

*The Taste of Tasmania,
Hobart*



**THE TASMANIAN TOURISM INDUSTRY
AUTUMN 2015 BUSINESS SENTIMENT SURVEY
APRIL 2015**

About this survey

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

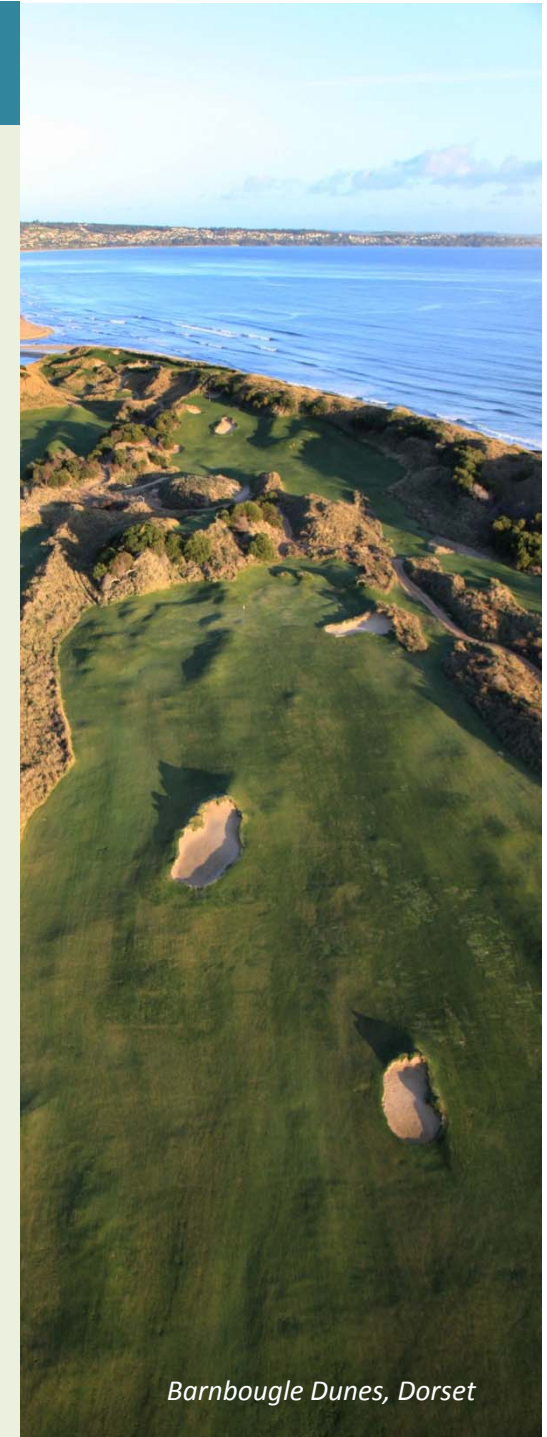
An Autumn Survey is undertaken in March/April, asking operators to report on their business performance over the preceding peak Summer visitor season and their expectations coming into the traditionally quieter autumn and winter months.

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.

From **March 27, 2015 – April 7, 2015**, 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 measure of industry confidence.

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

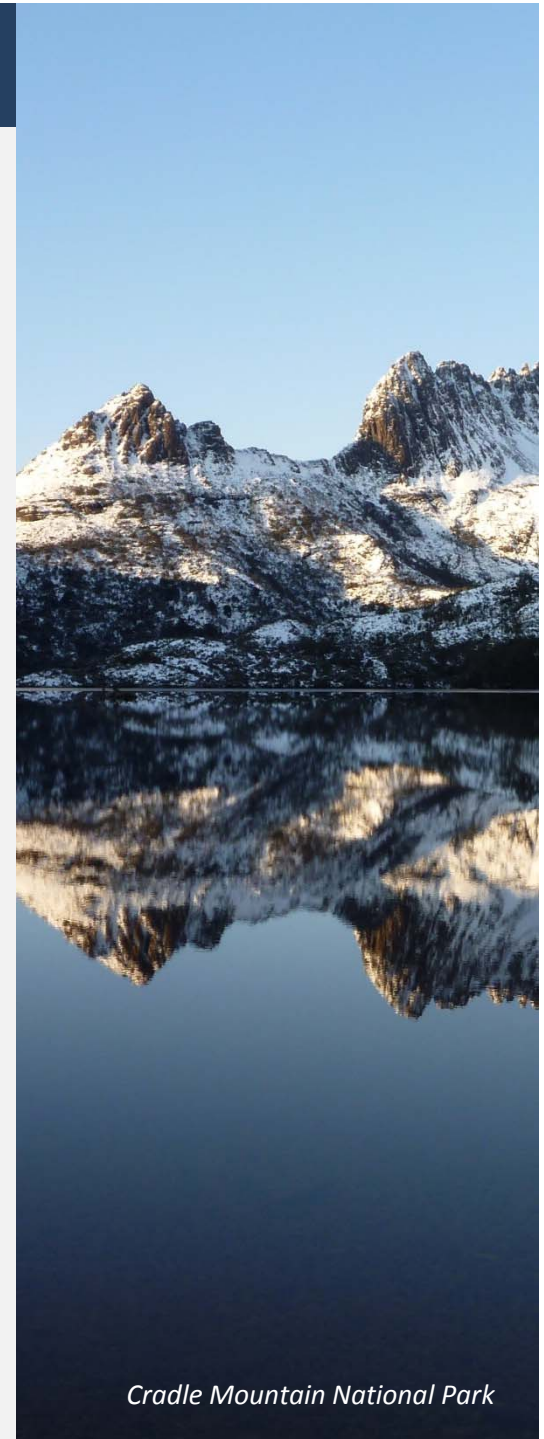
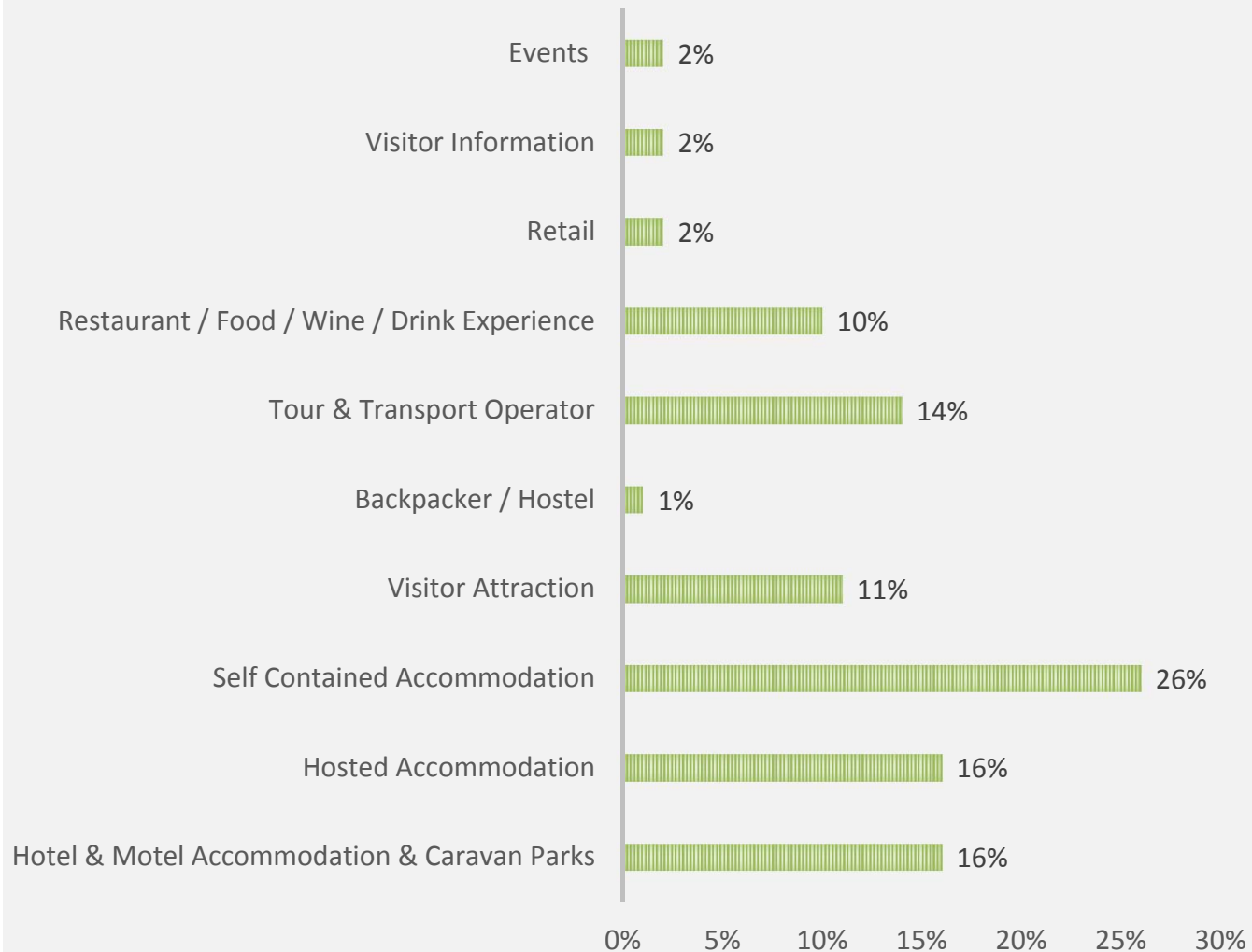


Barnbougle Dunes, Dorset

Sample size by business type

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

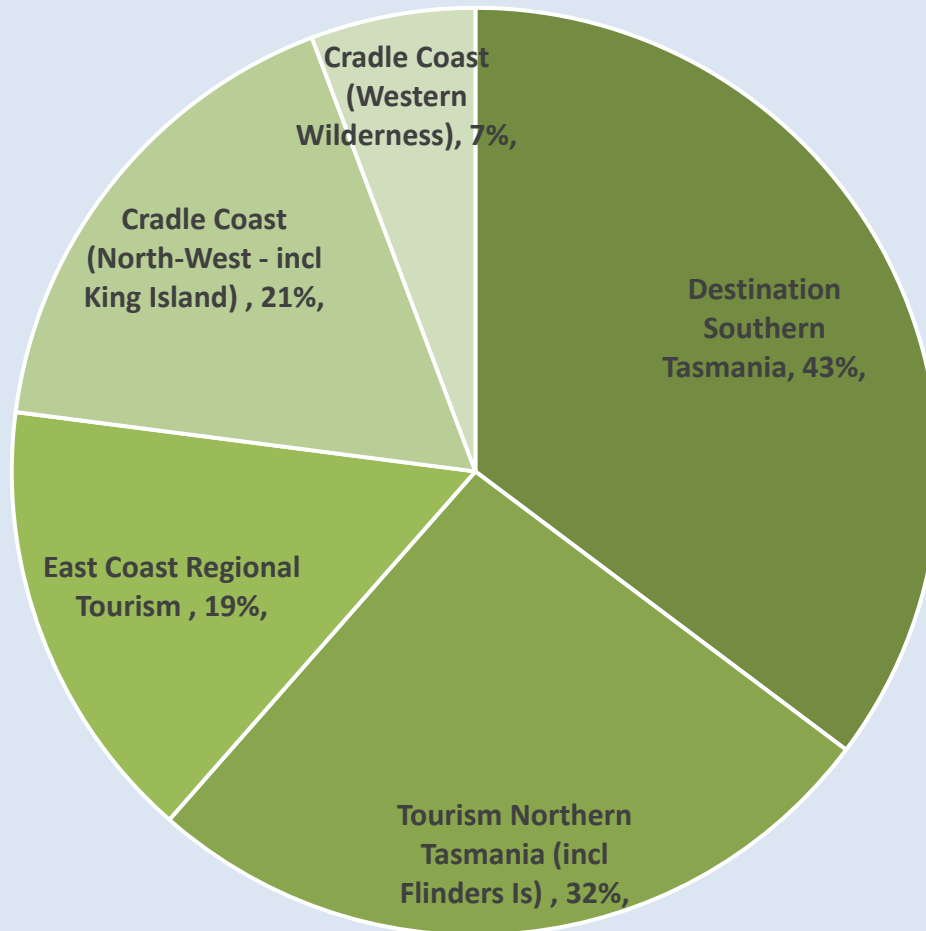
■ Which of the following best describes your business?



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.



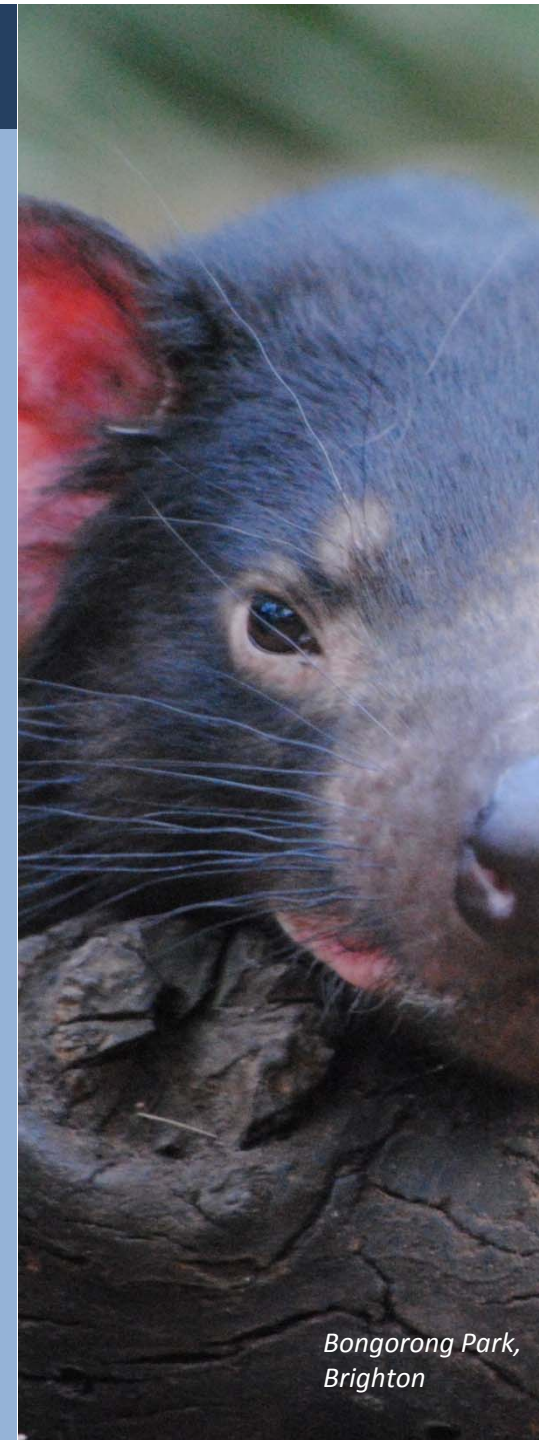
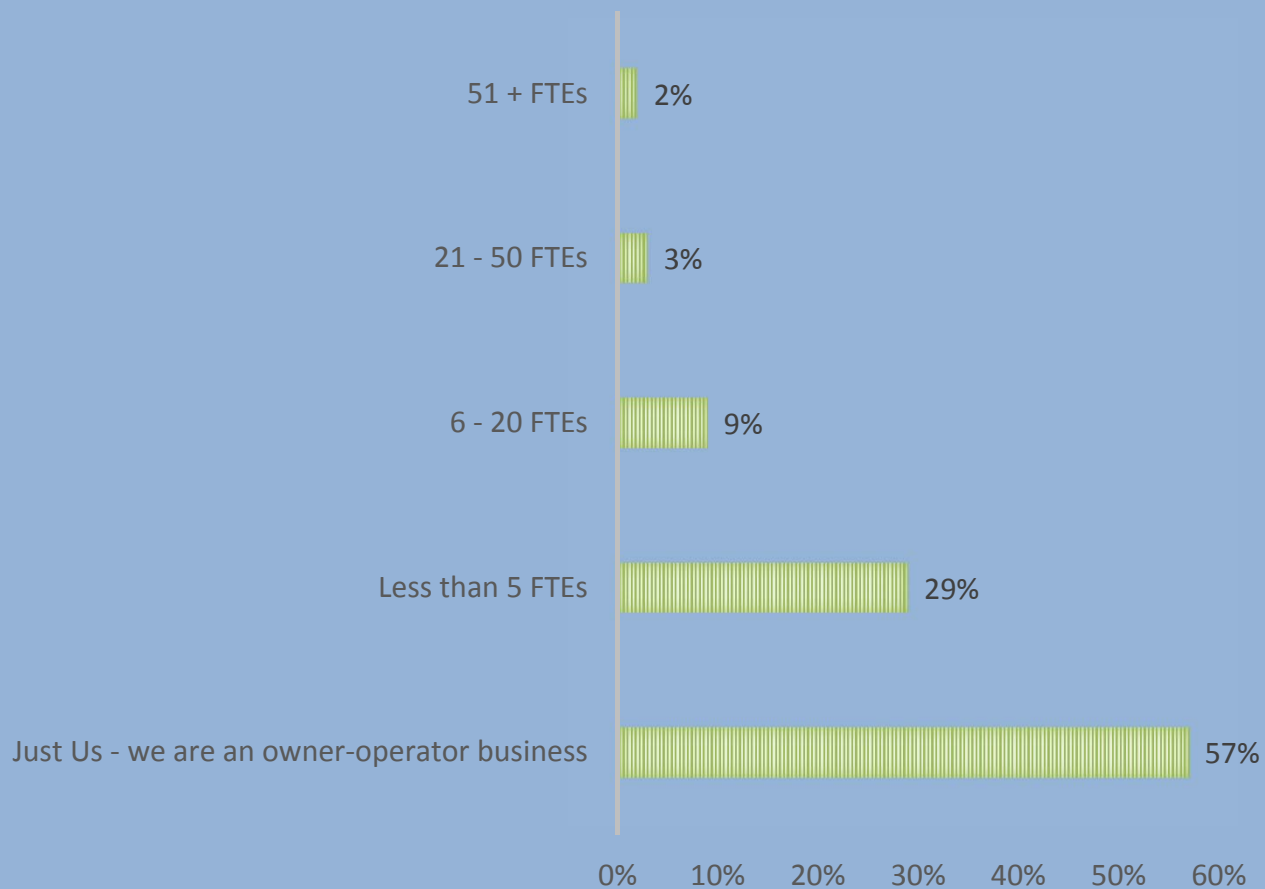
Boag's Brewery, Launceston



Sample by business size

86% 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?

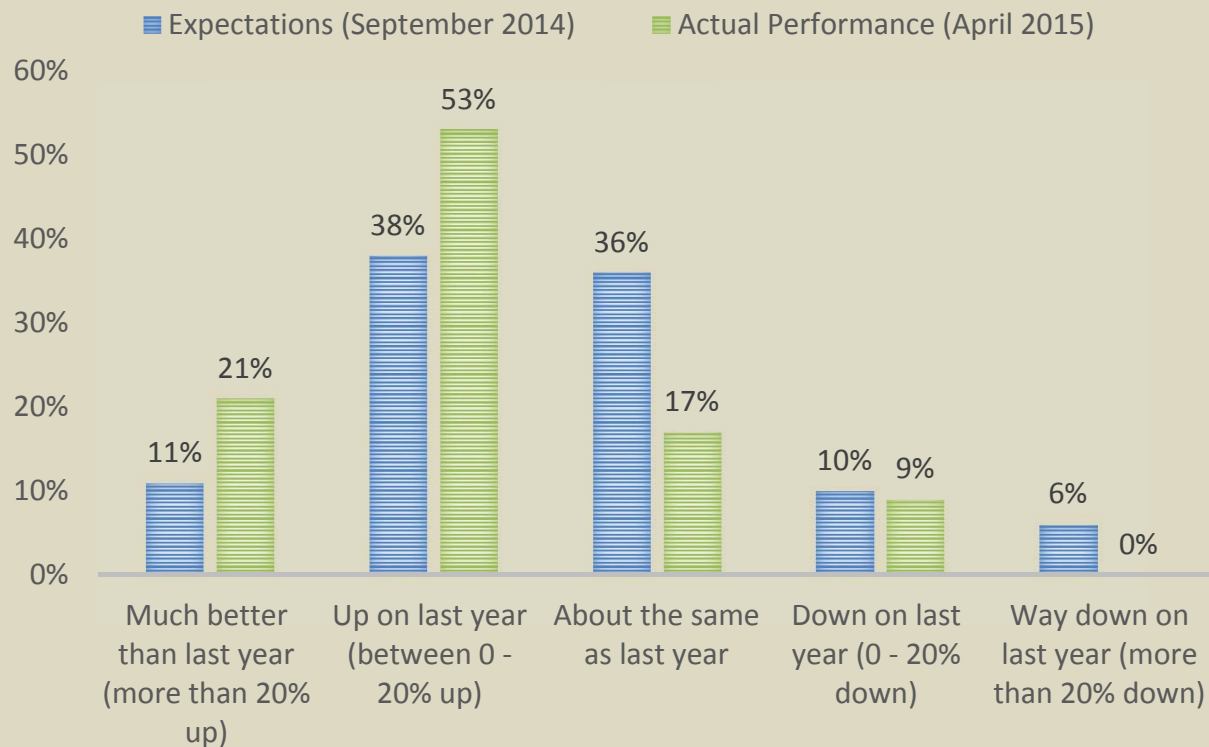


Bongorong Park,
Brighton

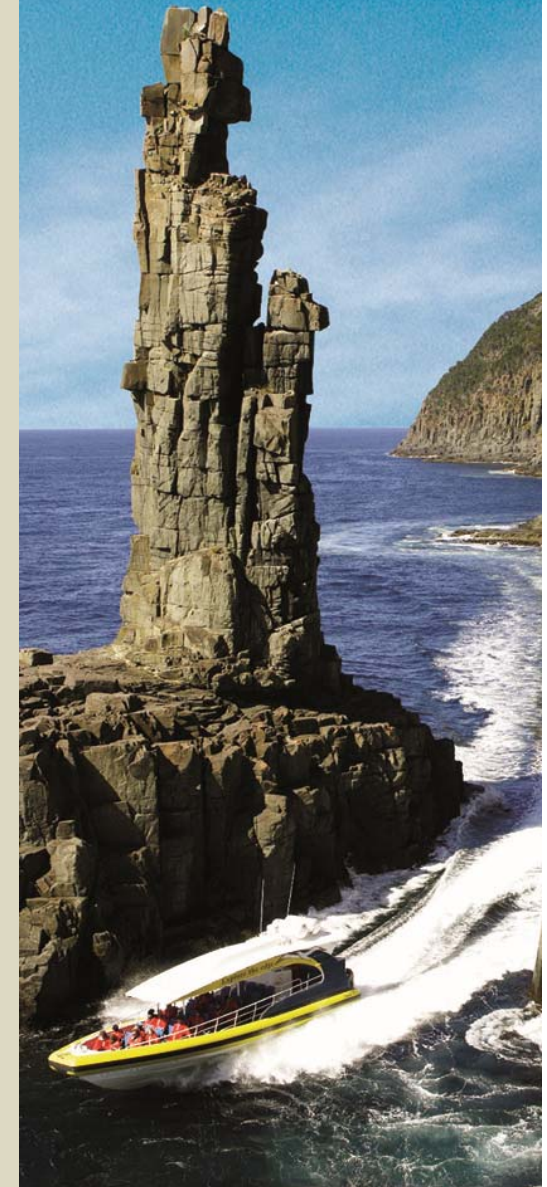
Business Performance vs Expectations

In September 2014, operators were asked to record how they expected their business would perform over the forthcoming 2014/15 Spring/Shoulder peak visitor season. Half (49%) reported they were expecting business to be up on the same time the previous year (2013/14), while 36% expected business to be about the same, and 16% expected business to be down on the corresponding period the previous year.

In this survey, 74% of operators have reported actual business performance over that peak season to be better than the same time last year, while 36% report similar business performance, and just 9% report business being down on last year, indicating industry performance exceeded expectations.

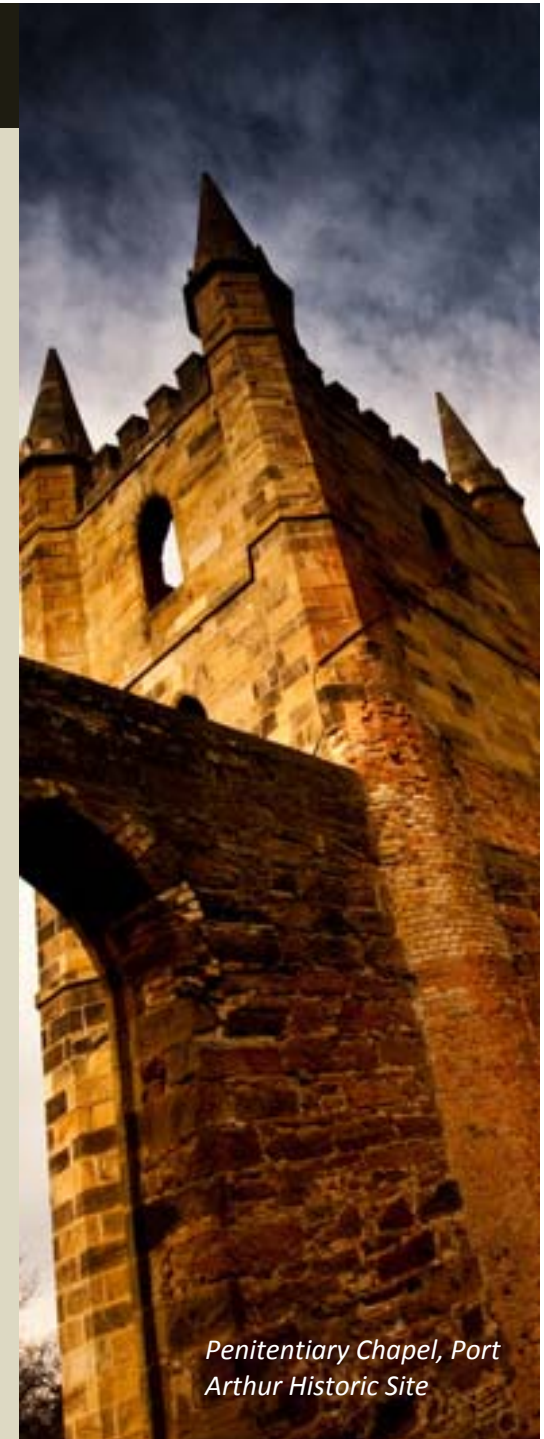
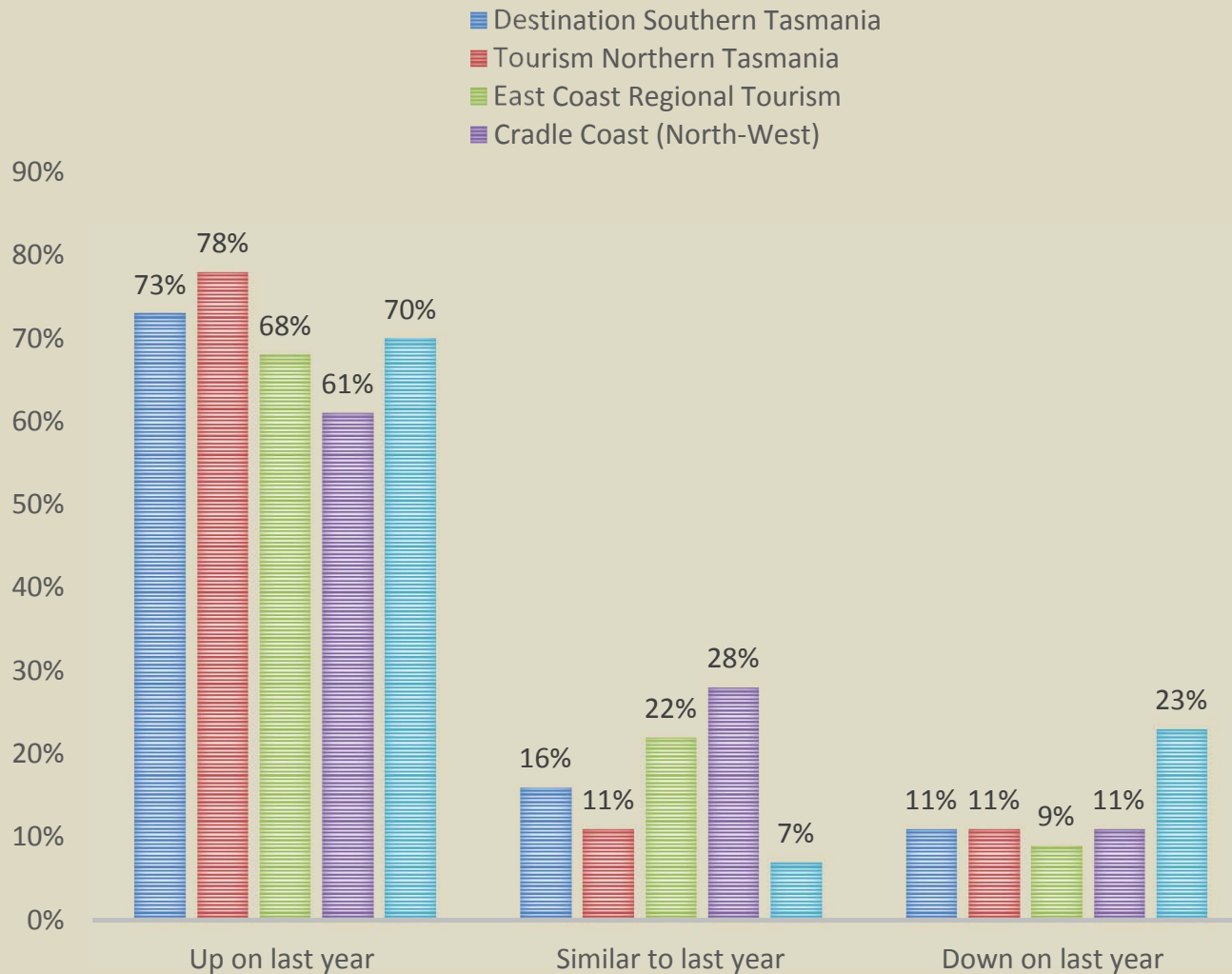


Bruny Island Cruises,
Bruny Island



Business Performance across the Regions

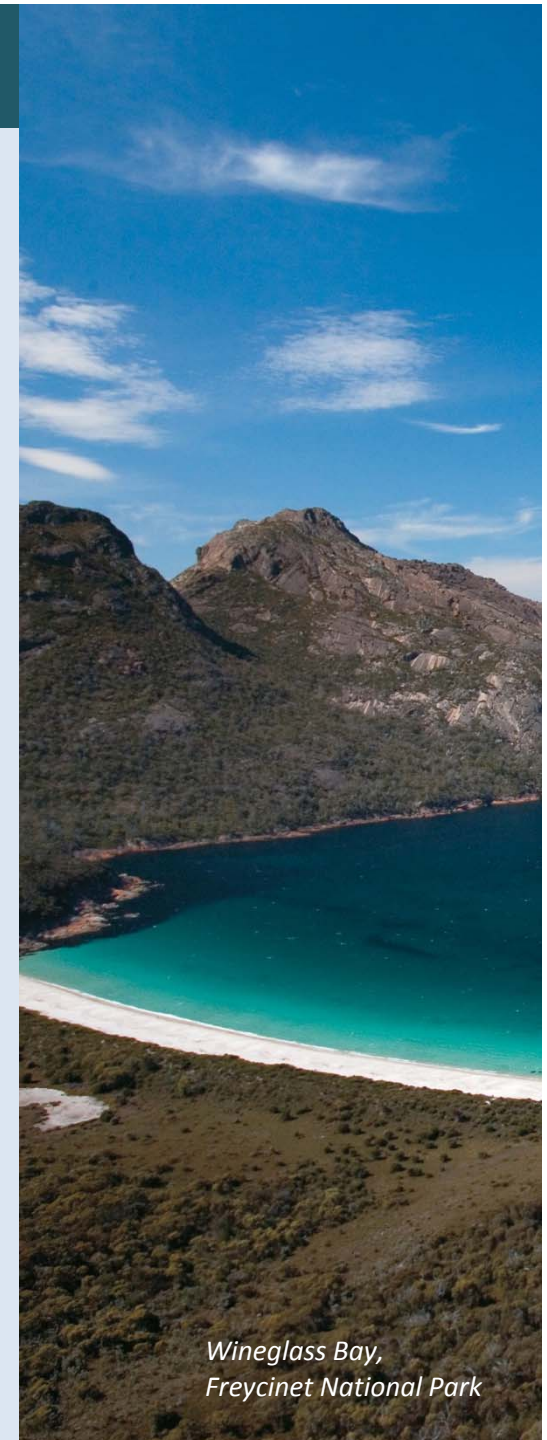
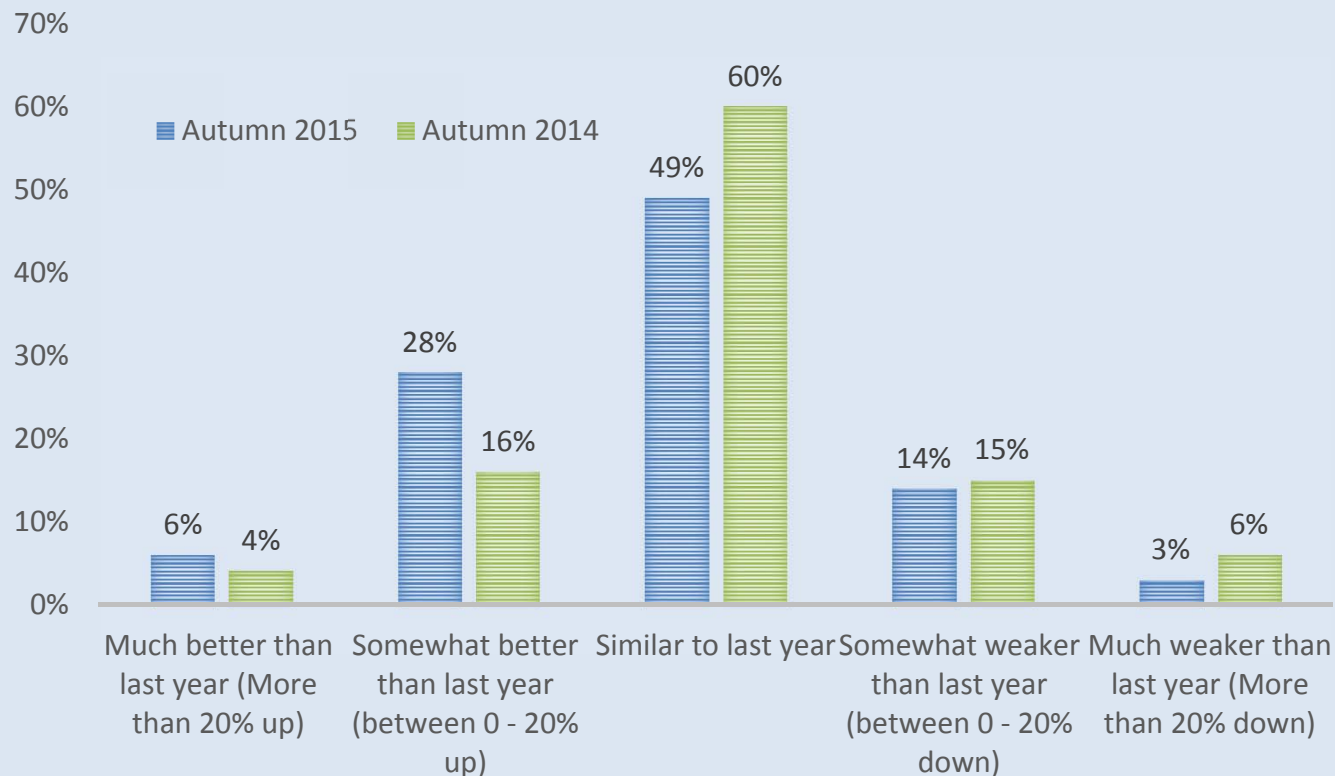
There was minimal variation from operators across the four tourism regions reporting actual business performance over the peak visitor period compared to the corresponding period the previous year.



Expectations for Autumn/Winter

Looking ahead to the forthcoming Autumn/Winter Shoulder Season, 34% of operators expect business to be up on the same time last year. 49% expect similar business conditions, and 17% expect business to be down on last year.

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

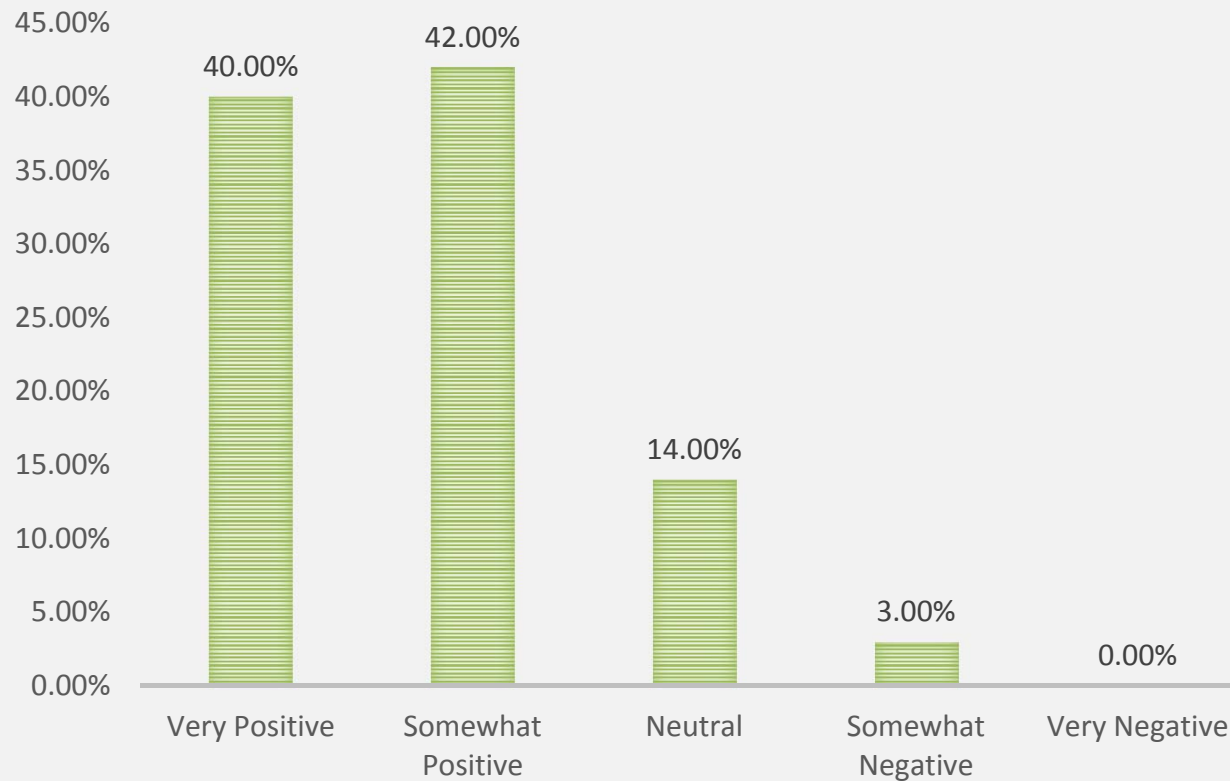


*Wineglass Bay,
Freycinet National Park*

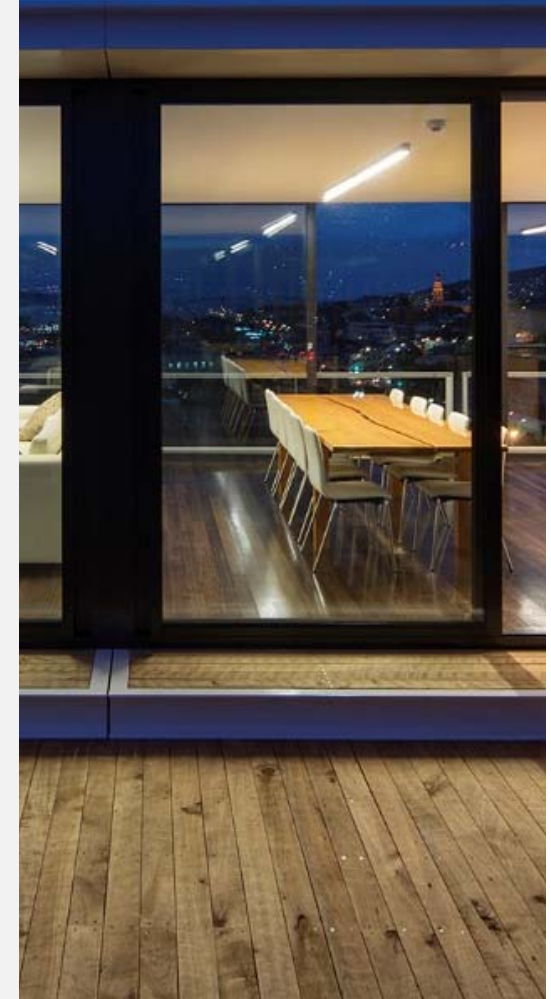
Industry Outlook

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?



Avalon City Retreat,
Hobart

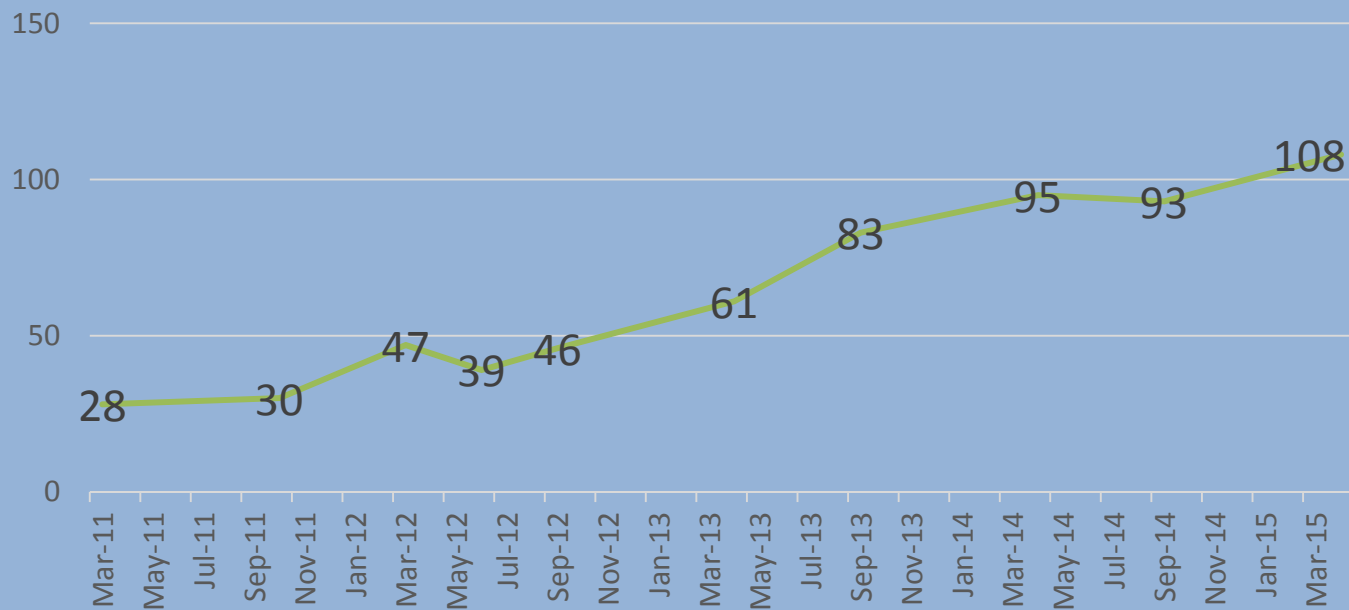


Industry Confidence Index

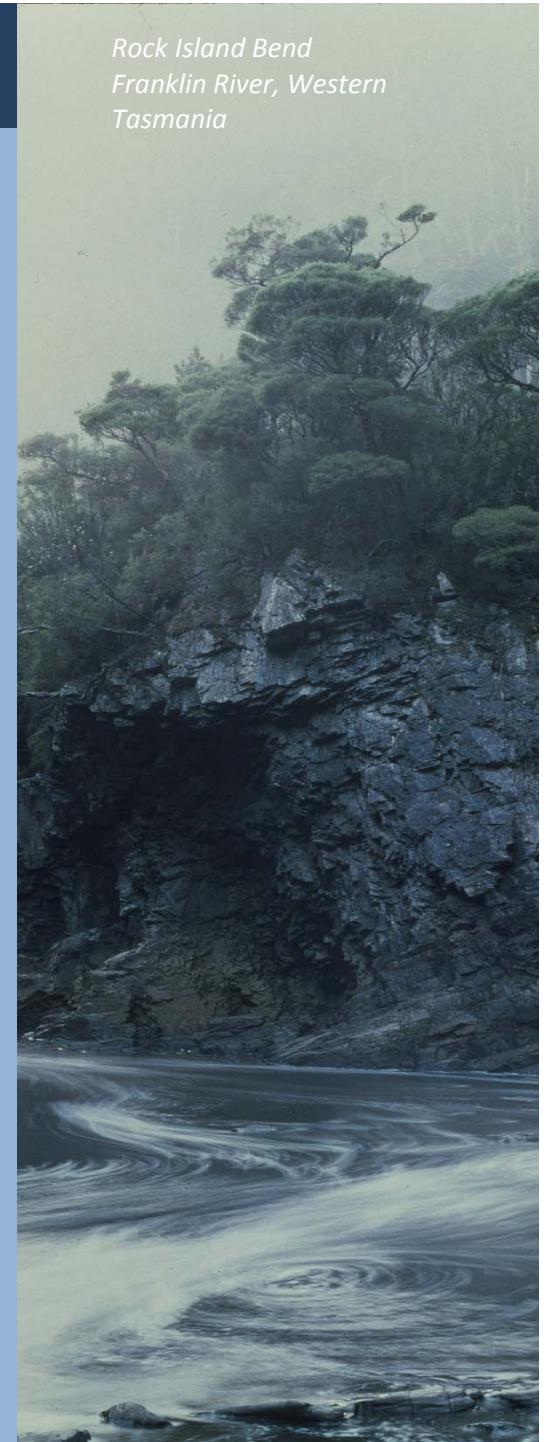
Based on the Tasmanian Chamber of Commerce and Industry (TCCI) Business Confidence Index, asking the same question and weighting, to achieve an index score between 0 – 100. An index score above 50 Points represents a positive general industry outlook, below 50 Points represents a negative general outlook.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

The Tasmanian Tourism Industry Business Confidence Index for April 2015 is 108 Points – which surpasses the conventional index scale. In April 2014 it was 95 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.



Rock Island Bend
Franklin River, Western
Tasmania



Industry Hot Topic – Major Events

Operators were asked for their views on the value of Major Events to the Tasmanian tourism industry.

- 92% of operators said it was 'Important' or 'Very Important' for Tasmania to host major sporting, arts, cultural and community events.
- Just 1% said it was not important for Tasmania to host these types of events.

In thinking about the benefits for Tasmania in hosting these types of Major Events;

- 61% said the Marketing Benefit for Tasmania was 'Very Important' in hosting Major Events to help promote what the State to offer
- 48% said the Economic Benefit was 'Very Important'
- The Marketing Benefit to the State in hosting Major Events was considered marginally more important than the Economic and Community Benefits Major Events bring to Tasmania.

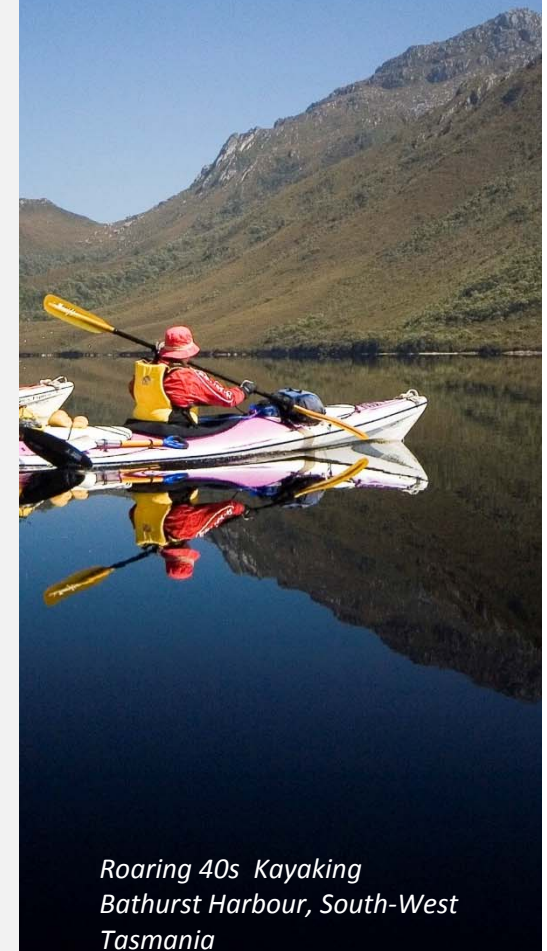
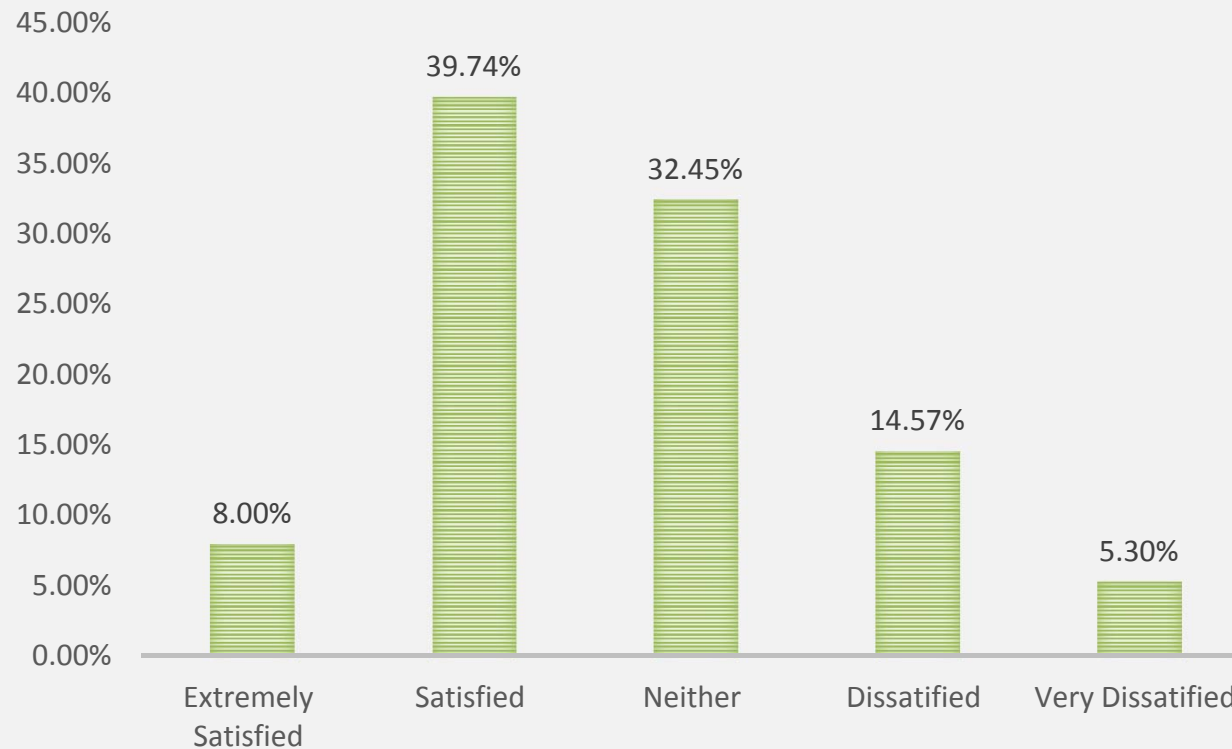
*Dark Mofo Winter
Solstice Swim, Hobart*



Industry Hot Topic - Parks & Wildlife

In accordance with the *Parks 21* Agreement between Tourism Industry Council Tasmania and the Tasmanian Parks & Wildlife Service, tourism operators will be surveyed once yearly on their views about the value of Parks & Reserves to Tasmania's tourism industry.

HOW SATISFIED ARE YOU WITH THE PERFORMANCE OF THE TASMANIAN PARKS & WILDLIFE SERVICE'S MANAGEMENT OF TOURISM OPPORTUNITIES AND FACILITIES IN PARKS AND RESERVES?

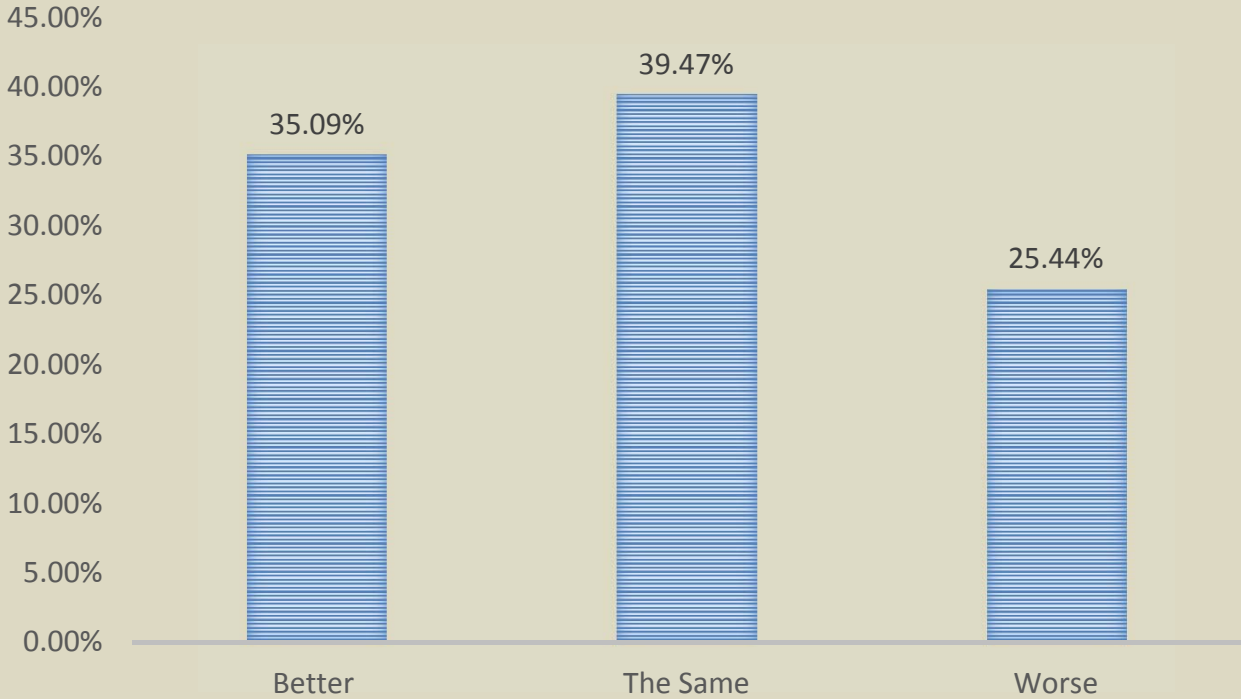


*Roaring 40s Kayaking
Bathurst Harbour, South-West
Tasmania*

Industry Hot Topic – Parks & Wildlife

Operators expressed general satisfaction with the performance of the Tasmanian Parks & Wildlife Service, but have mixed views about whether this performance is improving.

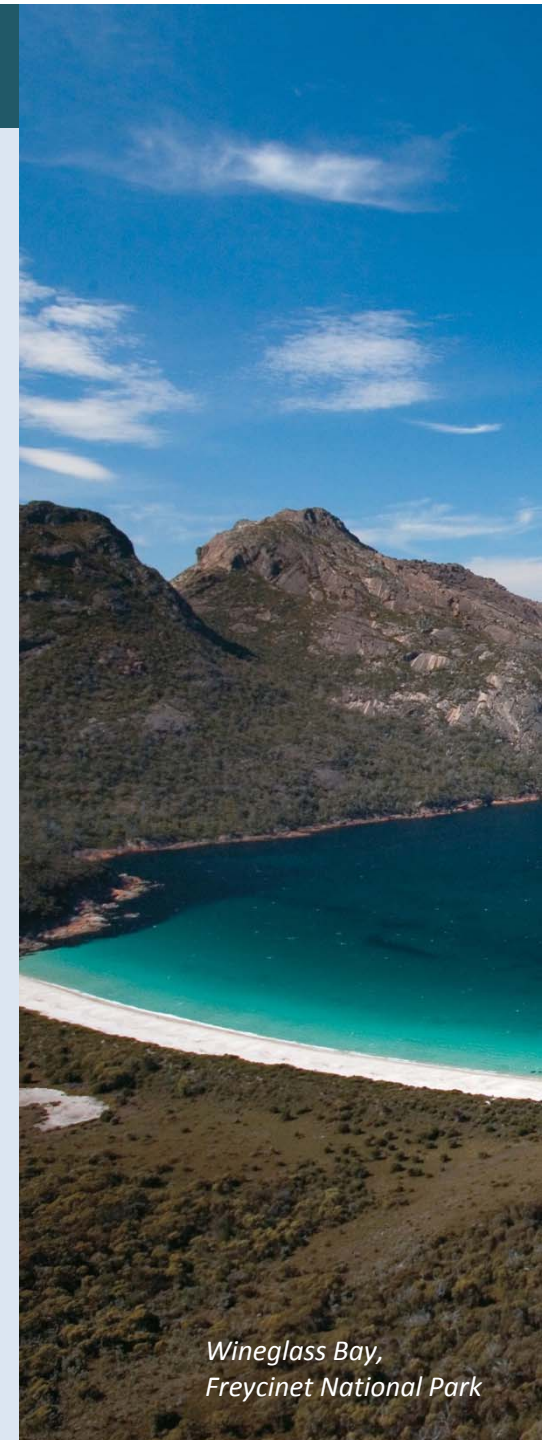
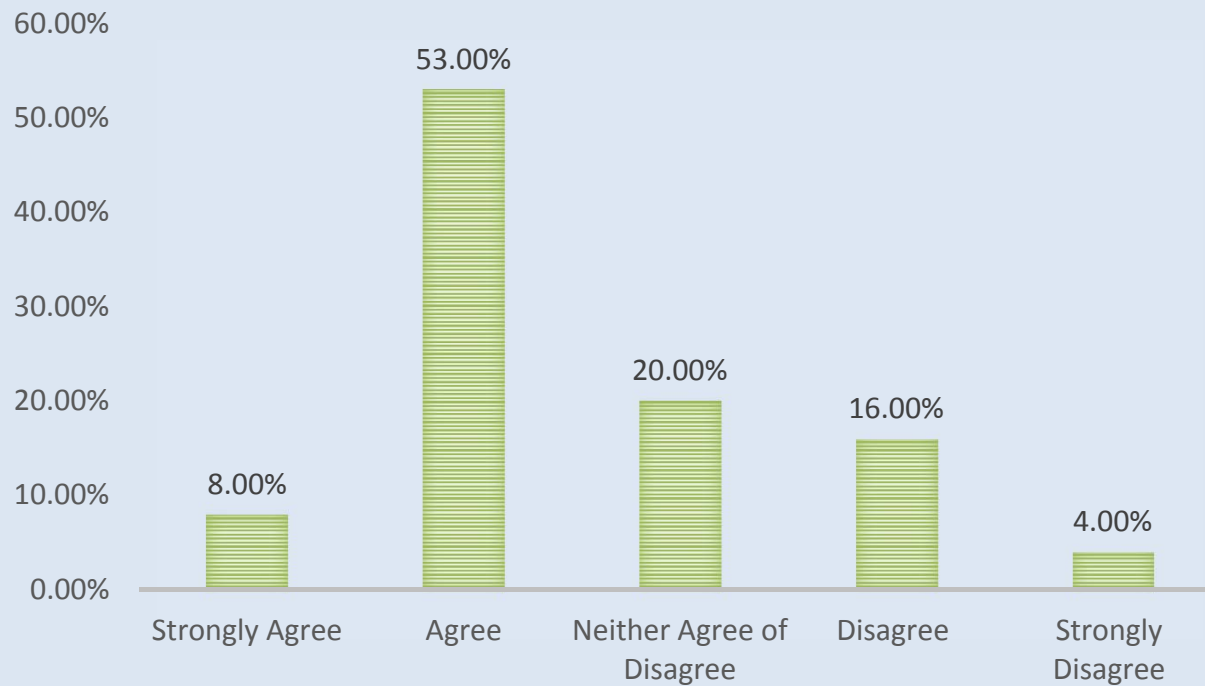
IS THE PERFORMANCE OF THE TASMANIAN PARKS & WILDLIFE IN MANAGING TOURISM OPPORTUNITIES AND FACILITIES IN PARKS AND RESERVES BETTER OR WORSE THAN IT WAS FIVE YEARS AGO?



Industry Hot Topic – Parks & Wildlife

Operators generally believe Parks and Wildlife strike the right balance in managing recreation/tourism with conservation outcomes.

THE TASMANIAN PARKS & WILDLIFE SERVICE IS ACHIEVING
A GOOD BALANCE BETWEEN TOURISM/RECREATION AND
CONSERVATION



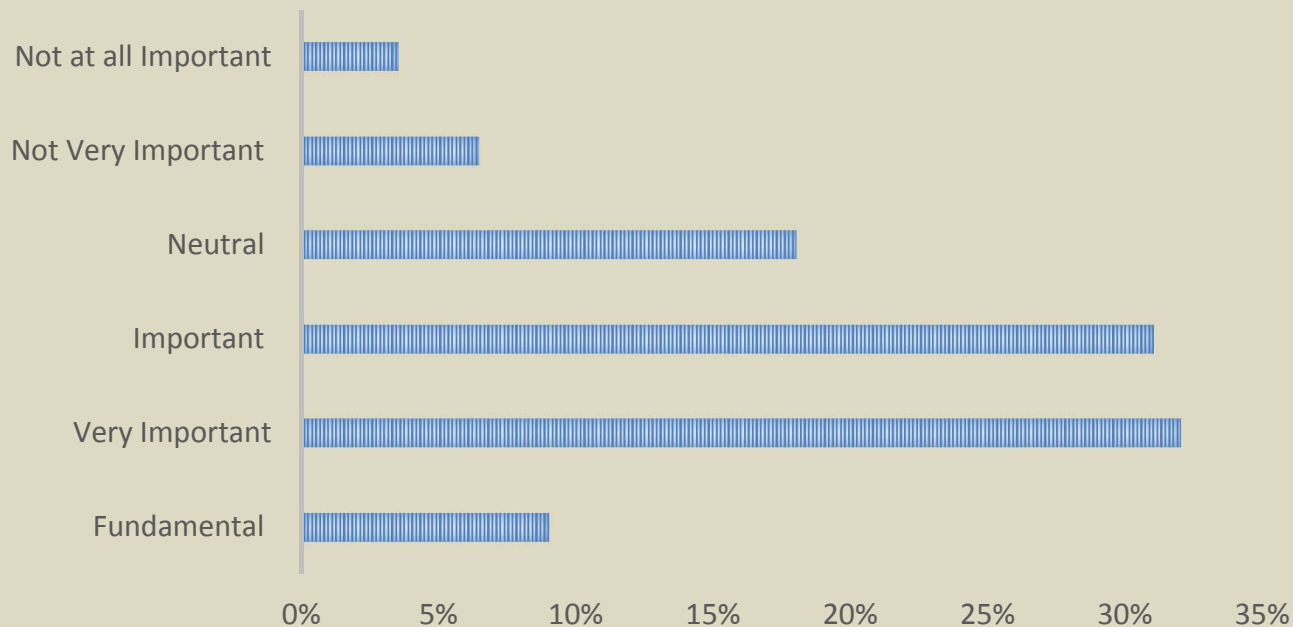
*Wineglass Bay,
Freycinet National Park*

Industry Hot Topic – Parks & Wildlife

Tourism operators across all sectors of the industry consider Tasmania's Parks & Reserves as either fundamental, important or very important to their business. Only 10% of respondents view Tasmania Parks & Reserves as not important to their business.

This baseline data will be compared each year in measuring the value of Parks & Reserves to the Tasmanian tourism industry, along with the strength of the partnership between the Tasmanian tourism industry and the Tasmanian Parks & Wildlife Service.

HOW IMPORTANT ARE TASMANIA'S PARKS & RESERVES TO YOUR BUSINESS



*Bruny Island Cruises,
Bruny Island*

