



THE TASMANIAN TOURISM INDUSTRY AUTUMN 2018 BUSINESS SENTIMENT SURVEY

APRIL 2018

About this survey

Taste of Tasmania, Hobart

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 27 – APRIL 6**, 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.

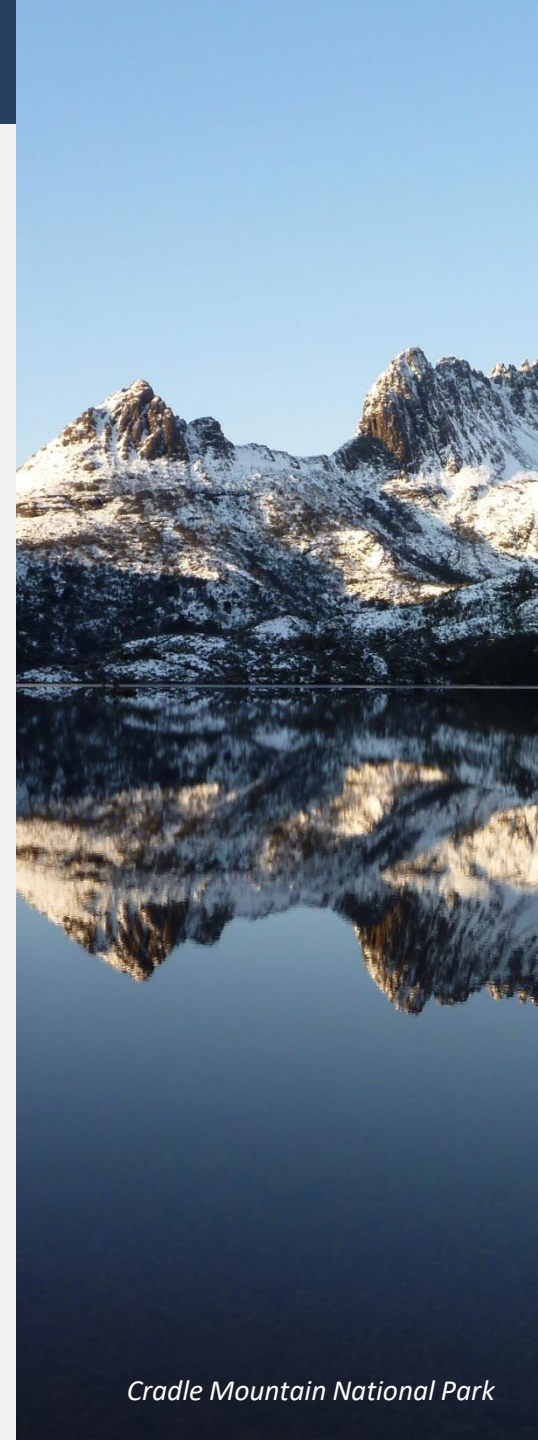
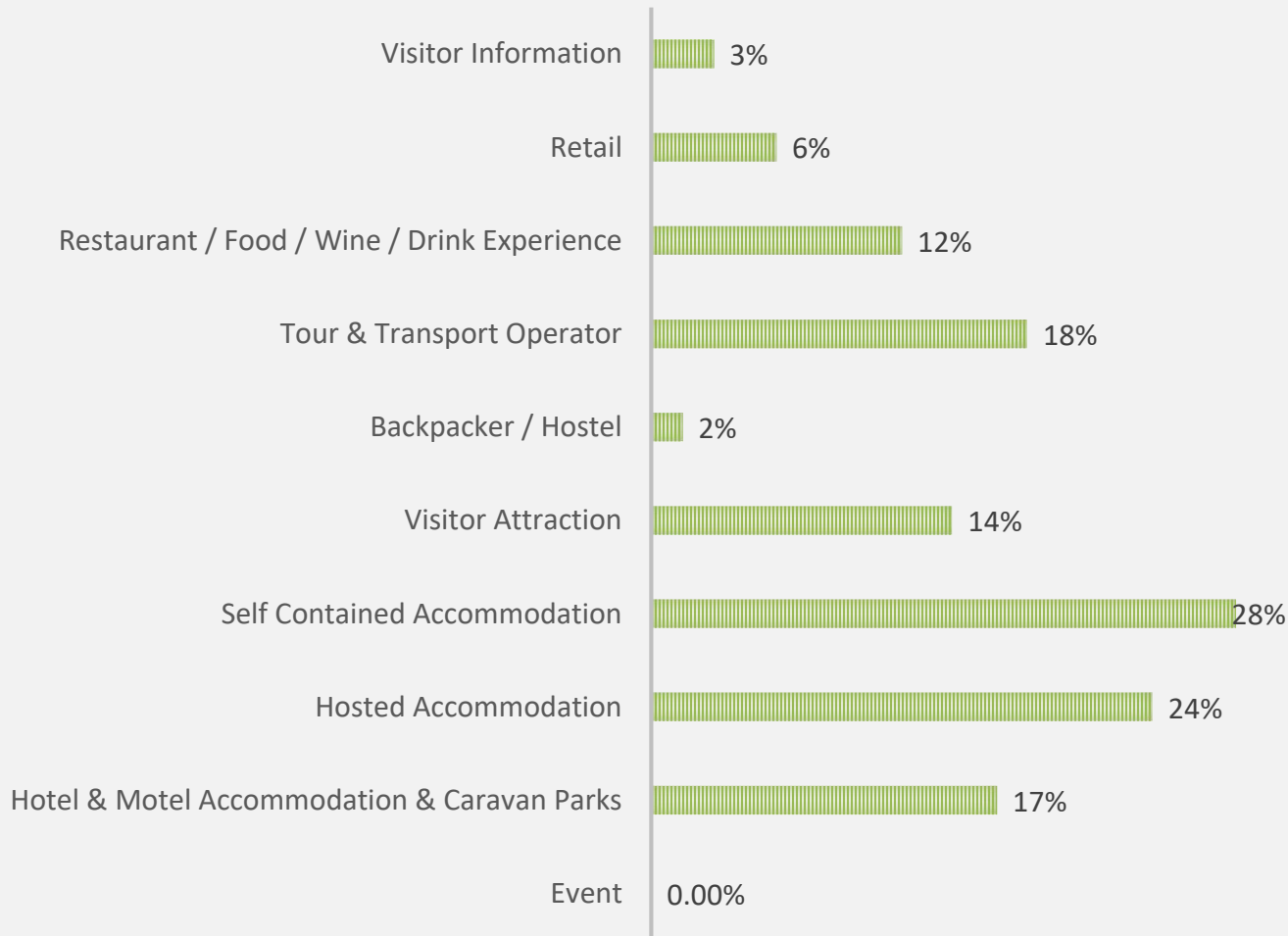
The results are compared across Tasmania's four tourism regions, and with past TICT business confidence survey.



Sample size by business type

172 operators completed the survey covering a broad cross section of the industry. This represents a 13% response rate.

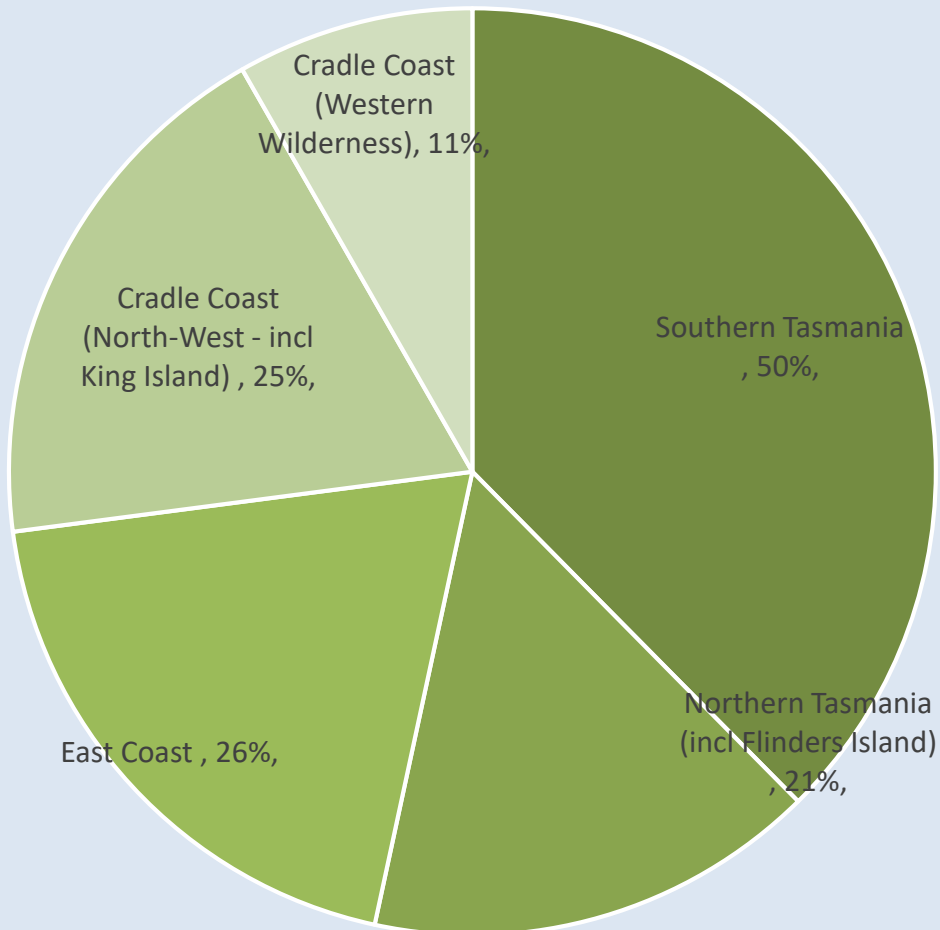
Which of the following best describes your business?



Sample size by region

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

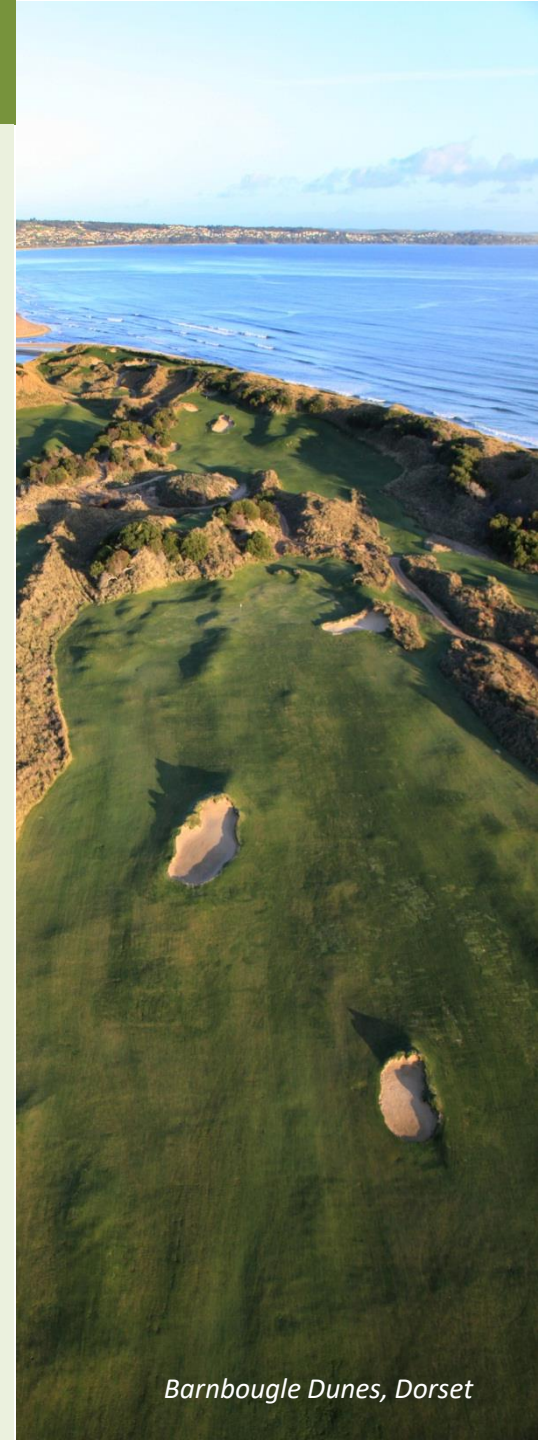
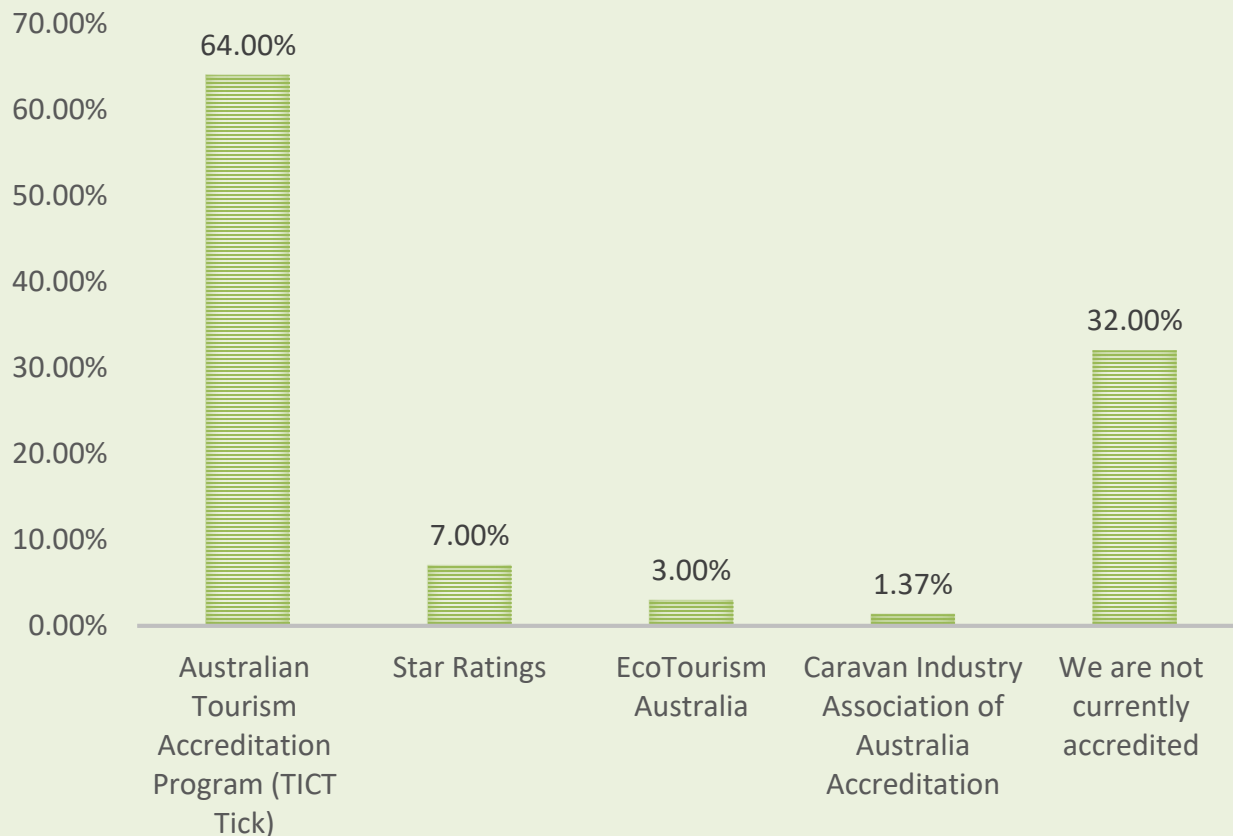
Note; Western Wilderness & North West Coast together make up the Cradle Coast Region.



Accreditation

68% 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?

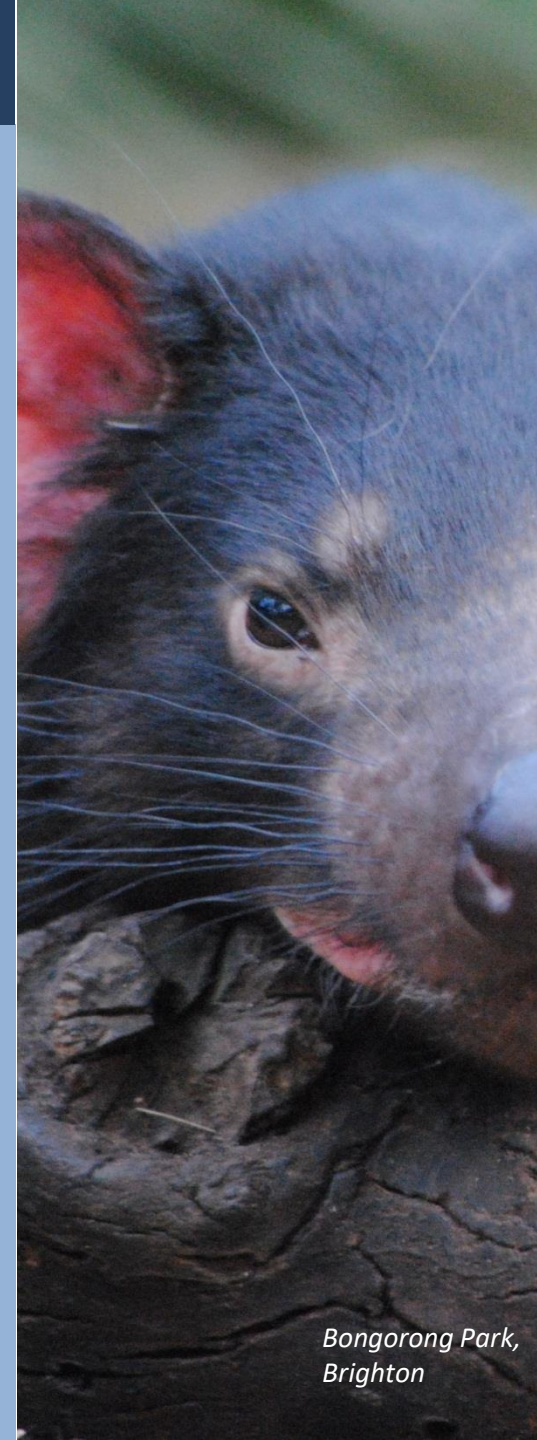
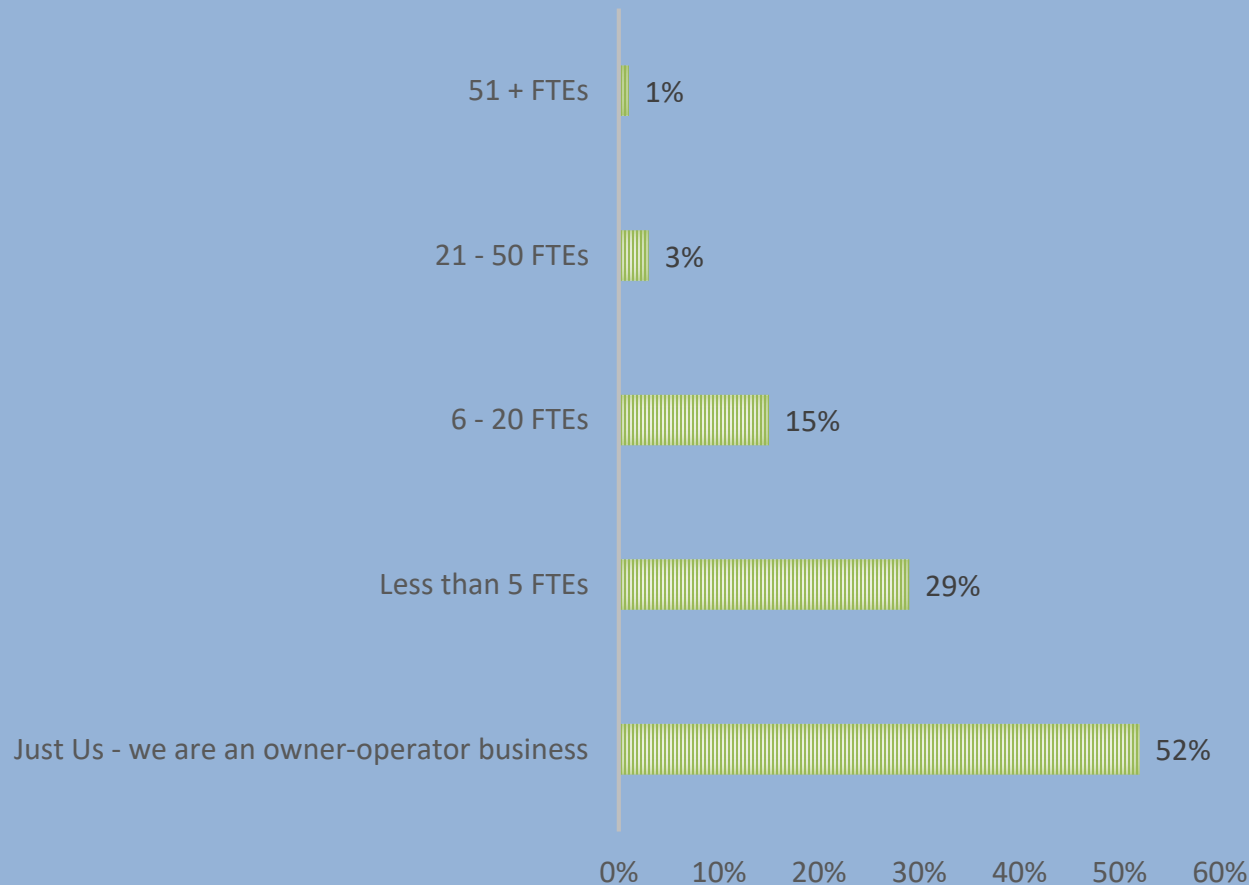


Barnbougle Dunes, Dorset

Sample by business size

81% 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?



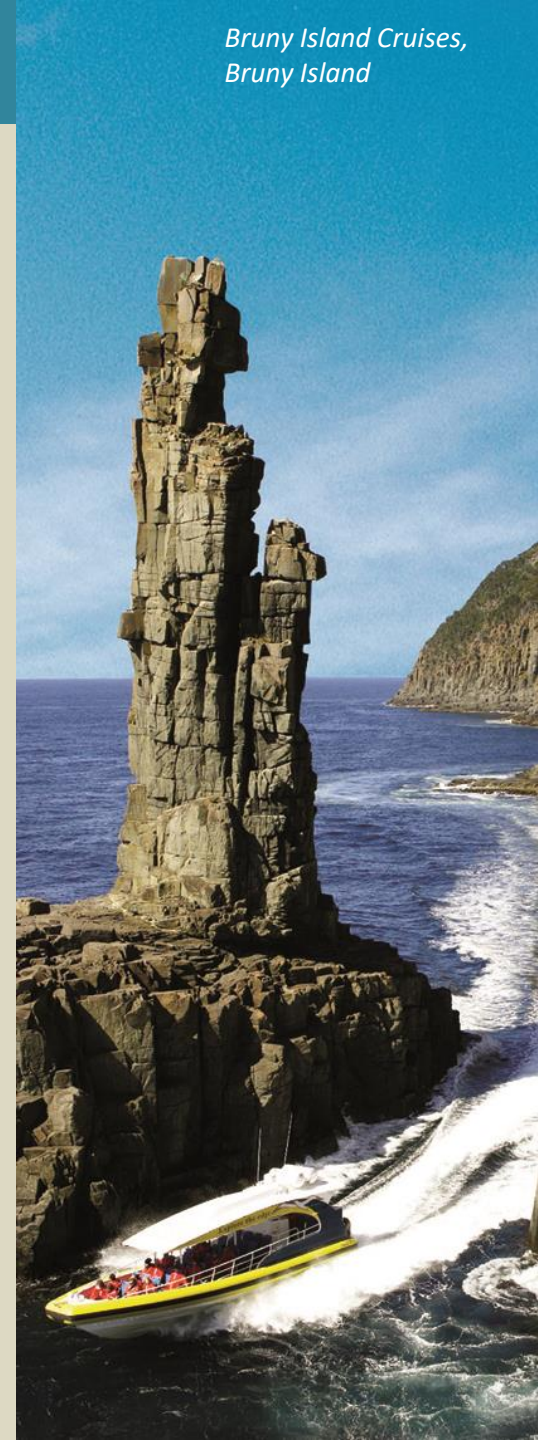
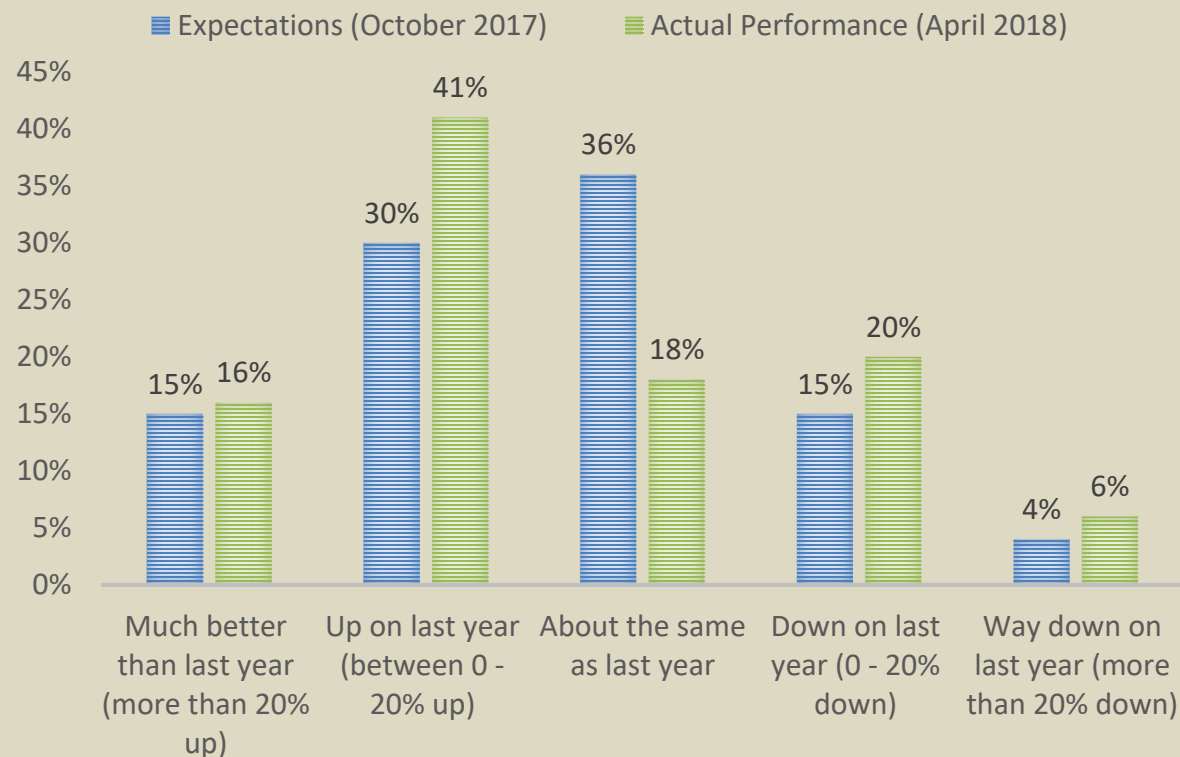
Bongorong Park,
Brighton

Business Performance vs Expectations

57% of operators report business being up this peak visitor season (Spring/Summer 2017/18) compared to the same time last year. While 26% were down on last year.

This is a slight shift on operators expectations for the peak visitor season coming into the peak visitor season.

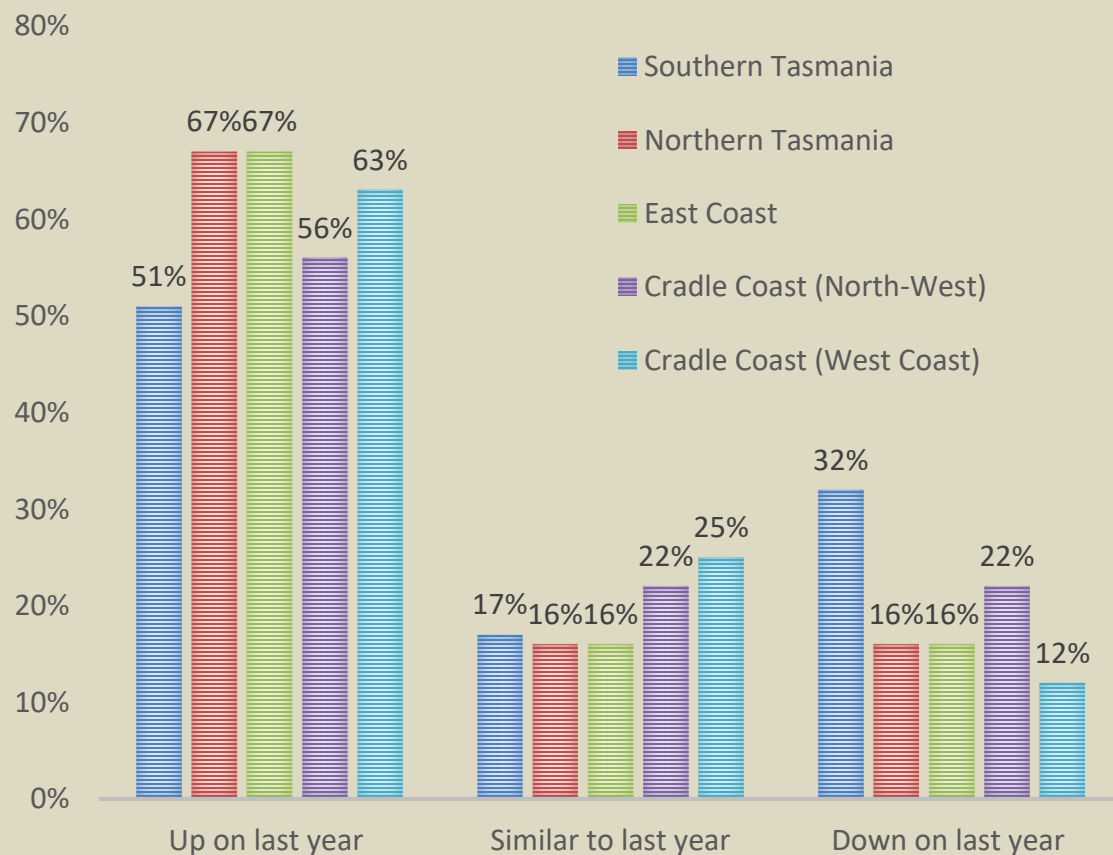
‘Looking at your own business performance over the past 6-months, how has this Spring/Summer visitor season (October 2017 – March 2018), compared to the same time the previous year (October 2016 – March 2017)?’



Business Performance across the Regions

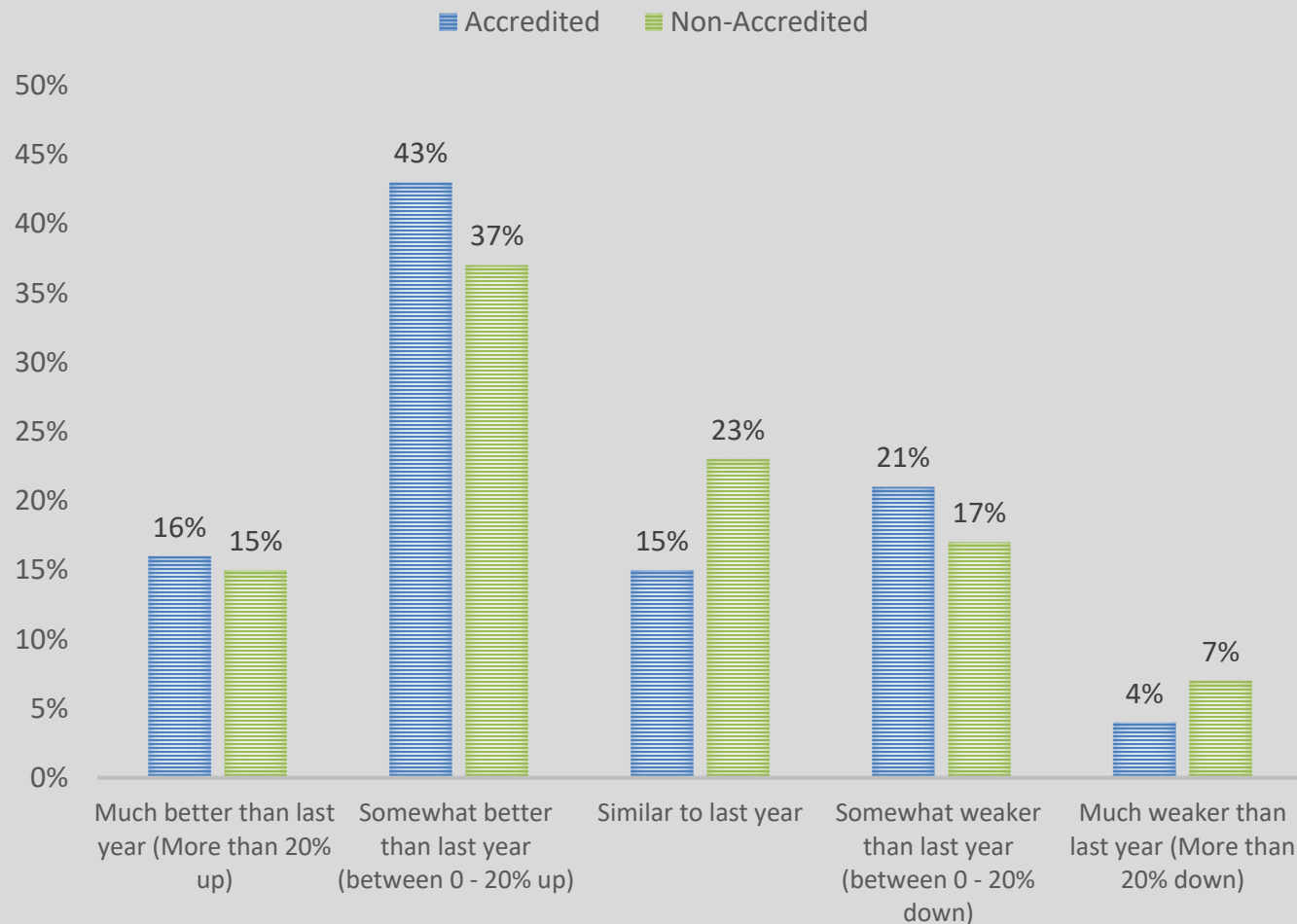
The responses from operators across different regions was largely consistent, albeit its interesting the largest samples from the South also reported the lowest business improvement.

‘Looking at your own business performance over the past 6-months, how has this Spring/Summer visitor season (October 2017 – March 2018), compared to the same time the previous year (October 2016 – March 2017)?’



Accredited / Non-Accredited Operators

As per all Business Sentiment Surveys, accredited tourism operators reported slightly stronger business performance than operators currently not accredited.



Expectations for Winter

Operators were asked to share their business expectations coming into the Autumn/Winter period, based on forward bookings and inquiries.

Around half of operators expect business to be about the same as last year, while 31% expect business to be up, and 24% down. Previous year's responses are shown for comparison.

*'Looking at your forward bookings and inquiries,
how are you expecting your business to perform over the coming Autumn/Winter months
(April – Sept 2018) compared to the same time last year (April – Sept 2017)?'*

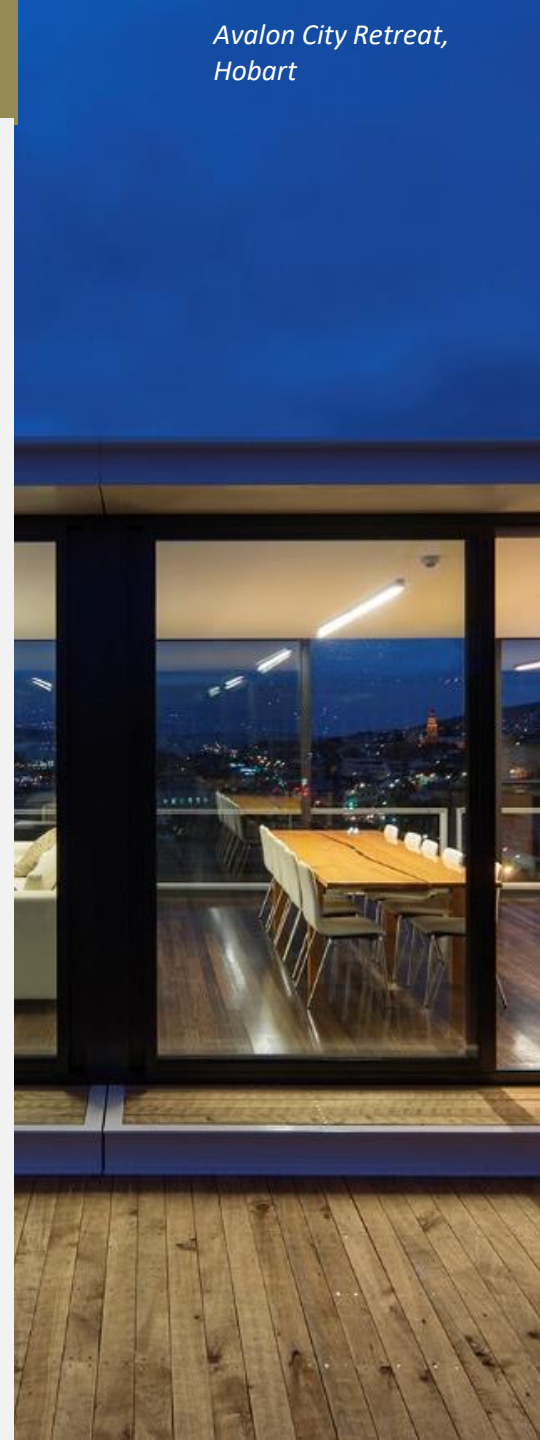
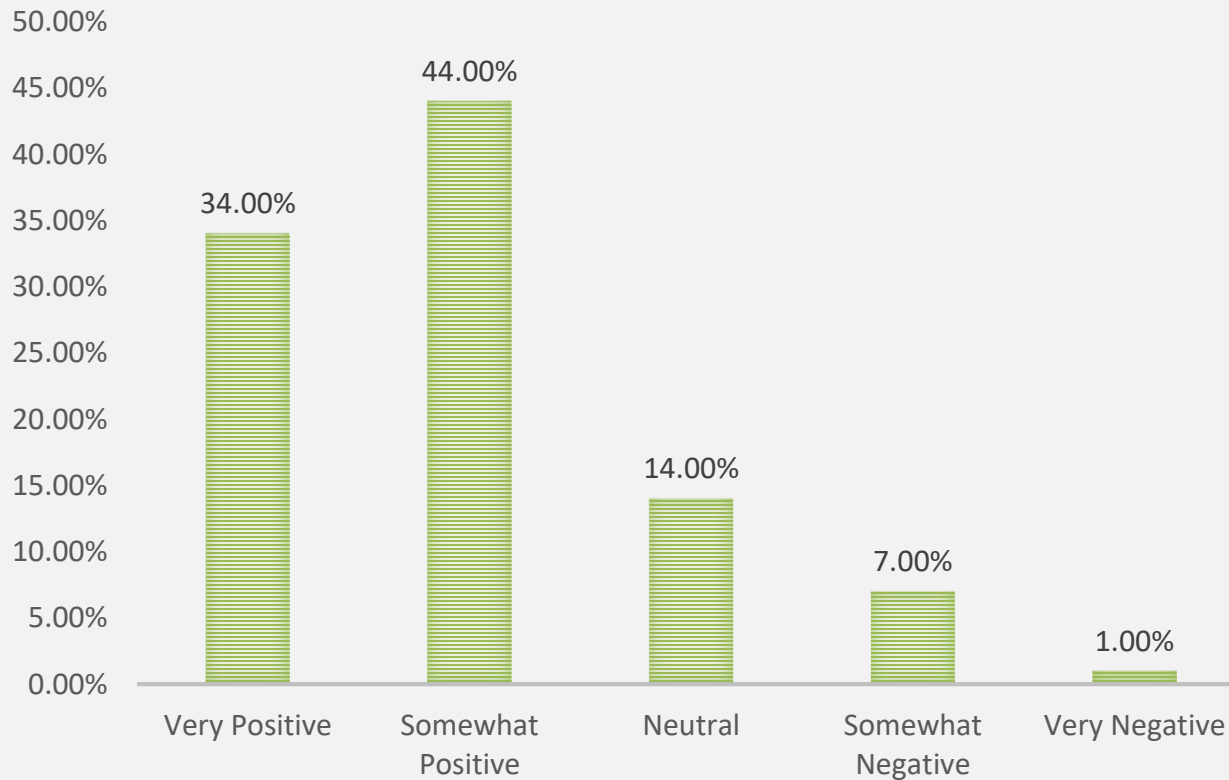


Wineglass Bay,
Freycinet National Park

Short term 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?*



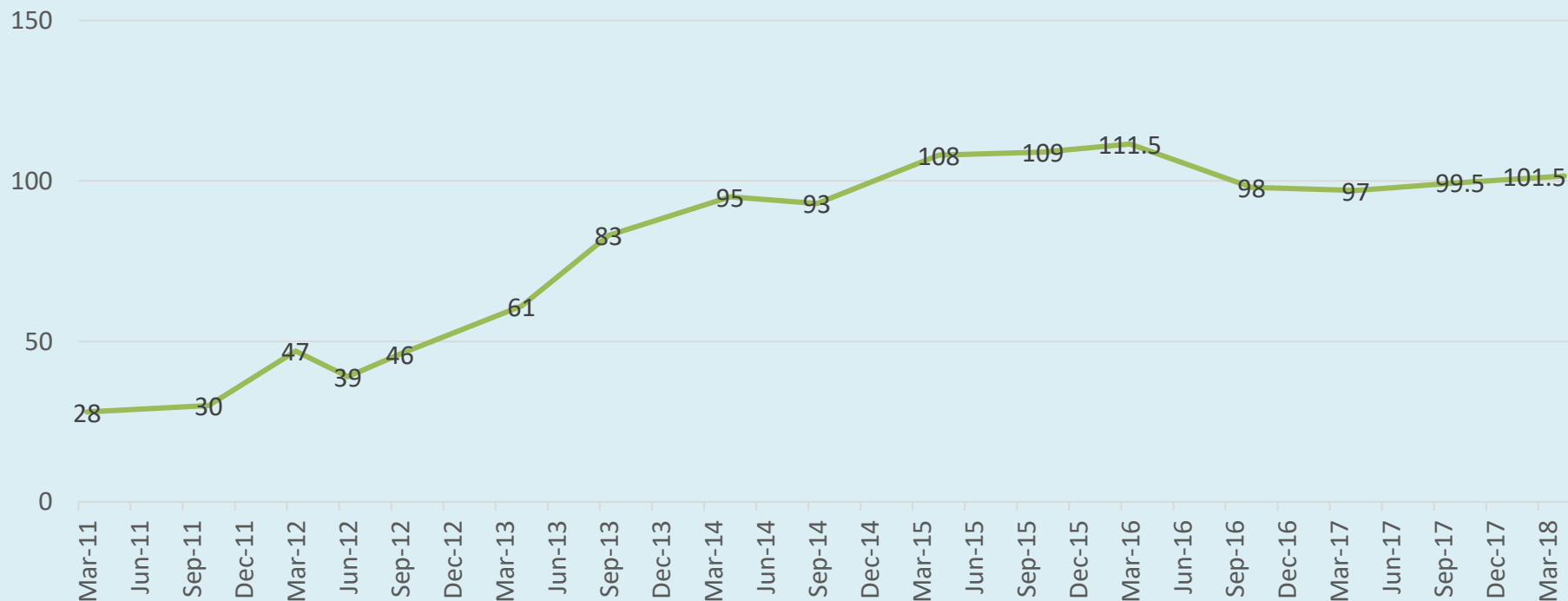
Tourism Industry Business Confidence Index

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 Points represent conditions representing sustained industry growth encouraging further investment.

The Tasmanian Tourism Industry Business Confidence Index for April 2018 is 101.5 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.



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?*

