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International Tourism Snapshot Year ending March 2009

Data Source: International Visitor Survey, Tourism Research Australia

Australia's tourism outlook in response to the global economic slowdown[1]

Beyond April 2009, Australian tourism operators report significant uncertainty as consumers react to job insecurity, move to later booking trends (making forward booking forecasting very challenging), commit differently across different markets for bargain travel prices and alter their values regarding holiday/leisure travel. Discounted pricing is also impacting business yield and operators are questioning around how long this can be sustained. Adding to the forward forecasting challenge is the potential impact of the H1N1 virus (Swine Flu). Whilst most markets are reporting limited impact, others are reporting cancellations and postponements.

Discounting of domestic travel product is reflective of operators' efforts to stimulate domestic travel with accommodation and airlines offering more competitive rates and fares. This appears to be pushing domestic travellers to leave bookings as late as possible to guarantee the best bargain. Early data from 2009 suggests intention to take a short break (1 to 2 nights) is weaker in March 2009 than last year however, intention to take a longer trip (3 nights) is slightly stronger in March 2009 than last year.

National Overview

International tourism demand for Australia has deteriorated further due to the impact of the global economic recession. International visitor numbers into Australia declined by 2% over the year to March 2009, leaving the overall volume at the lowest level recorded in three years. This is consistent with UNWTO[2] reports' that destinations all around the world have suffered from a decrease in demand in major source markets, expecting international tourism to decline between 2% and 3% in 2009. However, it is expected the full force of the recession may not be felt until later in 2009, as there is typically an extended time between booking and travel to Australia from many long haul key source markets.

Despite a decrease in international visitors to Australia over the year (-2%), visitor nights and the expenditure of visitors from aboard rose to a record 172.2 million nights (+7%) and $16.9 billion (+4%) respectively.

Source markets recording positive visitor growth over the year to March 2009 included China (+2%), Canada (+4%), Malaysia (+9%), Singapore (+1%), Germany (+4%) and Other Europe (+5%). The decline in Japanese visitation (-22%) continues to heavily impact visitation numbers nationally. Japanese visitor numbers have reached an all time low, down by 41%, or 272,000 visitors, over the last five years. In addition, visitation from Australia's other key source markets - the United Kingdom (-5%), and New Zealand (-2%) both declined over the year to March 2009 when compared with the previous year. Not surprisingly given its current economic situation, the numbers of visitors from the USA declined for the first time in six years, down 3% over the year.

The year to March 2009 saw a further drop in international holiday visitation (-6%), a steadily growing trend since the September quarter 2007. International holiday visitor numbers are the lowest they have been since 2004. Most of the reduction in holiday visitation was out of Japan (-24%), Korea (-19%), New Zealand (-8%) and the UK (-7%). With holiday visitation down, the national leisure sector decreased 3%, although an increase in people visiting friends and relatives (VFR) (+4%) helped to offset some of the impact of the decline. Visitation for education (+4%) and employment (+16%) recorded positive growth, while business visitation (-3%) declined over the year.

[1] *Tourism Australia Global Market Monitor, May 2009*
[2] *United Nations World Tourism Organisation*

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Tasmanian Overview

Tasmania has followed the national trend, recording an even more significant decline in international visitors than nationally. The larger decline can be attributed to Tasmania's greater reliance on the holiday market which represent 70% of international visitors, whereas at the national level, holiday visitors represent 47% of all international visitors. All three of Tasmania's key international tourism indicators decreased over the year to March 2009 – visitors (-5%), nights (-2%) and expenditure (-4%). The numbers of international visitors to Tasmania have been steadily decreasing each quarter over the last year, to reach 147,400 visitors, the lowest number of arrivals in almost three years. The deceleration in international visitation to Tasmania is supported by a recent report from the Tourism and Transport Forum, suggesting regional communities, including Tasmania, many of which rely on tourism to sustain their local economies, will be highly susceptible to the overall tourism downturn[3].

Total spend by international visitors decreased 4% over the year to March 2009 to $237 million, the first negative growth posted after four consecutive significant performances. Most of the decrease was out of the education sector; down 26% over the year to $75 million (was $101 million). Despite fewer international visitors, nights and expenditure, the average spend per visitor and per night in the year to March 2009 remained relatively stable at $1,608 (+1%) and $81 (-2%) respectively.

International visitor nights spent in Tasmania reached 2.92 million (-2%) over the year to March 2009. A larger decline in visitors (-5%) than in nights (-2%) meant on average international visitors stayed longer in the State over the year. The average length of time international visitors spent in Tasmania increased from 19.2 nights in the year to March 2008 to 19.8 nights in the year to March 2009.

In line with declining national holiday visitation (-6%), Tasmania, along with all other states/territories, recorded a decrease in international holiday visitors in the year to March 2009 (-4%). Additionally, decreases were recorded in all other sectors in the State – VFR (-7%), Education (-12%), Business (-44%). With the largest decline in percentage terms, the number of international visitors to Tasmania on business fell to 11,600, the lowest year ending March result since 2006. International visitors in Tasmania for education purposes, an ordinarily important sector for Tasmania due to the high volume of nights they spend in the State, have been gradually declining each quarter over the last year, with total education nights down 16% over the year to March 2009 compared with last year. This decrease is the result of a downturn in the number of people visiting for educational purposes and a slight decline in their average length of stay.

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 15% of all nights spent by international visitors in Tasmania were spent in areas outside the major cities. In contrast, almost two thirds (64%) of all international visitor nights were spent in Hobart and Surrounds, followed by 21% of nights in Launceston, Tamar and the North, although both areas recorded a decrease in nights on the previous year. In addition, there were decreases in the number of international visitors to each zone in the year to March 2009, with the greatest decrease (-17%) recorded in Launceston, Tamar and the North.

Almost half (45%) of all international visitors to Tasmania stayed in a hotel, resort, motel, or motor inn, followed by 24% staying in the home of a friend or relative, and 21% staying in a backpacker/hostel. The largest proportion of international nights (32%) was spent in rented house/apartment/unit/flat accommodation, with 68% of these nights spent in Tasmania by international education visitors. Also during the year ending March 2009, 56% of all international visitors to Tasmania were travelling on their own in the State, 57% were on a return visit to Australia, 23% used the internet prior to leaving home to book some of their accommodation in Australia, and 41% were aged between 15 and 34 years.

Tasmania's International Market Share

Tasmania received 2.9% of all international visitors to Australia in the year to March 2009, slightly lower than in the year to March 2008 (3.0%). Victoria (+1%) and Western Australia (WA) (+1%) were the only states to experience any positive growth, albeit small, in visitor numbers and market share, with the bulk of the growth again coming from the VFR market. All states/territories recorded a drop in international holiday visitor numbers over the period, ranging within 1% to 7%.

[3] *Tourism & Transport Forum, Geoff Carmody & Associates (GCA), Tourism Analysis Note No. 2, March 2009*

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For the second quarter in a row, Tasmania was the only state/territory to record a decline in visitor nights in the year to March 2009 (-2%), hence its market share of all international nights in Australia dropped, albeit marginally, from 1.9% to 1.7%. Of the other states/territories, the Australian Capital Territory (ACT) (+22%), Victoria (+16%), and WA (+14%) experienced the strongest growth in visitor nights over the year. Most of the growth in ACT nights was out of the education sector (+46%), with Victoria's growth mainly out of education as well (+28%), along with VFR (+23%) and Employment (+15%). Total holiday nights in Australia (+2%) were held up by WA's strong performance in holiday nights (+14%), the only state/territory to post any influential increase.

Tasmania's share of all international expenditure (excluding package expenditure) in Australia dropped marginally from 1.6% in the year to March 2008 to 1.5% in the year to March 2009. All other states/territories, except for Tasmania and the ACT, recorded growth or no change in international expenditure. The Northern Territory achieved the strongest growth rate (+29%), followed by South Australia (+15%), Victoria (+12%), WA (+2%), and NSW (+2%).

Tasmania's International Markets Overview

Visitors from Asia, Europe, North America, and the United Kingdom (UK) continued to be Tasmania's largest sources of international visitors during the year to March 2009. Continuing demand from the USA (+7% to 21,600) is slowly closing the gap on UK's lead. Meanwhile, recovery from the UK market (+1% to 26,900) has just started to ease, although Tasmania is still holding up much better than Australia as a whole (-5%). Visitation from New Zealand was also positive over the year to March 2009, up 8%. However, strong declines recorded out of Germany (-16%), Japan (-39%), Canada (-4%) and Other Europe (-10%) negated any overall growth in international visitors for Tasmania. The UK ($28 million) was Tasmania's largest source market in terms of total spend in the State in the year to March 2009, followed by the USA ($20 million), and New Zealand ($18 million).

North America (Canada and USA)

A decline in the number of visitors to Australia from North America (-1% to 537,200) is a likely reflection of the USA moving deeper into recession and the continuing contraction of the Canadian economy. With the number of visitors to Australia from North America decreasing for the first time in six years, Tasmania performed well by increasing its share of North America visitors to 30,700 (+4%) over the year. In contrast to recent negative performances, all of this growth was out of USA, up 7% on the previous year; whereas visitors from Canada declined by 4%, the second consecutive drop in visitors since 2002. Despite growth in visitors, total nights by North America visitors declined 6%, with the average length of stay dropping from 10.1 nights to 9.1 nights. A shorter length of stay resulted in a 3% decrease in total expenditure, with the average spend per North America visitor declining to $912; whilst average spend per night remained stable at $100.

United Kingdom (UK)

Along with USA, the UK continues to be Tasmania's largest contributor to visitation from overseas. Although visitors from the UK declined at the national level (-5%), the State enjoyed a small increase in visitors numbers from the UK (+1%). UK visitors continue to stay for longer periods in Tasmania, with average length of stay increasing from 12.6 nights to 13.7 nights in the year to March 2009, resulting in a 9% increase in visitor nights. Total spend by UK visitors also grew (+17%) in the year to March 2009 compared with the previous year. Consequently, the average spend per UK visitor increased to $1041, while their average spend per night increased marginally to $76 (was $71).

New Zealand (NZ)

New Zealand is Tasmania's third largest source of international visitors. While there was a fairly small decline in visitors into Australia from NZ (-2%) over the year, Tasmania experienced an 8% increase in visitor numbers from NZ. Their average length of stay in Tasmania also increased from 10.7 nights in the year to March 2008 to 13.7 nights in the year to March 2009, resulting in a 39% increase in the total nights spent in the State. The average spend per visitor decreased slightly to $1139 (was $1164), as did average spend per night from $109 to $83. Total spend by New Zealanders visiting Tasmania reached $18 million, up 6% on the previous year.

Total Europe (Germany and Other Europe)

Total visitor numbers to Tasmania from Europe decreased 12% to 29,100 over the year to March 2009. While the number of Germans visiting Australia increased 4% to 153,500, the number who visited Tasmania during the same period decreased by 16% to 7,800. Despite this reduction in number, Germany remains Tasmania's single largest market within Europe. In addition, the number of visitors from all other European countries combined decreased (-10%) over the year. However, due to a decline in average length of stay, from 17.9 nights to 15.6 nights, the total nights spent in the State by Total European visitors declined 23%. The average length of stay by German visitors remained unchanged from the previous year at 19.6 nights, while Other European countries combined dropped from 17.3 to 14.1 nights. European expenditure is not published as it is considered to be unreliable.

Japan

With the Japanese economy officially in recession, it is hardly surprising that Australia (-22%) and Tasmania (-39%) continue to record significant negative growth out of Japan. Previously, smaller negative growth in Japanese nights would counteract larger decreases in Japanese visitors, hence resulting in a longer average stay, this year however, average length of stay decreased from 31.4 nights to 29.7 nights. Expenditure by Japanese visitors reached $12 million during the year; a decline of 14% on the previous 12 month period. Despite the drop in expenditure, Japanese visitors continue to record the highest spend per visitor ($2034), and the longest average length of stay in Tasmania, than any other single market.

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

While the number of visitors from the combined Asian nations excluding Japan into Australia increased by 1% to 1.5 million visitors, Tasmania experienced a 7% decline in the number of visitors from this market over the year to March 2009 (now 31,400 visitors). An 11% increase in nights from combined Asian nations helped offset a larger decline total visitor nights in the State. Of all overseas visitors, those from Other Asia spent the greatest number of nights in Tasmania (1.2 million nights), which accounted for 41% of total international nights spent in the State. The average length of stay of Other Asia visitors grew from 32 nights in the year to March 2008, to 38.2 nights the following year. The long average stay is largely due to a high proportion of Malaysian and Chinese visitors in Tasmania for education purposes.

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TABLE 1. INTERNATIONAL VISITATION TO TASMANIA AND AUSTRALIA

	TASMANIA			AUSTRALIA		
	12 months ending Mar 08	12 months ending Mar 09	% Change	12 months ending Mar 08	12 months ending Mar 09	% Change
International visitors	155,100	147,400	-5	5,206,300	5,122,700	-2
International nights	2,977,900	2,920,700	-2	160,525,200	172,196,500	7
Average Length of Stay (nights)	19.2	19.8	3	30.8	33.6	9
Expenditure *excluding* package expenditure ($million)	$247	$237	-4	$15,209	$15,860	4
Expenditure *including* package expenditure ($million)	$260	$250	-4	$16,275	$16,970	4
Average expenditure per visitor[1]	$1,593	$1,608	1	$2,921	$3,096	6
Average expenditure per night[1]	$83	$81	-2	$95	$92	-3
Market Share						
Visitors	3.0%	2.9%		100%	100%	
Nights	1.9%	1.7%		100%	100%	
Expenditure[1]	1.6%	1.5%		100%	100%	
International Purpose of visit[2]						
Holiday	106,300	102,100	-4	2,557,800	2,397,400	-6
Visit friends or relatives	31,500	29,400	-7	1,110,300	1,158,200	4
Business	20,700	11,600	-44	875,100	845,600	-3
Education	9,200	8,100	-12	372,200	381,600	3
Employment	np	3,500	np	106,300	123,800	16
Other reason	np	2,800	np	184,600	216,100	17
Total international visitors	155,100	147,400	-5	5,206,300	5,122,700	-2

Source: International Visitor Survey, Tourism Research Australia

[1] Average spend per visitor, spend per night and expenditure market share is calculated using expenditure excluding package spend.

[2] 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.

TABLE 2. INTERNATIONAL VISITOR NIGHTS SPENT IN TASMANIA

	12 months ending Mar 08	12 months ending Mar 09	% Change	Average Length of Stay (08)	Average Length of Stay (09)	% Change
Purpose of visit	nights	nights	%	nights	nights	%
Holiday	1,056,500	934,300	-12	10	9	-8
Visit friends or relatives	467,500	599,000	28	15	20	37
Business	np	np	np	np	np	np
Education	1,248,500	1,053,700	-16	136	130	-4
Employment	np	np	np	np	np	np
Other	np	np	np	np	np	np
Total	2,977,900	2,920,700	-2	19	20	3

Source: International Visitor Survey, Tourism Research Australia

np – not published due to data reliability.

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TABLE 3. INTERNATIONAL VISITOR EXPENDITURE SPENT IN TASMANIA BY PURPOSE OF VISIT[1]

	EXPENDITURE (EXCLUDING PACKAGE $)						
Purpose of visit	12 months ending Mar 08	12 months ending Mar 09	% Change	Average spend per visitor (07)	Average spend per visitor (08)	Average spend per night (07)	Average spend per night (08)
	$million	$million	%	$	$	$	$
Holiday	$90	$89	-1	$847	$872	$85	$95
Visit friends or relatives	$29	$33	14	$921	$1,122	$62	$55
Business	$25	$19	-24	$1,208	$1,638	np	np
Education	$101	$75	-26	$10,978	$9,259	$81	$71
Other	np	$20	np	np	np	np	np
Total	$247	$237	-4	$1,593	$1,608	$83	$81

Source: International Visitor Survey, Tourism Research Australia
[1] Modelled expenditure excluding package expenditure
np – not published due to data reliability.

TABLE 4. ORIGIN OF INTERNATIONAL VISITORS TO TASMANIA

	VISITORS			NIGHTS				EXPENDITURE				
Origin of visitor	12 months ending Mar 08	12 months ending Mar 09	% Change	12 months ending Mar 08	12 months ending Mar 09	% Change	Average Length of Stay (09)	12 months ending Mar 08	12 months ending Mar 09	% Change	Average $ per visitor (09)	Average $ per night (09)
	visitors	visitors	%	nights	nights	%	nights	$million	$million	%	$	$
United Kingdom	26,700	26,900	1	337,600	369,000	9	13.7	$24	$28	17	$1,041	$76
New Zealand	14,600	15,800	8	156,600	217,200	39	13.7	$17	$18	6	$1,139	$83
Total Asia	43,500	37,300	-14	1,386,700	1,375,500	-1	36.9	np	np	np	np	np
Japan	9,600	5,900	-39	301,300	175,100	-42	29.7	$14	$12	-14	$2,034	$69
Other Asia	33,900	31,400	-7	1,085,400	1,200,400	11	38.2	np	np	np	np	np
North America	29,500	30,700	4	297,100	279,500	-6	9.1	$29	$28	-3	$912	$100
USA	20,100	21,600	7	188,200	150,500	-20	7.0	$20	$20	0	$926	$133
Canada	9,500	9,100	-4	108,900	129,000	18	14.2	$9	$8	-11	$879	$62
Total Europe	32,900	29,100	-12	589,400	452,600	-23	15.6	np	np	np	np	np
Germany	9,300	7,800	-16	182,000	153,000	-16	19.6	$15	$9	-40	$1,154	$59
Other Europe	23,600	21,300	-10	407,400	299,600	-26	14.1	np	np	np	np	np
Other Countries	7,900	7,700	-3	210,400	226,900	8	29.5	$19	$21	11	$2,727	$93
Total	155,100	147,400	-5	2,977,900	2,920,700	-2	19.8	$247	$237	-4	$1,608	$81

Source: International Visitor Survey, Tourism Research Australia
[1] Modelled expenditure excluding package expenditure
np – not published due to data reliability

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TABLE 5. ORIGIN OF INTERNATIONAL VISITORS TO AUSTRALIA

Origin of visitor	VISITORS 12 months ending Mar 08	VISITORS 12 months ending Mar 09	VISITORS % Change	NIGHTS 12 months ending Mar 08	NIGHTS 12 months ending Mar 09	NIGHTS % Change	NIGHTS Average Length of Stay (09)	EXPENDITURE 12 months ending Mar 08	EXPENDITURE 12 months ending Mar 09	EXPENDITURE % Change	Average $ per visitor (09)	Average $ per night (09)
	visitors	visitors	%	nights	nights	%	nights	$million	$million	%	$	$
United Kingdom	643,000	613,900	-5	20,920,300	21,441,300	2	34.9	$1,866	$1,789	-4	$2,914	$83
New Zealand	1,030,100	1,005,800	-2	13,841,200	14,248,100	3	14.2	$1,471	$1,416	-4	$1,408	$99
Total Asia	2,034,700	1,937,600	-5	72,897,500	77,894,800	7	40.2	$6,869	$7,290	6	$3,762	$94
Japan	504,900	395,700	-22	10,497,200	8,366,400	-20	21.1	$874	$775	-11	$1,959	$93
Other Asia	1,529,800	1,542,000	1	62,400,300	69,528,400	11	45.1	$5,995	$6,515	9	$4,225	$94
North America	545,100	537,200	-1	13,993,500	14,271,500	2	26.6	$1,614	$1,558	-3	$2,900	$109
USA	432,400	420,500	-3	9,764,300	9,210,600	-6	21.9	$1,207	$1,091	-10	$2,595	$118
Canada	112,700	116,700	4	4,229,300	5,060,900	20	43.4	$407	$467	15	$4,002	$92
Total Europe	618,400	649,500	5	27,323,900	30,248,500	11	46.6	$2,317	$2,550	10	$3,926	$84
Germany	147,900	153,500	4	6,682,500	7,209,700	8	47.0	$540	$580	7	$3,779	$80
Other Europe	470,500	496,000	5	20,641,400	23,038,800	12	46.4	$1,777	$1,970	11	$3,972	$86
Other Countries	335,000	378,700	13	11,548,700	14,092,300	22	37.2	$1,074	$1,259	17	$3,325	$89
Total	5,206,300	5,122,700	-2	160,525,200	172,196,500	7	33.6	$15,209	$15,860	4	$3,096	$92

Source: International Visitor Survey, Tourism Research Australia
[1] *Modelled expenditure excluding package expenditure*
np – not published due to data reliability

TABLE 6. INTERNATIONAL VISITORS TO STATES/TERRITORIES

State/territory visited	VISITORS 12 mths ending Mar 08	VISITORS 12 mths ending Mar 09	VISITORS % Change	VISITORS Visitor share (08)	NIGHTS 12 mths ending Mar 08	NIGHTS 12 mths ending Mar 09	NIGHTS % Change	NIGHTS Night share (08)	EXPENDITURE 12 mths ending Mar 08	EXPENDITURE 12 mths ending Mar 09	EXPENDITURE % Change	EXPENDITURE Spend share (08)
			%	%			%	%	$million	$million	%	%
NSW	2,823,900	2,739,600	-3	53.5%	57,587	59,980	4	34.8%	$5,642	$5,739	2	36.2%
VIC	1,466,700	1,476,700	1	28.8%	30,859	35,822	16	20.8%	$3,145	$3,532	12	22.3%
QLD	2,159,300	2,018,700	-7	39.4%	38,532	39,052	1	22.7%	$3,533	$3,532	0	22.3%
SA	364,100	350,100	-4	6.8%	6,563	7,100	8	4.1%	$501	$576	15	3.6%
WA	669,100	674,200	1	13.2%	18,045	20,562	14	11.9%	$1,665	$1,698	2	10.7%
TAS	155,100	147,400	-5	2.9%	2,978	2,921	-2	1.7%	$247	$237	-4	1.5%
NT	338,900	323,300	-5	6.3%	2,962	3,134	6	1.8%	$259	$335	29	2.1%
ACT	165,400	156,900	-5	3.1%	2,560	3,120	22	1.8%	$215	$211	-2	1.3%
*Total Australia	5,206,300	5,122,700	-2	100.0%	160,525	172,197	7	100.0%	$15,209	$15,860	4	100.0%

Source: International Visitor Survey, Tourism Research Australia
**Sum of components for State/terrirory visited will be greater than the total as a visitor can visit more than one state per visit to Australia.*

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TABLE 7. PURPOSE OF VISIT TO TASMANIA BY ORIGIN OF INTERNATIONAL VISITORS

	LEISURE (HOLIDAY & VFR)[1]			OTHER REASON[2]			TOTAL		
Origin of visitor	12 months ending Mar 08	12 months ending Mar 09	% Change	12 months ending Mar 08	12 months ending Mar 09	% Change	12 months ending Mar 08	12 months ending Mar 09	% Change
	visitors	visitors	%	visitors	visitors	%	visitors	visitors	%
United Kingdom	26,100	25,600	-2	np	np	np	26,700	26,900	1
New Zealand	10,700	11,400	7	4,400	4,800	8	14,600	15,800	8
Total Asia	28,900	28,300	-2	16,700	10,200	-39	43,500	37,300	-14
Japan	7,800	4,300	-44	2,600	np	np	9,600	5,900	-38
Other Asia	21,000	23,900	14	14,000	8,500	-40	33,900	31,400	-8
North America	25,500	27,700	9	5,100	3,600	-29	29,500	30,700	4
USA	17,400	18,900	9	3,400	2,900	-13	20,100	21,600	8
Canada	8,000	8,800	9	np	np	np	9,500	9,100	-4
Total Europe	30,500	26,900	-12	3,000	3,000	1	32,900	29,100	-11
Germany	8,600	7,100	-17	np	np	np	9,300	7,800	-16
Other Europe	21,900	19,700	-10	2,000	2,200	10	23,600	21,300	-10
Other Countries	6,400	5,700	-11	2,000	np	np	7,900	7,700	-3
Total	128,000	125,600	-2	31,900	24,900	-22	155,100	147,400	-5

Source: International Visitor Survey, Tourism Research Australia
[1] VFR – Visit friends and/or relatives
[2] Other Reason includes travel for business, education, employment and other
np – not published due to data reliability.

TABLE 8. ZONES VISITED IN TASMANIA[1]

	VISITORS				NIGHTS			
Zones Visted	12 months ending Mar 08	12 months ending Mar 09	% Change	% of visitors (08)	12 months ending Mar 08	12 months ending Mar 09	% Change	% of nights (08)
Hobart and Surrounds	128,300	118,700	-8	81%	1,962,100	1,867,500	-5	64%
Launceston, Tamar and the North	67,200	55,500	-17	38%	665,800	600,400	-10	21%
The North West and King Island	27,000	23,700	-12	16%	np	np	np	np
Western Wilderness[2]	33,000	32,700	-1	22%	np	np	np	np
The East Coast and Flinders Island	34,300	31,100	-9	21%	np	np	np	np
Total	155,100	147,400	-5		2,977,900	2,920,700	-2	

Source: International Visitor Survey, Tourism Research Australia
[1] Zones are based on Tourism Tasmania's Marketing Zones.
[2] Western Wilderness includes Cradle Mountain.
np – not published due to data reliability
How to read this table: 64% of all international visitor nights in Tasmania in the 12 months to March 2009 were spent in Hobart and Surrounds.

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TABLE 9. ACCOMMODATION USED IN TASMANIA

	VISITORS				NIGHTS			
Accommodation used	12 months ending Mar 08	12 months ending Mar 09	% Change	% of visitors (08)	12 months ending Mar 08	12 months ending Mar 09	% Change	% of nights (08)
Hotel, resort, motel, motor inn	72,100	66,500	-8	45%	377,400	369,600	-2	13%
Backpacker / hostel	32,600	30,400	-7	21%	281,700	304,600	8	10%
Rented house/apartment/unit/flat	15,100	12,000	-20	8%	926,200	941,000	2	32%
Friend/relatives home (no payment)	37,000	35,100	-5	24%	527,800	680,600	29	23%
Caravan	18,200	17,700	-2	12%	np	np	np	np
Guest house / Bed and Breakfast	10,700	10,000	-7	7%	np	np	np	np
Boat,houseboat,cabin cruiser,cruise ship	6,200	4,600	-26	3%	np	np	np	np
Educational institution (eg uni)	3,300	2,100	-35	1%	311,600	231,000	-26	8%
Homestay	3,300	2,300	-29	2%	255,100	np	np	np
Other	3,000	2,700	-8	2%	np	np	np	np
Total	155,100	147,400	-5	100%	2,977,900	2,920,700	-2	100%

Source: International Visitor Survey, Tourism Research Australia
How to read this table: 24% of all international visitors to Tasmania in the 12 months to March 2009 stayed in a home of a friend or relative.
np – not published due to data reliability

TABLE 10. FIRST OR RETURN VISIT TO AUSTRALIA

First or return visit	12 months ending Mar 08 visitors	12 months ending Mar 09 visitors	% Change %	12 months ending Mar 08 %	12 months ending Mar 09 %
First visit to Australia	64,800	63,200	-2	42%	43%
Return visit to Australia	90,300	84,200	-7	58%	57%
Total	155,100	147,400	-5	100%	100%

Source: International Visitor Survey, Tourism Research Australia
How to read this table: 43% of all international visitors to Tasmania in the 12 months to March 2009 where visiting Australia for the first time.

TABLE 11. TRAVEL PARTY OF INTERNATIONAL VISITORS

Travel party	12 months ending Mar 08 visitors	12 months ending Mar 09 visitors	% Change %	12 months ending Mar 08 %	12 months ending Mar 09 %
Unaccompanied traveller	88,900	82,400	-7	57%	56%
Adult couple	41,300	42,400	3	27%	29%
Family group – parent(s) and children	8,800	9,600	9	6%	7%
Friends/relatives travelling together	11,900	10,600	-11	8%	7%
Business associates travelling together	4,200	2,400	-43	3%	2%
Total	155,100	147,400	-5	100%	100%

Source: International Visitor Survey, Tourism Research Australia
How to read this table: 56% of international visitors to Tasmania in the 12 months to March 2009 were travelling alone.

TABLE 12. AGE OF INTERNATIONAL VISITORS

	12 months ending Mar 08 ALL	12 months ending Mar 09	% Change	12 months ending Mar 08	12 months ending Mar 09
Age group	visitors	visitors	%	%	%
15 to 24	25,500	24,900	-2	16%	17%
25 to 34	31,200	34,700	11	20%	24%
35 to 44	19,300	21,600	12	12%	15%
45 to 54	25,200	18,100	-28	16%	12%
55 to 64	33,300	29,000	-13	21%	20%
65 and over	20,500	19,200	-6	13%	13%
Total	155,100	147,400	-5	100%	100%

Source: International Visitor Survey, Tourism Research Australia
How to read this table: 24% of all international visitors to Tasmania in the 12 months to March 2009 were aged between 25 to 34 years.

TABLE 13. ITEMS BOOKED VIA THE INTERNET BY INTERNATIONAL VISITORS

	12 months ending Mar 08	12 months ending Mar 09	% Change	12 months ending Mar 08	12 months ending Mar 09
Information Sources	visitors	visitors	%	%	%
International airfare	39,500	48,400	23	25%	33%
Domestic airfare	35,100	32,200	-8	23%	22%
Organised tour	9,000	6,100	-32	6%	4%
Vehicle rental	14,200	13,000	-8	9%	9%
Accommodation	35,800	34,300	-4	23%	23%
Sporting events	np	np	np	np	np
Entertainment activities or events	2,700	3,000	9	2%	2%
Bus or train transport	3,500	2,400	-32	2%	2%
Australian travel package	np	np	np	np	np
Education training or conferences	np	np	np	np	np
Not applicable	86,700	77,000	-11	56%	52%
Total	155,100	147,400	-5	100%	100%

Source: International Visitor Survey, Tourism Research Australia
How to read this table: 33% of all international visitors to Tasmania in the 12 months to March 2009 used the internet to book accommodation in Australia prior to leaving home.
np – not published due to data reliability

Tasmania
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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

	VISITORS		NIGHTS		EXPENDITURE ($million)	
Estimate	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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