

International Tourism Snapshot

International visitors to Tasmania, Year ending June 2009

Data Source: International Visitor Survey, Tourism Research Australia

International Tourism Forecast¹

The Tourism Forecasting Committee (TFC) suggests a sharp fall in both international tourism arrivals to Australia and tourism activity by Australian residents in 2009. On the world stage, 2009 is set to remain one of the toughest years for world tourism, as it faces the global economic recession and its impacts on job security and discretionary spending. In its June 2009 release, the United Nations World Tourism Organisation (UNWTO) updated its forecast for international tourism activity from a decline between -2% and -3%, to between -4 and -6%.

The UNWTO reports that international tourist arrivals world-wide declined 8% in the January–April 2009 period (compared with the same period in 2008), with Europe being the worst (-10%). Whilst recognising the difficult market environment and the overall reduction in arrivals around the world, it must be noted that Australia is outperforming many competing destinations. The Australian inbound market decreased only 1.1%, while outbound travel remained largely unchanged in the January–April 2009 period (compared with the same period in 2008).

However, the TFC assumes that the full effect of the global economic recession is yet to be felt on Australia's inbound tourism market. Although arrivals were down only 1.1% in the first four months of 2009, the TFC expects arrivals to fall by around 5.5% on average for the remainder of this year, and 4.0% in 2009 as a whole. Further, last year's popular World Youth Day celebrations in July 2008 inflated visitor arrivals—nations strongly represented at the event, such as Italy and other smaller European markets, are forecast to fall markedly this year.

Despite this, Australia has gained market share of a fast falling international travel market aided by a combination of factors, such as expanding international capacity on Australian routes. This has led to a substantial increase in the depth and scope of airfare discounting on Australian routes. This trend is expected to continue for the remainder of this year. Some of the key factors impacting on inbound tourism demand in Australia are:

- The lower value of the Australian dollar between August 2008 and March 2009, which enabled Australia's price competitiveness as a destination to improve. However, recent data shows this price competitiveness was short lived as the Australian dollar appreciated between March and July 2009. The TFC assumes that the Australian dollar will continue to appreciate slowly against most currencies over the 2009–2012 period, which is consistent with a moderate recovery in world economic growth over the same period.
- Lower oil prices. The large fall in the price of oil in late December 2008 led to reductions in airline fuel surcharges and allowed airlines to reduce airfares on long haul routes. Oil prices have more recently risen in early July 2009, causing concern amongst airlines.
- International airfares and package travel remain cheaper following the sharp discounting of international airfares.

¹ Tourism Forecasting Committee, 2009 Issue 1

- Less exposure to hard-hit business travel (compared with US and European travel sectors). This also means greater exposure to the less affected up-market leisure segment and the still growing education and youth/working holiday maker segments.

International Visitors to Australia

According to the latest results of the International Visitor Survey (IVS), international visitor numbers into Australia continue a steady trend downward, declining marginally (-1%) over the year to June 2009, leaving the overall volume at the lowest level recorded in two years (5.1 million). Although there was a decrease in international visitors to Australia over the year, visitor nights and the expenditure of visitors from abroad rose to a record 174.1 million nights (+8%) and \$16 billion (+5%) respectively.

Source markets recording positive visitor growth over the year to June 2009 included Hong Kong (+2%), Malaysia (+17%), Singapore (+5%), India (+12%), Germany (+2%) and Other Europe (+4%). The decline in Japanese visitation (-23%) continues to heavily impact visitor numbers nationally. Japanese visitor numbers (373,600) are the lowest volume ever recorded by the IVS over the last ten years. In addition, visitation from Australia's other key source markets the United Kingdom (-4%), and New Zealand (-2%) both declined over the year to June 2009 when compared with the previous year. The number of visitors from the USA (-0.5%) have also declined, albeit slightly, for the second quarter in a row.

At the national level, holiday and business travel continues to be most affected by the global financial crisis. The year to June 2009 saw another decline in international holiday visitation (-5%), a trend that has been accelerating from the September quarter 2007 onwards. International holiday visitor numbers are now the lowest they have been since 2004. Most of the reduction in holiday visitation was out of Japan (-26%), Korea (-19%), New Zealand (-6%), China (-4%) and the UK (-6%). An increase in international people visiting friends and relatives (VFR) (+7%) has helped to offset some of the impact of the decline in holiday travel. Countries driving the growth in VFR travel included New Zealand (+8%), USA (+13%), and China (+13%). Education (+4%) and employment travel also recorded positive growth (+14%) over the year. Business travel (-10%) on the other hand suffered significantly over the year to June 2009, the second decline in a row after almost six years of sustained growth.

International Visitors to Tasmania

Tasmania (-4%) recorded a more significant decline in international visitors than the national result (-1%) according to the year ending June 2009 IVS. The VFR travel market, which grew at the national level (+7%) but declined in Tasmania (-13%), represents a smaller proportion of international visitors to Tasmania (19% of all visitors) than to any other State. A smaller share of VFR visitors is not as favourable for Tasmania as it is for other states in the current economic climate where travellers are increasingly choosing VFR travel when travelling internationally.

The number of international visitors to Tasmania has been steadily decreasing each quarter since March 2008, to reach 149,500 visitors in the year ending June 2009. In line with declining visitor numbers, visitor nights (-7%) were also down over the year. Despite this, the total spend of international visitors increased 3% over the year to June 2009 to \$253 million, a return to positive growth after the decrease posted in the year ending March 2009. All of the increase in spend was out of the holiday (+17%) and VFR (+35%) sectors. Additional spend, together with fewer visitors and nights, saw the average spend per visitor and per night grow to \$1,692 (+8%) and \$89 (+11%) respectively.

Nights spent by international visitors in Tasmania reached 2.85 million (-7%) over the year to June 2009. Most of the decline was from the education (-20%), business (-28%) and VFR (-13%) sectors. An increase in holiday nights (+7%) helped deflect what could have been a significantly worse performance in total nights. A larger decline in total nights (-7%) than in total visitors (-4%) meant, on average, international visitors spent less time in the State than the previous year. The average length of time international visitors spent in Tasmania decreased from 19.6 nights in the year to June 2008 to 19.1 nights in the year to June 2009.

In contrast to the decline in holiday travel to Australia (-5%), the number of international holiday visitors to Tasmania remained unchanged from the previous year, the first optimistic result after three consecutive negative quarterly results. Tasmania has weathered the national holiday decline better than any other State in Australia, with all states/territories (except Tasmania) recording a decrease in international holiday visitors.

Except for holiday travel (no change), all other travel sectors in Tasmania declined over the year: VFR (-13%), Education (-15%), Business (-38%). With the largest decline in percentage terms (-38%), the number of international visitors to Tasmania on business fell to 12,100, which more than likely reflects a curtailing of business activity in response to the global financial crisis. International visitors in Tasmania for education purposes, an important sector for Tasmania due to the high volume of nights they spend in the State, have been gradually declining over recent quarters, with total education nights down 20% over the year to June 2009 compared with last year, the lowest volume recorded in three years.

The majority of international visitors who come to Tasmania continue to only visit the major cities and not extend their itineraries into regional Tasmania. Only 16% of all nights spent by international visitors in Tasmania were spent in areas outside the major cities. Two thirds (66%) of all international visitor nights were spent in Hobart and Surrounds, followed by 18% of nights in Launceston, Tamar and the North. Overall however, both areas recorded a decrease in the number of nights spent by international visitors compared to the previous year. In addition, there were decreases in the number of international visitors to each zone in the year to June 2009, with the greatest decrease (-16%) recorded in Launceston, Tamar and the North.

Tasmania's International Visitor Market Share

International Visitor Share:

Tasmania received 2.9% of all international visitors to Australia in the year to June 2009, slightly lower than in the year to June 2008 (3.0%). All states/territories aside from Western Australia (WA) (+2%), stayed stable or decreased. Queensland (-5%) experienced the greatest decline, followed by South Australia (SA) (-4%), Tasmania (-4%) and New South Wales (NSW) (-3%). The bulk of the decline in visitors was from the holiday and business markets. The international VFR market was the only significant growth market for all states/territories aside from Tasmania (-13%), Australian Capital Territory (ACT) (-8%), and the Northern Territory (-32%).

International Nights Share:

For the third quarter in a row, Tasmania was the only state/territory to record a decline in visitor nights in the year to June 2009 (-7%), with the State's market share falling from 1.9% to 1.6%. All of Tasmania's decrease in nights was from the VFR (-13%), business (-28%) and education (-20%) sectors. Most other states/territories recorded good growth in the VFR and education markets, therefore outperforming Tasmania in overall visitor nights. Of the larger states, WA (+14%), Victoria (+13%), and NSW (+6%) experienced the strongest growth in nights. Most of the growth in WA nights was out of the holiday (+16%), VFR (+10%) and employment (+49%) sectors, while Victoria's growth was mainly out of VFR (+31%) and Education (+22%). Total holiday nights in Australia (+5%) were held up by a healthy performance recorded by all states/territories, excluding Victoria (-3%) and SA (-3%).

International Expenditure Share:

Tasmania's share of all international expenditure (excluding package expenditure) in Australia remained unchanged at 1.6% in the year to June 2009. All other states/territories recorded growth in expenditure, aside from Western Australia with no change. SA (+18%) achieved the strongest growth rate in international spend mainly due to its education market; followed by Victoria (+11%) with growth coming out of its VFR and education markets. Tasmania's overall spend growth was stimulated by strong increases in its holiday (+17%) and VFR (+35%) markets, despite no growth in visitor numbers from these markets.

Tasmania's International Markets Overview

Visitors from Asia, Europe, North America, and the United Kingdom (UK) remain Tasmania's largest sources of international visitors during the year to June 2009. Increases were recorded in the number of visitors from New Zealand (+8%), Hong Kong (+15%), Singapore (+29%), Malaysia (+18%), Indonesia and Taiwan (+128%). However, these increases were offset by declines out of Japan (-34%), Korea (-59%) and China (-35%), and hence a key influence in the fall in total international visitors to Tasmania. Similarly, after two consecutive quarters of positive growth, there were decreases out of the UK (-2%) and the USA (-1%). Despite fewer visitors, the UK and the USA each recorded a significant increase (+15% and +22% respectively) in the total spend of international visitors in the State, along with visitors from New Zealand (+25%).

North America (Canada and USA)

The number of visitors to Australia from North America eased for the second quarter in a row after six years of steady and continuous growth. Tasmania's share of visitors from North America decreased to 28,600 (-5%) over the year to June 2009. Declines in holiday and business travel were responsible for the decrease in the number of visitors from North America in Tasmania, while growth in VFR travel helped moderate a larger overall decline. Visitors from the USA were down 1% on the previous year; while visitors from Canada declined by 12%. Furthermore, total nights by North American visitors declined 19%, with the average length of stay dropping from 10.3 nights to 8.8 nights. On a positive note, expenditure by North American visitors in Tasmania remained unchanged from the previous year. Spending the same in a shorter amount of time has meant the average spend per North America visitor increased to \$979 (was \$930); whilst average spend per night grew to \$111 (was \$91).

United Kingdom (UK)

In line with a national decline in visitors from the UK (-4%), Tasmania experienced a small decrease in visitors numbers from the UK (-2%). Most of the decline at the national level was due to a reduction in holiday travel (-6%), whereas for Tasmania it was due to a drop in VFR travellers (-23%). UK visitors continue to stay for longer periods in Australia, and the average length of stay in Tasmania increased from 13.4 nights to 13.8 nights in the year to June 2009, contributing to a minor (+1%) increase in visitor nights. Total spend by UK visitors also grew (+15%) in the year to June 2009 compared with the previous year. Consequently, the average spend per UK visitor increased to \$1132 (was \$959), while their average spend per night increased by \$10 to \$82.

New Zealand (NZ)

While there was a fairly small decline in the number of NZ visitors (-2%) to Australia over the year, Tasmania experienced an 8% increase in visitor numbers from NZ, largely as a result of an increase in VFR (+16%), education and employment travel. Their average length of stay in Tasmania also increased from 10.0 nights in the year to June 2008 to 14.5 nights in the year to June 2009, resulting in a 58% increase in the total nights spent in the State. In

addition, the average spend per NZ visitor increased to \$1258 (was \$1,088), whereas the average spend per night dropped from \$109 to \$86. Total spend by New Zealanders visiting Tasmania reached \$20 million, up 25% on the previous year.

Total Europe (Germany and Other Europe)

Total visitor numbers to Australia from Europe increased by 3% to 648,400 over the year to June 2009. Tasmania's share of total European visitors was 5% of this total, or 30,200 visitors; down 8% on the previous year as a result of a significant drop in VFR travel (-59%) from Europe. While the number of Germans visiting Australia increased 2% to 153,300, the number who visited Tasmania during the same period remained unchanged at 8,800. Despite no movement in visitor numbers, Germany remains Tasmania's single largest market within Europe. The number of visitors from all other European countries combined (excluding Germany) decreased (-11%) over the year. A decline in average length of stay, from 16.1 nights to 14.6 nights, saw the total nights spent in the State by Total European visitors decline by 17%. The average length of stay by German visitors increased slightly from the previous year to 19.9 nights, while Other European countries combined dropped from 15 to 12.5 nights. Total spend by German visitors declined by 9% to \$10 million; a result of a decline in the average spend per visitor (now \$1,136) and per night (now \$57).

Japan

Japanese visitors numbers continue to decline at a rapid rate both nationally (-23%) and in Tasmania (-34%). Most of this decline is due to a significant reduction in Japanese holiday travel. Average length of stay decreased from 34.5 nights to 27.1 nights, the shortest length of stay recorded in two years. Expenditure by Japanese visitors reached \$11 million during the year; a decline of 21% on the previous year. Despite the fall in expenditure, Japanese visitors continue to record the highest spend per visitor (\$1,897) than in any other single market. The spend per night also increased from \$46 in the year to June 2008 to \$70 in the year to June 2009.

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 at the same rate for both Australia (+1%) and Tasmania (+1%) over the year to June 2009. Tasmania's increase was primarily due to a 34% rise in holiday visitors, while nationally the growth was due to a healthy expansion in VFR (+11%) and education (+10%) travel. Asian countries recording positive growth in Tasmania included; Singapore (+29%), Hong Kong (+15%), Malaysia (+18%), Taiwan and Indonesia. However, a decline in visitors from Korea (-59%) and China (-35%) helped offset any potential overall gain in total Other Asia visitors.

A 4% increase in nights from combined Asian nations (excluding Japan) helped make up for a larger decline in 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 43% of total international nights spent in the State. The average length of stay of Other Asia visitors grew from 34.2 nights in the year to June 2008, to 35.2 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.

International Visitor Tables

Table I. International visitation - summary						
	TASMANIA			AUSTRALIA		
	12 months ending June 08	12 months ending June 09	% Change	12 months ending June 08	12 months ending June 09	% Change
International visitors	155,900	149,500	▼ -4	5,195,800	5,120,600	▼ -1
International nights	3,057,400	2,851,600	▼ -7	161,232,200	174,160,200	▲ 8
Average Length of Stay (nights)	19.6	19.1	▼ -3	31.0	34.0	▲ 10
Expenditure - <u>excluding</u> package expenditure (\$million)	\$245	\$253	▲ 3	\$15,236	\$16,000	▲ 5
Expenditure - <u>including</u> package expenditure (\$million)	\$258	\$268	▲ 4	\$16,318	\$17,077	▲ 5
Average expenditure per visitor ¹	\$1,572	\$1,692	▲ 8	\$2,932	\$3,125	▲ 7
Average expenditure per night ¹	\$80	\$89	▲ 11	\$94	\$92	▼ -3
Market Share						
Visitors	3.0%	2.9%	▼	100%	100%	
Nights	1.9%	1.6%	▼	100%	100%	
Expenditure ¹	1.6%	1.6%	▶	100%	100%	
International Purpose of visit²						
Holiday	106,500	106,600	▶ 0	2,520,400	2,391,700	▼ -5
Visit friends or relatives	32,200	28,000	▼ -13	1,121,900	1,200,400	▲ 7
Business	19,400	12,100	▼ -38	886,300	798,500	▼ -10
Education	9,200	7,800	▼ -15	372,500	389,200	▲ 4
Employment	np	3,000	np np	109,300	124,400	▲ 14
Other reason	np	3,600	np np	185,500	216,400	▲ 17
Total international visitors	155,900	149,500	▼ -4	5,195,800	5,120,600	▼ -1

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.

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

Table 2. International visitor nights spent in Tasmania

	12 months		Nights		Average Stay		% Change
	ending June 08	ending June 09	% Change	June 08	June 09	% Change	
	Holiday	1,019,400	1,090,500	▲ 7	9.6	10.2	
Visit friends or relatives	552,500	481,400	▼ -13	17.2	17.2	▶ 0	
Business	143,600	103,100	▼ -28	7.4	8.5	▲ 15	
Education	1,241,400	990,200	▼ -20	134.9	126.9	▼ -6	
Employment	np	167,300	np	np	55.8	np	
Other	np	np	np	np	np	np	
Total	3,057,400	2,851,600	▼ -7	19.6	19.1	▼ -3	

Source: International Visitor Survey, Tourism Research Australia

np - not published due to data reliability.

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

Table 3. International visitor expenditure spent in Tasmania by

	Expenditure (excluding package expenditure)						
	12 months	12 months	% Change	Average \$	Average \$	Average \$	Average \$
	ending June 08	ending June 09		per visitor (08)	per visitor (09)	per night (08)	per night (09)
	\$ million	\$ million		\$	\$	\$	\$
Holiday	\$88	\$103	▲ 17	\$826	\$966	\$86	\$94
Visit friends or relatives	\$26	\$35	▲ 35	\$807	\$1,250	\$47	\$73
Business	\$24	\$22	▼ -8	\$1,237	\$1,818	\$167	\$213
Education	\$102	\$75	▼ -26	\$11,087	\$9,615	\$82	\$76
Other	np	\$17	np	np	\$5,667	np	\$102
Total	\$245	\$253	▲ 3	\$1,572	\$1,692	\$80	\$89

Source: International Visitor Survey, Tourism Research Australia

¹ Modelled expenditure excluding package expenditure

np - not published due to data reliability.

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

Country of residence	Visitors		
	12 months ending June 08	12 months ending June 09	% Change
United Kingdom	27,100	26,500	▼ -2
New Zealand	14,700	15,900	▲ 8
Total Asia:	43,200	40,500	▼ -6
Japan	8,800	5,800	▼ -34
Other Asia	34,400	34,700	▲ 1
North America:	30,100	28,600	▼ -5
USA	20,500	20,200	▼ -1
Canada	9,500	8,400	▼ -12
Total Europe:	32,800	30,200	▼ -8
Germany	8,800	8,800	▶ 0
Other Europe	24,000	21,300	▼ -11
Other Countries	8,100	7,700	▼ -5
Total international visitors	155,900	149,500	▼ -4

Source: International Visitor Survey, Tourism Research Australia

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

Country of residence	Nights					
	12 months ending June 08	12 months ending June 09	% Change	Average Stay Jun 08	Average Stay Jun 09	
United Kingdom	363,000	365,700	▲ 1	13.4	13.8	▲
New Zealand	146,600	231,300	▲ 58	10.0	14.5	▲
Total Asia:	1,480,100	1,378,800	▼ -7	34.3	34.0	▼
Japan	303,300	156,900	▼ -48	34.5	27.1	▼
Other Asia	1,176,800	1,221,900	▲ 4	34.2	35.2	▲
North America:	308,900	251,400	▼ -19	10.3	8.8	▼
USA	180,100	151,700	▼ -16	8.8	7.5	▼
Canada	128,800	99,700	▼ -23	13.6	11.9	▼
Total Europe:	528,800	440,800	▼ -17	16.1	14.6	▼
Germany	168,000	175,200	▲ 4	19.1	19.9	▲
Other Europe	360,800	265,600	▼ -26	15.0	12.5	▼
Other Countries	230,000	183,600	▼ -20	28.4	23.8	▼
Total international visitors	3,057,400	2,851,600	▼ -7	19.6	19.1	▼

Source: International Visitor Survey, Tourism Research Australia

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

Table 6. Expenditure of international visitors in Tasmania

Expenditure (excluding package expenditure)									
Country of residence	12 months	12 months	% Change	Average \$	Average \$	Average \$	Average \$	Average \$	Average \$
	ending June	ending June		per visitor	per visitor		per night		
	08	09		Jun 08	Jun 09		Jun 08	Jun 09	
	\$million	\$million	%	\$	\$		\$	\$	
United Kingdom	\$26	\$30	▲ 15	\$959	\$1,132	▲	\$72	\$82	▲
New Zealand	\$16	\$20	▲ 25	\$1,088	\$1,258	▲	\$109	\$86	▼
Total Asia:	np	np	np	np	np	np	np	np	np
Japan	\$14	\$11	▼ -21	\$1,591	\$1,897	▲	\$46	\$70	▲
Other Asia	np	np	np	np	np	np	np	np	np
North America:	\$28	\$28	▶ 0	\$930	\$979	▲	\$91	\$111	▲
USA	\$18	\$22	▲ 22	\$878	\$1,089	▲	\$100	\$145	▲
Canada	\$10	\$6	▼ -40	\$1,053	\$714	▼	\$78	\$60	▼
Total Europe:	np	np	np	np	np	np	np	np	np
Germany	\$11	\$10	▼ -9	\$1,250	\$1,136	▼	\$65	\$57	▼
Other Europe	\$5	np	np	\$208	np	np	np	np	np
Other Countries	\$19	\$17	▼ -11	\$2,346	\$2,208	▼	\$83	\$93	▲
Total international visitors	\$245	\$253	▲ 3	\$1,572	\$1,692	▲	\$80	\$89	▲

Source: International Visitor Survey, Tourism Research Australia

n.p. not published due to data reliability

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

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

Origin	Visitors			Nights			Average Length of Stay (08)	Average Length of Stay (09)
	12 months ending June 08	12 months ending June 09	% Change	12 months ending June 08	12 months ending June 09	% Change		
	visitors	visitors		nights	nights			
United Kingdom	643,046	618,847	▼ -4	20,681,261	22,103,829	▲ 7	32.2	35.7
New Zealand	1,014,422	998,835	▼ -2	13,971,038	13,926,236	▼ -0.3	13.8	13.9
Total Asia	2,026,169	1,932,489	▼ -5	72,814,269	79,062,500	▲ 9	35.9	40.9
<i>Japan</i>	483,632	373,559	▼ -23	9,719,087	8,015,416	▼ -18	20.1	21.5
<i>Other Asia</i>	1,542,537	1,558,930	▲ 1	63,095,182	71,047,085	▲ 13	40.9	45.6
North America	541,319	540,099	▼ -0.2	14,035,618	14,321,192	▲ 2.0	25.9	26.5
<i>USA</i>	426,606	424,646	▼ -0.5	9,563,214	9,252,631	▼ -3.2	22.4	21.8
<i>Canada</i>	114,713	115,454	▲ 1	4,472,404	5,068,561	▲ 13	39.0	43.9
Total Europe	627,900	648,381	▲ 3	27,581,014	30,510,585	▲ 11	43.9	47.1
<i>Germany</i>	149,689	153,264	▲ 2	6,769,698	7,482,120	▲ 11	45.2	48.8
<i>Other Europe</i>	478,210	495,117	▲ 4	20,811,316	23,028,464	▲ 11	43.5	46.5
Other Countries	342,908	381,911	▲ 11	12,148,985	14,235,895	▲ 17	35.4	37.3
Total	5,195,763	5,120,562	▼ -1	161,232,183	174,160,237	▲ 8	31.0	34.0

Source: International Visitor Survey, Tourism Research Australia

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

Table 8. Origin of international visitors to Australia - spend

Origin	Expenditure (excluding package expenditure)						
	12 months	12 months	% Change	Average \$	Average \$	Average	Average
	ending June	ending June		per visitor	per visitor	\$ per	\$ per
	08	09	(08)	(09)	night (08)	night (09)	
	\$million	\$million		\$	\$	\$	\$
United Kingdom	\$1,868	\$1,808	▼ -3	\$2,905	\$2,922	\$90	\$82
New Zealand	\$1,459	\$1,364	▼ -7	\$1,438	\$1,366	\$104	\$98
Total Asia	\$6,843	\$7,441	▲ 9	\$3,377	\$3,850	\$94	\$94
<i>Japan</i>	\$824	\$747	▼ -9	\$1,704	\$2,000	\$85	\$93
<i>Other Asia</i>	\$6,019	\$6,694	▲ 11	\$3,902	\$4,294	\$95	\$94
North America	\$1,590	\$1,568	▼ -1	\$2,937	\$2,903	\$113	\$109
<i>USA</i>	\$1,180	\$1,109	▼ -6	\$2,766	\$2,612	\$123	\$120
<i>Canada</i>	\$410	\$459	▲ 12	\$3,574	\$3,976	\$92	\$91
Total Europe	\$2,380	\$2,546	▲ 7	\$3,790	\$3,927	\$86	\$83
<i>Germany</i>	\$557	\$579	▲ 4	\$3,721	\$3,778	\$82	\$77
<i>Other Europe</i>	\$1,823	\$1,967	▲ 8	\$3,812	\$3,973	\$88	\$85
Other Countries	\$1,097	\$1,274	▲ 16	\$3,199	\$3,336	\$90	\$89
Total	\$15,236	\$16,000	▲ 5	\$2,932	\$3,125	\$94	\$92

Source: International Visitor Survey, Tourism Research Australia

¹ Modelled expenditure excluding package expenditure

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

Table 9. International visitors to States/Territories

State/ territory visited	Visitors			Visitor Share 09	Nights			Expenditure			Spend Share 09	
	12 months ending June 08	12 months ending June 09	% Change		12 mths ending June 08	12 mths ending June 09	% Change	Nights Share 09	12 mths ending June 08	12 mths ending June 09		% Change
					('000s)	('000s)			\$million	\$million		
NSW	2,806,400	2,712,300	▼ -3	53.0%	56,864	60,541	▲ 6	34.8%	\$5,608	\$5,779	▲ 3	36.1%
VIC	1,480,700	1,481,300	► 0	28.9%	31,656	35,902	▲ 13	20.6%	\$3,185	\$3,529	▲ 11	22.1%
QLD	2,129,300	2,012,300	▼ -5	39.3%	38,934	39,863	▲ 2	22.9%	\$3,534	\$3,589	▲ 2	22.4%
SA	361,100	347,400	▼ -4	6.8%	6,521	7,047	▲ 8	4.0%	\$492	\$581	▲ 18	3.6%
WA	670,500	684,400	▲ 2	13.4%	18,371	21,012	▲ 14	12.1%	\$1,696	\$1,702	▲ 0.4	10.6%
TAS	155,900	149,500	▼ -4	2.9%	3,057	2,852	▼ -7	1.6%	\$245	\$253	▲ 3	1.6%
NT	332,500	331,500	▼ -0	6.5%	2,829	3,316	▲ 17	1.9%	\$264	\$348	▲ 32	2.2%
ACT	160,500	159,000	▼ -1	3.1%	2,539	3,116	▲ 23	1.8%	\$209	\$219	▲ 5	1.4%
*Total Australia	5,195,800	5,120,600	▼ -1	100.0%	161,232	174,160	▲ 8	100.0%	\$15,236	\$16,000	▲ 5	100.0%

Source: International Visitor Survey, Tourism Research Australia

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

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

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

Country of residence	Holiday		VFR		Business		Edu- cation	Employ- ment		Other reason	Total	% Change	
	%	% Change	%	% Change	%	% Change		%	% Change				
United Kingdom	20,400	▼ -2	7,100	▼ -23	np	np	np	np	np	np	26,500	▼ -2	
New Zealand	6,500	▼ -1	6,600	▲ 16	3,100	▼ -11	1,000	np	1,000	np	15,900	▲ 8	
Total Asia	28,000	▲ 18	4,900	▼ -14	3,200	▼ -66	4,700	▼ -27	1,600	np	40,500	▼ -6	
Japan	4,100	▼ -32	np	np	np	np	np	np	np	np	5,800	▼ -34	
Other Asia	24,000	▲ 34	4,100	▼ -8	2,500	▼ -69	4,100	▼ -22	1,600	np	34,700	▲ 1	
North America	22,400	▼ -8	5,100	▲ 30	1,800	▼ -53	np	np	np	np	28,600	▼ -5	
USA	15,500	▼ -8	3,200	▲ 61	1,600	▼ -37	np	np	np	np	20,200	▼ -1	
Canada	6,900	▼ -8	1,800	▼ -3	np	np	np	np	np	np	8,400	▼ -12	
Total Europe	25,400	▼ -1	2,600	▼ -59	2,100	▲ 19	np	np	np	np	30,200	▼ -8	
Germany	7,700	► 0	np	np	np	np	np	np	np	np	8,800	► 0	
Other Europe	17,700	▼ -1	2,300	▼ -57	1,600	▲ 26	np	np	np	np	21,300	▼ -11	
Other Countries	4,000	▼ -25	1,700	▲ 21	1,000	np	np	np	np	np	7,700	▼ -5	
Total	106,600	▲ 0	28,000	▼ -13	12,100	▼ -38	7,800	▼ -15	3,000	▲ 61	###	149,500	▼ -4

Source: International Visitor Survey, Tourism Research Australia

¹ VFR - Visit friends and/or relatives

np - not published due to data reliability.

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

Table 11. Zones visited in Tasmania¹

Zones Visted	Visitors				Nights			
	12 months	12 months	%	09 Visitor	12 months	12 months	%	09 Nights
	ending June 08	ending June 09	Change	Share	ending June 08	ending June 09	Change	Share
Hobart and Surrounds	127,000	123,800	▼ -3	83%	1,977,800	1,883,200	▼ -5	66%
Launceston, Tamar and the North	67,400	56,400	▼ -16	38%	712,500	521,600	▼ -27	18%
The North West and King Island	33,500	31,600	▼ -6	21%	np	np	np np	np
Western Wilderness ²	25,200	24,700	▼ -2	17%	155,600	163,800	▲ 5	6%
The East Coast and Flinders Island	33,100	33,100	► 0	22%	101,300	119,500	▲ 18	4%
Total	155,900	149,500	▼ -4	100%	3,057,400	2,851,600	▼ -7	100%

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: 66% of all international visitor nights in Tasmania in the 12 months to June 2009 were spent in Hobart and Surrounds.

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

Table 12. Accommodation used in Tasmania

Accommodation used	Visitors				Nights			
	12 months			% 09 Visitor	12 months			% 09 Nights
	12 months	ending June	%		12 months	12 months	%	
ending June 08	09	Change	Share	ending June 08	ending June 09	Change	Share	
Hotel, resort, motel, motor inn	69,300	70,700	▲ 2	47%	370,800	386,000	▲ 4	14%
Backpacker / hostel	32,300	31,600	▼ -2	21%	276,100	296,100	▲ 7	10%
Rented house/apartment/unit/flat	16,500	12,100	▼ -27	8%	997,100	928,400	▼ -7	33%
Friend/relatives home (no payment)	37,000	33,900	▼ -8	23%	666,100	562,100	▼ -16	20%
Caravan	17,400	19,200	▲ 10	13%	144,200	161,500	▲ 12	6%
Guest house / Bed and Breakfast	10,000	10,300	▲ 3	7%	53,400	46,600	▼ -13	2%
Boat,houseboat,cabin cruiser,cruise	6,400	4,200	▼ -34	3%	22,300	27,800	▲ 25	1%
Educational institution (eg uni)	3,000	2,100	▼ -30	1%	307,400	223,100	▼ -27	8%
Homestay	2,700	2,300	▼ -15	2%	164,400	132,200	▼ -20	5%
Other	2,300	3,200	▲ 39	2%	55,500	87,900	▲ 58	3%
Total	155,900	149,500	▼ -4	100%	3,057,400	2,851,600	▼ -7	100%

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 2009 stayed in a home of a friend or relative.

np - not published due to data reliability

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

Table 13. Length of visit to Tasmania

	12 months ending June 08	12 months ending June 09	% 08 Visitor Change	08 Visitor Share	09 Visitor Share
1 night	6,100	6,200	▲ 2	4%	4%
2 nights	10,300	10,300	▶ 0	7%	7%
3 to 7 nights	73,900	70,200	▼ -5	47%	47%
8 to 14 nights	34,400	31,700	▼ -8	22%	21%
15 to 27 nights	11,100	13,200	▲ 19	7%	9%
28 or more nights	20,200	18,000	▼ -11	13%	12%
Total	155,900	149,500	▼ -4	100%	100%

Source: International Visitor Survey, Tourism Research Australia

How to read this table: 47% of all international visitors to Tasmania in the 12 months to June 2009 spent 3 to 7 nights in the State.

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

Table 14. First or return visit to AUSTRALIA

	12 months ending June 08	12 months ending June 09	% 08 Visitor Change	08 Visitor Share	09 Visitor Share
First visit to Australia	65,700	63,300	▼ -4	42%	42%
Return visit to Australia	90,200	86,200	▼ -4	58%	58%
Total	155,900	149,500	▼ -4	100%	100%

Source: International Visitor Survey, Tourism Research Australia

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

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

Table 15. Travel Party

	12 months ending June 08	12 months ending June 09	Change	% 08 Visitor Share	09 Visitor Share
Unaccompanied traveller	88,800	82,400	▼ -7	57%	55%
Adult couple	41,100	43,400	▲ 6	26%	29%
Family group - parent(s) and children	9,500	10,500	▲ 11	6%	7%
Friends/relatives travelling together	12,400	10,600	▼ -15	8%	7%
Business associates travelling together	4,000	2,700	▼ -33	3%	2%
Total	155,900	149,500	▼ -4	100%	100%

Source: International Visitor Survey, Tourism Research Australia

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

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

Table 16. Age of international visitors

	12 months ending June 08	12 months ending June 09	Change	% 08 Visitor Share	09 Visitor Share
15 to 24	25,900	24,500	▼ -5	17%	16%
25 to 34	32,100	35,700	▲ 11	21%	24%
35 to 44	18,400	21,500	▲ 17	12%	14%
45 to 54	24,700	18,600	▼ -25	16%	12%
55 to 64	34,500	30,000	▼ -13	22%	20%
65 and over	20,300	19,200	▼ -5	13%	13%
Total	155,900	149,500	▼ -4	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 June 2009 were aged between 25 to 34 years.

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

Table 17. Items booked via the internet by international visitors

	12 months ending June 08	12 months ending June 09	Change	% 08 Visitor Share	09 Visitor Share
International airfare	42,000	52,400	▲ 25	27%	35%
Domestic airfare	36,000	35,600	▼ -1	23%	24%
Organised tour	9,200	7,500	▼ -18	6%	5%
Vehicle rental	14,700	13,700	▼ -7	9%	9%
Accommodation	36,100	36,400	▲ 1	23%	24%
Sporting events	np	np	np np	np	np
Entertainment activities or events	2,700	3,500	▲ 30	2%	2%
Bus or train transport	3,500	2,700	▼ -23	2%	2%
Australian travel package	np	np	np np	np	np
Education training or conferences	np	np	np np	np	np
Not applicable	86,200	75,100	▼ -13	55%	50%
Total	155,900	149,500	▼ -4	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 June 2009 used the internet to book accommodation in Australia prior to leaving home.

np - not published due to data reliability

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

Table 18. Information sources used by international visitors

	12 months ending June 08	12 months ending June 09	Change	% 08 Visitor Share	09 Visitor Share
Airline company	np	2,500	np	np	2%
Travel Agent	31,600	32,800	▲	4	20%
Internet	67,100	76,500	▲	14	43%
Tour operator	3,800	5,100	▲	34	2%
Travel book or guide	37,300	34,400	▼	-8	24%
Travel Article in Newspaper or Magazine	4,400	2,900	▼	-34	3%
Films or TV or Radio Program	3,300	4,200	▲	27	2%
Friend or relative living in Australia	34,600	40,800	▲	18	22%
Friend or relative who has visited Australia	22,000	18,000	▼	-18	14%
The library	2,400	2,200	▼	-8	2%
Tourism Australian	np	2,900	np	np	2%
Tourist Bureau or Information Centre	np	np	np	np	np
Previous visit(s)	34,700	28,000	▼	-19	22%
IDP Education Australia (2006 onwards)	5,600	5,700	▲	2	4%
Work related / Business colleagues	10,300	6,800	▼	-34	7%
No information obtained	11,000	9,300	▼	-15	7%
Total	155,900	149,500	▼	-4	100%

Source: International Visitor Survey, Tourism Research Australia

How to read this table: 51% of all international visitors to Tasmania in the 12 months to June 2009 used the internet as an information source about Australia

np - not published due to data reliability

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

Data source and reliability

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

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

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

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

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