

# International Tourism Snapshot

## International visitors to Tasmania, Year ending June 2010

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

- Worldwide, international tourism is steadily gaining momentum following an extremely challenging 2009.
- Consensus Economics forecast the global economy to expand 3.4% in 2010. However, the sovereign debt crisis in Europe represents a considerable risk to the outlook for the world economy.
- Inbound arrivals to Australia are forecast to increase 5.5% in 2010 to reach 5.9 million, in line with the assumed world economic recovery and competitive airfares.
- Higher economic growth in key inbound source markets and a lower average value of the Australian dollar are the primary sources for the forecast solid growth in international visitor arrivals in 2010.
- Arrivals into Australia from all major inbound markets are forecast to increase in 2010, with most growth (in terms of trips) coming from the US (+9% or 42,000), China (+9% or 34,000) and New Zealand (+3% or 30,000). The markets showing the strongest growth this year in percentage terms are the Middle East (+20%) and Indonesia (+19%).
- The number of international visitor nights spent in Tasmania is forecast to reach 2.78 million in 2010, a 5.3% increase on the 2009 total of 2.64 million nights.

### International visitors to Australia

#### Key Messages:

- According to the latest results of the International Visitor Survey, international visitor arrivals to Australia in the year ending June 2010 increased 3% on the previous year.
- A total of 5.28 million international tourists visited the country in the year ending June 2010.
- The number of nights international travellers spent in Australia grew (+5%), while international visitor expenditure<sup>2</sup> increased 1% over the same period.

#### Summary:

- 5.28 million International travellers visited Australia in the year ending June 2010 (+3%). Nearly all of the growth was from the VFR<sup>3</sup> market (+9%), followed by the education market (+10%), whilst the holiday market remained stable (+1%).
- Visitor nights spent in Australia grew by 5% to 182.7 million, with growth coming from the VFR (+9%), holiday (+1%) and the education (+10%) sectors. Average length of stay remained stable at 34.6 nights.
- Total expenditure in Australia for the year ending June 2010 increased 1% to \$17.3 billion (including package expenditure).
- Key source markets recording positive growth over the year included: USA (+8%), New Zealand (+2%), China (+11%), Singapore (+4%), Canada (+3%), Indonesia (+23%) and Malaysia (+11%).
- The United Kingdom visitor numbers remained stable at (-1%). Meanwhile, the only key source market to record a decline was Japan (-9%).
- New South Wales (+3%), Victoria (+5%), South Australia (+5%), and the all recorded increases while Western Australia remained stable in international visitors. Meanwhile, Tasmania recorded the biggest decline in visitor numbers (-10%), followed by Qld (-2%), Northern Territory (-3%) and the ACT (-4%).
- International visitors on a return visit to Australia (62% of all visitors) increased 7% over the year to June 2010, whilst first time visitors (38% of all visitors) decreased by 3% on the previous year.

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

<sup>2</sup> Includes package expenditure

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

## International Visitors to Tasmania

### *Key Messages:*

- In contrast to the positive national trend, international visitor arrivals into Tasmania continued to decline, with arrivals down 10% in the year ending June 2010 to 134,500 visitors.
- Consequently, Tasmania's share of all international visitors to Australia fell to 2.5% over the year (was 2.9%).
- Visitor nights spent in Tasmania fell by 6%, an ongoing trend since December 2007. Also international visitor expenditure for Tasmania decreased 2% to \$263 million (including package expenditure).

### *Summary:*

- Tasmania received 134,500 international visitors in the year ending June 2010, 10% fewer visitors than in the previous year.
- With visitor nights spent in Tasmania decreasing 6%, although the length of stay increased slightly from 19.1 nights to 19.8 nights.
- With the drop in visitor numbers and nights, the total amount spent by international visitors in Tasmania also decreased by 2% to \$263 million (including package expenditure).
- The average spend per international visitor in Tasmania grew from \$1,793 to \$1,955 in the year ending June 2010. Similarly, spend per night increased to \$99 (was \$94)<sup>4</sup>.
- Only the VFR market (+17%) and education (+9%) recorded an increase in international visitors over the year. Declines were recorded in the holiday (-16%), business (-33%), and the employment market (-27%).
- In regards to nights spent in Tasmania, Education (+7%) and Employment (+21%) recorded increases. There were decreases in Holiday (-20%), VFR (-5%) and Business nights (-31%) were largely responsible for the decrease in the total number of nights spent in the state by international visitors in Tasmania (-6%).
- There was an increase in visitors from China (+34%), Hong Kong (+32%), Korea (+24%) Scandinavia (+66%) and France (+12%) over the year to June 2010. Smaller increases in visitor numbers were recorded out of Germany, and Malaysia.
- The greatest decrease in visitors numbers was out of the UK, reducing by 7,000 visitors (-25%) to 19,800. Other markets recording negative figures over the year to June 2010 included: USA (-21%), New Zealand (-23%), Canada (-49%) Japan (-17%) and Singapore (-15%).
- International visitors to Tasmania on a repeat visit to Australia (61% of all visitors) increased 3% over the year to June 2010, whilst the number of visitors to Tasmania on their first trip to Australia (39% of all visitors) decreased by 3% on the previous year.

<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 7% to 578,100 over the year to June 2010.
- Meanwhile, Tasmania's share of visitors from North America decreased to 20,300 (-29%).
- A decline in holiday, business and VFR travel was responsible for the overall decrease in North American visitors to Tasmania.
- Visitors from the USA were down 21% to 15,900 visitors on the previous year; while visitors from Canada declined by 49% to 4,300 visitors.
- Total nights by USA visitors to Tasmania increased 41% while nights spent in Tasmania by Canadian visitors decreased -2%. The average length of stay in Tasmania by visitors from North America increased for the USA to 13.4 nights (was 7.5 nights) and Canada 22.6 nights (was 11.9 nights).
- The total modelled expenditure of USA visitors in Tasmania decreased 15% to \$23 million. Total modelled expenditure for Canada increased 13% to \$9 million.

### *United Kingdom (UK):*

- The number of visitors to Australia from the UK remained stable (-1%) although the number of visitors to Tasmania from the UK decreased (-25%) to 19,800 visitors in the 12 months to June 2010.
- Most of the decline for Tasmania was the result of a drop in holiday and VFR travel.
- The average length of stay UK visitors spent in Tasmania increased from 13.8 nights to 14.4 nights over the year. Despite an increased average length of stay, there was a 22% decrease in visitor nights spent by UK visitors in Tasmania.
- Total modelled spend by UK visitors to Tasmania decrease (-29%) to \$24 million (was \$34 million). This expenditure represents 1.3% of the national spend by visitors from the UK.

### *New Zealand (NZ):*

- While visitors numbers to Australia from NZ increased 2% over the year, Tasmania experienced a 23% decrease in visitor numbers from NZ, largely as a result of a decrease in Holiday, VFR and Business travel.
- The average length of stay in Tasmania by NZ visitors also decreased from 14.5 nights to 9.4 nights in the 12 months to June 2010, resulting in a 50% decrease in the total nights spent in the State.
- Total modelled spend by New Zealanders visiting Tasmania reached \$26million<sup>5</sup>, up 24% on the previous year.

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

- Arrivals into Australia from Europe increased 2% to 660,200 visitors.
- Tasmania's share of total European visitors was 5% of this total, or 34,300 visitors; up 14% on the previous year mainly as a result of an increase in VFR and holiday travel.
- The number of Germans visiting Australia increased 3% to 158,000, and the number who visited Tasmania during the same period increased 7% to 9,400.
- Tasmania's share of all German visitors to Australia now stands at 6%.
- Total modelled expenditure by German visitors to Tasmania for the year ending June 2010 increased 10% to \$11 million (was \$10 million)
- Total Europe expenditure is not published due to reliability concerns.

<sup>5</sup> Preliminary expenditure estimate which may be subject to revision.

*Japan:*

- Japanese visitors numbers continue to decline both nationally (-9%) and in Tasmania (-17%).
- Most of the decline in Tasmania is due to a decline in Japanese holiday travel.
- Average length of stay decreased from 27.1 nights to 20.6 nights.
- Expenditure by Japanese visitors was \$8 million for the year; a decline of 38% on the previous year.

*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 7% for Australia, while for Tasmania numbers increased 3% to 35,700 over the year to June 2010.
- Tasmania's growth was due to an increase in VFR and education travel.
- Countries driving the growth in the combined Asian nations category included; Hong Kong, Malaysia, China and Korea.
- Declines were recorded in visitors from Singapore. 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 (49%) of all nights were spent by visitors in the state for education purposes, while 24% of all nights were spent by visitors on a holiday.

### International Visitor Tables:

International visitors							
	to Tasmania			to Australia			
	YE June 2009	YE June 2010	% change	YE June 2009	YE June 2010	% change	
<b>Visitors</b>							
International visitors	149,500	134,500	↓ -10%	5,120,600	5,279,700	↑ 3%	
<b>Nights</b>							
Nights ('000s)	2,852	2,669	↓ -6%	174,160	182,677	↑ 5%	
Length of stay (nights)	19.1	19.8	↑ 4%	34.0	34.6	↑ 2%	
<b>Expenditure*</b>							
Expenditure (\$million)*	\$268	\$263	↓ -2%	\$17,077	\$17,256	↑ 1%	
Average spend per visitor	\$1,793	\$1,955	↑ 9%	\$3,335	\$3,268	↓ -2%	
Average spend per night	\$94	\$99	↑ 5%	\$98	\$94	↓ -4%	
Holiday spend (\$million)	\$118	\$95	↓ -19%	\$6,750	\$6,344	↓ -6%	
<b>Purpose**</b>							
Holiday	106,600	89,800	↓ -16%	2,391,700	2,408,600	↑ 1%	
Visit friends or relatives (VFR)	28,000	32,700	↑ 17%	1,200,400	1,309,500	↑ 9%	
Business	12,100	8,100	↓ -33%	798,500	816,400	↑ 2%	
Education	7,800	8,500	↑ 9%	389,200	429,900	↑ 10%	
Employment	3,000	2,200	↓ -27%	124,400	112,100	↓ -10%	
Other Reason	3,600	2,200	↓ -39%	216,400	203,200	↓ -6%	
<b>Total</b>	<b>149,500</b>	<b>134,500</b>	<b>↓ -10%</b>	<b>5,120,600</b>	<b>5,279,700</b>	<b>↑ 3%</b>	

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

\* Modelled expenditure including 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.

International visitor nights spent in Tasmania							
	YE June 2009	YE June 2010	% change	Average Stay June 2009	Average Stay June 2010	% change	
<b>Nights</b>							
Holiday	1,090,500	867,000	↓ -20%	10.2	9.7	↓ -6%	
Visit friends or relatives	481,400	458,900	↓ -5%	17.2	14.0	↓ -18%	
Business	103,100	70,900	↓ -31%	8.5	8.8	↑ 3%	
Education	990,200	1,062,900	↑ 7%	126.9	125.0	↓ -1%	
Employment	167,300	202,600	↑ 21%	55.8	92.1	↑ 65%	
Other	19,100	6,800	↓ -64%	5.3	3.1	↓ -42%	
<b>Total</b>	<b>2,851,600</b>	<b>2,669,200</b>	<b>↓ -6%</b>	<b>19.1</b>	<b>19.8</b>	<b>↑ 4%</b>	

Source: International Visitor Survey, Tourism Research Australia

np - not published due to data reliability.

International visitor expenditure spent in Tasmania by purpose of visit <sup>1</sup>										
	YE June			Average			Average			
	09	10	%	spend per	spend per	%	spend per	spend per	%	
	\$million	\$million	Change	visitor 09	visitor 10	Change	night 09	night 10	Change	
<b>Expenditure</b>										
Holiday	\$118	\$95	↓ -19%	\$1,107	\$1,058	↓ -4%	\$108	\$110	↑ 1%	
Visit friends or relatives	\$35	\$36	↑ 3%	\$1,250	\$1,101	↓ -12%	\$73	\$78	↑ 8%	
Business	\$22	\$20	↓ -9%	\$1,818	\$2,469	↑ 36%	\$213	np	np	
Education	\$75	\$102	↑ 36%	\$9,615	\$12,000	↑ 25%	\$76	\$96	↑ 27%	
Other	\$17	np	np	\$5,667	np	np	np	np	np	
<b>Total</b>	<b>\$268</b>	<b>\$263</b>	<b>↓ -2%</b>	<b>\$1,793</b>	<b>\$1,955</b>	<b>↑ 9%</b>	<b>\$94</b>	<b>\$99</b>	<b>↑ 5%</b>	

Source: International Visitor Survey, Tourism Research Australia

<sup>1</sup> Modelled expenditure including package expenditure

np - not published due to data reliability.

International visitors to States/Territories						
	YE June	YE June	%	YE June	YE June	% point
	2009	2010	change	2009	2010	difference
<i>State/territory visited</i>	<i>Visitors</i>			<i>Market Share</i>		
New South Wales	2,712,300	2,781,900	↑ 3%	53.0%	52.7%	↓ -0.3%
Victoria	1,481,300	1,548,200	↑ 5%	28.9%	29.3%	↑ 0.4%
Queensland	2,012,300	1,969,800	↓ -2%	39.3%	37.3%	↓ -2.0%
South Australia	347,500	363,600	↑ 5%	6.8%	6.9%	↑ 0.1%
Western Australia	684,400	683,700	→ 0%	13.4%	12.9%	↓ -0.4%
Tasmania	149,500	134,500	↓ -10%	2.9%	2.5%	↓ -0.4%
Northern Territory	331,500	322,600	↓ -3%	6.5%	6.1%	↓ -0.4%
Australia Capital Territory	159,000	153,400	↓ -4%	3.1%	2.9%	↓ -0.2%
<b>Total visitors to Australia</b>	<b>5,120,600</b>	<b>5,279,700</b>	<b>↑ 3%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>→ 0.0%</b>

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

Origin of international visitors to Tasmania							
	YE June 2009	YE June 2010	% change	YE June 2009	YE June 2010	% point difference	
Country of origin	Visitors			National Market Share			
New Zealand	15,900	12,300	↓ -23%	1.6%	1.2%	↓	-0.4%
Japan	5,800	4,800	↓ -17%	1.6%	1.4%	↓	-0.1%
Hong Kong	5,000	6,600	↑ 32%	3.7%	4.7%	↑	1.0%
Singapore	6,100	5,200	↓ -15%	2.5%	2.1%	↓	-0.5%
Malaysia	5,300	5,400	↑ 2%	3.0%	2.8%	↓	-0.2%
Indonesia	np	np	np	2.4%	0.5%	↓	-2.0%
Taiwan	np	np	np	5.0%	3.0%	↓	-2.0%
Thailand	np	np	np	2.5%	3.6%	↑	1.1%
Korea	2,500	3,100	↑ 24%	1.4%	1.7%	↑	0.3%
China	5,000	6,700	↑ 34%	1.5%	1.8%	↑	0.3%
India	np	np	np	1.2%	1.3%	↑	0.1%
Other Asia	np	np	np	0.9%	1.0%	→	0.0%
USA includes Hawaii	20,200	15,900	↓ -21%	4.8%	3.5%	↓	-1.3%
Canada	8,400	4,300	↓ -49%	7.3%	3.7%	↓	-3.6%
United Kingdom	26,500	19,800	↓ -25%	4.3%	3.2%	↓	-1.1%
Germany	8,800	9,400	↑ 7%	5.7%	6.0%	↑	0.2%
Scandinavia	3,800	6,300	↑ 66%	4.9%	7.5%	↑	2.6%
France	4,200	4,700	↑ 12%	4.9%	5.0%	↑	0.1%
Italy	np	np	np	2.8%	5.8%	↑	3.0%
Netherlands	2,900	3,100	↑ 7%	5.8%	6.2%	↑	0.3%
Switzerland	np	np	np	5.6%	5.6%	→	0.0%
Other Europe	6,800	5,300	↓ -22%	3.6%	3.0%	↓	-0.6%
Other Countries	7,700	7,300	↓ -5%	2.0%	1.9%	↓	-0.2%
<b>Total</b>	<b>149,500</b>	<b>134,500</b>	<b>↓ -10%</b>	<b>2.9%</b>	<b>2.5%</b>	<b>↓</b>	<b>-0.4%</b>

Source: International Visitor Survey, Tourism Research Australia

np - not published due to data reliability.

Origin of international visitor nights spent in Tasmania									
	YE June 2009	YE June 2010	% change	YE June 2009	YE June 2010	YE June 2009	YE June 2010	% point difference	
Country of origin	Nights			Average Stay (nights)		National Market Share			
New Zealand	231,300	116,100	↓ -50%	14.5	9.4	1.7%	0.9%	↓	-0.8%
Japan	156,900	98,800	↓ -37%	27.1	20.6	2.0%	1.3%	↓	-0.7%
Hong Kong	108,600	135,200	↑ 24%	21.7	20.5	2.4%	2.6%	↑	0.2%
Singapore	52,400	87,200	↑ 66%	8.6	16.8	1.0%	1.5%	↑	0.5%
Malaysia	339,900	248,300	↓ -27%	64.1	46.0	5.2%	3.8%	↓	-1.5%
Indonesia	np	np	np	np	np	1.0%	0.1%	↓	-0.9%
Taiwan	np	np	np	np	np	4.1%	1.5%	↓	-2.7%
Thailand	np	np	np	np	np	2.1%	2.3%	↑	0.3%
Korea	101,800	135,900	↑ 33%	40.7	43.8	0.9%	1.1%	↑	0.2%
China	237,300	234,500	↓ -1%	47.5	35.0	1.4%	1.0%	↓	-0.3%
India	np	np	np	np	np	0.5%	0.7%	↑	0.2%
Other Asia	np	np	np	np	np	1.0%	1.0%	→	0.0%
USA includes Hawaii	151,700	213,800	↑ 41%	7.5	13.4	1.6%	2.1%	↑	0.5%
Canada	99,700	97,300	↓ -2%	11.9	22.6	2.0%	2.2%	↑	0.2%
United Kingdom	365,700	284,800	↓ -22%	13.8	14.4	1.7%	1.3%	↓	-0.4%
Germany	175,200	126,600	↓ -28%	19.9	13.5	2.3%	1.8%	↓	-0.6%
Scandinavia	50,100	77,900	↑ 55%	13.2	12.4	1.5%	2.2%	↑	0.7%
France	52,300	79,200	↑ 51%	12.5	16.9	1.2%	1.6%	↑	0.4%
Italy	np	np	np	np	np	1.1%	1.1%	→	0.0%
Netherlands	38,100	54,800	↑ 44%	13.1	17.7	1.9%	2.6%	↑	0.7%
Switzerland	np	np	np	np	np	2.4%	2.0%	↓	-0.4%
Other Europe	np	np	np	np	np	0.6%	0.7%	→	0.0%
Other Countries	183,600	274,900	↑ 50%	23.8	37.7	1.3%	2.0%	↑	0.7%
<b>Total</b>	<b>2,851,600</b>	<b>2,669,200</b>	<b>↓ -6%</b>	<b>19.1</b>	<b>19.8</b>	<b>1.6%</b>	<b>1.5%</b>	<b>↓</b>	<b>-0.2%</b>

Source: International Visitor Survey, Tourism Research Australia

np - not published due to data reliability.

Origin of international visitor expenditure spent in Tasmania							
	YE June 2009	YE June 2010	% change		YE June 2009	YE June 2010	% point difference
Country of origin	Expenditure (\$million)				National Market Share		
New Zealand	\$21	\$26	↑ 24%		1.5%	1.9%	↑ 0.4%
United Kingdom	\$34	\$24	↓ -29%		1.7%	1.3%	↓ -0.4%
Germany	\$10	\$11	↑ 10%		1.6%	1.9%	↑ 0.3%
Scandinavia	np	np	np		np	np	np
Switzerland	np	np	np		np	np	np
Netherlands	np	np	np		np	np	np
France	np	np	np		np	np	np
Italy	np	np	np		np	np	np
Other Europe	np	np	np		np	np	np
United States of America	\$27	\$23	↓ -15%		2.2%	1.8%	↓ -0.3%
Canada	\$8	\$9	↑ 13%		1.7%	2.0%	↑ 0.4%
Japan	\$13	\$8	↓ -38%		1.3%	0.9%	↓ -0.4%
China	\$20	\$25	↑ 25%		1.1%	1.1%	→ 0.0%
Korea	np	np	np		np	np	np
Singapore	np	\$11	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	\$17	\$19	↑ 12%		1.3%	1.5%	↑ 0.2%
Total	\$268	\$263	↓ -2%		1.6%	1.5%	→ 0.0%

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

np: not published due to data reliability

<sup>1</sup> Modelled expenditure including package expenditure

Note: 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

Origin of international visitors to Australia									
	YE June 2009	YE June 2010	% Change		YE June 2009	YE June 2010	% Change	Average Stay 2009	Average Stay 2010
Country of origin	Visitors				Nights ("000")			Average Stay (nights)	
New Zealand	998,800	1,020,700	↑ 2%		13,926	13,104	↓ -6%	13.9	12.8
Japan	373,600	340,300	↓ -9%		8,015	7,661	↓ -4%	21.5	22.5
Hong Kong (SAR of China)	136,200	141,300	↑ 4%		4,577	5,247	↑ 15%	33.6	37.1
Singapore	242,600	252,900	↑ 4%		5,257	5,766	↑ 10%	21.7	22.8
Malaysia	175,200	193,900	↑ 11%		6,519	6,607	↑ 1%	37.2	34.1
Indonesia	86,100	106,100	↑ 23%		3,652	4,447	↑ 22%	42.4	41.9
Taiwan	87,500	81,700	↓ -7%		3,911	4,577	↑ 17%	44.7	56.0
Thailand	71,800	77,400	↑ 8%		3,742	3,709	↓ -1%	52.1	47.9
Korea	179,000	182,700	↑ 2%		11,482	12,196	↑ 6%	64.1	66.8
China (excludes SARs and Taiwan Province)	339,700	376,600	↑ 11%		17,306	22,459	↑ 30%	50.9	59.6
India	113,400	122,500	↑ 8%		7,137	7,505	↑ 5%	62.9	61.3
Other Asia	127,600	139,800	↑ 10%		7,465	8,220	↑ 10%	58.5	58.8
USA includes Hawaii	424,600	459,300	↑ 8%		9,253	10,125	↑ 9%	21.8	22.0
Canada	115,500	118,800	↑ 3%		5,069	4,450	↓ -12%	43.9	37.5
United Kingdom	618,800	614,600	↓ -1%		22,104	22,445	↑ 2%	35.7	36.5
Germany	153,300	157,800	↑ 3%		7,482	7,115	↓ -5%	48.8	45.1
Scandinavia	77,100	84,100	↑ 9%		3,309	3,551	↑ 7%	42.9	42.2
France	85,100	93,300	↑ 10%		4,444	5,043	↑ 13%	52.2	54.0
Italy	57,100	54,000	↓ -5%		2,774	2,259	↓ -19%	48.6	41.8
Netherlands	50,100	49,500	↓ -1%		2,055	2,139	↑ 4%	41.0	43.2
Switzerland	37,600	42,200	↑ 12%		1,617	1,525	↓ -6%	43.0	36.1
Other Europe	188,100	179,300	↓ -5%		8,830	8,706	↓ -1%	46.9	48.6
Other Countries	381,900	390,800	↑ 2%		14,236	13,821	↓ -3%	37.3	35.4
<b>Total</b>	<b>5,120,600</b>	<b>5,279,700</b>	<b>↑ 3%</b>		<b>174,160</b>	<b>182,677</b>	<b>↑ 5%</b>	<b>34.0</b>	<b>34.6</b>

Source: International Visitor Survey, Tourism Research Australia

np - not published due to data reliability.

Origin of international visitor spend in Australia							
	YE June 2009	YE June 2010	% Change	Average spend per visitor 09	Average spend per visitor 10	Average spend per night 09	Average spend per night 10
Country of origin	Expenditure (\$million)			Spend per visitor		Spend per night	
New Zealand	\$1,410	\$1,390	↓ -1%	\$1,412	\$1,362	\$101	\$106
United Kingdom	\$1,945	\$1,832	↓ -6%	\$3,143	\$2,981	\$88	\$82
Germany	\$625	\$587	↓ -6%	\$4,077	\$3,720	\$84	\$82
Scandinavia	\$338	\$353	↑ 4%	\$4,384	\$4,197	\$102	\$99
Switzerland	\$188	\$195	↑ 4%	\$5,000	\$4,621	\$116	\$128
Netherlands	\$183	\$190	↑ 4%	\$3,653	\$3,838	\$89	\$89
France	\$348	\$353	↑ 1%	\$4,089	\$3,783	\$78	\$70
Italy	\$244	\$216	↓ -11%	\$4,273	\$4,000	\$88	\$96
Other Europe	\$833	\$761	↓ -9%	\$4,428	\$4,244	\$94	\$87
United States of America	\$1,236	\$1,252	↑ 1%	\$2,911	\$2,726	\$134	\$124
Canada	\$482	\$441	↓ -9%	\$4,173	\$3,712	\$95	\$99
Japan	\$966	\$848	↓ -12%	\$2,586	\$2,492	\$121	\$111
China	\$1,834	\$2,263	↑ 23%	\$5,399	\$6,009	\$106	\$101
Korea	\$982	\$928	↓ -5%	\$5,486	\$5,079	\$86	\$76
Singapore	\$790	\$842	↑ 7%	\$3,256	\$3,329	\$150	\$146
Malaysia	\$712	\$743	↑ 4%	\$4,064	\$3,832	\$109	\$112
Hong Kong	\$540	\$561	↑ 4%	\$3,965	\$3,970	\$118	\$107
Indonesia	\$392	\$453	↑ 16%	\$4,553	\$4,270	\$107	\$102
Thailand	\$351	\$334	↓ -5%	\$4,889	\$4,315	\$94	\$90
India	\$567	\$559	↓ -1%	\$5,000	\$4,563	\$79	\$74
Taiwan	\$312	\$325	↑ 4%	\$3,566	\$3,978	\$80	\$71
Other Asia	\$495	\$602	↑ 22%	\$3,879	\$4,306	\$66	\$73
Other Countries	\$1,305	\$1,228	↓ -6%	\$3,417	\$3,142	\$92	\$89
<b>Total</b>	<b>\$17,077</b>	<b>\$17,256</b>	<b>↑ 1%</b>	<b>\$3,335</b>	<b>\$3,268</b>	<b>\$98</b>	<b>\$94</b>

Source: International Visitor Survey, Tourism Research Australia

<sup>1</sup> Modelled expenditure including package expenditure

Purpose of visit to Tasmania by origin of international visitors, Year ending June 2010												
Country of origin	Holiday	% change	VFR <sup>1</sup>	% change	Business	% change	Education	% change	Employment	% change	Total	% change
Visitors												
United Kingdom	13,000	↓ -36%	8,300	↑ 17%	np	np	np	np	np	np	19,800	↓ -25%
New Zealand	4,900	↓ -25%	5,200	↓ -21%	2,600	↓ -16%	np	np	np	np	12,300	↓ -23%
Total Asia	25,900	↓ -8%	6,500	↑ 32%	2,200	↓ -33%	5,300	↑ 11%	np	np	40,500	↔ 0%
Japan	3,300	↓ -18%	np	np	np	np	np	np	np	np	4,800	↓ -17%
Other Asia	22,600	↓ -6%	5,700	↑ 36%	1,900	↓ -25%	4,700	↑ 14%	np	np	35,700	↑ 3%
North America	15,100	↓ -33%	3,300	↓ -35%	1,600	↓ -11%	1,300	↑ 51%	np	np	20,300	↓ -29%
USA	12,000	↓ -23%	2,400	↓ -25%	1,300	↓ -16%	1,100	↑ 52%	np	np	15,900	↓ -21%
Canada	3,100	↓ -55%	np	np	np	np	np	np	np	4,300	↓ -48%	
Total Europe	26,600	↑ 5%	7,500	↑ 188%	np	np	np	np	np	np	34,300	↑ 14%
Germany	7,400	↓ -5%	2,000	↑ 532%	np	np	np	np	np	np	9,400	↑ 7%
Other Europe	19,300	↑ 9%	5,500	↑ 141%	np	np	np	np	np	np	24,900	↑ 17%
Other Countries	4,300	↑ 10%	2,000	↑ 16%	np	np	1,000	↑ 115%	np	np	7,300	↓ -6%
Total	89,800	↓ -16%	32,700	↑ 17%	8,100	↓ -33%	8,500	↑ 9%	2,200	↓ -27%	134,500	↓ -10%

Source: International Visitor Survey, Tourism Research Australia

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

np - not published due to data reliability.

Zones visited in Tasmania <sup>1</sup>										
Zones visited	Visitors			Nights			2009		2010	
	YE June 2009	YE June 2010	% Change	Visitor Share	Visitor Share	YE June 2009	YE June 2010	% Change	2009 Nights Share	2010 Nights Share
Hobart and Surrounds	123,800	111,800	↓ -10%	83%	83%	1,883,200	1,757,200	↓ -7%	66%	66%
North	56,400	48,100	↓ -15%	38%	36%	521,600	540,200	↑ 4%	18%	20%
Island	24,700	19,700	↓ -20%	17%	15%	163,800	182,600	↑ 11%	6%	7%
Western Wilderness <sup>2</sup>	33,100	26,300	↓ -21%	22%	20%	119,500	np	np	4%	np
Island	31,600	26,000	↓ -18%	21%	19%	np	np	np	np	np
Total	149,500	134,500	↓ -10%	100%	100%	2,851,600	2,669,200	↓ -6%	100%	100%

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: 66% of all international visitor nights in Tasmania in the 12 months to June 2010 were spent in Hobart and Surrounds.

Accommodation used in Tasmania										
	YE June 2009	YE June 2010	% Change	2009 Visitor Share	2010 Visitor Share	YE June 2009	YE June 2010	% Change	2009 Nights Share	2010 Nights Share
<i>Accommodation used</i>	<i>Visitors</i>				<i>Nights</i>					
Hotel, resort, motel, motor Inn	70,700	58,700	↓ -17%	47%	44%	386,000	335,800	↓ -13%	14%	13%
Backpacker / hostel	31,600	26,600	↓ -16%	21%	20%	296,100	295,100	→ 0%	10%	11%
Rented house / apartment / unit / flat	12,100	11,500	↓ -5%	8%	9%	928,400	877,700	↓ -5%	33%	33%
Home of friend or relative (no payment required)	33,900	34,700	↑ 2%	23%	26%	562,100	539,200	↓ -4%	20%	20%
Caravan	19,200	14,600	↓ -24%	13%	11%	161,500	109,700	↓ -32%	6%	4%
Guest house / Bed and Breakfast (2002 onwards)	10,300	9,600	↓ -7%	7%	7%	np	np	np	np	np
Boat, houseboat, cabin cruiser, or cruise ship	4,200	3,100	↓ -26%	3%	2%	np	np	np	np	np
Educational institution (eg university)	2,100	2,100	→ 0%	1%	2%	223,100	257,500	↑ 15%	8%	10%
Homestay	2,300	2,100	↓ -9%	2%	2%	132,200	126,400	↓ -4%	5%	5%
Other	3,200	2,000	↓ -38%	2%	1%	np	np	np	np	np
<b>Total</b>	<b>149,500</b>	<b>134,500</b>	<b>↓ -10%</b>	<b>100%</b>	<b>100%</b>	<b>2,851,600</b>	<b>2,669,200</b>	<b>↓ -6%</b>	<b>100%</b>	<b>100%</b>

Source: International Visitor Survey, Tourism Research Australia

How to read this table: 26% of all international visitors to Tasmania in the 12 months to June 2010 stayed in a home of a friend or relative.

np - not published due to data reliability

Length of visit to Tasmania					
	YE June 2009	YE June 2010	% Change	2009 Visitor Share	2010 Visitor Share
<i>Length of visit</i>	<i>Visitors</i>				
1 night	6,200	3,800	↓ -39%	4%	3%
2 nights	10,300	10,500	↑ 2%	7%	8%
3 to 7 nights	70,200	60,200	↓ -14%	47%	45%
8 to 14 nights	31,700	29,200	↓ -8%	21%	22%
15 to 27 nights	13,200	12,700	↓ -4%	9%	9%
28 or more nights	18,000	18,100	↑ 1%	12%	13%
<b>Total</b>	<b>149,500</b>	<b>134,500</b>	<b>↓ -10%</b>	<b>100%</b>	<b>100%</b>

Source: International Visitor Survey, Tourism Research Australia

How to read this table: 45% of all international visitors to Tasmania in the 12 months to June 2010 spent 3 to 7 nights in the State.

First or return visit to AUSTRALIA					
	YE June 2009	YE June 2010	% Change	2009 Visitor Share	2010 Visitor Share
<i>Repeat visitation</i>	<i>Visitors</i>				
First visit to Australia	63,300	51,900	↓ -18%	42%	39%
Return visit to Australia	86,200	82,500	↓ -4%	58%	61%
<b>Total</b>	<b>149,500</b>	<b>134,500</b>	<b>↓ -10%</b>	<b>100%</b>	<b>100%</b>

Source: International Visitor Survey, Tourism Research Australia

How to read this table: 39% of all international visitors to Tasmania in the 12 months to June 2010 where visiting Australia for the first time.

Travel Party					
	YE June 2009	YE June 2010	% Change	2009 Visitor Share	2010 Visitor Share
<i>Travel party description</i>	<i>Visitors</i>				
Unaccompanied traveller	82,400	73,500	↓ -11%	55%	55%
Adult couple	43,400	36,600	↓ -16%	29%	27%
children	10,500	10,800	↑ 3%	7%	8%
Friends and/ or relatives travelling together	10,600	10,700	↑ 1%	7%	8%
Business associates travelling together with or without spouses	2,700	2,900	↑ 7%	2%	2%
<b>Total</b>	<b>149,500</b>	<b>134,500</b>	<b>↓ -10%</b>	<b>100%</b>	<b>100%</b>

Source: International Visitor Survey, Tourism Research Australia

How to read this table: 55% of international visitors to Tasmania in the 12 months to June 2010 were travelling alone.

Age of international visitors					
	YE June 2009	YE June 2010	% Change	2009 Visitor Share	2010 Visitor Share
<i>Age of visitors</i>					
<i>Visitors</i>					
15 to 24	24,500	24,400	↔ 0%	16%	18%
25 to 34	35,700	30,600	↓ -14%	24%	23%
35 to 44	21,500	18,600	↓ -13%	14%	14%
45 to 54	18,600	20,700	↑ 11%	12%	15%
55 to 64	30,000	23,600	↓ -21%	20%	18%
65 and over	19,200	16,500	↓ -14%	13%	12%
<b>Total</b>	<b>149,500</b>	<b>134,500</b>	<b>↓ -10%</b>	<b>100%</b>	<b>100%</b>

Source: International Visitor Survey, Tourism Research Australia

How to read this table: 23% of all international visitors to Tasmania in the 12 months to June 2010 were aged between 25 to 34 years.

Items booked via the internet by international visitors					
	YE June 2009	YE June 2010	% Change	2009 Visitor Share	2010 Visitor Share
<i>Internet bookings</i>					
<i>Visitors</i>					
International airfare	52,400	50,800	↓ -3%	35%	38%
Domestic airfare	35,600	32,700	↓ -8%	24%	24%
Organised tour	7,500	5,100	↓ -32%	5%	4%
Vehicle rental	13,700	14,500	↑ 6%	9%	11%
Accommodation	36,400	37,300	↑ 2%	24%	28%
Entertainment activities or events	3,500	3,400	↓ -3%	2%	3%
Bus or train transport	2,700	4,600	↑ 70%	2%	3%
Australian travel package	1,100	1,500	↑ 36%	1%	1%
Education training or conferences	1,000	1,800	↑ 80%	1%	1%
Not applicable	75,100	62,900	↓ -16%	50%	47%
<b>Total</b>	<b>149,500</b>	<b>134,500</b>	<b>↓ -10%</b>	<b>100%</b>	<b>100%</b>

Source: International Visitor Survey, Tourism Research Australia

How to read this table: 28% of all international visitors to Tasmania in the 12 months to June 2010 used the internet to book accommodation in Australia prior to leaving home.

Information sources used by international visitors					
Visitors					
	YE June 2009	YE June 2010	% Change	2009 Visitor Share	2010 Visitor Share
<i>Information sources</i>	<i>Visitors</i>				
Airline company	2,500	2,000	↓ -20%	2%	1%
Travel Agent	32,800	28,400	↓ -13%	22%	21%
Internet	76,500	70,400	↓ -8%	51%	52%
Tour operator	5,100	2,900	↓ -43%	3%	2%
Travel book or guide	34,400	27,400	↓ -20%	23%	20%
Travel Article in Newspaper or Magazine	2,900	1,600	↓ -45%	2%	1%
Films or TV or Radio Program	4,200	2,700	↓ -36%	3%	2%
Advertising in Newspaper or Magazine	np	np	np	np	np
Advertising on TV or Radio	np	np	np	np	np
Other Advertising	np	np	np	np	np
Friend or relative living in Australia	40,800	32,700	↓ -20%	27%	24%
Friend or relative who has visited Australia	18,000	14,700	↓ -18%	12%	11%
Australian Consulate or Embassy	1,000	np	np	1%	np
The library	2,200	1,900	↓ -14%	1%	1%
Tourism Australian	2,900	2,000	↓ -31%	2%	1%
Tourist Bureau or Information Centre	1,100	np	np	1%	np
Previous visit(s)	np	np	np	np	np
IDP Education Australia (2006 onwards)	28,000	22,800	↓ -19%	19%	17%
Work related / Business colleagues	5,700	5,700	→ 0%	4%	4%
Conference related	np	np	np	np	np
Associations / Groups / Churches	6,800	5,000	↓ -26%	5%	4%
No information obtained	np	np	np	np	np
<b>Total</b>	<b>149,500</b>	<b>134,500</b>	<b>↓ -10%</b>	<b>100%</b>	<b>100%</b>

Source: International Visitor Survey, Tourism Research Australia

How to read this table: 52% of all international visitors to Tasmania in the 12 months to June 2010 used the internet as an information source about Australia

np - not published due to data reliability

Gender of international visitors					
	YE June 2009	YE June 2010	% Change	2009 Visitor Share	2010 Visitor Share
Gender	Visitors				
Male	72,400	63,100	↓ -13%	48%	47%
Female	77,100	71,300	↓ -8%	52%	53%
Total	149,500	134,500	↓ -10%	100%	100%

Source: International Visitor Survey, Tourism Research Australia

How to read this table: 53% of all international visitors to Tasmania in the 12 months to June 2010 were female.

## 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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