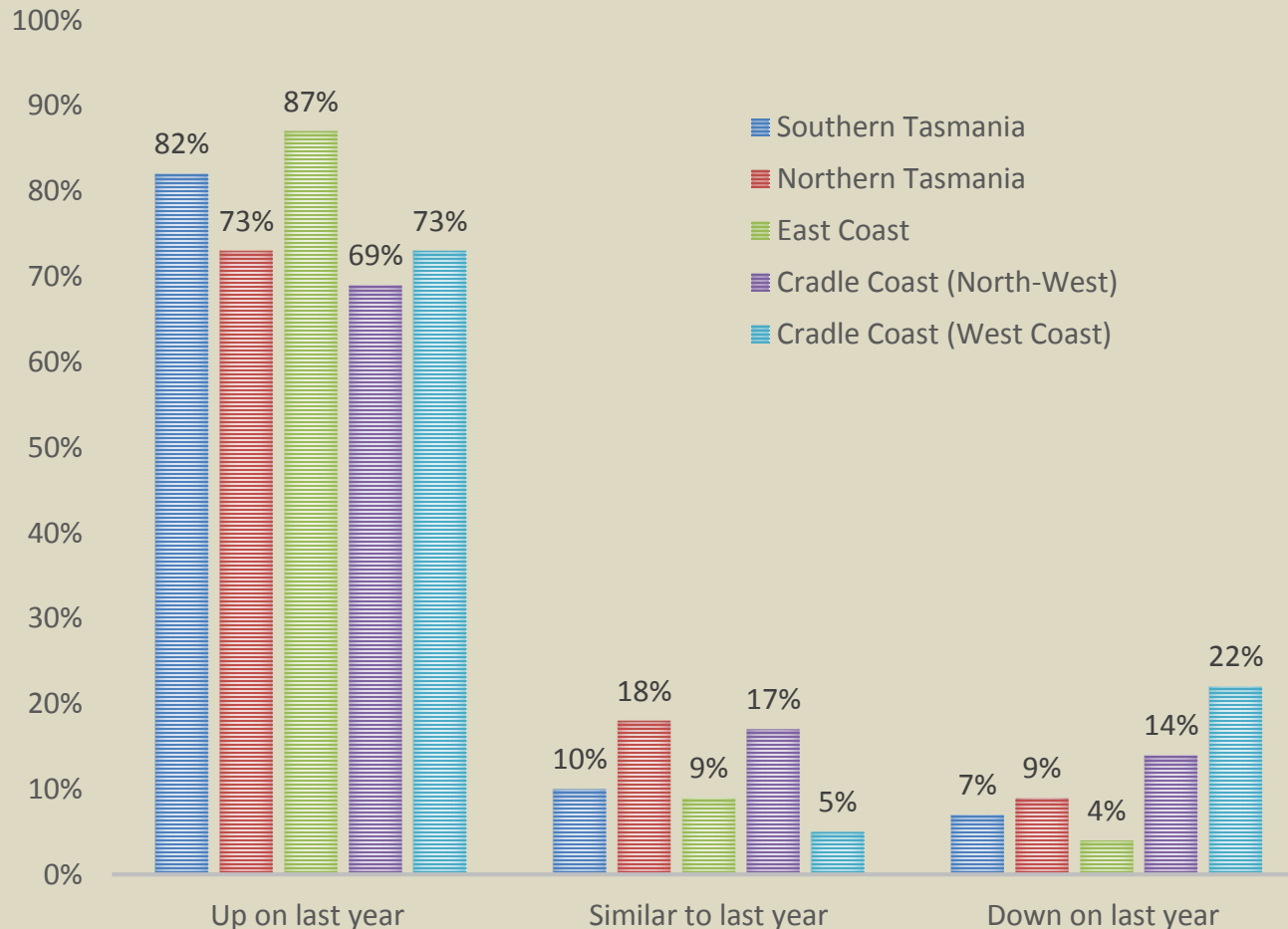




# Business Performance across the Regions

The strong performance was shared across all tourism regions.

Operators on the East Coast and Southern Tasmania reported the strongest year-on-year growth.

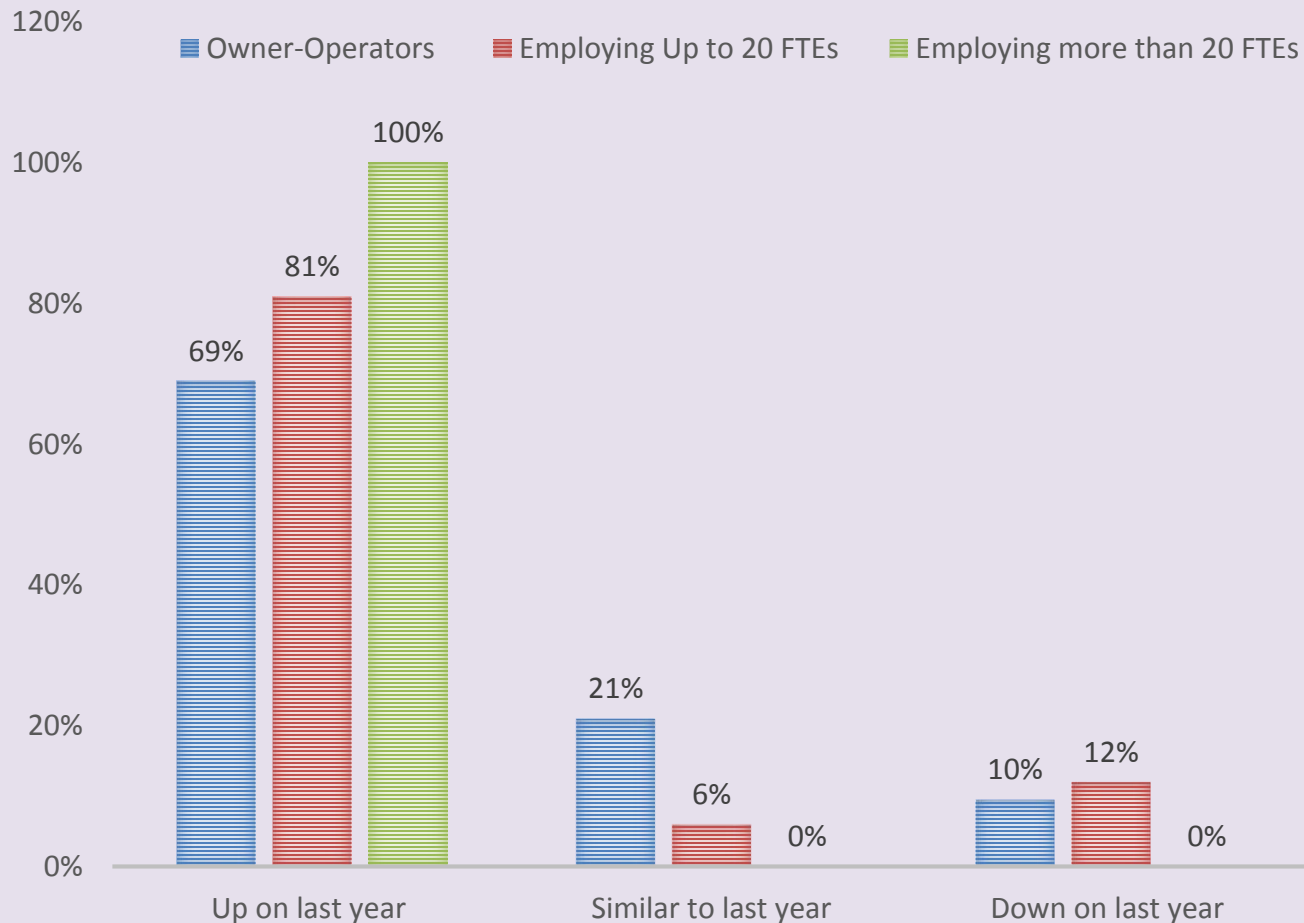




# Larger and smaller Operators

All respondents employing more than 20 FTEs reported growth on last year.

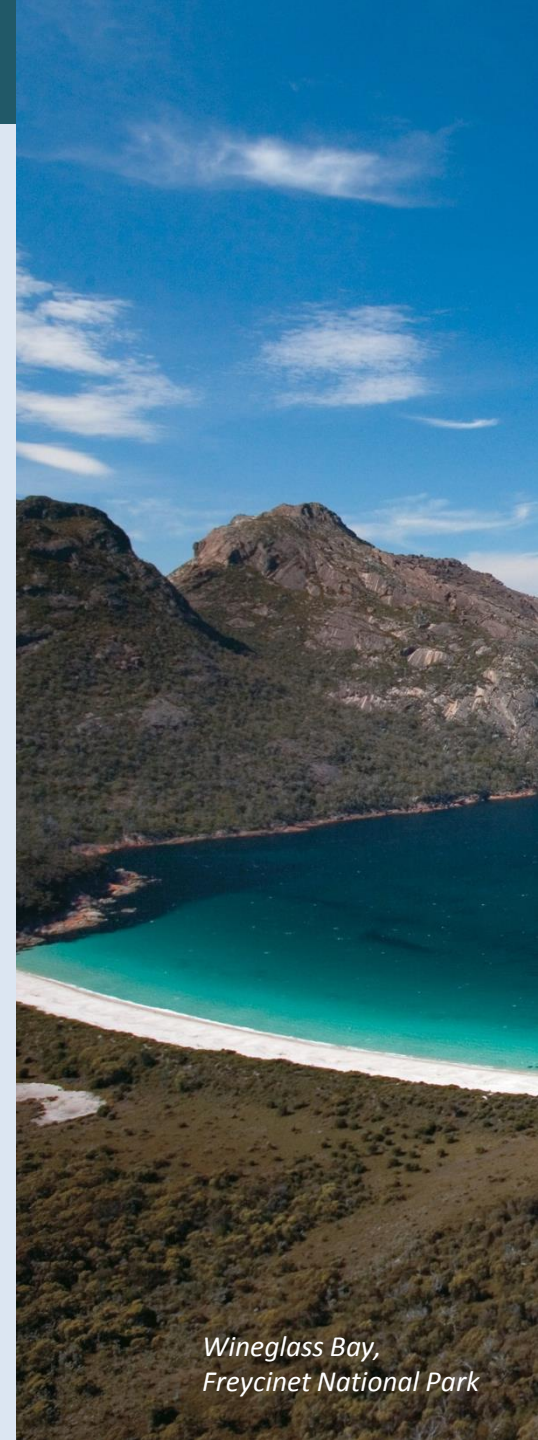
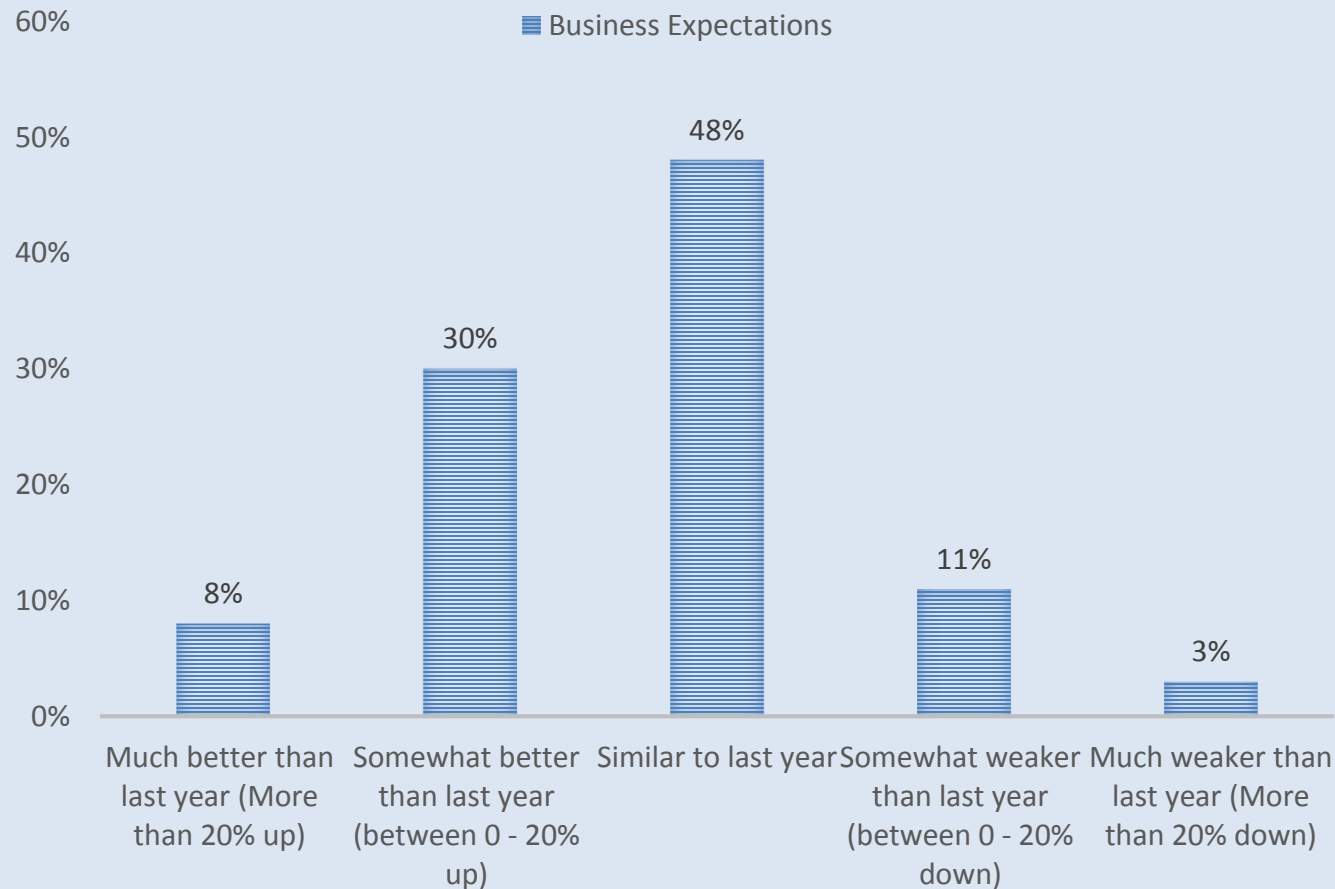
69% of owner-operator businesses, and 81% of businesses employing up to 20 FTEs report business being up.



*Bridestowe Lavendar Estate*

# Expectations for Winter

Looking ahead to the forthcoming Autumn/Winter Season, 38% of operators expect business to be up on the same time last year. 48% expect similar business conditions to last year, and 14% expect business to be down on last year.

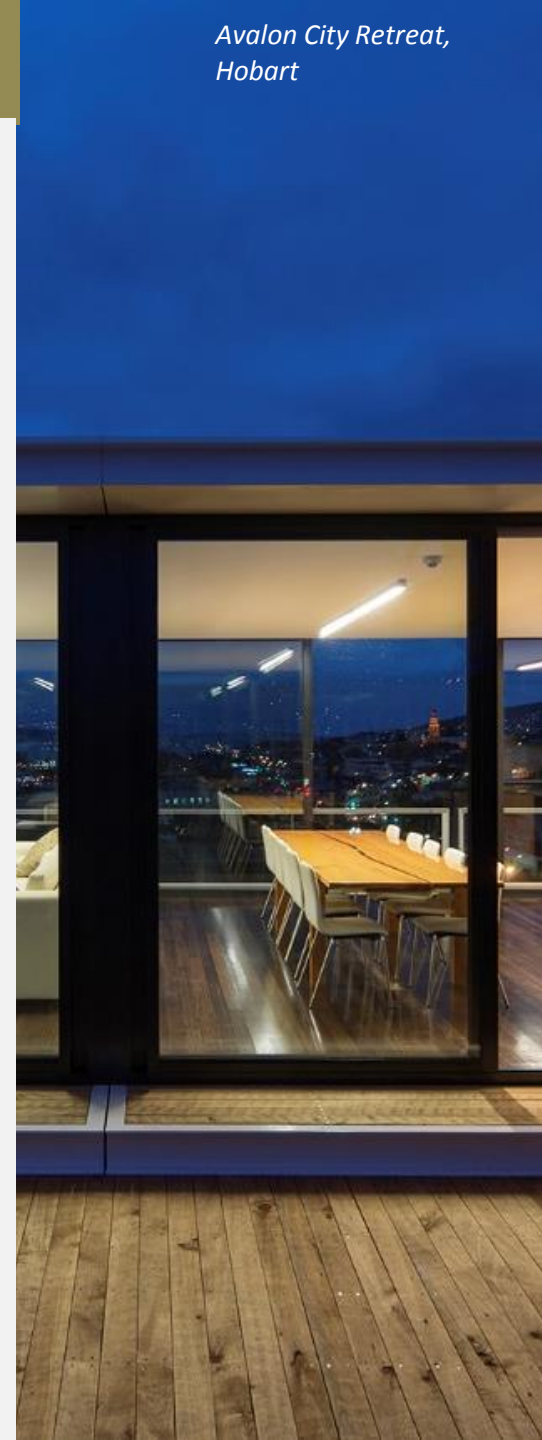
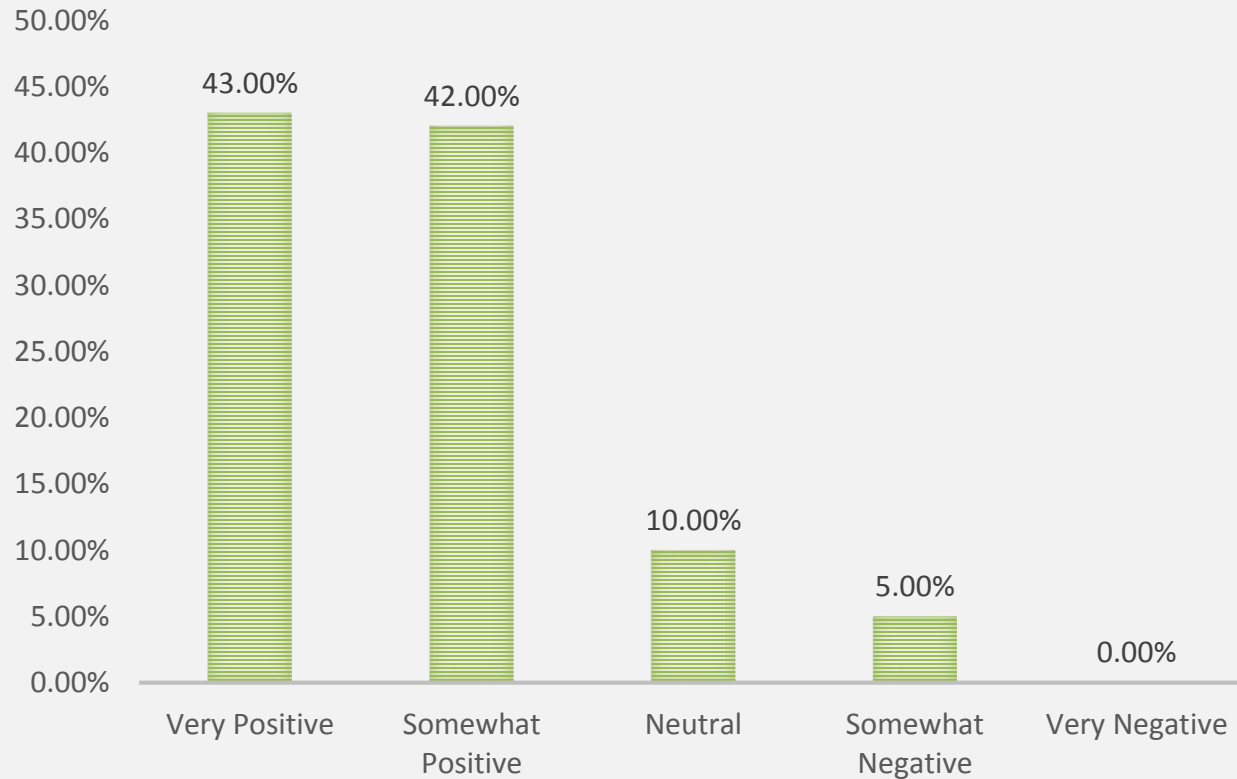


Wineglass Bay,  
Freycinet National Park

# Industry Outlook for the next 12 months

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?

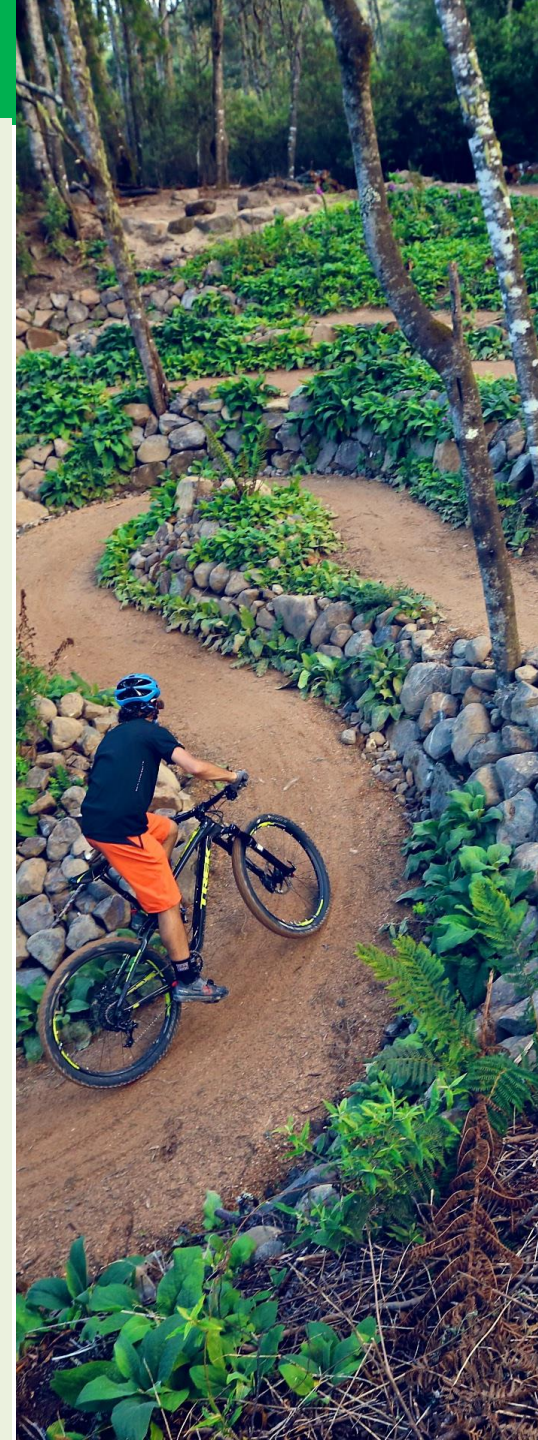
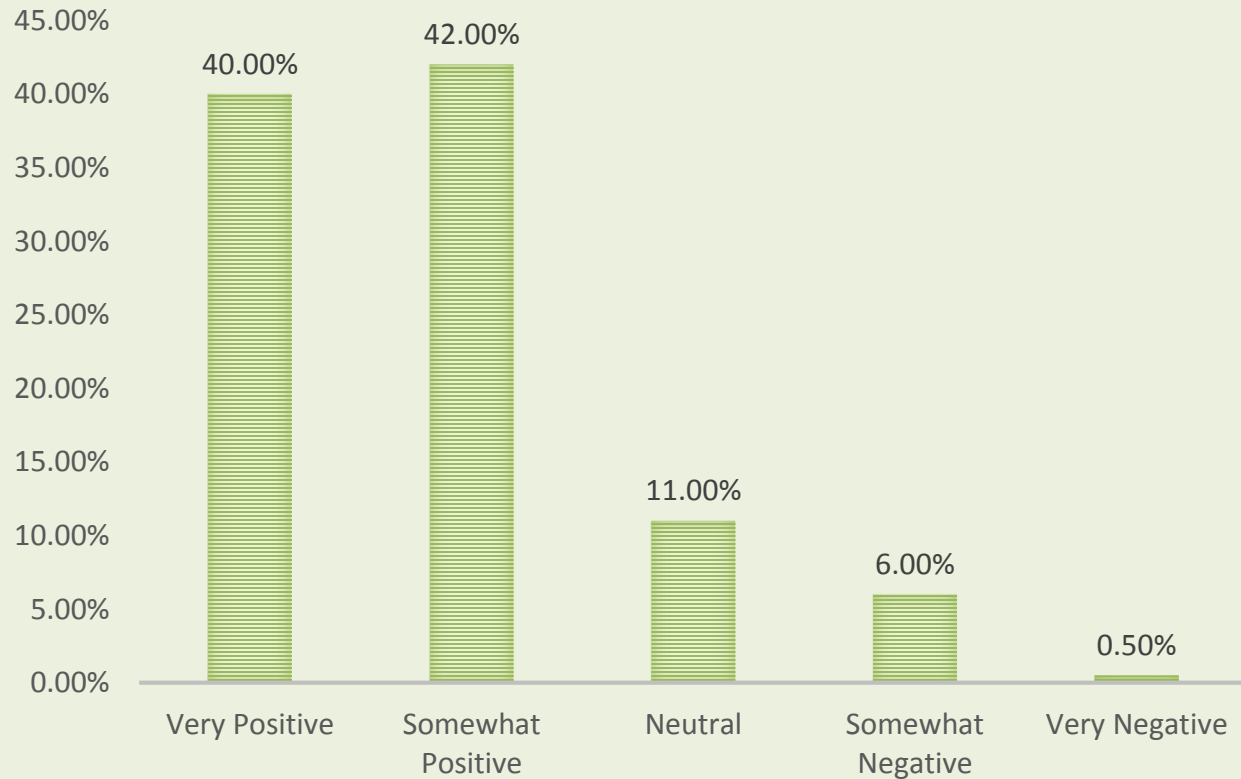




# Industry Outlook for the next 5 years

Operators also have a very positive outlook for the industry over the next five-years.

LOOKING AHEAD OVER THE NEXT 5 YEARS,  
WHAT IS YOUR OUTLOOK FOR THE  
TASMANIAN TOURISM INDUSTRY GENERALLY?



# Tourism Industry Business 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 of sustained business growth and encouraging further private investment.

**The Tasmanian Tourism Industry Business Confidence Index in April 2016 is 111.5 Points – which surpasses the conventional index scale.** In March 2015 it was 108 Points. By contrast, in March 2013 it was 61 points, and in March 2011, 28 points.

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

