

Tasmanian Tourism Industry Business Sentiment Survey

Tourism Industry Council Tasmania

Spring – October 2019



About

Tourism Industry Council Tasmania (TICT) 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, along with 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.

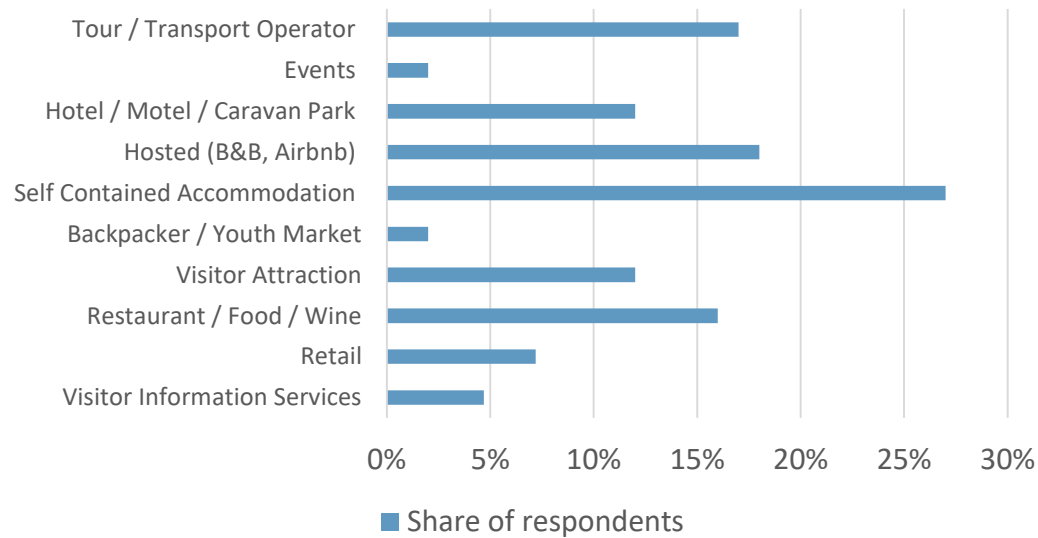
From **October 5 – October 22 2019**, TICT conducted the Spring 2019 survey of all Tasmanian tourism operators listed on the 'Tiger Tour' Database. The survey asked operators about their business performance over the past-6 months period, business expectations coming into the business spring and summer period, as well as their general outlook for the Tasmanian tourism industry over the 12

Sample

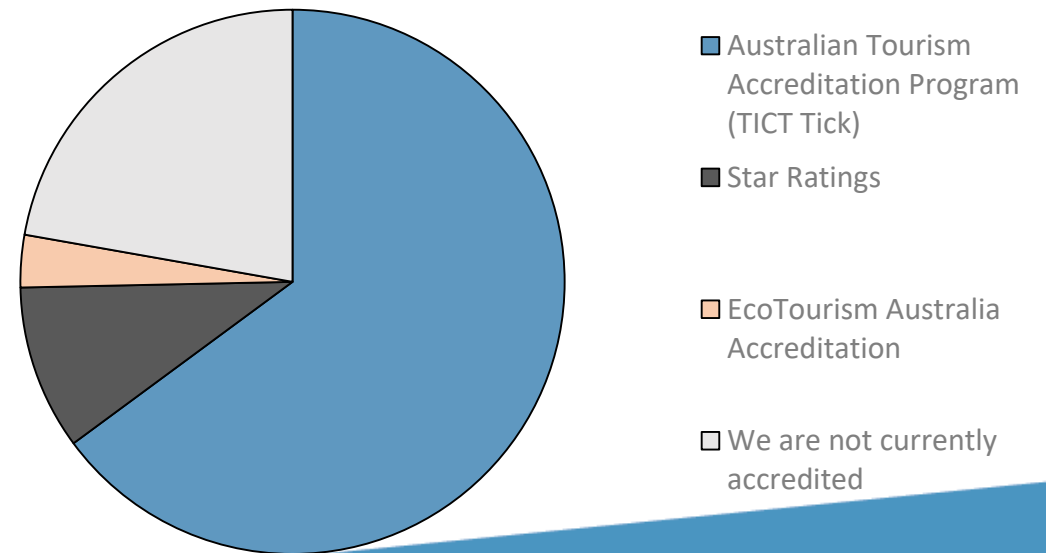
254 operators completed the survey.

This represents about 15% of all potential respondents, and is around the average response rate for this twice-yearly survey which hovers between 200 – 300 respondents.

“From the following list which best describes your business?”



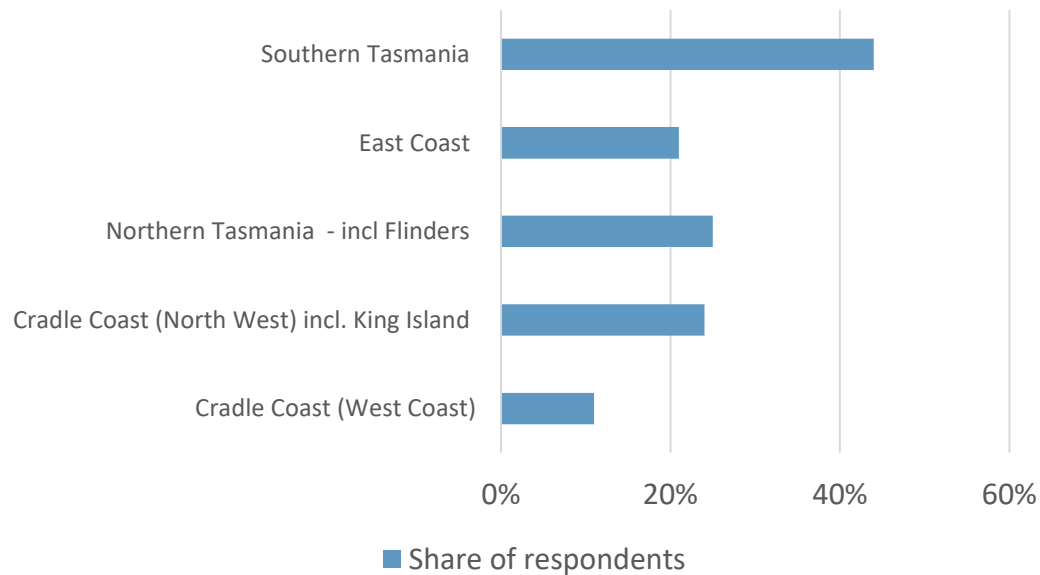
“Is your business tourism accredited with one of the following programs?”



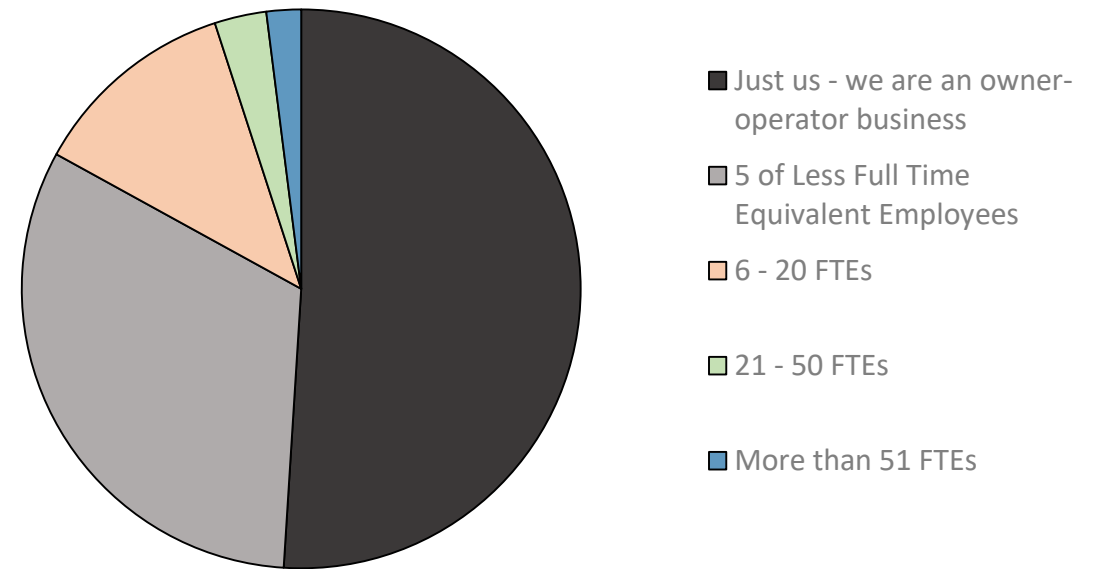
The sample is highly representative of the structure of the Tasmanian tourism industry, in terms of geographic spread across the State and type and size of businesses.

57% of respondents were based outside Southern Tasmania, and 4 out of 5 respondents were small businesses employing less than 5 FTEs.

“Which region(s) does your business operate within?”



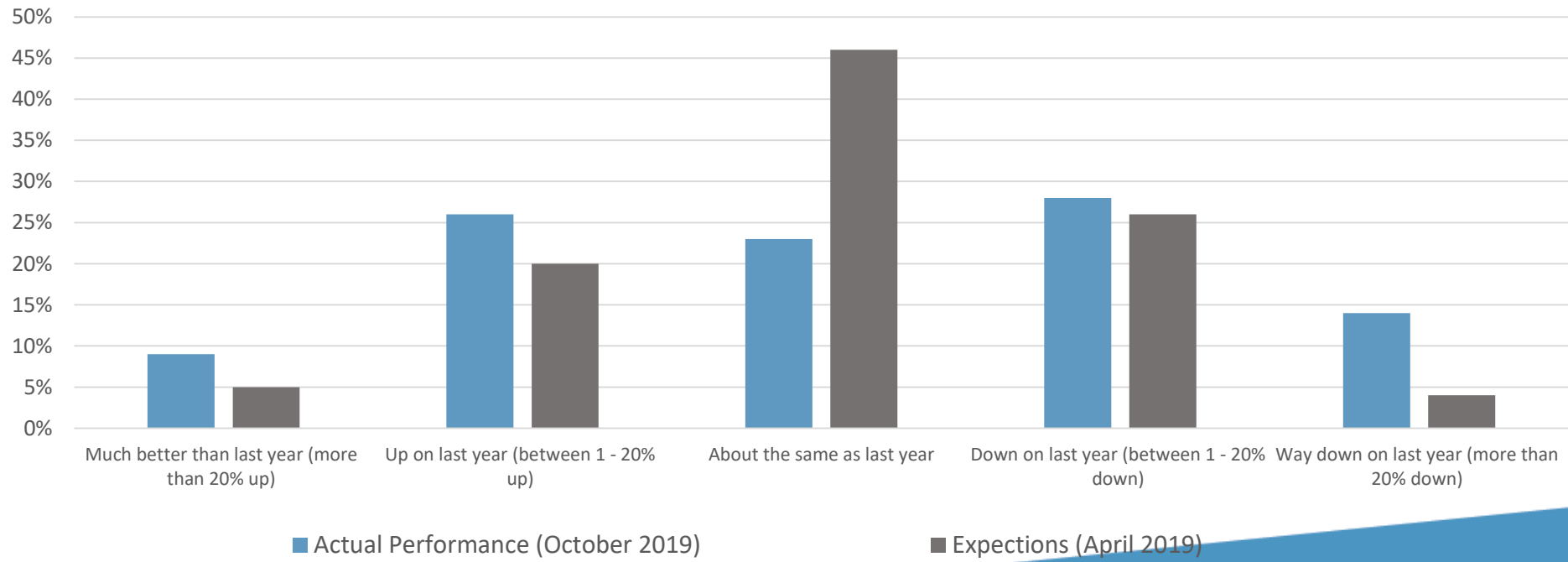
“How many Full Time Equivalent Employees does your business currently employ?”



Business Performance

35% of respondents reported business being up over the 2019 Autumn/Winter season compared to the same time last year.
 22% report similar business conditions to the same time last year
 42% report business being down on the same time last year.

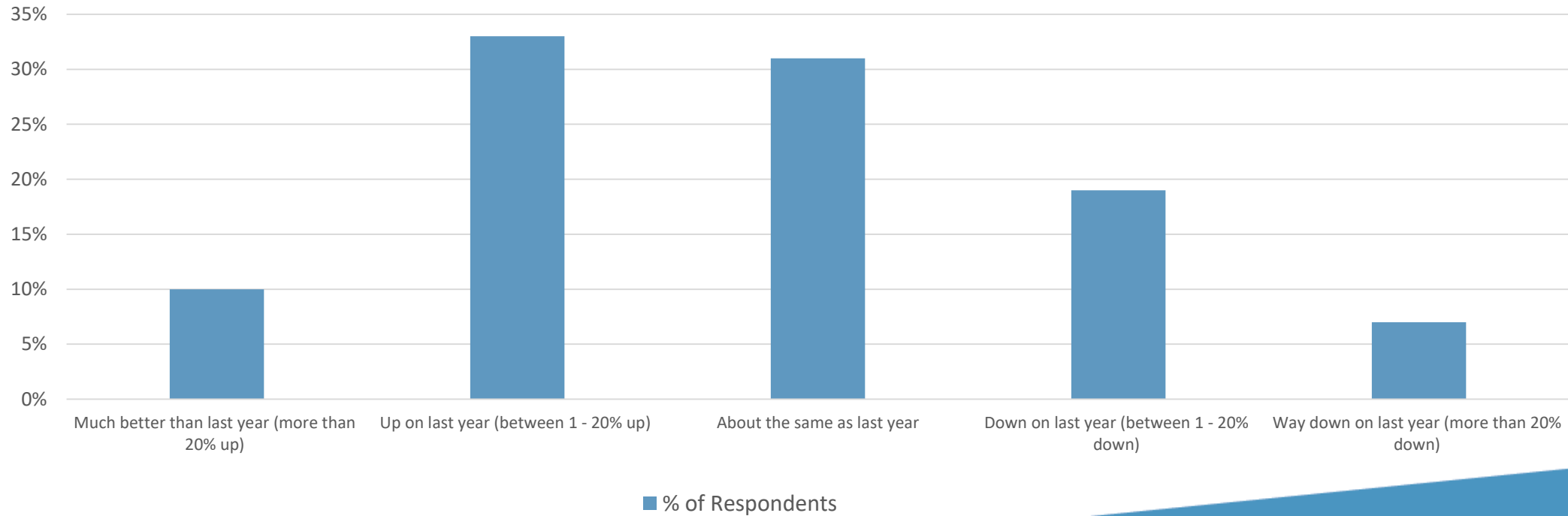
This is slightly different to expectations, with more operators experiencing a better winter than they were expecting, but equally more operators experiencing a weaker winter than they had expected.



Business Expectations

Coming into the forthcoming Spring/Summer peak visitor season, 43% of respondents expect their business to be up this year compared to the same time last year. 31% expect business to be about the same as last year, and 26% expect business to be down on last summer. This is consistent with the response to recent surveys.

'Looking at your forward bookings and inquiries, how are you expecting your business to perform over the coming Spring/Summer months (Oct 2019 – March 2020), compared to the same period last year (Oct 2018 – March 2019)?'

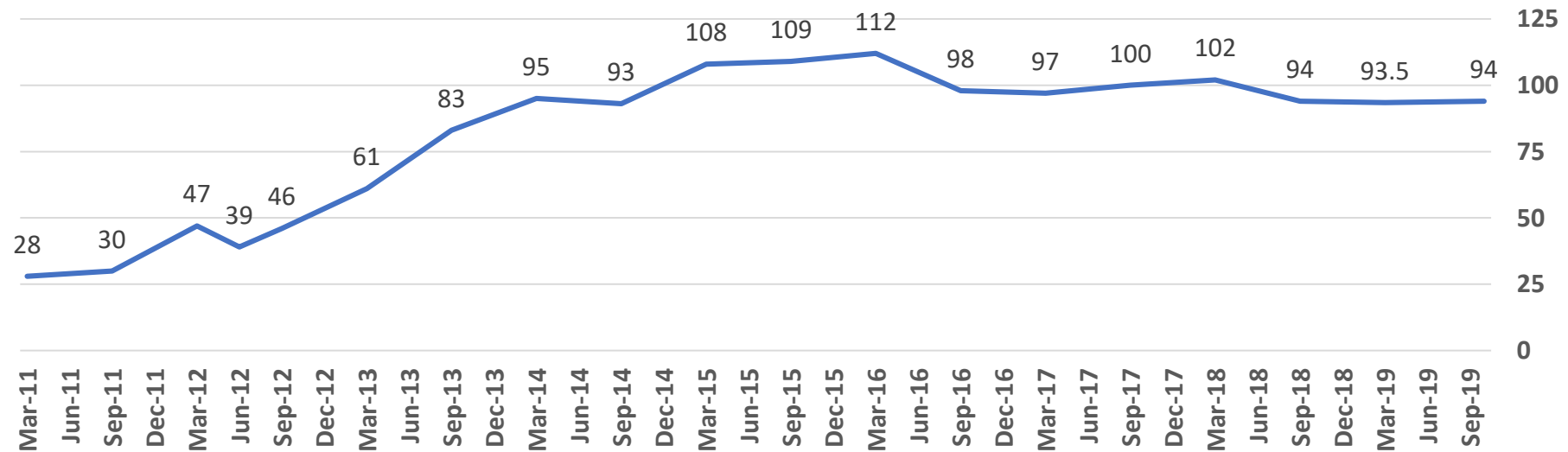


Tasmanian Tourism Industry Business Confidence Index

About this index:

50 Points is neutral. An index score above 50 Pts represents a positive industry outlook, below 50 Pts represents a negative industry outlook. The higher the score the more positive the responses. A consistent score above 50 Pts is considered representative of industry conditions encouraging further private investment and growth.

The Tasmanian Tourism Industry Business Confidence Index for Spring 2019 is steady at 94 Pts – maintaining a consistent very high level of industry confidence and positivity in the Tasmanian tourism industry since around 2013.



Industry Outlook

Operators continue to have a very positive outlook for the Tasmanian tourism industry over both the short and medium term: :

Looking ahead over the 12 months / 5 years, what is your outlook for the Tasmanian tourism industry generally?

