TASMANIAN TOURISM SNAPSHOT

YEAR ENDING SEPTEMBER 2022

Image: Wineglass Bay, Robert King Visuals

More Tasmanian tourism statistics are available on Tourism Tasmania's corporate website www.tourismtasmania.com.au/research and via the interactive TVS Analyser at www.TVSAnalyser.com.au

TASMANIAN TOURISM SNAPSHOT

Year ending September 2022

This Snapshot explores the changes in visitation to Tasmania over the past year, providing insights primarily from the Tasmanian Visitor Survey (TVS). The TVS Analyser (www.tvsanalyser.com.au) is a free, interactive and always-on dashboard of visitation data, allowing analysis on a variety of visitor behaviours with the most recent data.

As with all destinations globally, Tasmania saw significant declines in visitation due to COVID-19. However despite periods of restricted travel over the past year, the state has recently seen periods of record domestic visitation and spend

Tasmania welcomed 966,500 interstate and international visitors in the year to September 2022, up 48% from 2021 (or 73 per cent of the visitation levels of the year ending September 2019). Total nights were up 44% from 2021 to 9.72 million (90 per cent the level of 2019), and visitor spend was $2.787 billion, up 63% on the year ending September 2021 (110 per cent the level of 2019 spend).

Visitation to Tasmania in the last 12 months was almost entirely supplemented by interstate visitors, with 924,800 mainland Australians visiting the state. This is 80% of the domestic visitation seen in calendar year 2019.

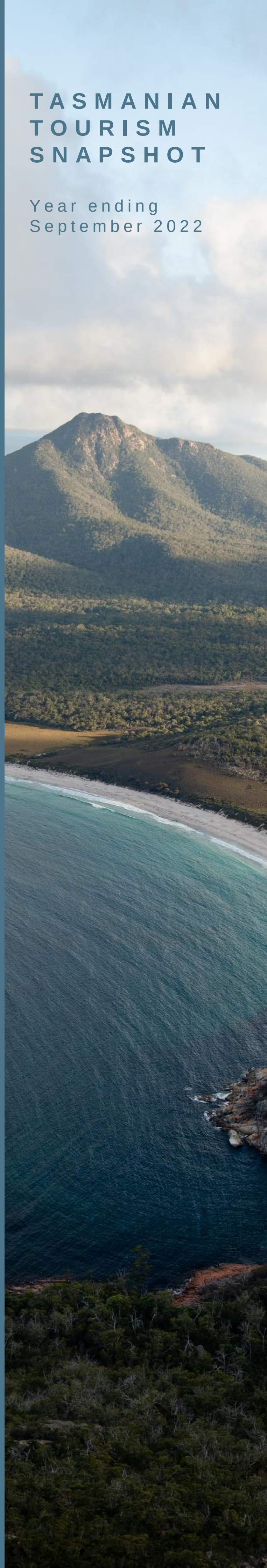
Tasmania's border was unrestricted for travellers for nine of the 12 months to September 2022, with restrictions through October-December 2021 primarily for Victorian and New South Wales travellers. Domestic travel resumed from all states from December 15, 2021. Limited international travel resumed from the same time, however the direct Hobart – Auckland flights only resumed in July 2022.

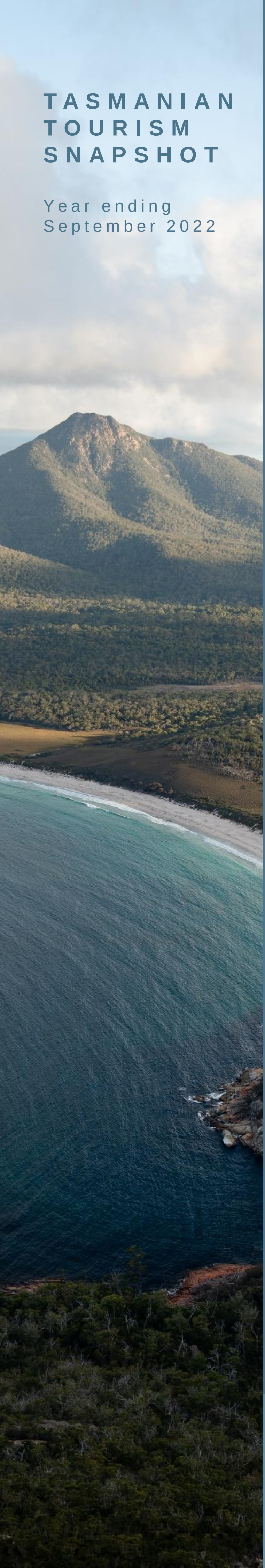
Tourism Tasmania's marketing activity was on throughout the year, including interstate, intrastate and international campaigns

The 'Come Down for Air' campaign was active in most interstate markets through the summer and autumn months, with the 'Off Season' campaign in the cooler winter months. With the opening of borders within Australia and internationally, travel is back on the agenda and Tasmania is performing strongly in the recovery stages.

Tasmanians were encouraged to travel their own state throughout the year, with locals consistently known to be passionate advocates for the state and eager sharers of their knowledge with friends, family and visitors.

Further information about Tourism Tasmania's campaigns, including how local industry can get involved, can be found at www.tourismtasmania.com.au/marketing/campaigns.





Comparing YE September 2022 to pre-COVID

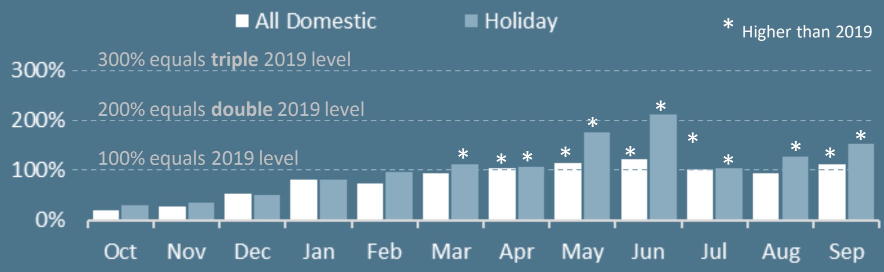
Although most travel restrictions lifted in mid-December 2021, this means the final three months of that year saw limited travel to the state. Using 2019 as a baseline for tracking recovery of **domestic** visitation, the below charts show each months' 'recovery rate' against the *same months in 2019*, demonstrating how changes in restrictions, and changes in visitor types, resulted in higher rates of spend and more nights in the state compared to recovery of number of visitors.

Tasmania saw record levels of domestic visitation from April to September 2022 compared to the same months in 2019.

Visitors

82%

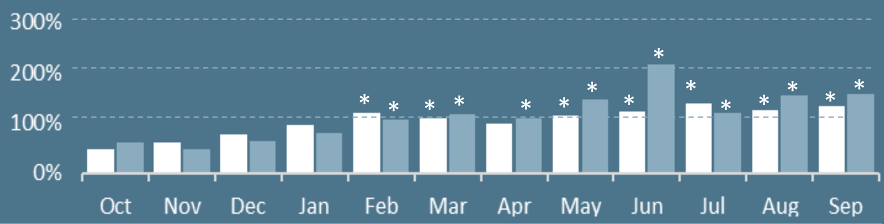
YE Sep 22 of YE Sep 19^



Nights

102%

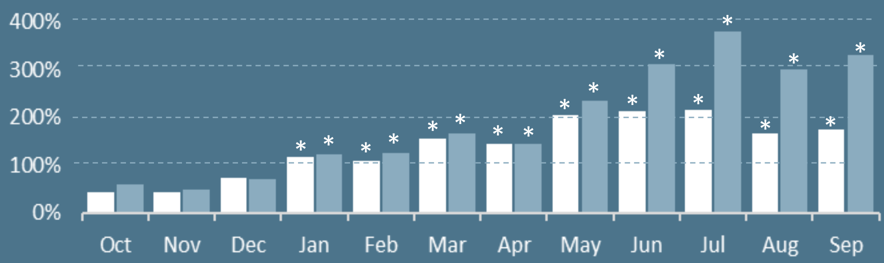
YE Sep 22 of YE Sep 19^



Spend

129%

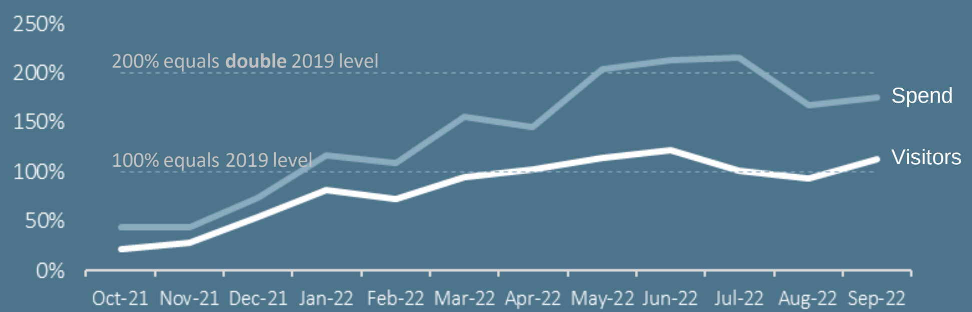
YE Sep 22 of YE Sep 19^



^Year ending September comparison is October 2018 to September 2019 and October 2021 to September 2022 for domestic visitors only.

Spend recovery continued to outpace visitation

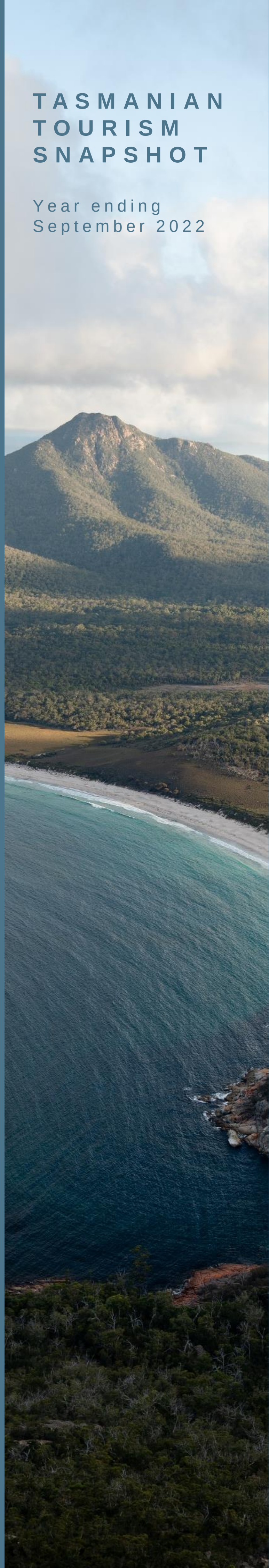
In the year to September 2022, Tasmania recorded nine months of domestic spend above the same months in any previous year. This spend was primarily from holiday visitors. For visitors, five months saw higher domestic visitation (April to September 2022, excluding August) compared to the same months in 2019.



Like to see more numbers?

The TVS Analyser interactive dashboard is available at www.tvsnalayser.com.au

Further research on Tasmania's visitor economy can be found on Tourism Tasmania's corporate site www.tourismtasmania.com.au/research

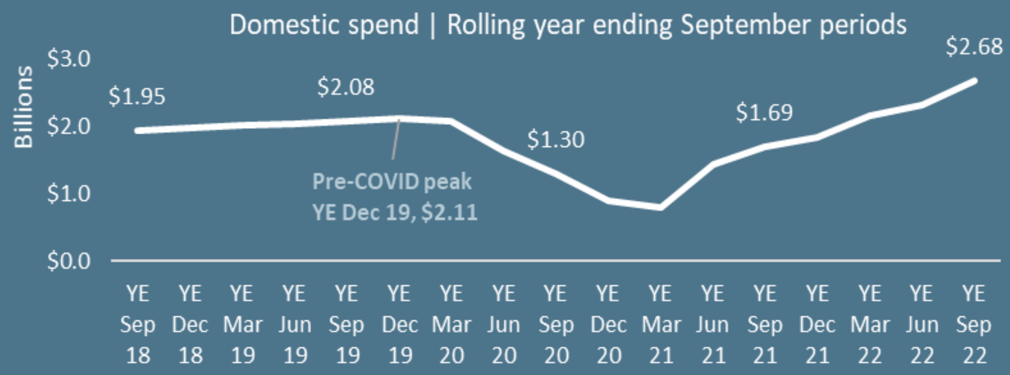


Visitors spent more in the September quarter of 2022 than they've ever spent in any previous September quarter

Although total visitation in the September quarter of 2022 was just below visitation in the same quarter of 2019 (down 2%), these visitors set a new September quarter record for expenditure in the state ($647.6m, up 73% from $375.2m in September quarter 2019). Of this spend, domestic visitors contributed $613.9m (up 88% on 2019, was $326.4m).

For the year to September 2022, total visitor spend was $2.787 billion, up 63% on the year ending September 2021 (110 per cent the level of 2019 spend). This is a new annual total spend record.

Domestic visitor spend in the year to September 2022 was $2.678 billion, also the highest annual domestic spend on record, and up 59 per cent from the $1.689 billion total domestic spend in the year to September 2021. Domestic visitor expenditure is now 129% of the levels of the year ending September 2019 (was $2.082 billion).

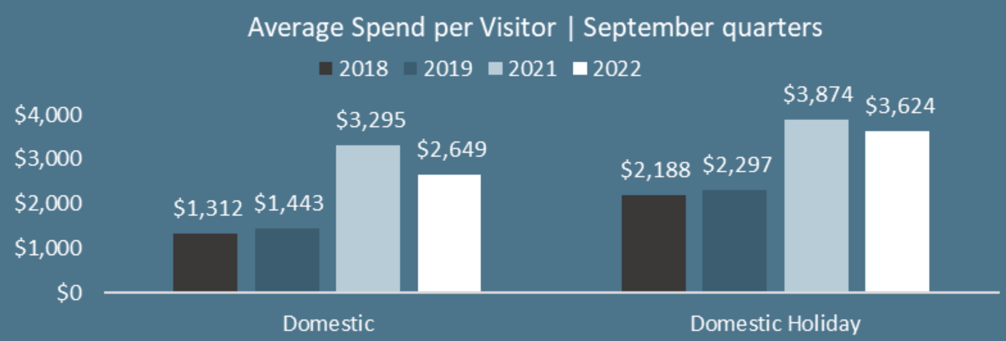


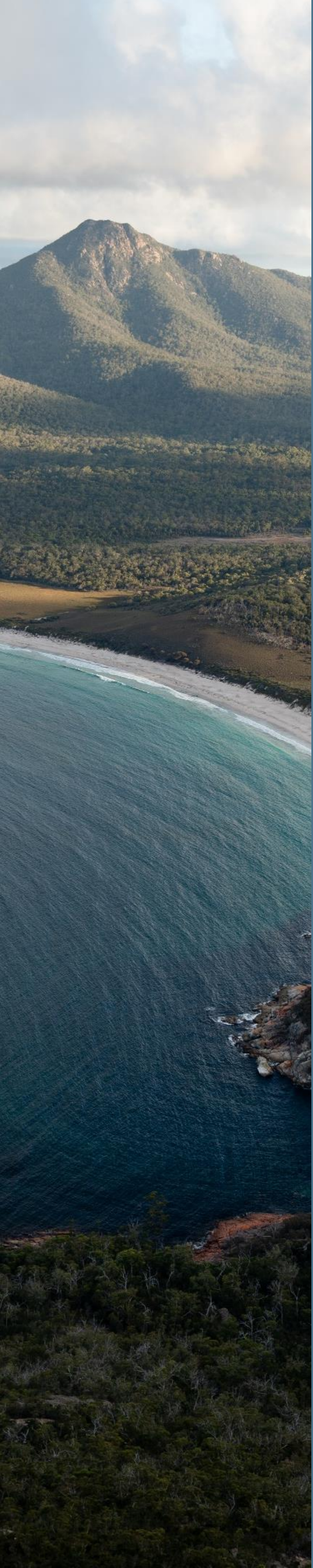
Average spend per visitor (ASPV) has softened, but remains well above pre-COVID levels

Since Tasmania's border first re-opened in late 2020, visitors have consistently been spending more each in Tasmania. Every month within the 12 months to September 2022 recorded higher average spend per domestic visitor (ASPV) compared to the same months in 2019.

Domestic *holiday* ASPV ($3,624) in the September quarter 2022 was higher than any previous September quarter, and up 58% on pre-COVID (September quarter 2019). Their ASPV has however followed the decline seen in the preceding June quarter, following ASPV peaks over $4,000.

For all domestic visitors, their ASPV of $2,649 in the September quarter 2022 was the fifth highest quarterly ASPV for domestic visitors of any previous quarter, and up 84% on pre-COVID (September quarter 2019, was $1,443): the four higher quarters are the preceding quarters.

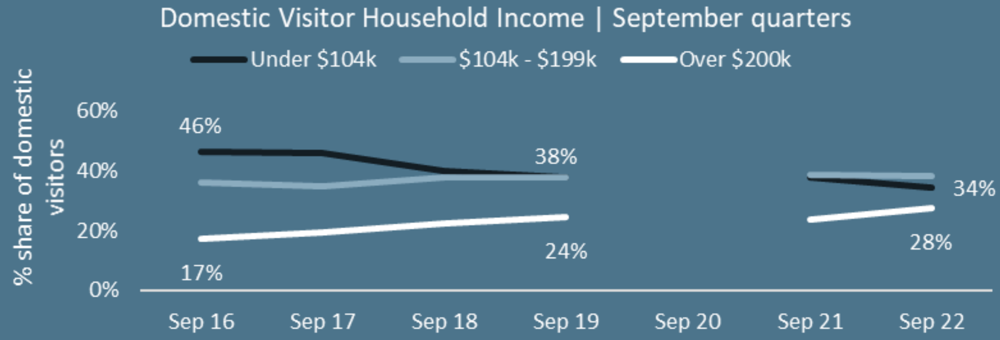




An increasing number of domestic visitors from higher income households were visiting Tasmania before COVID, with this trend continuing

Of all domestic visitors that reported their household income (HHI), the $200k or more HHI bracket represented 28% share of domestic visitors in the September quarter 2022, up from 24% share in the same quarter in 2019.

The over $200k HHI bracket has experienced the greatest increase in visitors of all income brackets since 2019, up 17%. The middle bracket, $104 to $199k, increased 4%, while HHI under $104k decreased 5% over the same period. Higher HHI visitors from NSW and QLD are driving this growth, aligned with their stronger likelihood to be holiday visitors who generally spend more than visitors coming to see friends or family (VFR).



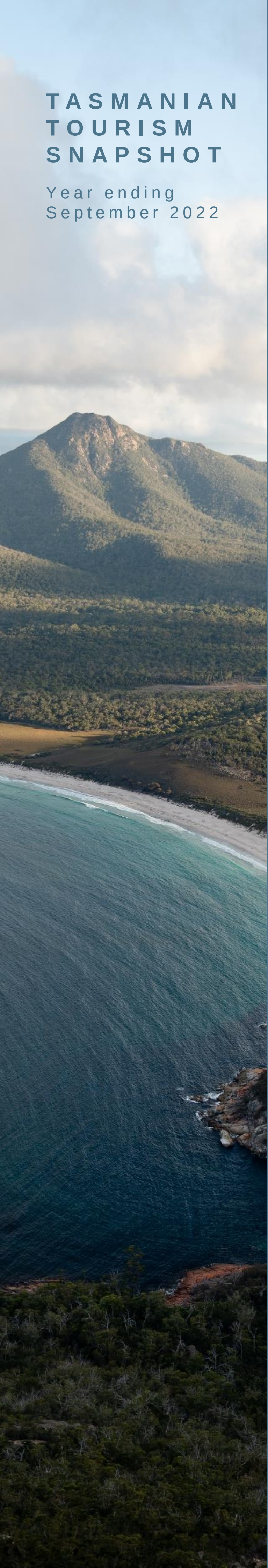
Average length of stay (ALOS) by interstate visitors in the September quarter of 2022 remains elevated above pre-COVID levels, although ALOS has been declining through 2022

Across Tasmania's four tourism regions, all except the East Coast recorded their highest number of domestic visitor nights in a September quarter;

this quarter in 2022 was the East Coast's second highest. Each tourism region did however see a slight increase the average length of stay of domestic visitors in their region.

September quarter	Domestic Visitors 2022	% Change Visitors 2021	% Share Visitors 2019	Domestic Nights 2022	% Change Nights 2021	% Share Nights 2019
Southern	**179,000**	187%	**105%**	903,000	95%	**128%**
Northern	**114,000**	175%	**111%**	377,000	110%	**128%**
WxNW	**91,000**	183%	**132%**	297,000	130%	**143%**
East Coast	**51,000**	177%	**170%**	115,000	139%	**195%**

% Share compares the September quarter 2022 to the September quarter 2019.



Travel by Tasmanians within the state appears to be softening following the re-opening of our border in December 2021

Overall, compared to pre-COVID intrastate travel remained strong through the year as Tasmanians took 1.76m overnight trips within the state in the 12 months to September 2022, remaining elevated above the same period in 2019 (up 13%), and up 3% on year to September 2021. Just over half (52%, 912k) of intrastate overnight trips in the year to September 2022 were holiday trips, down on 2021 (down 5%) but above 2019 (up 15%).

A total of 4.12m nights were spent by Tasmanians on trips within the state, down 4% from the year to September 2021, and steady, up 2% on September 2019. The decline was impacted by a softening of nights stayed by those travelling to visit friends or relatives (down 9%).

Slightly shorter stays for both holiday and VFR travel resulted in spend also declining (down 17%) from 2021, to $669m . However, because Tasmanians continue to spend more per trip since COVID, their overall expenditure was 32% higher than the same period in 2019.

Intrastate data is from Tourism Research Australia's National Visitor Survey.

International visitors are returning to the state, with the September quarter seeing ongoing positive signs of recovery

International travel, although largely unrestricted alongside domestic travel from December 2021, continues to be slower to recover to pre-COVID levels. Nationally, in the year to September 2022 just over 2m international visitors came to Australia, spending around $8.7b. This remains well down on 2019, when Australia welcomed 8.7m international visitors and $31.4b in spend.

In the year to September 2022 Tasmania welcomed 35,900 international visitors. Visitation remains well down on the same period in 2019 (down 88%), while spend was $90.9m, down 83% on 2019. Tasmania currently has a 1.8 per cent share of international visitors to Australia; Prior to COVID, this share remained steady at around 3.5 per cent share.

New Zealand, Singapore, UK, USA and India, and were the top source markets in the year to September 2022, accounting for 59% of international visitors. Following a pause of direct flights between Hobart and Auckland due to COVID in 2021, this trans-Tasman service resumed operation in July 2022, with this contributing the growth in New Zealand visitation within the September quarter 2022.

International data from Tourism Research Australia's International Visitor Survey

INTERSTATE VISITORS TO TASMANIA

YEAR ENDING SEPTEMBER 2022

ALL VISITORS*

VISITORS	NIGHTS	SPEND	ALOS (nights)	ASPV	ASPN
924k	8.92m	$2.68b	9.7	$2,895	$300
▲43%	▲35%	▲59%	▼-6%	▲11%	▲18%
80% of 2019^	101% of 2019	127% of 2019	126% of 2019	159% of 2019	126% of 2019

HOLIDAY VISITORS

VISITORS	NIGHTS	SPEND	ALOS (nights)	ASPV	ASPN
468k	4.72m	$1.84b	10.1	$3,922	$389
▲46%	▲43%	▲61%	►-2%	▲11%	▲13%
94% of 2019^	102% of 2019	135% of 2019	109% of 2019	144% of 2019	132% of 2019

State of origin

	Visitors	Nights '000	Spend $m	ALOS nights	ASPV	ASPN	% Share visitors from state: Holiday	VFR	Business	Other
VIC	326,700	2,571	802	7.9	$2,454	$312	45%	28%	21%	7%
NSW	253,300	2,493	767	9.8	$3,030	$308	55%	23%	14%	8%
QLD	219,600	2,365	722	10.8	$3,285	$305	57%	29%	10%	3%
SA	57,800	591	175	10.2	$3,037	$297	52%	22%	18%	8%
WA	35,800	569	120	15.9	$3,352	$211	42%	42%	14%	2%
ACT	24,100	222	68	9.2	$2,840	$308	38%	30%	24%	8%
NT	6,500	98	21	14.9	$3,275	$219	55%	45%	0%	0%

Recovery tracking by month of departure

	2021			2022								
	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
Visitors	20,800	27,200	58,800	126,300	77,800	100,900	114,800	85,900	80,500	83,800	63,800	84,200
% 2019 #	21%	28%	54%	81%	72%	94%	103%	115%	122%	101%	94%	112%
Nights ('000)	285	406	646	1,449	896	951	1,114	770	619	688	520	581
% 2019 #	47%	62%	78%	97%	119%	109%	100%	114%	122%	139%	126%	133%
Spend ($m)	71.9	81.7	145.2	444.2	215.5	311.0	343.2	246.0	205.1	258.4	143.5	212.1
% 2019 #	44%	43%	73%	116%	109%	156%	146%	203%	213%	215%	168%	176%

▲ Increase
► Steady (-2% to +2% change)
▼ Decrease

% Change is from previous year.
*'All visitors' on this page refers to Australian travellers, excluding Tasmanians.
^ % 2019 refers to comparison to *calendar year* 2019 figures (year ending December 2019).
# % 2019 monthly data refers to % share of the same month in 2019.

ALOS: Average length of stay (nights);
ASPV: Average spend per visitor;
ASPN: Average spend per night.

More data available at www.tvsanalyser.com.au

The Tasmanian Visitor Survey is an exit survey of approximately 9,000 interstate and international visitors annually. Roy Morgan Research conducts the survey on behalf of Tourism Tasmania.

INTERNATIONAL VISITORS TO TASMANIA

YEAR ENDING SEPTEMBER 2022

ALL VISITORS

VISITORS	NIGHTS	SPEND	ALOS (nights)	ASPV	ASPN
35,900	995k	$90.9m	27.7	$2,529	$91
▲735%+	▲317%	▲429%	▼-50%	▼-37%	▲27%
13% of 2019^	23% of 2019^	16% of 2019	2019: 15.0	2019: $1,962	2019: $131

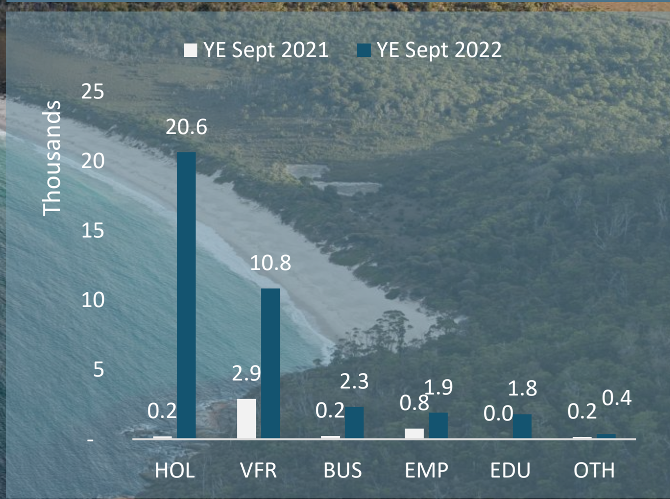
The September quarter 2022 saw international visitation continue, however this was softer comparison to the strong gains in the previous quarter (June quarter 2022). Compared to pre-COVID visitation for the **September quarter 2019**, the following levels of visitation recovery were recorded in **September quarter 2022**: NZ (171% recovery, 4,300 visitors), Singapore (63% recovery, 3,000 visitors), UK (96% recovery, 2,600 visitors) and USA (28% recovery, 1,200 visitors). Annual visitation is still well below 2019.

HOLIDAY VISITORS*

VISITORS	NIGHTS	SPEND	ALOS (nights)	ASPV	ASPN
20,600	168,700	$28m	8.2	$1,369	$167
9% of 2019^	9% of 2019	9% of 2019	2019: 8.8	2019: $1,386	2019: $158

Rolling Annual Visitation to **Tasmania**

Purpose of Stopovers* within **Tasmania**



Share of **all** visitors to **Australia**

VISITORS	NIGHTS	SPEND
1.8%	1.1%	1.0%
▼1.0%pts	▼-1.1%pts	▼-1.0%pts

Share of **holiday** visitors* to **Australia**

VISITORS	NIGHTS	SPEND
3.2%	1.5%	2.0%
▲1.9%pts	▲0.5%pts	▲1.0%pts

Want more data on international travellers to Australia?
Visit the International Visitor Survey website at www.tra.gov.au/international

▲ Increase
▶ Steady (-2% to +2% change)
▼ Decrease

+ % Change is from previous year.
* The IVS records purpose of visit per stopover, so a single 'trip' will include multiple purposes and therefore may add to more than 100%.
^ % 2019 refers to comparison to *calendar year* 2019 figures (year ending December 2019).
ALOS: Average length of stay (nights);
ASPV: Average spend per visitor;
ASPN: Average spend per night.

The International Visitor Survey interviews 40,000 overseas travellers in person in Australia's eight major international airports. Since March 2020 the IVS has scaled back interviews and primarily utilises passenger data cards. The IVS is conducted by Tourism Research Australia

INTRASTATE TRIPS WITHIN TASMANIA

YEAR ENDING SEPTEMBER 2022

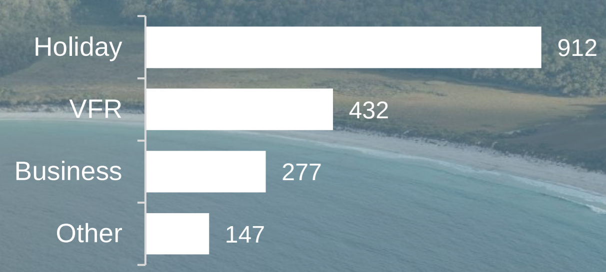
OVERNIGHT TRIPS

TRIPS	NIGHTS	SPEND	ALOS (nights)	ASPT	ASPN
1.76m	4.12m	$669m	2.3	$380	$162
▲3%	▼-4%	▼-17%	▼-7%	▼-19%	▼ -14%

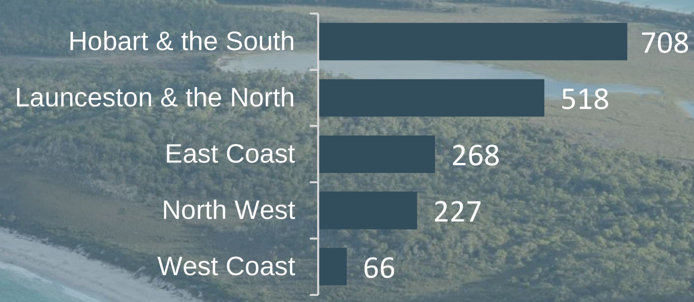
HOLIDAY OVERNIGHT TRIPS*

TRIPS	NIGHTS	SPEND	ALOS (nights)	ASPT	ASPN
912k	2.27m	$431m	2.5	$472	$190
▼-5%	▼-7%	▼-19%	►-2%	▼-15%	▼-13%

PURPOSE OF OVERNIGHT TRIP ('000)



OVERNIGHT TRIPS IN REGIONS ('000)



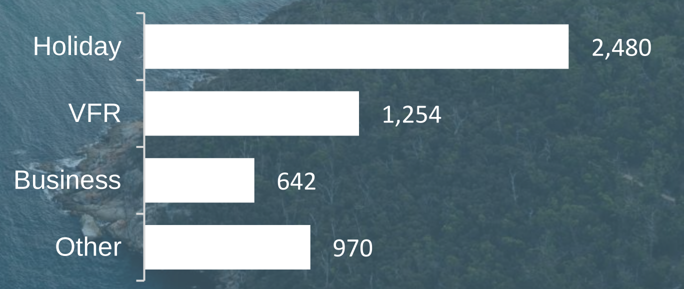
DAY TRIPS

TRIPS	SPEND	ASPT
5.35m	$733m	$137
►1%	▲22%	▲20%

HOLIDAY DAY TRIPS*

TRIPS	SPEND	ASPT
2.48m	$385m	$155
▼-13%	▲6%	▲22%

PURPOSE OF DAY TRIP ('000)



Want more data?

Visit the National Visitor Survey website at www.tra.gov.au/domestic

▲ Increase
► Steady (-2% to +2% change)
▼ Decrease

ALOS: Average length of stay (nights);
ASPT: Average spend per trip;
ASPN: Average spend per night.

% Change is from previous year.
*The NVS records purpose of visit per stopover, so a single 'trip' will include multiple purposes and therefore may add to more than 100%

The National Visitor Survey is a mobile phone survey of approximately 120,000 Australians annually. The NVS is conducted by Tourism Research Australia.

TASMANIAN ACCOMMODATION

Year ending September 2022

Tourism Tasmania measures a range of metrics of visitation into the state and across the visitor economy. This has traditionally been an historical insight, predominantly through the Tasmanian Visitor Survey, National Visitor Survey and International Visitor Survey.

Accommodation demand is a key indicator of industry and community recovery, and Tourism Tasmania has engaged and worked closely with two providers to deliver meaningful data that broadly represents the range of operators in Tasmania's accommodation sector.

- **STR**: Hotels, motels and other commercial accommodation with more than three rooms.
- **AirDNA**: Short-stay accommodation.

While only one sector of the visitor economy, accommodation data provides insight into the demand from of travellers in the state.

Commercial accommodation | STR Global

STR provides operators an opt-in system to add their data to an anonymous aggregate report, drawing on a broad capture of platforms and booking systems, across a wide range of accommodation types. STR takes into account operator size, rating, brand affiliation and rates.

Providers of hotel, motel, lodge and similar accommodation are invited to join the free STR program to help us monitor this important sector. Please contact Jacqueline (jchoo@str.com) to access your own bespoke complimentary report and contribute anonymously to industry insights and monitoring.

Short-stay accommodation | AirDNA

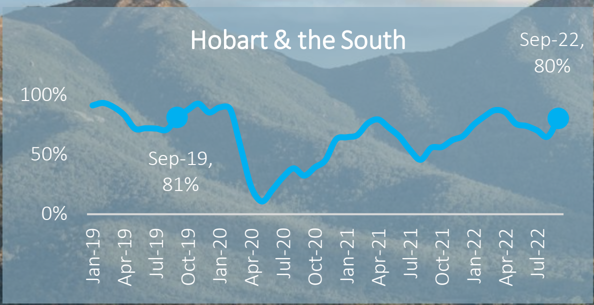
AirDNA provides an indicative view of the short-stay accommodation sector, including holiday homes, shacks, homes and self-contained apartments, as well as some traditional bed and breakfasts if they list on Airbnb or VRBO.

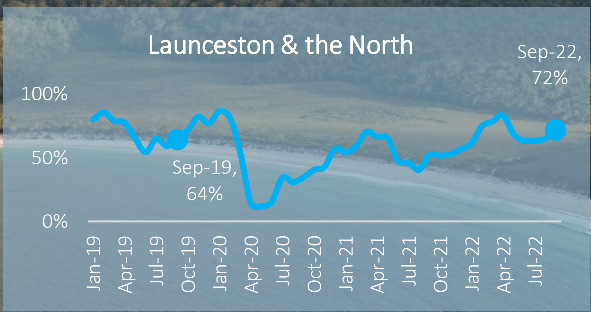
Data is provided across multiple indicator regions, offering a view of urban and regional performance. Data in this snapshot refers only to 'entire properties', where guests have the whole home to themselves; approximately 85% of listed properties in Tasmania. This can be a standalone building or self-contained apartment.

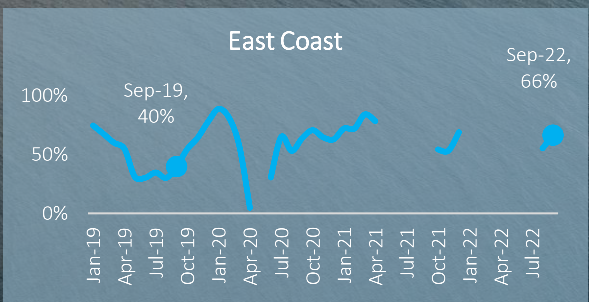
COMMERCIAL ACCOMMODATION IN TASMANIA

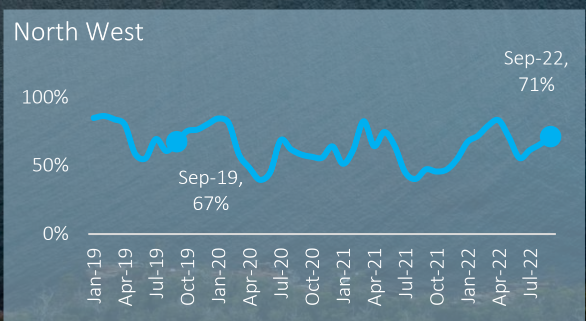
YEAR ENDING SEPTEMBER 2022

OCCUPANCY **BY MONTH**

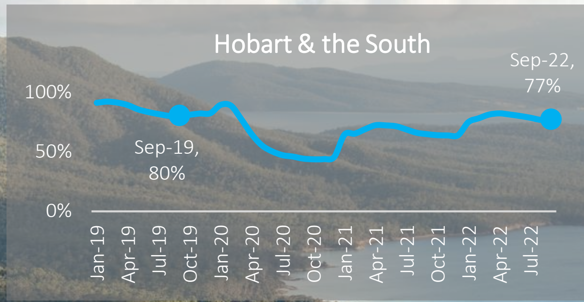


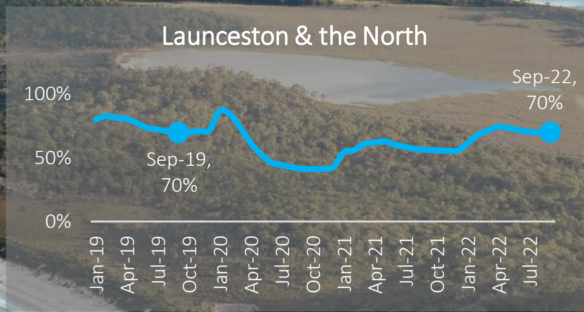


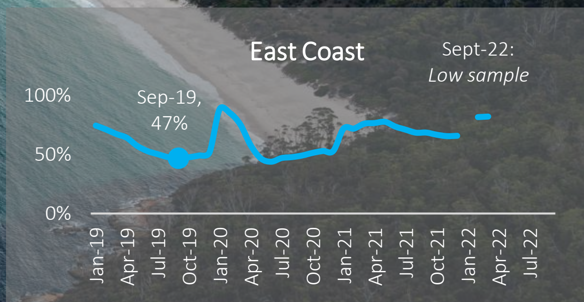


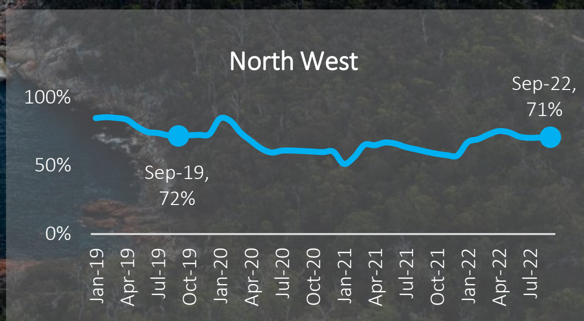


OCCUPANCY BY **ROLLING YEAR ENDING**









Source: STR

Image: Wineglass Bay, Robert King Visuals

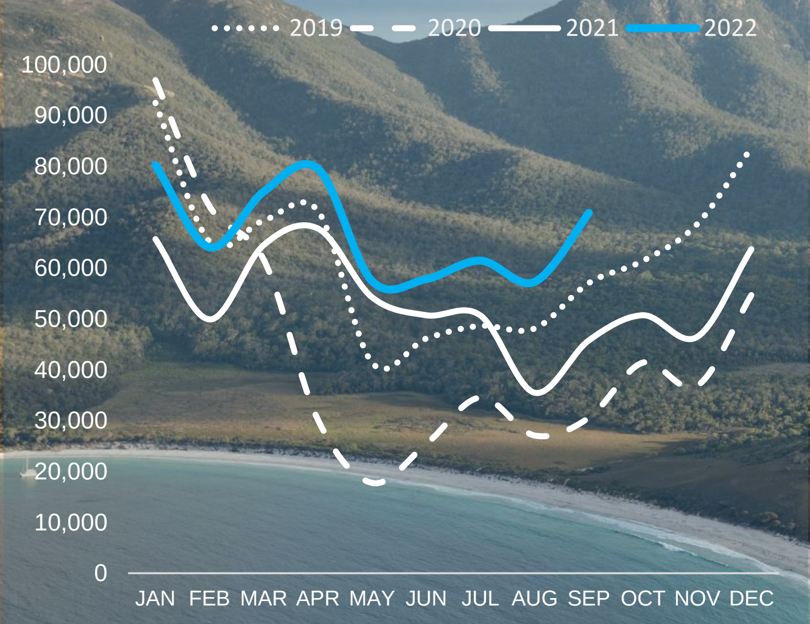
Some months are omitted due to insufficient sample.

Accommodation operators are invited to contact Jacqueline (jchoo@str.com) to access your own bespoke complimentary report and contribute anonymously to industry insights and monitoring.

SHORT-STAY ACCOMMODATION IN TASMANIA

YEAR ENDING SEPTEMBER 2022

TASMANIA | **DEMAND** (BOOKED NIGHTS)



The chart above shows demand (booked nights) each month.

YEAR ENDING SEPTEMBER

	2019	2020	2021	2022
DEMAND ('000)	724.8	612.9	616.0	757.0
SUPPLY ('000)	1,361.7	1,166.4	1,074.6	1,193.6
OCCUPANCY (%)	53%	53%	57%	63%
BOOKED LISTINGS	6,800	6,200	5,500	5,600

Demand (booked nights) in Tasmania for the year to September 2022 was 104% of demand recorded in the same period in 2019, and 124% of 2020. An 12% decline in Supply (nights available to book) from 2019 to 2022 resulted in an overall increase in Occupancy rate of 10 percentage points.

The months of March to September 2022 had the strongest demand in the year to September 2022, compared to their respective months in 2019. These months align with the sustained strong domestic visitation, nights and spend in Tasmania, as captured in the Tasmanian Visitor Survey (TVS).

Recovery tracking by **month**

	2021			2022								
	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
Demand (booked nights)	50,700	46,500	63,700	80,300	64,100	75,100	79,600	57,400	57,800	61,500	57,300	70,900
% 2019*	83%	68%	76%	87%	98%	108%	112%	139%	125%	126%	119%	124%
Supply (available nights)	95,900	93,600	107,500	105,300	92,500	104,200	102,500	99,700	101,400	100,800	98,600	101,700
% 2019	82%	77%	77%	78%	85%	87%	84%	100%	99%	94%	88%	94%
Occ. (%)	53%	50%	56%	76%	69%	72%	78%	58%	57%	61%	58%	52%
%pts diff. 2019	1%	-7%	-4%	8%	9%	14%	19%	16%	12%	16%	15%	-1%

Source: AirDNA

Image: Wineglass Bay, Robert King Visuals

Green cells indicate months where results were equal or higher than that month in 2019.

Data shown are for entire properties only.

- Recovery is shown as % share of the same month in 2019.
- Demand = booked nights
- Supply = available nights

Tourism Tasmania

SHORT-STAY ACCOMMODATION IN TASMANIA

YEAR ENDING SEPTEMBER 2022

		TAS	Hobart	Laun-ceston	Freycinet	NE Coast	West Coast	North West	King Is.	Flinders Is.	East Tamar - Bridport	Deloraine Evandale	Derby	Orford	Tasman Peninsula	Bruny Is.	Huon Far South	Eastern Shore
Supply (nights available)	YE Sept 22	1,193,600	203,100	96,100	174,400	85,800	27,900	116,300	7,300	11,400	33,700	34,700	27,100	24,600	34,300	50,200	52,700	29,000
	YE Sept 21	1,074,600	177,500	82,500	163,100	79,400	28,400	105,300	7,500	10,300	28,200	30,400	22,700	22,900	36,500	46,200	43,800	25,400
	% change	11%	14%	16%	7%	8%	-2%	10%	-3%	10%	20%	14%	20%	8%	-6%	9%	20%	14%
Demand (nights booked)	YE Sept 22	757,000	143,300	66,100	87,300	50,400	17,500	76,100	4,400	6,900	18,600	21,600	14,800	14,300	21,900	32,300	34,900	20,000
	YE Sept 21	616,000	105,600	50,700	71,600	46,800	15,500	62,700	4,600	6,200	14,100	16,500	12,100	12,700	21,300	30,100	27,500	15,200
	% change	23%	36%	30%	22%	8%	13%	21%	-4%	10%	32%	31%	22%	12%	3%	7%	27%	32%
Occupancy (%)	YE Sept 22	63%	71%	69%	50%	59%	63%	65%	60%	60%	55%	62%	54%	58%	64%	64%	66%	69%
	YE Sept 21	57%	59%	61%	44%	59%	55%	60%	61%	60%	50%	54%	53%	56%	58%	65%	63%	60%
	% change	11%	19%	12%	14%	0%	15%	10%	-1%	0%	10%	14%	2%	4%	9%	-1%	5%	15%
ADR ($)	YE Sept 22	242	259	218	276	243	199	209	516	302	256	210	236	255	231	286	233	266
	YE Sept 21	226	242	197	258	239	187	190	466	244	234	197	231	215	216	268	225	242
	% change	7%	7%	10%	7%	2%	7%	10%	11%	24%	9%	6%	2%	19%	7%	7%	3%	10%
RevPAR ($)	YE Sept 22	154	182	150	138	143	125	137	310	182	141	130	129	148	148	184	154	183
	YE Sept 21	130	144	121	113	141	102	113	282	147	117	107	123	119	126	175	141	145
	% change	19%	27%	24%	22%	1%	22%	21%	10%	24%	21%	21%	4%	24%	17%	5%	9%	26%
Revenue ($m) *Estimated*	YE Sept 22	183.4	37.1	14.4	24.1	12.3	3.5	15.9	2.3	2.1	4.8	4.5	3.5	3.6	5.1	9.2	8.1	5.3
	YE Sept 21	139.3	25.5	10.0	18.5	11.2	2.9	11.9	2.1	1.5	3.3	3.3	2.8	2.7	4.6	8.1	6.2	3.7
	% change	32%	45%	44%	30%	10%	20%	33%	6%	37%	44%	39%	25%	33%	10%	15%	31%	45%

Source: AirDNA

Data shown are for entire properties only.
% change is compared to the previous year.

Image: Wineglass Bay, Robert King Visuals

ACCOMMODATION REGIONS

SHORT-STAY | AirDNA

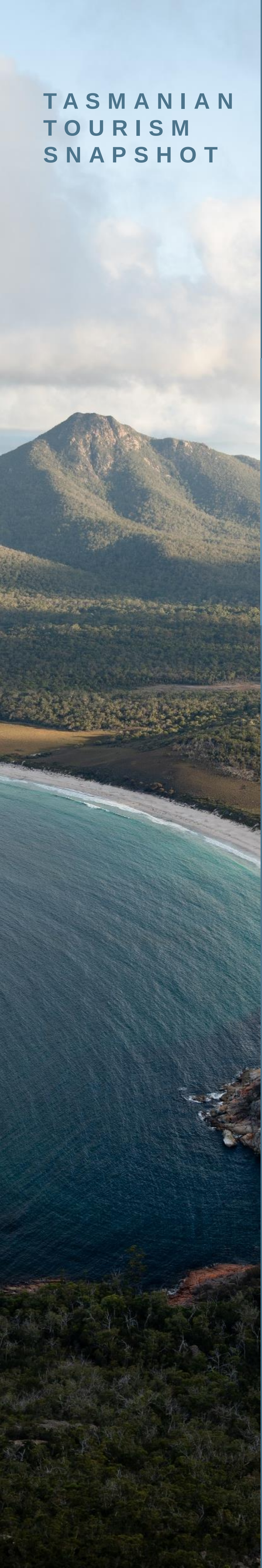
The AirDNA short-stay accommodation **forward demand** (booked nights) data provides insight into this sector of the industry at a state level plus Hobart, Launceston, and regional zones. The zones have been created to represent a range of urban and regional areas in the state on Airbnb and VRBO; the state level includes all 'entire places' listed in Tasmania in the period

Hobart Hobart City Council	**Launceston** Launceston City Council	**West Coast** West Coast Council	**Bruny Island** North & South Bruny
Tasman Peninsula Tasman Council	**Huon - Far South** Huon Valley Council	**King Island** King Island Council	**Flinders Island** Flinders Council
Derby Derby, Branxholm, Ringarooma, Pioneer	**Eastern Shore (Hobart)** Geilston Bay to Tranmere, Mornington	**Orford** Orford, Spring Beach, Triabunna, Little Swanport	**Freycinet** Coles Bay, Swanwick, Bicheno, Swansea
North West 7 LGAs: Circular Head, Waratah-Wynyard, Burnie, Devonport, Central Coast, Kentish and Latrobe	**North East Coast** Bay of Fires, St Helens, Welborough, Douglas River	**East Tamar – Bridport** George Town Council, Bridport	**Deloraine – Evandale** Deloraine, Mole Creek, Westbury, Evandale

COMMERCIAL | STR Global

The STR commercial accommodation **occupancy** data provides insight into this sector of the industry for four regions; Hobart and the South, Launceston and the North, East Coast and North West. The zones align with the state's Tourism Regions, except for the North West which excludes the West Coast due to insufficient sample.

Tourism Tasmania actively encourages property managers to contribute to this anonymous dataset to continually improve the reliability of the data. Please contact Jacqueline (jchoo@str.com) to contribute anonymously to industry insights and monitoring, and access your own bespoke complimentary report.



About this Snapshot

The Tasmanian Tourism Snapshot is published every quarter, using the latest figures from the Tasmanian Visitor Survey (TVS) and supplementary sources to provide you with an overview about international and interstate visitors to Tasmania, as well as intrastate travel by Tasmanians. Accommodation data from AirDNA and STR are also featured.

More detailed statistics are available at Tourism Tasmania's corporate website at www.tourismtasmania.com.au/research and via the interactive TVS Analyser www.tvsanalyser.com.au

A note of caution

You are advised to exercise care when interpreting figures contained in this report or TVS Analyser. These figures are collected from a sample of visitors and therefore may be different from the real figure if data from 100% of all visitors could have been collected. These estimates may be subject to chance variation, or sampling error, and smaller estimates under 1,000 must be treated with greater caution. Figures that show a change ≤ 2 per cent are shown as remaining steady due to sampling variability, please view the Confidence Interval Tables available at www.tourismtasmania.com.au/research/tvs for further information

Where does the visitor data come from?

Tasmanian Visitor Survey (TVS)

The TVS is an exit survey designed to provide a profile of the characteristics, travel behaviour and expenditure of international and domestic visitors to Tasmania. It is nationally acknowledged as the most reliable source of statistical data about visitors to Tasmania, being based on a sample of more than 9,000 visitors per year. Interviews take place at the states' four main airports as well as on the Spirit of Tasmania ferries.
www.tourismtasmania.com.au/research/tvs

International Visitor Survey (IVS)

The IVS is administered by Tourism Research Australia. The IVS is the most comprehensive source of information on international visitors to Australia, pre-COVID-19 sampling 40,000 departing, short-term international travellers in the departure lounges of eight international airports across Australia (not Hobart).

- Since April 2020 the IVS has utilised incoming passenger cards and algorithms in place of surveys.
- Limited interviews recommenced in line with New Zealand flights in April 2021.

www.tra.gov.au/international

National Visitor Survey (NVS)

The NVS is also administered by Tourism Research Australia, sampling over 120,000 Australians annually. The has continued uninterrupted as it 100% mobile call based. The NVS provides the only nationally comparable travel data for Tasmanians within their own state.
www.tra.gov.au/domestic