

# International Tourism Snapshot

## International visitors to Tasmania, Year ending September 2010

### International Tourism Forecast<sup>1</sup>

- The International Monetary Fund (IMF) estimates global economic growth of 4.8% in 2010 with this moderating slightly to 4.2% in 2011.
- Inbound arrivals to Australia are forecast to increase 5.3% in 2010 and 5.6% in 2011. Over the long-term inbound arrivals are expected to grow at an annual average of 3.9% during the years 2009-2020.
- In light of the strong appreciation of the Australian dollar, world economic recovery and competitive airfares, Total Inbound Economic Value (TIEV) is forecast to increase 1.9% to \$24.2 billion in real terms in 2010.
- Asian markets are increasing their share of total inbound arrivals, led by China, and this trend is expected to continue. Between 2009 and 2020, the Asian market share is forecast to grow from 38% to 42%. Over the same period, China is expected to account for nearly 17% of the growth in international visitor arrivals to Australia. Moreover, by 2018 China is anticipated to become Australia's second largest inbound market in terms of arrivals behind New Zealand. The Middle East (10.4%) and India (8.9%) are the only countries expected to have average annual growth equivalent to or greater than China (8.5%) in the long term.
- The Tourism Forecasting Committee has revised downwards the forecast for the number of nights spent in Tasmania by international visitors during 2010. They now estimate it will reach 2.76 million, a 4.6% increase on 2009 whereas the previous forecast estimate was for 2.78 million visitor nights or a 5.3% increase for that same period.

### International visitors to Australia

#### Key Results:

- According to the latest results of the International Visitor Survey for the year ending September 2010, international visitors to Australia increased (+6%) to 5.38 million, the number of nights international travellers spent in Australia grew (+6%) to 184.9 million, and international visitor expenditure<sup>2</sup> increased (+2%) to \$17.4 billion.

#### Summary:

- 5.38 million international travellers visited Australia in the year ending September 2010. All purpose segments of international travel recorded growth (business +10%, education +7%, VFR<sup>3</sup> +6% & holiday +4%). Visitor nights spent in Australia grew (+6%) to 184.9 million, with growth coming from the VFR (+11%) business (+20%) and education (+6%) sectors. Average length of stay remained stable at 34.4 nights (Table 1).
- Total expenditure in Australia for the year ending September 2010 increased (+2%) to \$17.4 billion (including package expenditure) (Table 1).
- Key source markets recording positive growth over the year included the USA (+5%), New Zealand (+3%), China (+19%), Japan (+5%), Singapore (+7%), Indonesia (+19%), Korea (+12%), and Malaysia (+12%) (Table 7).
- The United Kingdom was the only key source market to record a decline (-2%) (Table 7).

<sup>1</sup> Tourism Forecasting Committee, Forecast 2010 Issue 2

<sup>2</sup> Includes package expenditure

<sup>3</sup> Visiting friends and/or relatives

- New South Wales (+7%), Victoria (+6%), ACT (+2%), South Australia (+3%), and Queensland (+2%) all recorded increases in international visitors. Decreases in international travellers were recorded in Western Australia (-2%), Northern Territory (-4%) and Tasmania (-1%) (Table 9).
- International visitors on a return visit to Australia (62% of all visitors) increased (+7%) over the year to September 2010, whilst first time visitors (38% of all visitors) increased (+3%) on the previous year.

## International visitors to Tasmania

### *Key Results:*

- In contrast to the positive national trend, international visitors to Tasmania declined (-1%) to 141,800 in the year ending September 2010, leading to a drop in market share from 2.8 to 2.6% (Table 4).
- Visitor nights spent in Tasmania increased (+7%) to 2.95 million while international visitor expenditure for Tasmania increased slightly (+1%) to \$277 million (including package expenditure).

### *Summary:*

- Tasmania received 141,800 international visitors in the year ending September 2010, 1% fewer visitors than in the previous year (Table 1).
- With visitor nights spent in Tasmania increasing (+7%), length of stay has also increased (+9%) from 19.2 nights to 20.8 nights (Table 1).
- The total amount spent by international visitors in Tasmania increased (+1%) to \$277 million (including package expenditure) (Table 1).
- The average spend per international visitor in Tasmania grew from \$1,915 to \$1,953 in the year ending September 2010, while spend per night decreased from \$100 to \$94<sup>4</sup> (Table 1).
- Only the VFR (+27%) and employment (+4%) sectors recorded increases in international visitors over the year. Declines were recorded in the holiday (-10%), business (-8%), and education (-1%) sectors (Table 1).
- Overall, Tasmania recorded a 7% increase in nights spent by international visitors. Education (+29%), employment (+86%) and business (+22%) recorded increases while decreases were recorded for holiday (-15%) and VFR (-11%).
- There were increases in visitors from China (+61%), Hong Kong (+28%), Korea (+25%), Scandinavia (+69%), France (+22%), and Malaysia (+12%) over the year to September 2010. Smaller increases in visitor numbers were recorded out of Germany (+7%), New Zealand (+10%) and Japan (+3%) (Table 4).
- The greatest decrease in visitor numbers was out of the UK, reducing by 7,000 visitors (-26%) to 19,500. Other markets recording a decline over the year to September 2010 included the USA (-14%), Singapore (-2%) and Canada (-47%) (Table 4).

### *Commentary:*

A number of factors have influenced the decline in international visitation to Tasmania; such as, the deeply discounted airfares between the USA and Australia, and an increase in seat numbers on this route during 2009-10. These offers were targeted at one week visits which limited visitors' ability to disperse across the country, in particular to the remote states/territories of Australia such as Tasmania, Western Australia and the Northern Territory.

<sup>4</sup> Average spend per visitor and night includes package expenditure.

## Tasmania's International Markets Overview

*Note: Modelled Expenditure estimates for Tasmania's international markets should be interpreted with caution as they are derived from small sample sizes which can cause large fluctuations in estimates between years.*

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

- The number of visitors to Australia from North America increased (+5%) to 569,500 over the year to September 2010 (Table 7).
- Meanwhile, Tasmania's share of visitors from North America decreased (-23%) to 21,000 (Table 7).
- Declines in holiday and VFR travel were responsible for the overall decrease in North American visitors to Tasmania (Table 10).
- Visitors from the USA to Tasmania were down (-14%) to 16,900, and visitors from Canada declined (-47%) to 4,100 (Table 10).
- Total nights spent by USA visitors in Tasmania increased (+71%<sup>5</sup>) while nights spent by Canadian visitors decreased (-3%). The average length of stay in Tasmania increased for USA visitors to 15.4 nights (was 7.8 nights) and for Canadian visitors to 22.3 nights (was 11.9 nights) (Table 5).
- The total modelled expenditure of USA visitors in Tasmania decreased (-17%) to \$24 million (Table 6).

### *United Kingdom (UK):*

- The number of visitors to Australia from the UK declined (-2%) to 607,000 in the 12 months to September 2010 (Table 7).
- Similarly, the number of UK visitors to Tasmania declined (-26%) to 19,500 (Table 4).
- Most of the decline for Tasmania was the result of a drop in holiday travel (-34%) (Table 10).
- The average length of time UK visitors spent in Tasmania decreased from 13.5 nights to 12.9 nights over the year which resulted in a decrease (-29%) in visitor nights spent by UK visitors in Tasmania (Table 5).
- Total modelled spend by UK visitors to Tasmania decreased (-38%) to \$21 million (was \$34 million). This expenditure represents 1.1% of the national spend by visitors from the UK (Table 6).

### *New Zealand (NZ):*

- The number of visitors to Australia from NZ increased (+3%) over the year (Table 7).
- Similarly in Tasmania numbers also increased (+10%), largely as a result of holiday and business travel (Table 10).
- The average length of stay in Tasmania by NZ visitors decreased from 14.3 to 13.2 nights in the 12 months to September 2010, while total nights spent by NZ visitors increased (+2%) to 196,000 (Table 5).
- Total modelled spend by New Zealanders visiting Tasmania reached \$29 million<sup>6</sup>, up (+61%) on the previous year (Table 6).

<sup>5</sup> Volatility due to small sample size is evident in the data for visitors from the USA with their number decreasing 14% while the nights stayed increased 71%. The increase in nights stayed is due to 5 visitors who had an extended stay in the North and East Coast of Tasmania. The effect of this extended stay, compounded by the small sample, has inflated the estimate for the number of nights stayed in Tasmania by visitors from the USA, and thus the percentage change from the previous year.

<sup>6</sup> Preliminary expenditure estimate which may be subject to revision.

*Total Europe (Excluding United Kingdom):*

- Arrivals into Australia from Europe increased (+4%) to 657,900 visitors (Table 7).
- Tasmania's share of all European visitors to Australia was 5% of this total, or 34,400 visitors, up (+18%) on the previous year mainly as a result of an increase in VFR and holiday travel (Table 10).
- The number of Germans visiting Australia increased (+4%) to 157,800, and the number who visited Tasmania during the same period increased (+7%) to 9,100 (Tables 7 and 4).
- Tasmania's share of all German visitors to Australia now stands at 6%.
- Total Europe expenditure is not published as the sample size is too small to be reliable.

*Japan:*

- Japanese visitor numbers increased nationally (+5%) and in Tasmania (+3%) (Tables 7 and 4).
- Most of the increase in Tasmania was due to holiday travel (Table 10).
- Average length of stay increased from 20.5 nights to 25.5 nights (Table 5).
- Modelled expenditure by Japanese visitors was \$9 million for the year, a decline of 10% from the previous year (Table 6).

*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 11% for Australia, while for Tasmania numbers increased 10% to 38,200 over the year to September 2010 (Table 10).
- Tasmania's growth was due to an increase in holiday, VFR and education travel (Table 10).
- Countries driving the growth in the combined Asian nations category to Tasmania included Hong Kong, Malaysia, China and Korea (Table 4).
- Declines were recorded in visitors from Singapore (Table 4). Visitor numbers from Indonesia and India are not published due to concerns with data reliability.
- Of all overseas visitors, those from the combined Asian nations (excluding Japan) spent the greatest number of nights in Tasmania. Just over half (57%) of all nights were spent by visitors in the State for education purposes.

## International Visitor Tables:

NOTE: Unrounded estimates have been used to calculate percentage change and market share in all tables

TABLE 1: International visitors						
	to Tasmania			to Australia		
	YE Sept 2009	YE Sept 2010	% change	YE Sept 2009	YE Sept 2010	% change
<b>Visitors</b>						
International visitors	143,600	141,800	↓ -1%	5,098,000	5,381,500	↑ 6%
<b>Nights</b>						
Nights ('000s)	2,754	2,951	↑ 7%	175,258	184,921	↑ 6%
Ave Length of stay (nights)	19.2	20.8	↑ 9%	34.4	34.4	→ 0%
<b>Expenditure</b>						
Expenditure (\$million)	\$275	\$277	↑ 1%	\$17,141	\$17,424	↑ 2%
Average spend per visitor	\$1,915	\$1,953	↑ 2%	\$3,362	\$3,238	↓ -4%
Average spend per night	\$100	\$94	↓ -6%	\$98	\$94	↓ -4%
Holiday spend (\$million)	\$118	\$94	↓ -20%	\$6,692	\$6,340	↓ -5%
<b>Purpose</b>						
Holiday	104,700	93,700	↓ -10%	2,380,400	2,467,000	↑ 4%
Visit friends or relatives (VFR)	26,200	33,400	↑ 27%	1,244,200	1,318,000	↑ 6%
Business	10,300	9,400	↓ -8%	760,600	840,400	↑ 10%
Education	8,700	8,600	↓ -1%	401,800	430,200	↑ 7%
Employment	2,800	2,900	↑ 4%	121,000	122,000	↑ 1%
Other Reason	3,000	2,400	↓ -18%	190,000	203,900	↑ 7%
<b>Total</b>	<b>143,600</b>	<b>141,800</b>	<b>↓ -1%</b>	<b>5,098,000</b>	<b>5,381,500</b>	<b>↑ 6%</b>

Source: International Visitor Survey (IVS), Tourism Research Australia

Notes: Modelled expenditure includes package expenditure.

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.

TABLE 2: International visitor nights spent in Tasmania						
	YE Sept	YE Sept	% change	Average		% change
	2009	2010		Stay Sept 2009	Average Stay Sept 2010	
<b>Nights</b>						
Holiday	1,074,000	908,000	↓ -15%	10.3	9.7	↓ -6%
Visit friends or relatives	487,600	436,300	↓ -11%	18.6	13.1	↓ -30%
Business	76,600	93,800	↑ 22%	7.4	10.0	↑ 34%
Education	943,300	1,217,800	↑ 29%	108.4	141.6	↑ 31%
Employment	155,900	290,100	↑ 86%	55.7	100.0	↑ 80%
Other	16,400	5,400	↓ -67%	5.5	2.3	↓ -59%
<b>Total</b>	<b>2,753,800</b>	<b>2,951,400</b>	<b>↑ 7%</b>	<b>19.2</b>	<b>20.8</b>	<b>↑ 9%</b>

Source: International Visitor Survey, Tourism Research Australia

np - not published as the sample size is too small to be reliable.

**TABLE 3: International visitor expenditure spent in Tasmania by purpose of visit**

	YE Sept 09 \$million	YE Sept 10 \$million	% Change	Average spend per visitor 09	Average spend per visitor 10	% Change	Average spend per night 09	Average spend per	% Change
<i>Expenditure</i>									
Holiday	\$118	\$94	↓ -20%	\$1,127	\$1,003	↓ -11%	\$110	\$104	↓ -6%
Visit friends or relatives	\$39	\$32	↓ -18%	\$1,489	\$958	↓ -36%	\$80	\$73	↓ -8%
Business	\$19	\$21	↑ 11%	\$1,845	\$2,234	↑ 21%	\$248	\$224	↓ -10%
Education	\$79	\$117	↑ 48%	\$9,080	\$13,605	↑ 50%	\$84	\$96	↑ 15%
Other	\$18	np	np	\$6,000	np	np	\$1,098	np	np
<b>Total</b>	<b>\$275</b>	<b>\$277</b>	<b>↑ 1%</b>	<b>\$1,915</b>	<b>\$1,953</b>	<b>↑ 2%</b>	<b>\$100</b>	<b>\$94</b>	<b>↓ -6%</b>

Source: International Visitor Survey, Tourism Research Australia

np - not published as the sample size is too small to be reliable.

Note: Modelled expenditure includes package expenditure

**TABLE 4: Origin of international visitors to Tasmania**

Country of origin	YE Sept	YE Sept	% change	YE Sept		% point difference
	2009	2010		2009	YE Sept 2010	
	<i>Visitors to Tasmania</i>			<i>National Market Share</i>		
New Zealand	13,400	14,800	↑ 10%	1.3%	1.4%	↑ 0.1%
Japan	5,300	5,500	↑ 3%	1.5%	1.5%	→ 0.0%
Hong Kong	5,000	6,300	↑ 28%	3.5%	4.3%	↑ 0.8%
Singapore	5,300	5,200	↓ -2%	2.2%	2.0%	↓ -0.2%
Malaysia	5,500	6,100	↑ 12%	3.0%	3.0%	→ 0.0%
Indonesia	np	np	np	2.4%	0.4%	↓ -2.0%
Taiwan	np	np	np	5.0%	2.8%	↓ -2.2%
Thailand	np	np	np	2.6%	4.1%	↑ 1.5%
Korea	2,800	3,500	↑ 25%	1.7%	1.9%	↑ 0.2%
China	4,900	7,900	↑ 61%	1.4%	1.9%	↑ 0.5%
India	np	np	np	1.3%	1.2%	↓ -0.1%
Other Asia	np	np	np	0.8%	1.2%	↑ 0.4%
USA	19,500	16,900	↓ -14%	4.5%	3.7%	↓ -0.8%
Canada	7,900	4,100	↓ -47%	6.9%	3.5%	↓ -3.4%
United Kingdom	26,200	19,500	↓ -26%	4.2%	3.2%	↓ -1.0%
Germany	8,500	9,100	↑ 7%	5.6%	5.8%	↑ 0.2%
Scandinavia	3,800	6,500	↑ 69%	4.9%	7.7%	↑ 2.8%
France	4,000	4,800	↑ 22%	4.7%	5.2%	↑ 0.5%
Italy	np	np	np	3.2%	6.0%	↑ 2.8%
Netherlands	3,000	3,200	↑ 5%	6.1%	6.6%	↑ 0.5%
Switzerland	np	np	np	6.4%	4.9%	↓ -1.5%
Other Europe	5,800	5,500	↓ -5%	3.2%	3.1%	↓ -0.1%
Other Countries	7,500	8,400	↑ 12%	2.0%	2.1%	↑ 0.1%
<b>Total</b>	<b>143,600</b>	<b>141,800</b>	<b>↓ -1%</b>	<b>2.8%</b>	<b>2.6%</b>	<b>↓ -0.2%</b>

Source: International Visitor Survey, Tourism Research Australia

np - not published as the sample size is too small to be reliable.

% point difference - the difference between two percentages (i.e. the difference between 3% and 3.5% is 0.5 percentage points)

**TABLE 5: Origin of international visitor nights spent in Tasmania**

Country of origin	YE Sept	YE Sept	% change	YE Sept		YE Sept		% point difference
	2009	2010		2009	YE Sept 2010	2009	YE Sept 2010	
	Nights			Average Stay (nights)		National Market Share		
New Zealand	192,200	196,000	↑ 2%	14.3	13.2	1.4%	1.4%	→ 0.0%
Japan	108,600	140,200	↑ 29%	20.5	25.5	1.5%	1.7%	↑ 0.3%
Hong Kong	98,400	131,000	↑ 33%	19.7	20.8	2.1%	2.5%	↑ 0.4%
Singapore	48,800	111,200	↑ 128%	9.2	21.4	0.9%	2.0%	↑ 1.1%
Malaysia	370,300	222,600	↓ -40%	67.3	36.5	5.4%	3.2%	↓ -2.2%
Indonesia	np	np	np	np	np	0.5%	0.3%	↓ -0.1%
Taiwan	np	np	np	np	np	3.4%	1.3%	↓ -2.1%
Thailand	np	np	np	np	np	2.0%	3.8%	↑ 1.8%
Korea	144,000	155,800	↑ 8%	51.4	44.5	1.2%	1.3%	→ 0.0%
China	247,700	252,900	↑ 2%	50.6	32.0	1.3%	1.1%	↓ -0.3%
India	np	np	np	np	np	0.5%	0.6%	↑ 0.1%
Other Asia	np	np	np	np	np	1.0%	1.1%	↑ 0.1%
USA	152,300	259,600	↑ 71%	7.8	15.4	1.6%	2.7%	↑ 1.1%
Canada	94,400	91,400	↓ -3%	11.9	22.3	1.9%	2.1%	↑ 0.2%
United Kingdom	354,000	250,900	↓ -29%	13.5	12.9	1.6%	1.1%	↓ -0.4%
Germany	149,300	104,900	↓ -30%	17.6	11.5	2.0%	1.6%	↓ -0.4%
Scandinavia	45,100	204,600	↑ 354%	11.9	31.5	1.4%	5.9%	↑ 4.5%
France	71,100	53,200	↓ -25%	17.8	11.1	1.6%	1.0%	↓ -0.6%
Italy	np	np	np	np	np	1.1%	1.2%	→ 0.0%
Netherlands	47,800	36,700	↓ -23%	15.9	11.5	2.4%	1.8%	↓ -0.7%
Switzerland	np	np	np	np	np	3.0%	1.6%	↓ -1.4%
Other Europe	np	np	np	np	np	0.7%	0.6%	↓ -0.1%
Other Countries	154,700	273,000	↑ 77%	20.6	32.5	1.1%	1.9%	↑ 0.8%
<b>Total</b>	<b>2,753,800</b>	<b>2,951,400</b>	<b>↑ 7%</b>	<b>19.2</b>	<b>20.8</b>	<b>1.6%</b>	<b>1.6%</b>	<b>→ 0.0%</b>

Source: International Visitor Survey, Tourism Research Australia

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% point difference - the difference between two percentages (i.e. the difference between 3% and 3.5% is 0.5 percentage points)

**TABLE 6: Origin of international visitor expenditure spent in Tasmania**

Country of origin	YE Sept	YE Sept	% change	YE Sept		% point difference
	2009	2010		2009	YE Sept 2010	
	<i>Expenditure (\$million)</i>			<i>National Market Share</i>		
New Zealand	\$18	\$29	↑ 61%	1.3%	2.0%	↑ 0.7%
United Kingdom	\$34	\$21	↓ -38%	1.8%	1.1%	↓ -0.6%
Germany	\$10	\$10	→ 0%	1.6%	1.8%	↑ 0.2%
Scandinavia	np	np	np	np	np	np
Switzerland	np	np	np	np	np	np
Netherlands	np	np	np	np	np	np
France	np	\$4	np	np	np	np
Italy	np	np	np	np	np	np
Other Europe	np	np	np	np	np	np
USA	\$29	\$24	↓ -17%	2.3%	2.0%	↓ -0.3%
Canada	\$9	np	np	1.9%	np	np
Japan	\$10	\$9	↓ -10%	1.1%	1.0%	↓ -0.1%
China	\$23	\$25	↑ 9%	1.2%	1.0%	↓ -0.1%
Korea	np	np	np	np	np	np
Singapore	np	np	np	np	np	np
Malaysia	np	np	np	np	np	np
Hong Kong	np	np	np	np	np	np
Indonesia	np	np	np	np	np	np
Thailand	np	np	np	np	np	np
India	np	np	np	np	np	np
Taiwan	np	np	np	np	np	np
Other Asia	np	np	np	np	np	np
Other Countries	\$15	\$20	↑ 33%	1.2%	1.7%	↑ 0.5%
<b>Total</b>	<b>\$275</b>	<b>\$277</b>	<b>↑ 1%</b>	<b>1.6%</b>	<b>1.6%</b>	<b>→ 0.0%</b>

Source: International Visitor Survey, Tourism Research Australia

np - not published as the sample size is too small to be reliable.

Notes: Expenditure estimates for Tasmania's international markets should be interpreted with caution as they are derived from small sample sizes which can cause large fluctuations in estimates between years.

Modelled expenditure includes package expenditure

% point difference - the difference between two percentages (i.e. the difference between 3% and 3.5% is 0.5 percentage points)

**TABLE 7: Origin of international visitors to Australia**

Country of origin	YE Sept	YE Sept	% Change	YE Sept			Average Stay 2009	Average Stay 2010
	2009	2010		2009	YE Sept 2010	% Change		
	Visitors			Nights ("000")			Average Stay (nights)	
New Zealand	1,005,700	1,037,800	↑ 3%	13,906	13,832	↓ -1%	13.8	13.3
Japan	348,000	363,800	↑ 5%	7,413	8,169	↑ 10%	21.3	22.5
Hong Kong (SAR of China)	140,200	146,900	↑ 5%	4,750	5,303	↑ 12%	33.9	36.1
Singapore	243,400	261,500	↑ 7%	5,344	5,640	↑ 6%	22.0	21.6
Malaysia	184,400	206,000	↑ 12%	6,847	6,891	↑ 1%	37.1	33.5
Indonesia	92,000	109,800	↑ 19%	3,682	4,634	↑ 26%	40.0	42.2
Taiwan	91,000	82,900	↓ -9%	4,134	4,803	↑ 16%	45.4	57.9
Thailand	72,900	78,200	↑ 7%	3,927	3,738	↓ -5%	53.9	47.8
Korea	169,000	188,600	↑ 12%	11,697	12,025	↑ 3%	69.2	63.8
China (excludes SARs and Taiwan)	343,800	408,300	↑ 19%	18,408	23,623	↑ 28%	53.5	57.9
India	114,600	125,200	↑ 9%	7,387	7,759	↑ 5%	64.5	62.0
Other Asia	126,600	141,500	↑ 12%	7,332	8,334	↑ 14%	57.9	58.9
USA	431,200	451,100	↑ 5%	9,360	9,696	↑ 4%	21.7	21.5
Canada	113,700	118,400	↑ 4%	4,909	4,333	↓ -12%	43.2	36.6
United Kingdom	620,100	607,000	↓ -2%	22,287	22,032	↓ -1%	35.9	36.3
Germany	151,800	157,800	↑ 4%	7,554	6,755	↓ -11%	49.8	42.8
Scandinavia	77,300	83,900	↑ 8%	3,215	3,496	↑ 9%	41.6	41.7
France	84,300	93,500	↑ 11%	4,444	5,089	↑ 15%	52.7	54.4
Italy	50,500	54,400	↑ 8%	2,428	2,645	↑ 9%	48.1	48.6
Netherlands	49,800	48,600	↓ -2%	1,965	2,074	↑ 6%	39.5	42.7
Switzerland	38,300	42,100	↑ 10%	1,551	1,525	↓ -2%	40.5	36.2
Other Europe	179,400	177,600	↓ -1%	8,658	8,399	↓ -3%	48.3	47.3
Other Countries	370,000	396,400	↑ 7%	14,062	14,125	→ 0%	38.0	35.6
<b>Total</b>	<b>5,098,000</b>	<b>5,381,500</b>	<b>↑ 6%</b>	<b>175,258</b>	<b>184,921</b>	<b>↑ 6%</b>	<b>34.4</b>	<b>34.4</b>

Source: International Visitor Survey, Tourism Research Australia

np - not published as the sample size is too small to be reliable.

**TABLE 8: Origin of international visitor spend in Australia**

	YE Sept 2009	YE Sept 2010	% Change	Average spend per visitor 09	Average spend per visitor 10	Average spend per night 09	Average spend per night 10
<i>Country of origin</i>	<i>Expenditure (\$million)</i>			<i>Spend per visitor</i>		<i>Spend per night</i>	
New Zealand	\$1,379	\$1,439	↑ 4%	\$1,371	\$1,387	\$99	\$104
United Kingdom	\$1,938	\$1,833	↓ -5%	\$3,125	\$3,020	\$87	\$83
Germany	\$632	\$558	↓ -12%	\$4,163	\$3,536	\$84	\$83
Scandinavia	\$325	\$341	↑ 5%	\$4,204	\$4,064	\$101	\$98
Switzerland	\$186	\$193	↑ 4%	\$4,856	\$4,584	\$120	\$127
Netherlands	\$184	\$186	↑ 1%	\$3,695	\$3,827	\$94	\$90
France	\$340	\$356	↑ 5%	\$4,033	\$3,807	\$77	\$70
Italy	\$225	\$228	↑ 1%	\$4,455	\$4,191	\$93	\$86
Other Europe	\$813	\$734	↓ -10%	\$4,532	\$4,133	\$94	\$87
USA	\$1,255	\$1,201	↓ -4%	\$2,910	\$2,662	\$134	\$124
Canada	\$464	\$428	↓ -8%	\$4,081	\$3,615	\$95	\$99
Japan	\$930	\$889	↓ -4%	\$2,672	\$2,444	\$125	\$109
China	\$1,933	\$2,393	↑ 24%	\$5,622	\$5,861	\$105	\$101
Korea	\$946	\$914	↓ -3%	\$5,598	\$4,846	\$81	\$76
Singapore	\$799	\$855	↑ 7%	\$3,283	\$3,270	\$150	\$152
Malaysia	\$778	\$769	↓ -1%	\$4,219	\$3,733	\$114	\$112
Hong Kong	\$542	\$593	↑ 9%	\$3,866	\$4,037	\$114	\$112
Indonesia	\$397	\$457	↑ 15%	\$4,315	\$4,162	\$108	\$99
Thailand	\$355	\$357	↑ 1%	\$4,870	\$4,565	\$90	\$96
India	\$585	\$577	↓ -1%	\$5,105	\$4,609	\$79	\$74
Taiwan	\$325	\$348	↑ 7%	\$3,571	\$4,198	\$79	\$72
Other Asia	\$536	\$565	↑ 5%	\$4,234	\$3,993	\$73	\$68
Other Countries	\$1,276	\$1,211	↓ -5%	\$3,449	\$3,055	\$91	\$86
<b>Total</b>	<b>\$17,141</b>	<b>\$17,424</b>	<b>↑ 2%</b>	<b>\$3,362</b>	<b>\$3,238</b>	<b>\$98</b>	<b>\$94</b>

Source: International Visitor Survey, Tourism Research Australia

Note: Modelled expenditure includes package expenditure

**TABLE 9: International visitors to States/Territories**

State/territory visited	YE Sept	YE Sept	% change	YE Sept		% point difference
	2009	2010		2009	YE Sept 2010	
	Visitors			Market Share		
New South Wales	2,659,200	2,835,000	↑ 7%	52.2%	52.7%	↑ 0.5%
Victoria	1,501,700	1,597,400	↑ 6%	29.5%	29.7%	↑ 0.2%
Queensland	1,982,000	2,012,500	↑ 2%	38.9%	37.4%	↓ -1.5%
South Australia	353,700	364,000	↑ 3%	6.9%	6.8%	↓ -0.2%
Western Australia	694,600	680,800	↓ -2%	13.6%	12.7%	↓ -1.0%
Tasmania	143,600	141,800	↓ -1%	2.8%	2.6%	↓ -0.2%
Northern Territory	328,400	316,500	↓ -4%	6.4%	5.9%	↓ -0.6%
Australia Capital Territory	151,700	155,400	↑ 2%	3.0%	2.9%	↓ -0.1%
Total visitors to Australia	5,098,000	5,381,500	↑ 6%	100.0%	100.0%	→ 0.0%

Source: International Visitor Survey, Tourism Research Australia

% point difference - the difference between two percentages (i.e. the difference between 3% and 3.5% is 0.5 percentage points)

**TABLE 10: Purpose of visit to Tasmania by origin of international visitors, year ending Sept 2010**

Country of origin	Holiday % change		% VFR <sup>1</sup> change		% Business change		% Education change		% Employment change		% Total change	
	Visitors		Visitors		Visitors		Visitors		Visitors		Visitors	
United Kingdom	13,300 ↓ -34%	7,900 ↑ 11%	np	np	np	np	np	np	np	np	19,500 ↓ -26%	
New Zealand	6,200 ↑ 12%	5,000 ↓ -20%	3,700 ↑ 58%		np	np	np	np	np	np	14,800 ↑ 10%	
Total Asia	28,100 ↑ 3%	7,300 ↑ 58%	2,200 ↓ -29%		5,500 ↑ 5%		np	np	np	np	43,700 ↑ 9%	
Japan	4,000 ↑ 2%	np	np	np	np	np	np	np	np	np	5,500 ↑ 3%	
Other Asia	24,100 ↑ 4%	6,400 ↑ 56%	1,800 ↓ -19%		4,900 ↑ 2%		np	np	np	np	38,200 ↑ 10%	
North America	15,300 ↓ -32%	3,500 ↓ -19%	1,400 ↑ 6%		1,400 ↑ 30%		np	np	np	np	21,000 ↓ -23%	
USA	12,400 ↓ -21%	2,600 ↓ -9%	1,100 ↓ -12%		1,200 ↑ 29%		np	np	np	np	16,900 ↓ -14%	
Canada	2,900 ↓ -57%	np	np	np	np	np	np	np	np	np	4,100 ↓ -47%	
Total Europe	26,600 ↑ 7%	7,600 ↑ 263%	np	np	np	np	np	np	np	np	34,400 ↑ 18%	
Germany	7,000 ↓ -7%	2,100 ↑ 1204%	np	np	np	np	np	np	np	np	9,100 ↑ 7%	
Other Europe	19,600 ↑ 13%	5,500 ↑ 184%	np	np	np	np	np	np	np	np	25,300 ↑ 22%	
Other Countries	4,200 ↓ -8%	2,200 ↑ 12%	np	np	1,000 ↑ 207%		np	np	np	np	8,400 ↑ 12%	
Total	93,700 ↓ -10%	33,400 ↑ 27%	9,400 ↓ -8%		8,600 ↓ -1%		2,900 ↑ 4%		np	np	141,800 ↓ -1%	

Source: International Visitor Survey, Tourism Research Australia

np - not published as the sample size is too small to be reliable.

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

**TABLE 11: Zones visited in Tasmania<sup>1</sup>**

Zones visited	YE Sept	YE Sept	% Change	2009	2010	YE Sept	YE Sept	% Change	2009	2010
	2009	2010		Visitor Share	Visitor Share	2009	2010		Nights Share	Nights Share
	Visitors			Nights						
Hobart & Surrounds	120,100	118,900	↓ -1%	84%	84%	1,803,000	2,039,600	↑ 13%	65%	69%
L'ton, Tamar & North	55,200	47,400	↓ -14%	38%	33%	531,500	580,700	↑ 9%	19%	20%
North West	22,900	20,800	↓ -9%	16%	15%	147,700	170,500	↑ 15%	5%	6%
Western Wilderness <sup>2</sup>	31,900	25,500	↓ -20%	22%	18%	111,300	np	np	4%	np
East Coast	31,200	25,300	↓ -19%	22%	18%	np	np	np	np	np
<b>Total</b>	<b>143,600</b>	<b>141,800</b>	<b>↓ -1%</b>	<b>100%</b>	<b>100%</b>	<b>2,753,800</b>	<b>2,951,400</b>	<b>↑ 7%</b>	<b>100%</b>	<b>100%</b>

Example for how this table should be read: 69% of all international visitor nights in Tasmania in the 12 months to Sept 2010 were spent in Hobart and Surrounds.

Source: International Visitor Survey, Tourism Research Australia

np - not published as the sample size is too small to be reliable.

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

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

**TABLE 12: Accommodation used in Tasmania**

Accommodation used	YE Sept	YE Sept	% Change	2009	2010	YE Sept	YE Sept	% Change	2009 Nights	2010
	2009	2010		Visitor Share	Visitor Share	2009	2010		Share	Share
	Visitors				Nights					
Hotel, resort, motel, motor-inn	67,700	63,200	↓ -7%	47%	45%	360,000	385,800	↑ 7%	13%	13%
Backpacker / hostel	30,300	26,600	↓ -12%	21%	19%	291,600	285,200	↓ -2%	11%	10%
Rented house / apartment / unit / flat	12,100	12,800	↑ 6%	8%	9%	870,700	961,200	↑ 10%	32%	33%
Home of friend or relative (no payment required)	31,800	35,600	↑ 12%	22%	25%	508,700	538,800	↑ 6%	18%	18%
Caravan	19,000	13,600	↓ -29%	13%	10%	158,400	np	np	np	np
Guest house / Bed and Breakfast (2002 onwards)	10,700	9,600	↓ -11%	7%	7%	np	np	np	np	np
Boat, houseboat, cabin-cruiser, or cruise ship	3,900	3,300	↓ -15%	3%	2%	np	np	np	np	np
Educational institution (eg university)	2,200	2,000	↓ -11%	2%	1%	244,900	277,100	↑ 13%	9%	9%
Homestay	1,800	2,800	↑ 54%	1%	2%	162,400	158,000	↓ -3%	6%	5%
Other	3,200	3,300	↑ 3%	2%	2%	np	183,100	np	np	np
<b>Total</b>	<b>143,600</b>	<b>141,800</b>	<b>↓ -1%</b>	<b>100%</b>	<b>100%</b>	<b>2,753,800</b>	<b>2,951,400</b>	<b>↑ 7%</b>	<b>100%</b>	<b>100%</b>

Example for how this table should be read: 45% of all international visitors to Tasmania in the 12 months to Sept 2010 stayed in a hotel, resort, motel or motor inn

Source: International Visitor Survey, Tourism Research Australia

np - not published as the sample size is too small to be reliable.

**TABLE 13: Length of visit to Tasmania**

Length of visit	YE Sept	YE Sept	% Change	2009	2010
	2009	2010		Visitor Share	Visitor Share
	Visitors				
1 night	6,200	3,800	↓ -38%	4%	3%
2 nights	10,000	10,500	↑ 5%	7%	7%
3 to 7 nights	66,700	64,100	↓ -4%	46%	45%
8 to 14 nights	30,300	30,100	↓ -1%	21%	21%
15 to 27 nights	12,000	13,600	↑ 13%	8%	10%
28 or more nights	18,400	19,600	↑ 7%	13%	14%
<b>Total</b>	<b>143,600</b>	<b>141,800</b>	<b>↓ -1%</b>	<b>100%</b>	<b>100%</b>

Example for how this table should be read: 45% of all international visitors to Tasmania in the 12 months to Sept 2010 spent 3 to 7 nights in the State.

Source: International Visitor Survey, Tourism Research Australia

**TABLE 14: Age of international visitors who came to Tasmania**

	YE Sept 2009	YE Sept 2010	% Change	2009 Visitor Share	2010 Visitor Share
<i>Age of visitors</i>	<i>Visitors</i>				
15 to 24	24,100	25,600	↑ 6%	17%	18%
25 to 34	34,100	33,100	↓ -3%	24%	23%
35 to 44	20,300	19,500	↓ -4%	14%	14%
45 to 54	19,400	19,600	↑ 1%	14%	14%
55 to 64	27,400	25,800	↓ -6%	19%	18%
65 and over	18,300	18,000	↓ -2%	13%	13%
<b>Total</b>	<b>143,600</b>	<b>141,800</b>	<b>↓ -1%</b>	<b>100%</b>	<b>100%</b>

Example for how this table should be read: 23% of all international visitors to Tasmania in the 12 months to Sept 2010 were aged between 25 to 34 years.

Source: International Visitor Survey, Tourism Research Australia

**TABLE 15: Gender of international visitors who came to**

	YE Sept 2009	YE Sept 2010	% Change	2009 Visitor Share	2010 Visitor Share
<i>Gender</i>	<i>Visitors</i>				
Male	68,100	68,400	→ 0%	47%	48%
Female	75,500	73,300	↓ -3%	53%	52%
<b>Total</b>	<b>143,600</b>	<b>141,800</b>	<b>↓ -1%</b>	<b>100%</b>	<b>100%</b>

Example for how this table should be read: 52% of all international visitors to Tasmania in the 12 months to Sept 2010 were female.

Source: International Visitor Survey, Tourism Research Australia

## 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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