

# International Tourism Snapshot

## International visitors to Tasmania, Year ending September 2009

### The International Forecast for Australia<sup>1</sup>

After a 4 year growth period, inbound visitor arrivals into Australia peaked in 2007 at 5.64 million. Numbers declined slightly (-1%) to 5.59 million in 2008, and are predicted to decline a further 0.5% in 2009. Inbound visitor numbers are not expected to return to the peak of 2007 until 2010, when a 4.3% increase is forecast with numbers to reach 5.80 million. The decline in arrivals to Australia in 2009 was driven heavily by the poor performance out of Japan and South Korea. Japanese visitor arrivals to Australia are estimated to have fallen by 23% to 351,000. In contrast, Japan was Australia's leading inbound market just 12 years ago with over 814,000 arrivals. Likewise, the South Korea inbound market is expected to have dropped sharply for the second successive year, down 20% to 174,000 arrivals in 2009 after falling 14% in 2008. In both markets a sharp appreciation of the Australian dollar against the home currency, reductions in direct aviation capacity and a larger response to the Swine flu outbreak mid-year than other markets contributed to a substantial decline in arrivals.

International business travel is estimated to have decreased 14% in 2009, while the largest segment, holiday travel, is estimated to have declined at a lesser rate (3%). Other purpose tourism segments are estimated to have increased moderately in 2009: Visiting friends or relatives (VFR) travel by 12% and the "other" travel purposes segment (education and employment segments) by 6%.

While higher economic growth and expanding aviation capacity are expected to boost arrivals in 2010, growth will be constrained by the negative impact on competitiveness of the high value of the Australian dollar and high and rising oil prices. Arrivals are therefore forecast to increase 4.3% (or 238,000) to 5.8 million in 2010. With the global economic recovery expected to gather pace over 2010, combined with the release of pent-up travel demand and expanding aviation capacity, inbound arrivals to Australia are forecast to rise 4.9% in 2011 and 4.7% in 2012.

### The International Forecast for Tasmania (international visitor nights)<sup>1</sup>

After 3 years of growth, international visitor nights peaked in 2006 at 3.16 million, or 151,400 visitors. Since that time, the number of nights spent by international visitors in the state has declined. During 2009, it is expected that the number of international visitor nights will reach 2.73 million (estimated at 142,200 visitors<sup>2</sup>), an 8.7% decrease on the 2008 total of 2.99 million nights (152,000 visitors). Beyond 2009, the number of nights spent by international visitors to the state is forecast to continue its decline through to 2012, when they are expected to increase by 0.8% to 2.61 million after falling to 2.59 million nights in 2011.

Despite being forecast to return to year on year growth from 2011, inbound visitor nights are not expected to return to the peak of 2007 until the end of the forecast period (2018), when they are forecast to reach 3.21 million. It should be noted that the accuracy of these forecasts will be influenced by a range of factors, including aviation capacity in and out of Australia and Tasmania, exchange rates, price competition in international aviation routes to Australia and fuel prices.

<sup>1</sup> Tourism Forecasting Committee, 2009 Issue 2

<sup>2</sup> Estimate is based on September 2009 IVS results for average length of stay in Tasmania (19.1 nights).

## International Visitors to Australia

According to the latest results of the International Visitor Survey (IVS), the number of international visitors to Australia declined marginally (-2%) over the year to September 2009, leaving the overall volume at the lowest level recorded in almost three years. Despite the ongoing fall in international visitor numbers, the Australian tourism industry has demonstrated its resilience during the global downturn and compares favourably against many other countries. Although unfavourable conditions are expected to continue affecting tourism demand, rates of decline are easing. The UNWTO<sup>3</sup>'s initial forecast for 2010 indicates that the combined international tourist arrivals for all nations are likely to witness a moderate recovery of 1% to 3%<sup>4</sup>.

Despite a decrease in international visitors to 5.1 million during the 12 months to September 2009, visitor nights and the expenditure of visitors from abroad rose to a record 175.3 million nights (+7%) and \$16 billion (+5%) respectively. However, international holiday (-4%) and business (-15%) travel to Australia continue to be the sectors most affected by the global economic downturn, while VFR (+11%) travel remains the most resilient to the crisis.

Source markets recording positive visitor growth over the year to September 2009 included: Malaysia (+22%), Taiwan (+26%), Hong Kong (+8%), India (+8%), France (+8%) and Singapore (+4%). In contrast, the decline in Japanese visitation (-24%) continues to heavily impact visitation numbers nationally. Visitation from Australia's other key source market, the United Kingdom (-3%) also declined over the year. Meanwhile, the number of visitors from the USA and New Zealand (+1%) remained stable, while visitors from Canada decreased by 3%.

The year to September 2009 saw a further drop in international holiday visitation to Australia (-4% to 2.38 million), the lowest level recorded since 2003. Most of the reduction in holiday visitation was out of Japan (-27%), Korea (-29%), China (-5%) and the UK (-5%). Meanwhile, holiday arrivals from New Zealand eased over the year, declining marginally (-1%). An increase in international VFR visitors (+7%) helped offset some of the impact of the decline in holiday visitors. Countries driving the growth in VFR travel included New Zealand (+10%), Malaysia (+36%), USA (+21%), UK (+3%), and China (+19%). Education (+8%) and employment (+3%) travel also recorded positive growth over the year. Business travel (-15%) on the other hand suffered significantly over the year to September 2009, experiencing the third quarterly decline in a row after almost six years of sustained growth.

## International Visitors to Tasmania

Tasmania recorded a greater decline in international visitors (-9%) than the national result (-2%). The number of international visitors to Tasmania, which has been decreasing steadily since March 2008, reached 143,600, with visitor nights (-11%) also down over the year. The total spend of international visitors, however, increased 8% over the year to September 2009 to \$275 million. Additional spend, together with fewer visitors and nights, saw the average spend per visitor and per night grow to \$1,790 (+17%) and \$93 (+19%) respectively. The fall in the Australian dollar, which was below US\$0.75 between September 2008 and April 2009, may have contributed to the increase in expenditure flowing from increased buying power of visitors from the United States during that period.

Nights spent by international visitors in Tasmania decreased to 2.75 million (-11%) over the year to September 2009. Education visitors are often key contributors to visitor nights growth, however Tasmania saw a decline in both education visitors (-2%) and the number of nights (-26%) they spent in the State. Other declines in visitor nights were from the business and VFR (-22%) sectors. Despite this, a strong increase in holiday nights (+12%) helped deflect what could have been a significantly worse performance in total nights. A larger decline in total

<sup>3</sup> World Tourism Organisation (UNWTO), October 2009, World Tourism Barometer

<sup>4</sup> Tourism Australia, November 2009, Global Market Monitor

nights (-11%) than in total visitors (-9%) meant, on average, international visitors spent less time in the State than the previous year, from 19.5 nights in the year to September 2008 to 19.2 nights in the year to September 2009.

Tasmania received 2% fewer holiday visitors in the year to September 2009 compared with the previous year. Compared with other states, Tasmania has weathered the overall holiday decline better than any other state/territory in Australia, aside from WA (-1%), with all states/territories recording a much greater decrease in holiday visitors. The 12% increase in nights spent by holiday visitors in Tasmania is also a positive result. VFR travel, which grew at the national level (+7%), declined in Tasmania (-22%), but represents a smaller proportion of international visitors to Tasmania (18% of all visitors) compared to any other State. Except for travel for employment, all other sectors in Tasmania declined over the year: Education (-2%), Business (-44%). The number of international visitors to Tasmania on business fell to 10,300, a continuation of the trend of decreasing business activity in response to the global financial crisis.

The majority of international visitors who come to Tasmania continue to only visit the major cities and not extend their itineraries into regional Tasmania. Only 16% of all nights spent by international visitors in Tasmania were spent in areas outside the major cities. Almost two thirds (65%) of all international visitor nights were spent in the Hobart and Surrounds Zone, followed by 19% of nights in Launceston, Tamar and the North Zone. Overall however, both areas recorded a decrease in the number of nights spent by international visitors compared to the previous year. In addition, there were decreases in the number of international visitors to each zone in the year to September 2009, with the greatest decrease (-18%) recorded in the Launceston, Tamar and the North Zone.

## Tasmania's International Visitor Market Share

### *International Visitor Share:*

Tasmania received 2.8% of all international visitors to Australia in the year to September 2009, slightly lower than in 2008 (3.0%). All states, aside from Western Australia (WA)(+4%) and Victoria (+1%), recorded decreases in visitor numbers and market shares. Tasmania experienced the greatest decline (-9%) in visitor numbers, followed by New South Wales (NSW)(-6%), Queensland (-6%), Australian Capital Territory (ACT)(-5%), Northern Territory (NT) (-3%), and South Australia (SA) (-2%). The bulk of the decline in visitors in all states was from the holiday and business markets. As has been the trend since the global economic downturn took effect, the inbound VFR market was the only significant growth market for all states aside from Tasmania (-22%), ACT (-21%), and the NT (-2%).

### *International Nights Share:*

For the fourth quarter in a row, Tasmania was the only state/territory to record a decline in visitor nights in the year to September 2009 (336,400 fewer nights), with the state's market share falling from 1.9% to 1.6%. The majority of the decline in nights was in the education sector (-26%) and there were also declines in VFR nights (-16%) and business nights. These declines were in part offset by the increase in holiday nights (+12%). Most other states/territories recorded good growth in the international VFR and education markets, hence outperforming Tasmania in overall visitor nights.

### *International Expenditure Share:*

Tasmania's share of all international expenditure (excluding package expenditure) in Australia remained unchanged at 1.6% in the year to September 2009. All states and territories recorded growth in expenditure. SA (+20%) achieved the strongest growth rate in international spend mainly due to its education market; followed by Victoria (+12%) with growth coming out of its VFR and education markets. Tasmania's overall spend growth was stimulated by strong expenditure increases in its holiday (+19%) and VFR (+50%) markets, despite negative growth in visitor numbers from these markets.

## Tasmania's International Markets Overview

Visitors from Asia, Europe, North America, the United Kingdom (UK) and New Zealand remain Tasmania's largest sources of international visitors for the year to September 2009. Year on year increases were recorded in visitors from Hong Kong (+35%), Malaysia (+28%), Indonesia and Taiwan (+92%). However, these increases were offset by declines out of Korea (-49%), China (-42%) and Japan (-35%), and hence a key influence in the fall in total international visitors from Asia to Tasmania. Similarly, there were decreases out of the UK (-7%), the USA (-6%) and Canada (-21%). Despite fewer visitors, the UK and the USA each recorded a significant increase in the total spend by their visitors in the state (+15% and +50% respectively), along with visitors from New Zealand (+13%).

### *North America (Canada and United States of America):*

The number of visitors to Australia from North America eased for the third quarter in a row after six years of steady and continuous growth to December 2008. Tasmania's share of visitors from North America decreased to 27,400 (-11%) over the year to September 2009. A decline in holiday and business travel was responsible for the decrease in Tasmania, while growth in VFR travel helped moderate a larger overall decrease.

### *United Kingdom (UK):*

In line with a national decline in visitors from the UK (-3%), Tasmania experienced a decrease in visitors numbers from this market (-7%). Most of the decline at the national level was due to a reduction in holiday (-5%) and business travel (-13%), while the decline for Tasmania was primarily from a drop in holiday (-9%) and VFR travel (-25%).

### *New Zealand (NZ):*

While there was a slight increase in the number of NZ visitors (+1%) to Australia over the year, Tasmania experienced a -9% decrease in visitor numbers from NZ, largely as a result of a decrease in holiday (-13%) travel.

### *Total Europe (Germany and Other Europe):*

Visitor numbers to Australia from Europe decreased by 3% to 631,500 over the year to September 2009. Most of the decline at the national level was due to a reduction in business travel (20%) and other reasons not specified (45%), Tasmania's share of total European visitors was 9% of this total, or 55,400 visitors; down 8% on the previous year mainly as a result of a 47% decline in VFR travel. The number of Germans visiting Australia decreased 1% to 151,800, and the number who visited Tasmania during the same period decreased 3% to 8,500 mainly as a result of a 3% decline in holiday travel.

### *Japan:*

Japanese visitors numbers continue to decline at a rapid rate both nationally (-24%) and consequently to Tasmania (-35%). Most of this decline is due to a significant reduction in Japanese holiday travel and education and locally, VFR travel.

### *Other Asia (excluding Japan but including China, Korea, Hong Kong, Singapore, Malaysia, Indonesia, Taiwan, Thailand):*

The number of visitors from the combined Asian nations (excluding Japan) increased 3% for Australia whereas for Tasmania there was a 2% decrease over the year to September 2009. Tasmania's decrease was primarily due to a 71% decrease in business visitors, while nationally the growth was due to a 16% increase in VFR travel. Asian countries recording positive growth in Tasmania included; Hong Kong (+33%), Malaysia (+28%), Taiwan and Indonesia. However, a decline in visitors from Korea (-49%) and China (-42%) helped counter any potential overall gain in the number of visitors from Other Asia.

## International Visitor Tables

	TASMANIA			AUSTRALIA		
	12 months ending Sep 08	12 months ending Sep 09	% Change	12 months ending Sep 08	12 months ending Sep 09	% Change
International visitors	158,300	143,600	▼ -9	5,201,000	5,098,000	▼ -2
International nights	3,090,200	2,753,800	▼ -11	164,492,600	175,258,400	▲ 7
Average Length of Stay (nights)	19.5	19.2	▼ -2	31.6	34.4	▲ 9
Expenditure - <u>excluding</u> package expenditure (\$million)	\$243	\$257	▲ 6	\$15,423	\$16,161	▲ 5
Expenditure - <u>including</u> package expenditure (\$million)	\$255	\$275	▲ 8	\$16,538	\$17,141	▲ 4
Average expenditure per visitor <sup>1</sup>	\$1,535	\$1,790	▲ 17	\$2,965	\$3,170	▲ 7
Average expenditure per night <sup>1</sup>	\$79	\$93	▲ 19	\$94	\$92	▼ -2
<b>Market Share</b>						
Visitors	3.0%	2.8%	▼	100%	100%	
Nights	1.9%	1.6%	▼	100%	100%	
Expenditure <sup>1</sup>	1.6%	1.6%	▶	100%	100%	
<b>International Purpose of visit <sup>2</sup></b>						
Holiday	106,800	104,700	▶ -2	2,476,900	2,380,400	▼ -4
Visit friends or relatives	33,800	26,200	▼ -22	1,125,600	1,244,200	▲ 11
Business	18,400	10,300	▼ -44	896,500	760,600	▼ -15
Education	8,800	8,700	▼ -1	373,500	401,800	▲ 8
Employment	1,800	2,800	▲ 56	113,700	121,000	▲ 6
Other reason	2,000	3,000	▲ 50	214,800	190,000	▼ -12
<b>Total international visitors</b>	<b>158,300</b>	<b>143,600</b>	<b>▼ -9</b>	<b>5,201,000</b>	<b>5,098,000</b>	<b>▼ -2</b>

Source: International Visitor Survey, Tourism Research Australia

<sup>1</sup> Average spend per visitor, spend per night and expenditure market share is calculated using expenditure excluding package spend.

<sup>2</sup> The sum of the reasons for visiting Tasmania may be greater than the total as a visitor can give more than one reason for their visit.

np - not published due to data reliability.

▲ Increase on year ending Sept 08, ▼ Decrease on year ending Sept 08, ▶ No change on year ending Sept 08

Table 2. International visitor nights spent in Tasmania

	Nights						
	12 months	12 months	% Change		Average		% Change
	ending Sep 08	ending Sep 09			Stay Sep 08	Average Stay Sep 09	
Holiday	962,800	1,074,000	▲	12	9.0	10.3	▲ 14
Visit friends or relatives	582,100	487,600	▼	-16	17.2	18.6	▲ 8
Business	np	np	np	np	np	np	np
Education	1,266,400	943,300	▼	-26	143.9	108.4	▼ -25
Employment	np	np	np	np	np	np	np
Other	np	np	np	np	np	np	np
Total	3,090,200	2,753,800	▼	-11	19.5	19.2	▼ -2

Source: International Visitor Survey, Tourism Research Australia

np - not published due to data reliability.

▲ Increase on year ending Sept 08, ▼ Decrease on year ending Sept 08, ► No change on year ending Sept 08

Table 3. International visitor expenditure spent in Tasmania by purpose of visit<sup>1</sup>

	Expenditure (excluding package \$)							
	12 months	12 months	% Change		Average \$	Average \$	Average \$	Average \$
	ending Sep 08	ending Sep 09			per visitor (08)	per visitor (09)	per night (08)	per night (09)
	\$ million	\$ million			\$	\$	\$	\$
Holiday	\$86	\$102	▲	19	\$805	\$974	\$89	\$95
Visit friends or relatives	\$26	\$39	▲	50	\$769	\$1,489	\$45	\$80
Business	\$25	\$18	▼	-28	\$1,359	\$1,748	np	np
Education	\$100	\$79	▼	-21	\$11,364	\$9,080	\$79	\$84
Other	np	\$18	np	np	np	\$6,429	np	np
Total	\$243	\$257	▲	6	\$1,535	\$1,790	\$79	\$93

Source: International Visitor Survey, Tourism Research Australia

<sup>1</sup> Modelled expenditure *excluding* package expenditure

np - not published due to data reliability.

▲ Increase on year ending Sept 08, ▼ Decrease on year ending Sept 08, ► No change on year ending Sept 08

Table 4. Origin of international visitors to Tasmania

Country of residence	Visitors		
	12 months ending Sep 08	12 months ending Sep 09	% Change
New Zealand	14,800	13,400	▼ -9
Japan	8,200	5,300	▼ -35
Hong Kong (SAR of China)	3,700	5,000	▲ 35
Singapore	6,200	5,300	▼ -15
Malaysia	4,300	5,500	▲ 28
Indonesia	np	2,200	np
Taiwan	2,400	4,600	▲ 92
Thailand	np	np	np
Korea	5,500	2,800	▼ -49
China (excludes SARs and Taiwan Province)	8,400	4,900	▼ -42
India	1,800	1,500	▼ -17
OA	4,700	4,300	▼ -9
USA includes Hawaii	20,700	19,500	▼ -6
Canada	10,000	7,900	▼ -21
United Kingdom	28,300	26,200	▼ -7
Germany	8,700	8,500	▼ -2
Scandinavia	3,100	3,800	▲ 23
France	4,300	4,000	▼ -7
Italy	np	np	np
Netherlands	3,400	3,000	▼ -12
Switzerland	3,300	2,500	▼ -24
OE	9,300	7,400	▼ -20
Other Countries	9,100	7,500	▼ -18
<b>Total</b>	<b>158,300</b>	<b>143,600</b>	<b>▼ -9</b>

Source: International Visitor Survey, Tourism Research Australia

np - not published due to data reliability.

▲ Increase on year ending Sept 08, ▼ Decrease on year ending Sept 08, ► No change on year ending Sept 08

Table 5. International visitor nights spent in Tasmania

Country of residence	Nights		
	12 months ending Sep 08	12 months ending Sep 09	% Change
New Zealand	152,500	192,200	▲ 26
Japan	290,200	108,600	▼ -63
Hong Kong (SAR of China)	np	np	np
Singapore	159,400	np	np
Malaysia	369,700	370,300	▶ 0
Indonesia	np	np	np
Taiwan	np	139,600	np
Thailand	np	np	np
Korea	115,800	144,000	▲ 24
China (excludes SARs and Taiwan Province)	101,400	247,700	▲ 144
India	np	np	np
Other Asia	425,200	349,500	▼ -18
North America	299,700	246,700	▼ -18
USA includes Hawaii	166,200	152,300	▼ -8
Canada	133,500	np	np
United Kingdom	390,600	354,000	▼ -9
Germany	172,100	149,300	▼ -13
Scandinavia	np	np	np
France	np	np	np
Italy	np	np	np
Netherlands	np	np	np
Switzerland	np	np	np
Other Europe	336,100	297,300	▼ -12
Other Countries	277,500	154,700	▼ -44
Total	3,090,200	2,753,800	▼ -11

Source: International Visitor Survey, Tourism Research Australia

np - not published due to data reliability.

▲ Increase on year ending Sept 08, ▼ Decrease on year ending Sept 08, ▶ No change on year ending Sept 08

Table 6. Expenditure of international visitors in Tasmania

Country of residence	Expenditure				Average \$ per visitor Sep 08	Average \$ per visitor Sep 09	Average \$ per night Sep 08	Average \$ per night Sep 09
	12 months ending Sep 08	12 months ending Sep 09	% Change					
	\$million	\$million	%					
New Zealand	\$15	\$17	▲	13	\$1,014	\$1,269	\$98	\$88
United Kingdom	\$27	\$31	▲	15	\$954	\$1,183	\$69	\$88
Germany	\$10	\$10	▶	0	\$1,149	\$1,176	\$58	\$67
Scandinavia	np	np	np	np	np	np	np	np
Switzerland	np	np	np	np	np	np	np	np
Netherlands	np	np	np	np	np	np	np	np
France	\$4	np	np	np	\$930	np	np	np
Italy	np	np	np	np	np	np	np	np
Other Europe	np	np	np	np	np	np	np	np
North America	\$26	\$31	▲	19	\$847	\$1,131	\$87	\$126
United States of America	\$16	\$24	▲	50	\$773	\$1,231	\$96	\$158
Canada	\$10	\$7	▼	-30	\$1,000	\$886	\$96	np
Japan	\$15	\$8	▼	-47	\$1,829	\$1,509	\$52	\$74
China	np	\$21	np	np	np	\$4,286 np		\$85
Korea	np	np	np	np	np	np	np	np
Singapore	np	np	np	np	np	np	np	np
Malaysia	np	np	np	np	np	np	np	np
Hong Kong	np	np	np	np	np	np	np	np
Indonesia	np	np	np	np	np	np	np	np
Thailand	np	np	np	np	np	np	np	np
India	np	np	np	np	np	np	np	np
Taiwan	np	np	np	np	np	np	np	np
Other Asia	np	np	np	np	np	np	np	np
Other Countries	\$19	\$15	▼	-21	\$2,088	\$2,000	\$68	\$97
<b>Total</b>	<b>\$243</b>	<b>\$257</b>	<b>▲</b>	<b>6</b>	<b>\$1,535</b>	<b>\$1,790</b>	<b>\$79</b>	<b>\$93</b>

Source: International Visitor Survey, Tourism Research Australia

n.p. not published due to data reliability

▲ Increase on year ending Sept 08, ▼ Decrease on year ending Sept 08, ▶ No change on year ending Sept 08

Table 7. Origin of international visitors to **Australia** - visitors and nights

Origin	Visitors				Nights					
	12 months ending Sep 08	12 months ending Sep 09	% Change		12 months ending Sep 08	12 months ending Sep 09	% Change		Average Length of Stay (08)	Average Length of Stay (09)
	visitors	visitors			nights	nights			nights	nights
New Zealand	1,000,417	1,005,664	▲	1	13,536,464	13,905,986	▲	3	13.5	13.8
Japan	458,428	347,960	▼	-24	9,336,801	7,413,171	▼	-21	20.4	21.3
Hong Kong (SAR of China)	129,596	140,192	▲	8	4,015,048	4,749,631	▲	18	31.0	33.9
Singapore	233,819	243,421	▲	4	5,455,381	5,343,910	▼	-2	23.3	22.0
Malaysia	151,281	184,403	▲	22	5,595,396	6,847,383	▲	22	37.0	37.1
Indonesia	88,200	92,024	▲	4	3,699,632	3,681,676	▼	-0	41.9	40.0
Taiwan	72,029	90,987	▲	26	2,899,204	4,134,160	▲	43	40.3	45.4
Thailand	75,184	72,869	▼	-3	3,228,459	3,927,405	▲	22	42.9	53.9
Korea	215,140	169,046	▼	-21	10,717,599	11,697,081	▲	9	49.8	69.2
China (excludes SARs and Taiwan Pro)	347,319	343,821	▼	-1	15,959,286	18,407,751	▲	15	45.9	53.5
India	106,005	114,580	▲	8	6,061,267	7,386,569	▲	22	57.2	64.5
Other Asia	119,519	126,618	▲	6	7,002,439	7,331,574	▲	5	58.6	57.9
USA includes Hawaii	432,364	431,171	▼	-0	9,850,897	9,359,525	▼	-5	22.8	21.7
Canada	117,104	113,740	▼	-3	4,515,024	4,908,753	▲	9	38.6	43.2
United Kingdom	637,943	620,073	▼	-3	20,620,293	22,287,161	▲	8	32.3	35.9
Germany	153,431	151,778	▼	-1	6,693,775	7,554,010	▲	13	43.6	49.8
Scandinavia	80,981	77,300	▼	-5	3,315,529	3,215,033	▼	-3	40.9	41.6
France	78,373	84,323	▲	8	3,710,095	4,444,063	▲	20	47.3	52.7
Italy	57,459	50,515	▼	-12	2,288,950	2,427,529	▲	6	39.8	48.1
Netherlands	50,326	49,834	▼	-1	2,294,057	1,964,610	▼	-14	45.6	39.4
Switzerland	39,267	38,273	▼	-3	1,709,248	1,550,964	▼	-9	43.5	40.5
Other Europe	192,025	179,428	▼	-7	8,931,645	8,657,989	▼	-3	46.5	48.3
Other Countries	364,784	369,994	▲	1	13,056,077	14,062,422	▲	8	35.8	38.0
<b>Total</b>	<b>5,200,993</b>	<b>5,098,013</b>	<b>▼</b>	<b>-2</b>	<b>164,492,566</b>	<b>175,258,357</b>	<b>▲</b>	<b>7</b>	<b>31.6</b>	<b>34.4</b>

Source: International Visitor Survey,

Tourism Research Australia

▲ Increase on year ending Sept 08, ▼ Decrease on year ending Sept 08, ► No change on year ending Sept 08

Table 8. Origin of international visitors to Australia - spend

Origin	Expenditure						
	12 months ending Sep 08	12 months ending Sep 09	% Change	Average \$ per visitor (08)	Average \$ per visitor (09)	Average \$ per night (08)	Average \$ per night (09)
	\$million	\$million		\$	\$	\$	\$
New Zealand	\$1,444	\$1,338	▼ -7	\$1,443	\$1,330	\$107	\$96
Japan	\$777	\$732	▼ -6	\$1,695	\$2,104	\$83	\$99
Hong Kong	\$480	\$531	▲ 11	\$3,704	\$3,788	\$120	\$112
Singapore	\$790	\$784	▼ -1	\$3,379	\$3,221	\$145	\$147
Malaysia	\$632	\$768	▲ 22	\$4,178	\$4,165	\$113	\$112
Indonesia	\$415	\$389	▼ -6	\$4,705	\$4,227	\$112	\$106
Taiwan	\$220	\$303	▲ 38	\$3,054	\$3,330	\$76	\$73
Thailand	\$303	\$351	▲ 16	\$4,030	\$4,817	\$94	\$89
Korea	\$876	\$905	▲ 3	\$4,072	\$5,354	\$82	\$77
China	\$1,476	\$1,789	▲ 21	\$4,250	\$5,203	\$92	\$97
India	\$475	\$575	▲ 21	\$4,481	\$5,018	\$78	\$78
Other Asia	\$451	\$532	▲ 18	\$3,773	\$4,202	\$64	\$73
United States of America	\$1,167	\$1,136	▼ -3	\$2,699	\$2,635	\$118	\$121
Canada	\$423	\$443	▲ 5	\$3,612	\$3,895	\$94	\$90
United Kingdom	\$1,839	\$1,804	▼ -2	\$2,883	\$2,909	\$89	\$81
Germany	\$554	\$587	▲ 6	\$3,611	\$3,867	\$83	\$78
Scandinavia	\$321	\$296	▼ -8	\$3,964	\$3,829	\$97	\$92
France	\$268	\$320	▲ 19	\$3,420	\$3,795	\$72	\$72
Italy	\$185	\$201	▲ 9	\$3,220	\$3,979	\$81	\$83
Netherlands	\$175	\$171	▼ -2	\$3,477	\$3,431	\$76	\$87
Switzerland	\$182	\$173	▼ -5	\$4,635	\$4,520	\$106	\$112
Other Europe	\$775	\$777	▲ 0	\$4,036	\$4,330	\$87	\$90
Other Countries	\$1,193	\$1,256	▲ 5	\$3,270	\$3,395	\$91	\$89
<b>Total</b>	<b>\$15,423</b>	<b>\$16,161</b>	<b>▲ 5</b>	<b>\$2,965</b>	<b>\$3,170</b>	<b>\$94</b>	<b>\$92</b>

Source: International Visitor Survey, Tourism Research Australia

<sup>1</sup> Modelled expenditure *excluding* package expenditure

▲ Increase on year ending Sept 08, ▼ Decrease on year ending Sept 08, ► No change on year ending Sept 08

Table 9. International visitors to States/Territories

State/ territory visited	Visitors				Nights				Expenditure			
	12 months ending Sep 08	12 months ending Sep 09	% Change	Visitor Share 09	12 mths ending Sep 08	12 mths ending Sep 09	% Change	Nights Share 09	12 mths ending Sep 08	12 mths ending Sep 09	% Change	Spend % 09
					('000s)	('000s)			\$million	\$million		
NSW	2,820,800	2,659,200	▼ -6	52%	57,400	59,500	▲ 4	34%	\$5,666	\$5,717	▲ 1	35%
VIC	1,486,800	1,501,700	▲ 1	29%	33,000	37,700	▲ 14	22%	\$3,294	\$3,701	▲ 12	23%
QLD	2,098,000	1,982,000	▼ -6	39%	39,500	40,000	▲ 1	23%	\$3,534	\$3,604	▲ 2	22%
SA	362,500	353,600	▼ -2	7%	6,700	7,100	▲ 6	4%	\$503	\$602	▲ 20	4%
WA	666,300	694,600	▲ 4	14%	18,700	21,200	▲ 13	12%	\$1,691	\$1,708	▲ 1	11%
TAS	158,300	143,600	▼ -9	3%	3,100	2,800	▼ -10	2%	\$243	\$257	▲ 6	2%
NT	338,900	328,400	▼ -3	6%	2,900	3,500	▲ 21	2%	\$294	\$342	▲ 16	2%
ACT	159,600	151,700	▼ -5	3%	2,600	2,900	▲ 12	2%	\$197	\$229	▲ 16	1%
*Total Australia	5,201,000	5,098,000	▼ -2	100%	164,500	175,300	▲ 7	100%	\$15,423	\$16,161	▲ 5	100%

Source: International Visitor Survey, Tourism Research Australia

\*Sum of components for State/territory visited will be greater than the total as a visitor can visit more than one state per visit to Australia.

▲ Increase on year ending Sept 08, ▼ Decrease on year ending Sept 08, ► No change on year ending Sept 08

Table 10. Purpose of visit to Tasmania by origin of international visitors, Year ending Sep 2009

Country of residence	Holiday		VFR <sup>1</sup>		Business		Education		Employment		Total	% Change
	%	Change	%	Change	%	Change	%	Change	%	Change		
United Kingdom	20,000	▼ -9	7,100	▼ -25	np	np	np	np	np	np	26,200	▼ -7
New Zealand	5,600	▼ -13	6,200	▼ -1	2,300	▼ -10	1,000	▲ 459	np	np	13,400	▼ -9
Total Asia	27,200	▲ 12	4,600	▼ -20	3,000	▼ -66	5,200	▼ -18	1,700	▲ 249	39,900	▼ -8
Japan	3,900	▼ -28	np	np	np	np	np	np	np	np	5,300	▼ -35
Other Asia	23,300	▲ 23	4,100	▼ -9	2,300	▼ -71	4,900	▼ -3	1,600	▲ 241	34,600	▼ -2
North America	22,400	▼ -6	4,300	▼ -8	1,300	▼ -69	1,000	▲ 64	np	np	27,400	▼ -11
USA	15,700	▼ -5	2,900	▼ 26	1,300	▼ -53	np	np	np	np	19,500	▼ -6
Canada	6,700	▼ -10	1,400	▼ -40	np	np	np	np	np	np	7,900	▼ -21
Total Europe	24,900	► 0	2,100	▼ -65	1,700	▼ -11	np	np	np	np	29,100	▼ -9
Germany	7,600	▼ -3	np	np	np	np	np	np	np	np	8,500	▼ -3
Other Europe	17,400	▲ 2	1,900	▼ -61	1,000	▼ -36	np	np	np	np	20,600	▼ -12
Other Countries	4,600	▼ -15	2,000	▲ 13	1,100	▲ 216	np	np	np	np	7,500	▼ -18
Total	104,700	▼ -2	26,200	▼ -22	10,300	▼ -44	8,700	▼ -2	2,800	▲ 55	143,600	▼ -9

Source: International Visitor Survey, Tourism Research Australia

<sup>1</sup> VFR - Visit friends and/or relatives

np - not published due to data reliability.

▲ Increase on year ending Sept 08, ▼ Decrease on year ending Sept 08, ► No change on year ending Sept 08

Table 11. Zones visited in Tasmania<sup>1</sup>

Zones Visted	Visitors					Nights			
	12 months	12 months	% Change	09 Visitor Share	12 months ending Sep 08	12 months	% Change	09 Nights Share	
	ending Sep 08	ending Sep 09				ending Sep 09			
Hobart and Surrounds	128,700	120,100	▼ -7	84%	2,022,300	1,803,000	▼ -11	65%	
Launceston, Tamar and the North	67,500	55,200	▼ -18	38%	639,700	531,500	▼ -17	19%	
The North West and King Island	42,200	37,700	▼ -11	26%	246,000	np	np	np	
Western Wilderness <sup>2</sup>	33,900	31,900	▼ -6	22%	np	np	np	np	
The East Coast and Flinders Island	34,100	31,200	▼ -9	22%	np	np	np	np	
<b>Total</b>	<b>158,300</b>	<b>143,600</b>	<b>▼ -9</b>		<b>3,090,200</b>	<b>2,753,800</b>	<b>▼ -11</b>		

Source: International Visitor Survey, Tourism Research Australia

<sup>1</sup> Zones are based on Tourism Tasmania's Marketing Zones.

<sup>2</sup> Western Wilderness includes Cradle Mountain.

np - not published due to data reliability

How to read this table: 65% of all international visitor nights in Tasmania in the 12 months to Sep 2009 were spent in Hobart and Surrounds.

▲ Increase on year ending Sept 08, ▼ Decrease on year ending Sept 08, ► No change on year ending Sept 08

Table 12. Accommodation used in Tasmania

Accommodation used	Visitors					Nights			
	12 months	12 months	% Change	09 Visitor Share	12 months ending Sep 08	12 months	% Change	09 Nights Share	
	ending Sep 08	ending Sep 09				ending Sep 09			
Hotel, resort, motel, motor inn	70,200	67,700	▼ -4	47%	398,300	360,000	▼ -10	13%	
Backpacker / hostel	33,300	30,300	▼ -9	21%	310,600	291,600	▼ -6	11%	
Rented house/apartment/unit/flat	16,500	12,100	▼ -27	8%	1,022,900	870,700	▼ -15	32%	
Friend/relatives home (no payment)	38,900	31,800	▼ -18	22%	708,300	508,700	▼ -28	18%	
Caravan	17,200	19,000	▲ 10	13%	137,200	158,400	▲ 15	6%	
Guest house / Bed and Breakfast	9,600	10,700	▲ 11	7%	np	np	np	np	
Boat,houseboat,cabin cruiser,cruise ship	6,600	3,900	▼ -41	3%	np	np	np	np	
Educational institution (eg uni)	2,500	2,200	▼ -12	2%	278,400	244,900	▼ -12	9%	
Homestay	2,600	1,800	▼ -31	1%	116,300	162,400	▲ 40	6%	
Other	np	3,200	np	2%	np	np	np	np	
<b>Total</b>	<b>158,300</b>	<b>143,600</b>	<b>▼ -9</b>		<b>3,090,200</b>	<b>2,753,800</b>	<b>▼ -11</b>		

Source: International Visitor Survey, Tourism Research Australia

How to read this table: 22% of all international visitors to Tasmania in the 12 months to Sep 2009 stayed in a home of a friend or relative.

np - not published due to data reliability

▲ Increase on year ending Sept 08, ▼ Decrease on year ending Sept 08, ► No change on year ending Sept 08

Table 13. Length of visit to Tasmania

	12 months ending Sep 08	12 months ending Sep 09	% Change	08 Visitor Share	09 Visitor Share
1 night	5,700	6,200	▲ 9	1%	4%
2 nights	10,100	10,000	▼ -1	2%	7%
3 to 7 nights	75,400	66,700	▼ -12	11%	46%
8 to 14 nights	34,400	30,300	▼ -12	5%	21%
15 to 27 nights	12,400	12,000	▼ -3	2%	8%
28 or more nights	20,300	18,400	▼ -9	3%	13%
Total	158,300	143,600	▼ -9	24%	100%

Source: International Visitor Survey, Tourism Research Australia

How to read this table: 46% of all international visitors to Tasmania in the 12 months to Sep 2009 spent 3 to 7 nights in the State.

▲ Increase on year ending Sept 08, ▼ Decrease on year ending Sept 08, ► No change on year ending Sept 08

Table 14. First or return visit to AUSTRALIA

	12 months ending Sep 08	12 months ending Sep 09	% Change	08 Visitor Share	09 Visitor Share
First visit to Australia	67,100	60,000	▼ -11	42%	42%
Return visit to Australia	91,300	83,600	▼ -8	58%	58%
Total	158,300	143,600	▼ -9	100%	100%

Source: International Visitor Survey, Tourism Research Australia

How to read this table: 42% of all international visitors to Tasmania in the 12 months to Sep 2009 where visiting Australia for the first time.

▲ Increase on year ending Sept 08, ▼ Decrease on year ending Sept 08, ► No change on year ending Sept 08

Table 15. Travel Party

	12 months ending Sep 08	12 months ending Sep 09	% Change	08 Visitor Share	09 Visitor Share
Unaccompanied traveller	89,100	78,900	▼ -11	56%	55%
Adult couple	43,900	41,700	▼ -5	28%	29%
Family group - parent(s) and children	9,300	9,800	▲ 5	6%	7%
Friends/relatives travelling together	12,900	10,400	▼ -19	8%	7%
Business associates travelling together	3,200	2,700	▼ -16	2%	2%
Total	158,300	143,600	▼ -9	100%	100%

Source: International Visitor Survey, Tourism Research Australia

How to read this table: 55% of international visitors to Tasmania in the 12 months to Sep 2009 were travelling alone.

▲ Increase on year ending Sept 08, ▼ Decrease on year ending Sept 08, ► No change on year ending Sept 08

Table 16. Age of international visitors

	12 months ending Sep 08	12 months ending Sep 09	% Change	08 Visitor Share	09 Visitor Share
15 to 24	28,062	17,992	▼ -36	18%	13%
25 to 34	31,007	30,109	▼ -3	20%	21%
35 to 44	19,912	17,693	▼ -11	13%	12%
45 to 54	22,496	15,384	▼ -32	14%	11%
55 to 64	35,527	25,941	▼ -27	22%	18%
65 and over	21,330	17,417	▼ -18	13%	12%
Refused or don't know	np	19,000	np	np	13%
Total	158,332	143,578	▼ -9	100%	100%

Source: International Visitor Survey, Tourism Research Australia

How to read this table: 21% of all international visitors to Tasmania in the 12 months to Sep 2009 were aged between 25 to 34 years.

▲ Increase on year ending Sept 08, ▼ Decrease on year ending Sept 08, ► No change on year ending Sept 08

Table 17. Items booked via the internet by international visitors

	12 months ending Sep 08	12 months ending Sep 09	% Change	08 Visitor Share	09 Visitor Share
International airfare	46,800	51,000	▲ 9	30%	36%
Domestic airfare	36,800	34,200	▼ -7	23%	24%
Organised tour	9,900	6,800	▼ -31	6%	5%
Vehicle rental	15,000	14,500	▼ -3	9%	10%
Accommodation	37,700	35,800	▼ -5	24%	25%
Sporting events	np	np	np	np	np
Entertainment activities or events	2,900	3,700	▲ 28	2%	3%
Bus or train transport	2,900	3,100	▲ 7	2%	2%
Australian travel package	1,900	np	np	1%	np
Education training or conferences	1,400	1,100	▼ -21	1%	1%
Not applicable	86,500	70,000	▼ -19	55%	49%
Total	158,300	143,600	▼ -9	100%	100%

Source: International Visitor Survey, Tourism Research Australia

How to read this table: 25% of all international visitors to Tasmania in the 12 months to Sep 2009 used the internet to book accommodation in Australia prior to leaving home.

np - not published due to data reliability

▲ Increase on year ending Sept 08, ▼ Decrease on year ending Sept 08, ► No change on year ending Sept 08

Table 18. Information sources used by international visitors

	12 months ending Sep 08	12 months ending Sep 09	% Change		08 Visitor Share	09 Visitor Share
Airline company	1,600	2,100	▲ 31		1%	1%
Travel Agent	31,800	33,700	▲ 6		20%	23%
Internet	70,800	74,500	▲ 5		45%	52%
Tour operator	3,900	5,400	▲ 38		2%	4%
Travel book or guide	36,700	33,800	▼ -8		23%	24%
Travel Article in Newspaper or Magazine	4,300	3,300	▼ -23		3%	2%
Films or TV or Radio Program	4,100	3,200	▼ -22		3%	2%
Advertising in Newspaper or Magazine	1,800	np			1%	
Advertising on TV or Radio	1,200	np			1%	
Other Advertising	1,000	np			1%	
Friend or relative living in Australia	36,700	40,000	▲ 9		23%	28%
Friend or relative who has visited Australia	22,200	17,100	▼ -23		14%	12%
Australian Consulate or Embassy	1,700	1,000	▼ -41		1%	1%
The library	2,400	2,500	▲ 4		2%	2%
Tourism Australian	1,600	2,600	▲ 63		1%	2%
Tourist Bureau or Information Centre	np	1,100	np			1%
Previous visit(s)	34,800	25,800	▼ -26		22%	18%
IDP Education Australia (2006 onwards)	5,300	5,800	▲ 9		3%	4%
Work related / Business colleagues	9,600	6,500	▼ -32		6%	5%
No information obtained	9,000	10,400	▲ 16		6%	7%
Total	158,300	143,600	▼ -9		100%	100%

Source: International Visitor Survey, Tourism Research Australia

How to read this table: 52% of all international visitors to Tasmania in the 12 months to Sep 2009 used the internet as an information source about Australia

np - not published due to data reliability

▲ Increase on year ending Sept 08, ▼ Decrease on year ending Sept 08, ► No change on year ending Sept 08

## Data source and reliability

The information included in this report was extracted from the International Visitor Survey (IVS), Tourism Research Australia. The IVS collects information via face to face interviews of a sample of short-term (<12 months) international visitors in the departure lounges of eight international airports around Australia.

The table below provides the 95% confidence intervals for a range of estimates in the IVS. That is, there are approximately 19 chances in 20 that the true number of international visitors, nights and expenditure is within the range identified in the table. A basic assumption is that the bigger the sample (the more visitors that were interviewed), the smaller the range can be. Conversely, results based on a small number of interviews are less reliable, meaning the size of the range is bigger to compensate. This means that smaller estimates are less reliable than larger estimates. To illustrate; if the IVS estimated that 20,000 visitors from the USA stayed in Tasmania then looking at the visitor column, we can be 95% confident that the true number of Americans who stayed in Tasmania was between 16,000 (lower limit estimate) and 24,000 (upper limit estimate).

Please consult the table below before drawing any conclusions or inferences, or taking any action, based on the data. Judgments as to the level of data reliability required should be relative to the decisions they inform.

95% Confidence Intervals for IVS estimates						
Estimate	Visitors		Nights		Expenditure (million)	
	lower limit	upper limit	lower limit	upper limit	lower limit	upper limit
2,000	1,000	3,000				
5,000	3,000	7,000				
10,000	7,000	13,000				
20,000	16,000	24,000				
50,000	43,000	57,000				
100,000	90,000	110,000	24,000	176,000		
155,000	143,000	168,000	59,000	251,000		
200,000			89,000	311,000		
300,000			161,000	439,000		
400,000			238,000	562,000		
500,000			316,000	684,000		
1,000,000			731,000	1,269,000		
2,000,000			1,606,000	2,394,000		
2,978,000			2,487,000	3,469,000		
5,000,000					\$4	\$6
10,000,000					\$7	\$13
15,000,000					\$11	\$19
20,000,000					\$15	\$25
50,000,000					\$19	\$31
100,000,000					\$75	\$126
200,000,000					\$149	\$251
247,000,000					\$184	\$310

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