TASMANIAN TOURISM SNAPSHOT

YEAR ENDING SEPTEMBER 2023

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 2023

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

Total Visitation

The post-pandemic recovery seen through 2022 continued through winter 2023, with total visitation (interstate and international) in YE September 2023 up 31% on the same time last year, but down slightly compared to YE September 2019. Both nights and spend were higher than pre-pandemic levels and 2022.

International visitation also continues to recover, with international visitor share at 13% of total visitation to the state, 2% lower than pre-pandemic international share.

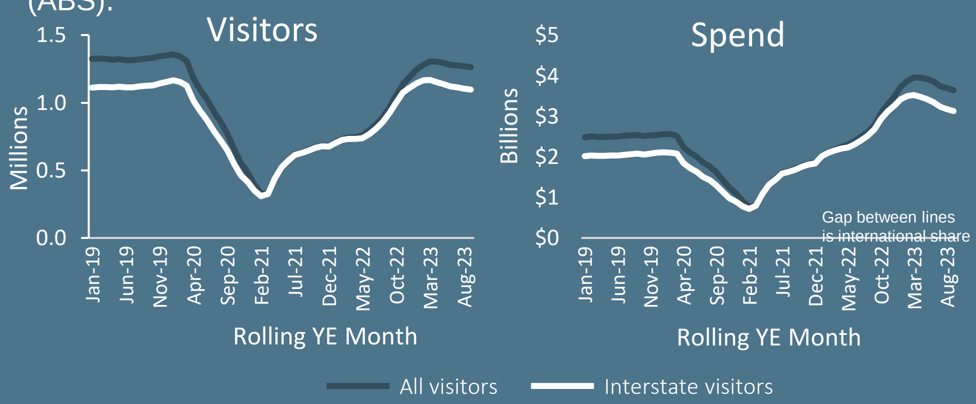
Total	YE Sep 22	YE Sep 23	% Change 2022	% Change 2019
Visitors	966,500	**1,262,200**	▲ 31%	▼ 5%
Nights	9.72m	**12.14m**	▲ 25%	▲ 12%
Spend	$2.787b	**$3.642b**	▲ 31%	▲ 44%

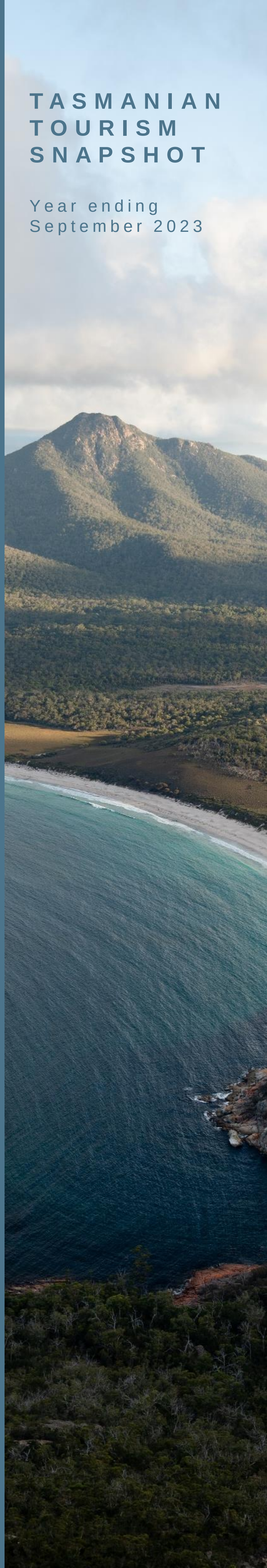
Interstate	YE Sep 22	YE Sep 23	% Change 2022	% Change 2019
Visitors	925,000	**1,097,000**	▲ 19%	▼ 3%
Nights	8.9m	**10.4m**	▲ 17%	▲ 19%
Spend	$2.678b	**$3.127b**	▲ 17%	▲ 50%

% change is calculated from unrounded figures. 2019 in this table refers to same YE period in 2019.

Visitation and spend

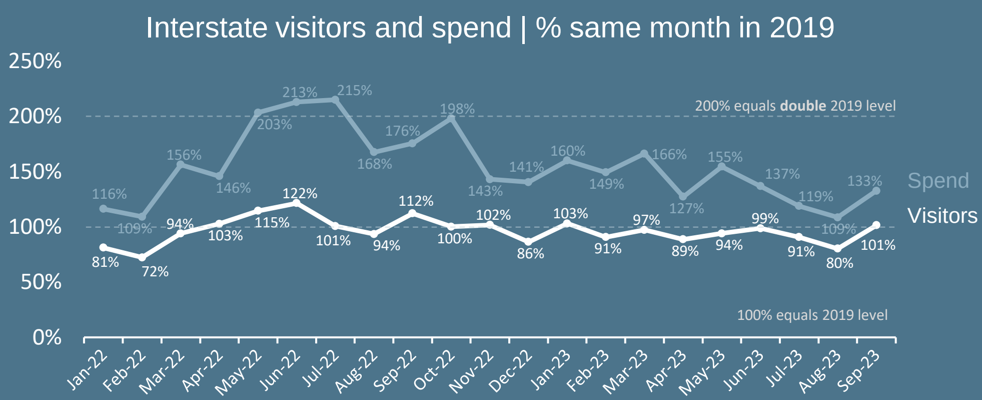
Visitation continues to soften as more Australians head overseas (ABS), although this softening appears to be tempered by increasing international visitation.
Softening of spend also continues, with the increasing cost of living, interest rate rises, and an extended period of low consumer confidence impacting discretionary spending. Similar trends in visitation and spend are being observed across most Australian states and territories (ABS).





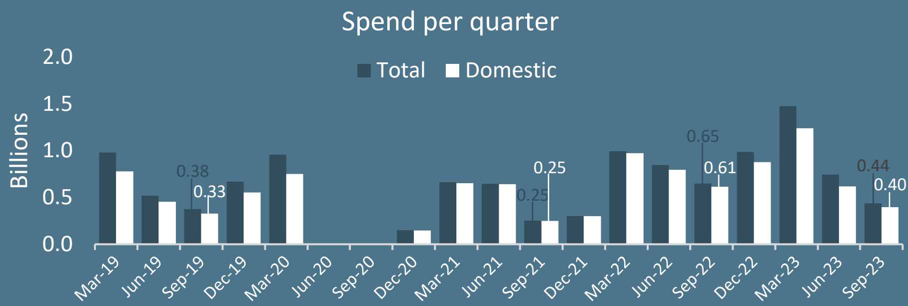
Interstate post-pandemic recovery over the September quarter

Spend recovery in the September quarter continued to outpace visitation, with both metrics showing a slight increase in the last month of the quarter following a period of softening.
While visitor numbers remained roughly equivalent or lower than the same quarter in 2019, spend was higher than any previous September quarter. Much of this increased spend was driven by Holiday visitors who represented 46% of all interstate visitors over the quarter (up from 43% in 2022, and 35% in 2019).

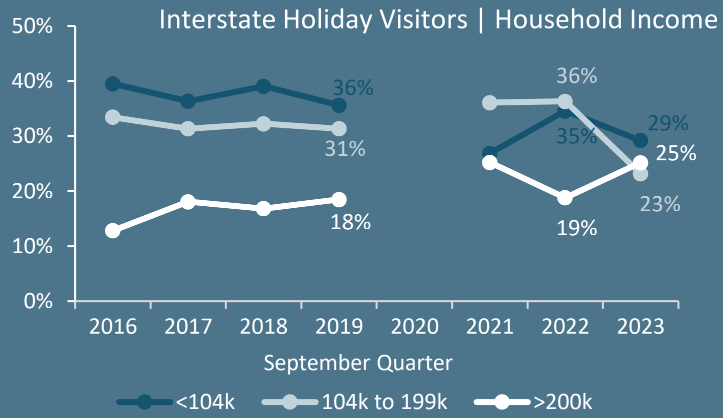


Spend in the September quarter

Spend in the September quarter remained above pre-pandemic spend but was down compared to the September quarter in 2022.



Interstate visitors that identified as being in the high-household income group (HHI; $200K + per annum) represented 25% of all interstate holiday visitors, up 6% on 2022 and 7% on 2019. Softening in spend in the September quarter is being driven by a decline in the percentage of mid-household income (MHI; $104-199K per annum) interstate *holiday* visitors, which may reflect the impact of higher interest rates, lower wage growth, and higher CPI. In the September quarter, MHI visitors represented 23% of interstate holiday visitors, down 13% on the same quarter in 2022, and 8% on 2019.



International Travel

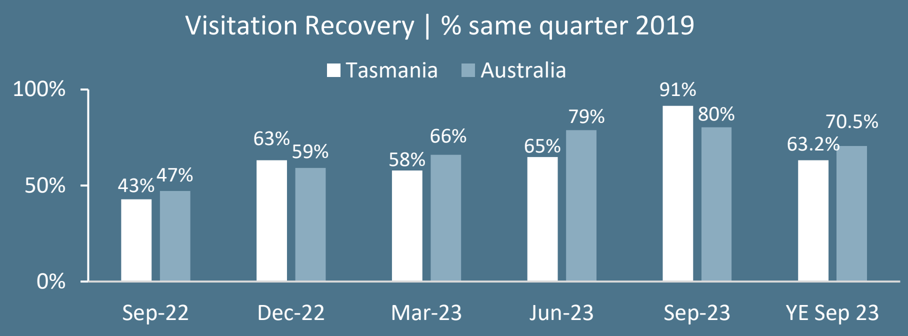
Post-pandemic international travel into Australia and Tasmania continued to increase over the YE September 2023, although visitation from all international markets remains down on 2019 levels. Tasmania's share of all international visitors to Australia was 3.0% (3.4% in 2019), and 4.6% of holiday visitors (5.1% in 2019).

Visitation to Australia

- 6.111m visitors (down 30% on 2019)
- $25.656b spend* (down 12% on 2019)
- 220.774m nights (down 20% on 2019)

Visitation to Tasmania

- 185,155 visitors (down 36% on 2019)
- $314.7m spend* (down 41% on 2019)
- 3.042m nights (down 28% on 2019)



Visitor country of origin – top seven YE Sept 23	YE Sep 19	YE Sep 23	% chg 2019
United States of America	45,800	**33,900**	▼ 26%
United Kingdom	27,200	**22,600**	▼ 17%
Singapore	17,700	**15,700**	▼ 11%
New Zealand	21,300	**15,400**	▼ 28%
China	40,900	**13,600**	▼67%
Hong Kong	29,600	**8,200**	▼72%
Canada	9,200	**6,700**	▼ 28%
Other Countries	80,600	**45,400**	
TOTAL INTERNATIONAL VISITORS TO TASMANIA	293,000	**185,200**	▼ **37%**

Top 5: 63% of int'l visitors

*IVS data up to Dec 22 is based on imputations from pre-COVID data while Jan-Sep 23 data is from resumption of interviews.

Tourism Tasmania's marketing activity

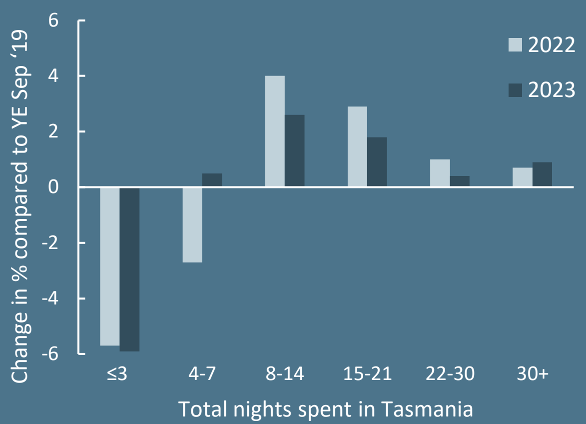
While Tourism Tasmania's domestic marketing activity has been ongoing over 2023, YE September 2023 saw targeted activity across our 7 key international markets: New Zealand, the United States, Singapore, Hong Kong, the United Kingdom, China, and Germany.

Campaign	Active period	Markets
International	Ongoing	NZ, USA, Singapore, Hong Kong, UK, China, Germany
Come Down for Air	Autumn + Summer 23-24	Eastern states, supported by key placements in others
Off Season	April to August 2023	
Intrastate	Continuous	Tasmania

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

Average Length of Stay (ALOS)

The YE September 2023 saw a 2% drop in the Average Length of Stay (ALOS) of leisure visitors (9.8 nights) compared to the same period in 2022 (10 nights), but a slight (4%) increase compared to 2019 (8.4 nights). This reflects the greater proportion of leisure visitors now staying in the state for 7 or more nights (54% of leisure visitors) compared to the same period in 2019 (46%). The proportion of all leisure visitors staying for 3 or less nights dropped 6% on the same period in 2019.



Left: Change in the percentage of leisure visitors by total nights spent in Tasmania for YE September 2022 and 2023, compared to the same period in 2019. A negative value in the 30+ nights category, for example, indicates a small percentage of leisure visitors stayed in the state for 30 or more nights compared to the same period in 2019.

Intrastate Travel by Tasmanians

Spend on overnight trips continued to increase in YE September 2023, exceeding one billion dollars over the year and up 21% and 50% on the same period in 2022 and 2019, respectively. Tasmanians' spend per overnight trip was 33% higher than the same period in 2022, and 46% higher than pre-pandemic YE September 2019.

Just under half (46%, 737k) of intrastate overnight trips in the year to September 2023 were for a holiday, down 18% on 2022 but equivalent to 2019 levels (99% of YE Sep 2019). Total nights stayed by Tasmanians travelling for a holiday was also down compared to the same period in 2022 (down 23%) and 2019 (down 21%). Total nights spent across the state by Tasmanians visiting friends and family was equivalent to 2022 (1%) but down slightly on 2019 (down 8%).

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

	YE Sep 22	YE Sep 23	% chg YE Sep 22	% chg YE Sep 19
Overnight trips	1.80m	**1.60m**	▼ 9%	▲ 2%
Nights	4.13m	**3.77m**	▼ 9%	▼ 6%
Spend	$906m	**$1.10b**	▲ 21%	▲ 50%
Day trips	**5.31m**	**5.71m**	▲ 7%	▼ 19%
Spend	$720m	**$723m**	▲ 0.5%	▼4%

Regional Visitation

In the YE September 2023, total and interstate visitor numbers and nights were higher than the same period in 2022 and 2019 in the Southern, West by North-west (WxNW) and East Coast regions but was down for all metrics in the Northern region.

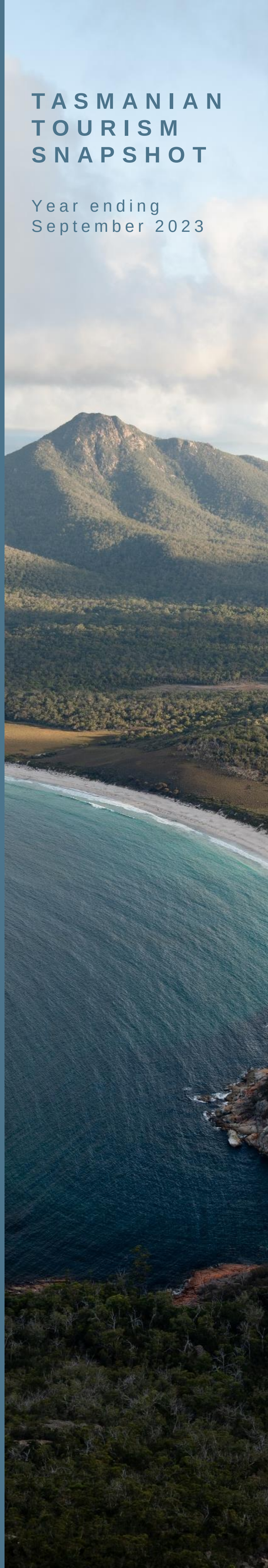
Aligning with the softening in visitation to the state seen post-summer, all regions saw a decline in visitor numbers in the September quarter 2023 compared to the same period in 2022. The growth in visitation in the YE September 2023 compared to 2022 highlights the record high interstate visitation seen through summer.

YE All visitors^	Visitors 2023	% Change 2022	% of Visitors in 2019*	Nights 2023	% Change 2022	% of Nights In 2019*
Southern	1,045,200	▲ 38%	99%	5,990,802	▲ 35%	116%
Northern	661,600	▲ 25%	93%	1,908,053	▲ 6%	86%
WxNW	550,200	▲ 35%	108%	2,264,390	▲ 21%	113%
East Coast	414,000	▲ 41%	117%	1,081,561	▲ 25%	130%

YE Interstate visitors	Visitors 2023	% Change 2022	% of Visitors in 2019*	Nights 2023	% Change 2022	% of Nights In 2019*
Southern	896,300	▲ 24%	103%	5,103,804	▲ 25%	121%
Northern	565,100	▲ 11%	96%	1,658,350	▼ 4%	92%
WxNW	469,200	▲ 20%	113%	1,991,176	▲ 21%	121%
East Coast	337,700	▲ 20%	128%	893,496	▲ 11%	141%

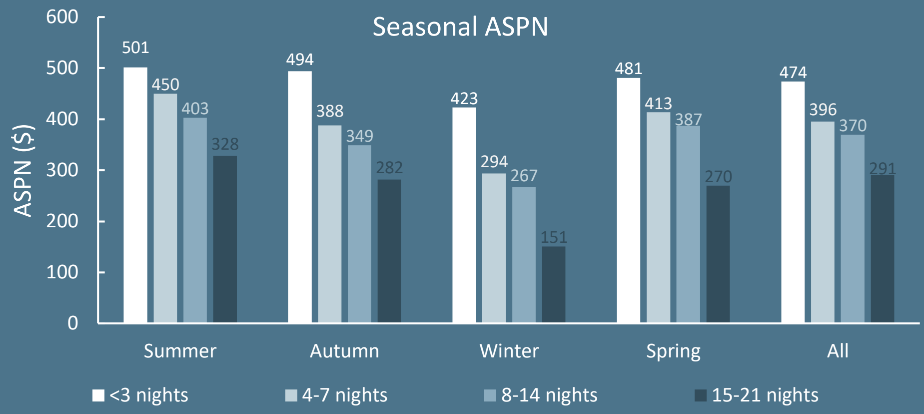
QTR All visitors^	Visitors Sep qtr 23	% Change Sep qtr 22	% of Visitors in Sep qtr 19~	Nights Sep qtr 23	% Change Sep qtr 22	% of Nights in Sep qtr 19~
Southern	188,000	▼ 1%	97%	1,175,217	▲ 23%	143%
Northern	101,700	▼ 16%	86%	319,643	▼ 22%	99%
WxNW	84,700	▼ 11%	107%	333,560	▲ 7%	139%
East Coast	54,000	▼ 1%	143%	138,246	▼ 11%	201%

*% of 2019 compares the YE September 23 to YE September 19.
~% of 2019 compares the September quarter 23 to the September quarter 19
^All visitors refers to interstate and international, excludes intrastate.

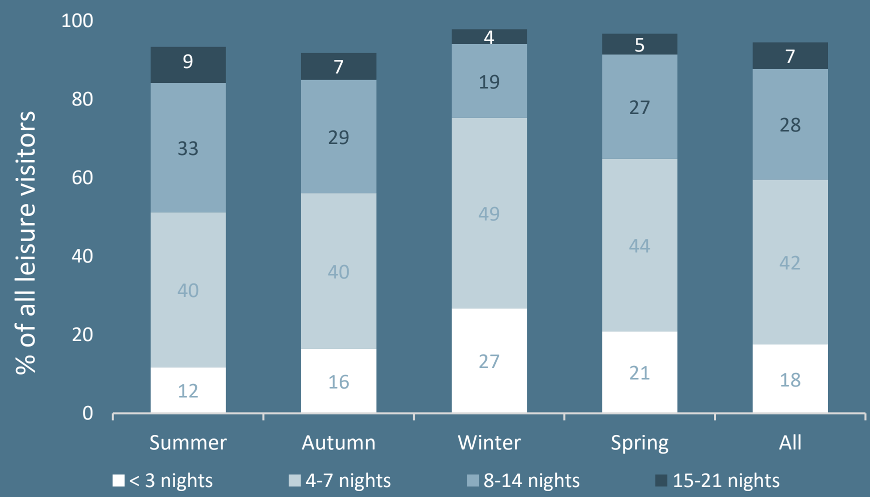


Seasonal ALOS and Average Spend Per Night (ASPN)

Over the YE September 2023, the percentage of visitors staying for 3 or fewer nights was highest in the winter months (27% of leisure visitors), and lowest over summer (12%).



Average spend per night (ASPN) declined steadily with increasing length of stay and was consistently lower in winter compared to other seasons. Leisure visitors that stayed for 3 or fewer nights consistently spent more per night across all seasons, spending an average of $474 per night compared to an average ASPN for all leisure visitors of $313. Average spend per night declined steadily with increasing length of stay and was consistently lower in winter compared to other seasons.



TASMANIA
COME DOWN FOR AIR

Tourism Tasmania

TOTAL VISITORS TO TASMANIA

YEAR ENDING September 2023

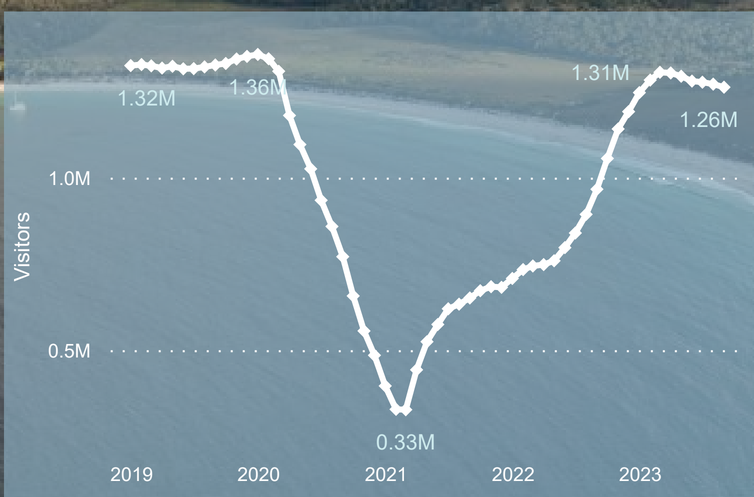
ALL VISITORS*

1.26M	**12.14M**	**$3.64bn**	**9.6**	**$2.886K**	**$300**
Visitors	Visitor Nights	Visitor Spend	ALOS (Nights)	ASPV	ASPN
▲ 30.6%	▲ 24.8%	▲ 30.7%	▼ -4.4%	▲ 0.1%	▲ 4.7%
95.1% of 2019	112.2% of 2019	143.7% of 2019	117.9% of 2019	151% of 2019	128% of 2019

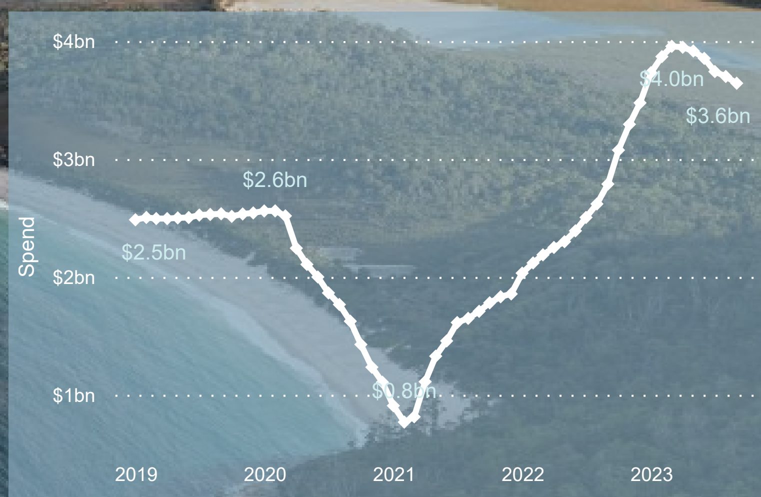
ALL HOLIDAY VISITORS

694.47K	**6.97M**	**$2.62bn**	**10.0**	**$3.773K**	**$376**
Visitors	Visitor Nights	Visitor Spend	ALOS (Nights)	ASPV	ASPN
▲ 42.9%	▲ 41.9%	▲ 38.6%	▼ -0.7%	▼ -3%	▼ -2.3%
110.8% of 2019	123.1% of 2019	157% of 2019	111.1% of 2019	141.7% of 2019	127.5% of 2019

ROLLING ANNUAL VISITATION TO TASMANIA

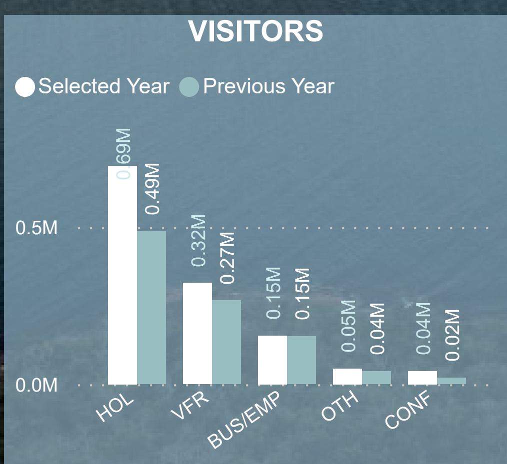


ROLLING ANNUAL SPEND IN TASMANIA

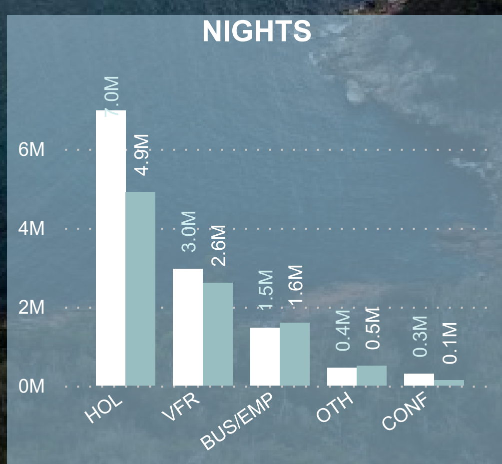


PURPOSE OF VISIT TO TASMANIA

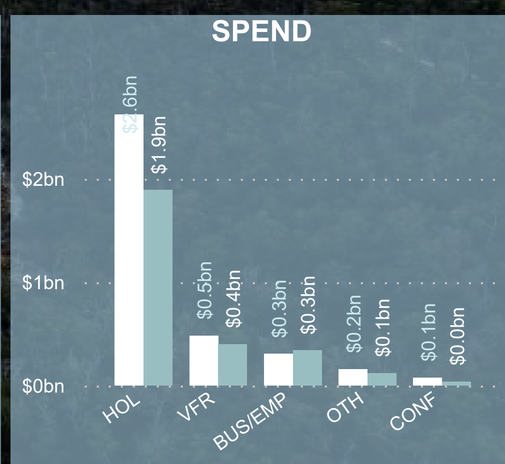
VISITORS



NIGHTS



SPEND



▲ Increase
▼ Decrease

% Change is from previous year.
* Total visitors is interstate and international, excluding Tasmanians and cruise ships.

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.

INTERSTATE VISITORS TO TASMANIA

YEAR ENDING September 2023

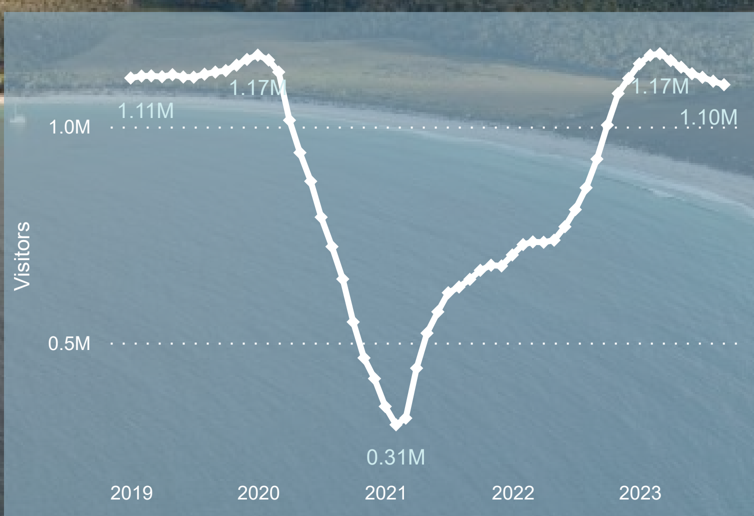
ALL INTERSTATE VISITORS*

1.10M	10.40M	$3.13bn	9.5	$2.851K	$301
Visitors	Visitor Nights	Visitor Spend	ALOS (Nights)	ASPV	ASPN
▲ 18.6%	▲ 16.6%	▲ 16.8%	▼ -1.7%	▼ -1.5%	▲ 0.2%
97.4% of 2019	118.8% of 2019	150.2% of 2019	122% of 2019	154.2% of 2019	126.5% of 2019

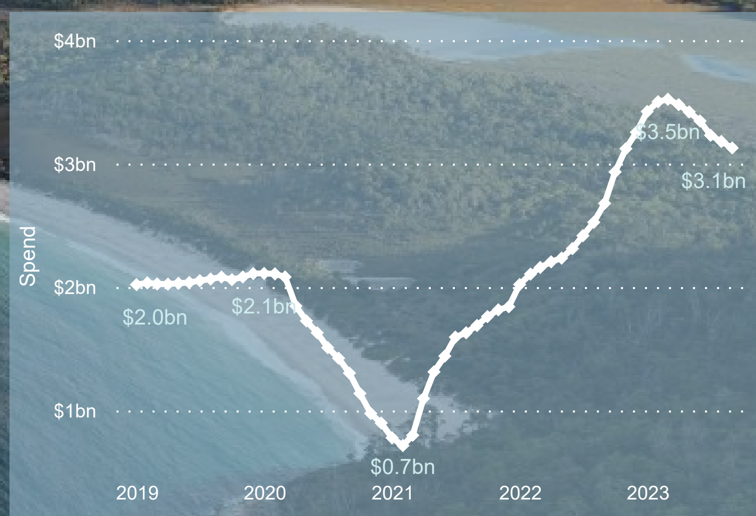
INTERSTATE HOLIDAY VISITORS

579.56K	5.93M	$2.23bn	10.2	$3.856K	$377
Visitors	Visitor Nights	Visitor Spend	ALOS (Nights)	ASPV	ASPN
▲ 23.7%	▲ 25.5%	▲ 21.6%	▲ 1.5%	▼ -1.7%	▼ -3.1%
118.4% of 2019	130.5% of 2019	166.9% of 2019	110.2% of 2019	140.9% of 2019	127.9% of 2019

ROLLING ANNUAL VISITATION TO TASMANIA



ROLLING ANNUAL SPEND IN TASMANIA



STATE OF ORIGIN

States	Visitors	Nights '000	Spend $m	ALOS	ASPV	ASPN	% Share visitors from state: Holiday	VFR	Business	Other
VIC	394,900	2,908	$914	7.4	$2,315	$314	49%	27%	17%	4%
NSW	313,100	2,906	$936	9.3	$2,990	$322	58%	25%	10%	4%
QLD	222,700	2,517	$731	11.3	$3,281	$290	57%	26%	11%	4%
SA	74,500	726	$188	9.7	$2,520	$259	44%	27%	11%	6%
WA	55,900	859	$243	15.4	$4,351	$283	60%	25%	8%	3%
ACT	26,400	276	$74	10.5	$2,820	$270	39%	38%	13%	7%
NT	8,400	175	$37	20.8	$4,450	$214	45%	47%	2%	4%

▲ Increase
▼ Decrease

% Change is from previous year.
* Interstate refers to Australian travellers, excluding Tasmanians and cruise.

ALOS: Average length of stay (nights);
ASPV: Average spend per visitor;
ASPN: Average spend per night.
More data available at www.tvsanalyser.com.au

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VISITATION TO TOURISM REGIONS
(INTERSTATE & INTERNATIONAL)

YEAR ENDING September 2023

VISITORS TO REGIONS

1.05M ▲ 37.8%	661.59K ▲ 25.2%	550.16K ▲ 35.2%	413.93K ▲ 41.2%
Southern	Northern	West x North West	East Coast
99.3% of 2019	93.4% of 2019	107.9% of 2019	117.1% of 2019

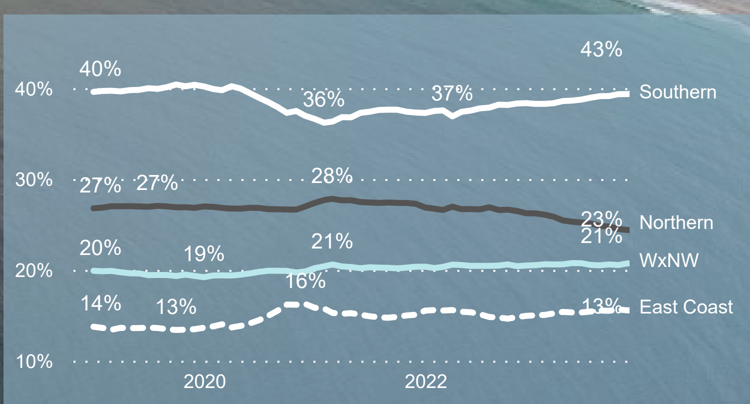
OVERNIGHT VISITORS^

976.26K ▲ 36.2%	498.36K ▲ 21.6%	424.14K ▲ 32.5%	326.60K ▲ 34.9%
Southern	Northern	West x North West	East Coast
99.1% of 2019	92.4% of 2019	109.1% of 2019	112.5% of 2019

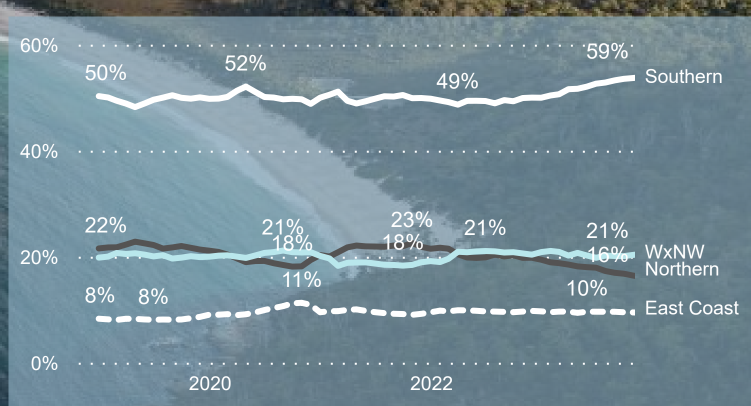
NIGHTS IN REGIONS

5.99M ▲ 34.6%	1.91M ▲ 5.9%	2.26M ▲ 21.2%	1.08M ▲ 25.4%
Southern	Northern	West x North West	East Coast
5.7 ALOS	2.9 ALOS	4.1 ALOS	2.6 ALOS

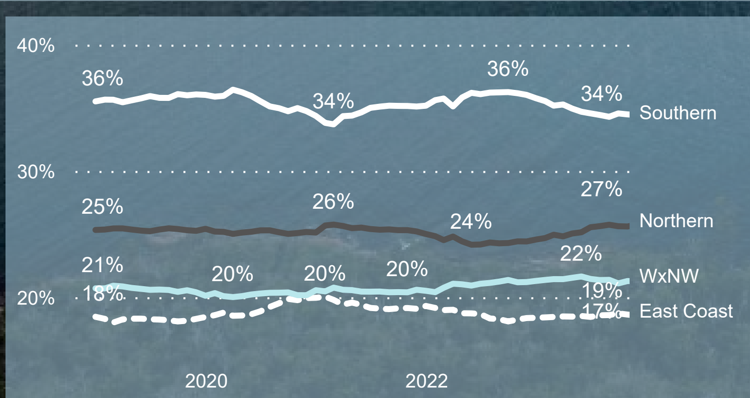
ROLLING ANNUAL SHARE* OF VISITORS BY REGION



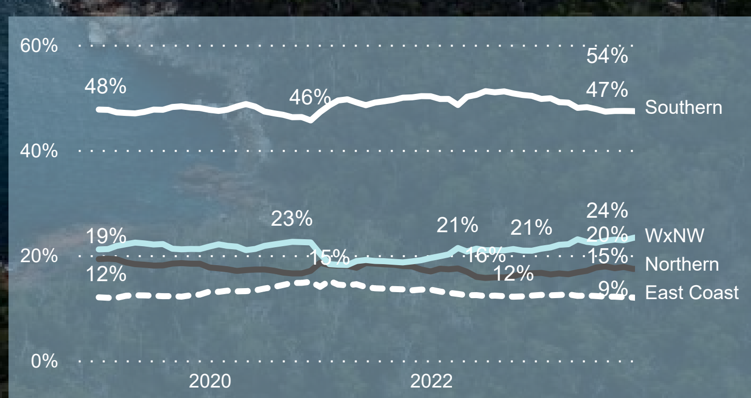
ROLLING ANNUAL SHARE OF NIGHTS BY REGION



ROLLING ANNUAL SHARE OF HOLIDAY VISITORS



ROLLING ANNUAL SHARE OF HOLIDAY NIGHTS



▲ Increase
▼ Decrease

% Change is from previous year.
^ Visitors who stayed at least one night in the region.
* Share of visitors refers to share of total to the state

ALOS: Average length of stay (nights);
ASPV: Average spend per visitor;
ASPN: Average spend per night.
More data available at www.tvsanalyser.com.au

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INTERNATIONAL VISITORS TO TASMANIA

YEAR ENDING September 2023

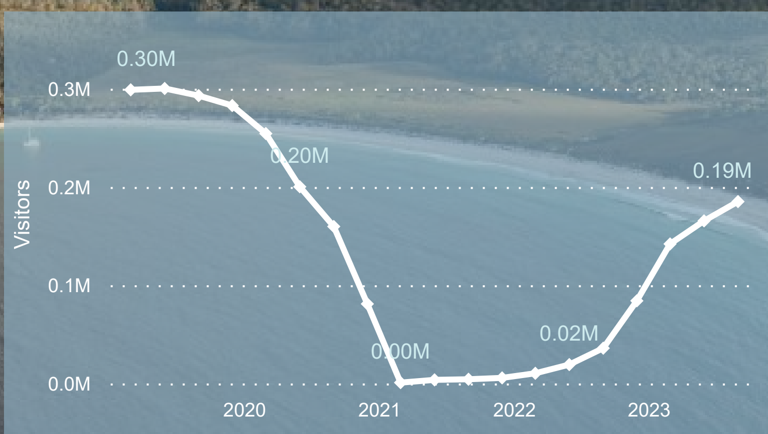
ALL VISITORS

185.16K	3.04M	$315M	16.43	$1,700	$103
Visitors	Nights	Spend**	ALOS (Nights)	ASPV	ASPN
▲ 415.1%	▲ 205.6%	▲ 246.2%	▼ -40.7%	▼ -32.8%	▲ 12.8%
63% of 2019	72% of 2019	59% of 2019	2019: 14.5	2019: $1830	2019: $126

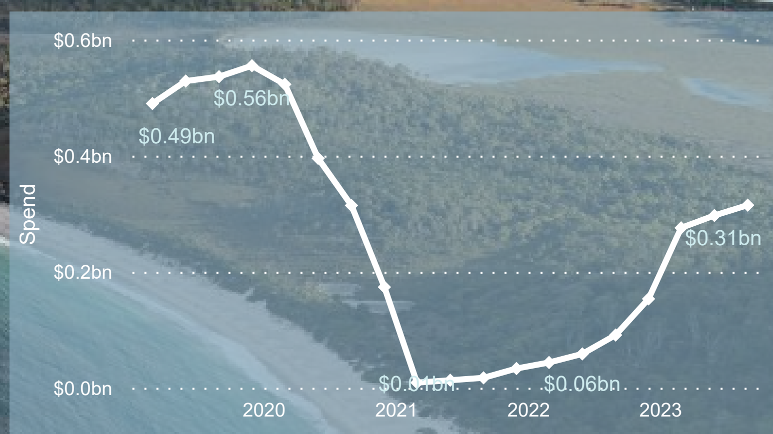
HOLIDAY VISITORS

126.83K	1.13M	$191M	8.91	$1,504	$169
Visitors	Nights	Spend**	ALOS (Nights)	ASPV	ASPN
53% of 2019	57% of 2019	60% of 2019	2019: 8.3	2019: $1343	2019: $161

ROLLING ANNUAL VISITATION TO TASMANIA



ROLLING ANNUAL SPEND IN TASMANIA



PRIMARY INTERNATIONAL SOURCE MARKETS

Markets	Visitors	Nights '000	Spend $m	ALOS (nights)	ASPV	% Share visitors from country				
						HOL	VFR	BUS	EDU	Other
USA	33,900	414	44	12.2	$1,305	77%	20%	1%		4%
UK	22,600	341	30	15.1	$1,331	54%	35%	11%	2%	6%
Singapore	15,700	121	26	7.7	$1,647	100%	1%		0%	48%
New Zealand	15,400	177	34	11.5	$2,242	68%	24%	10%	0%	6%
China	13,600	130	18	9.6	$1,330	65%	32%	0%	3%	0%
Hong Kong	8,200	127	21	15.4	$2,547	96%	10%	0%	1%	3%

▲ Increase
▼ Decrease
+ % Change is from previous year.
++ IVS
data up to December 2022 is based on imputations from pre-COVID visitor behaviours. March quarter 2023 is the first period to be based on interviews
* 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

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. Between March 20 and Dec 22 the IVS scaled back interviews and primarily utilises passenger data cards. Interviews fully resumed from Jan 20.
The IVS is conducted by Tourism Research Australia

INTRASTATE TRIPS WITHIN TASMANIA

YEAR ENDING September 2023

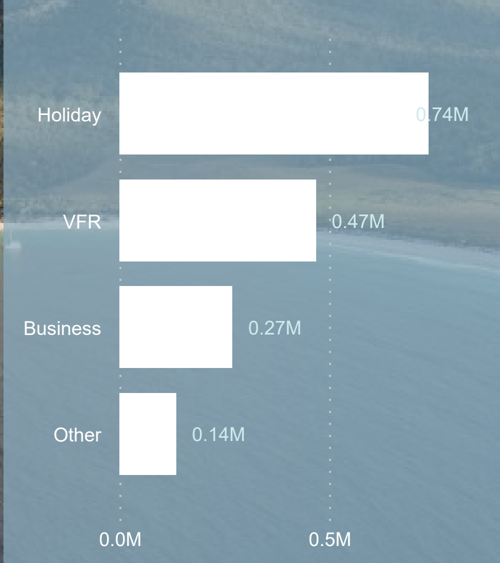
OVERNIGHT TRIPS

2M	3.77M	$1bn	2.4	$290	$686
Trips	Visitor Nights	Visitor Spend	ALOS (Nights)	ASPT	ASPN
▼ -9.3%	▼ -8.7%	▲ 20.9%	▲ 0.7%	▲ 32.4%	▲ 33.3%

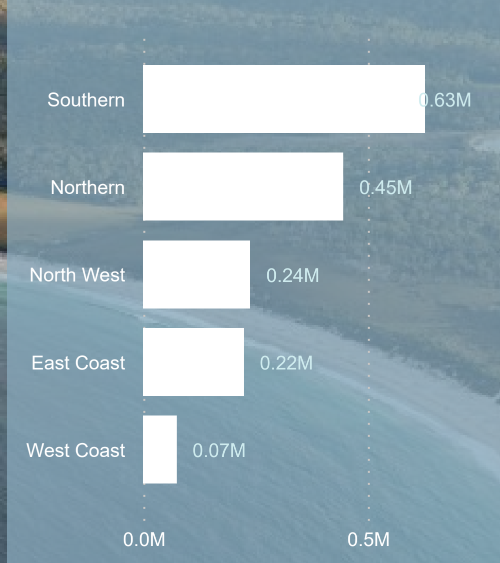
HOLIDAY OVERNIGHT TRIPS*

737K	1.75M	$386M	2.4	$220	$524
Trips	Visitor Nights	Visitor Spend	ALOS (Nights)	ASPT	ASPN
▼ -18.5%	▼ -22.5%	▼ -10.6%	▼ -5%	▲ 15.4%	▲ 9.7%

PURPOSE OF OVERNIGHT TRIP



OVERNIGHT TRIPS IN REGIONS



NIGHTS IN REGIONS

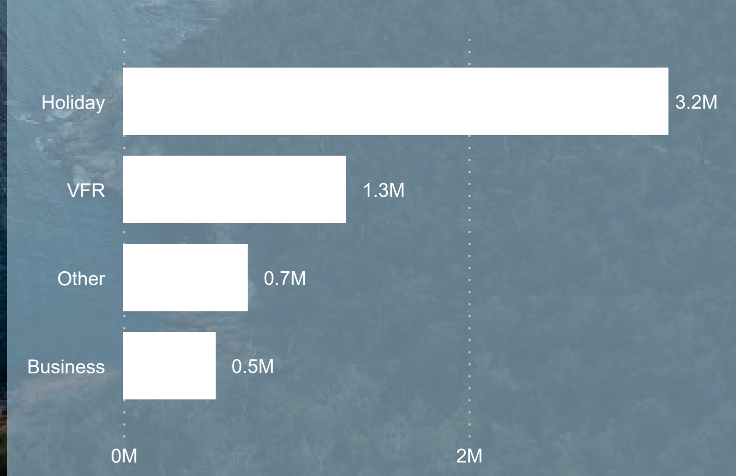
DAY TRIPS

6M	$723M	$127
Trips	Spend	ASPT
▲ 7.5%	▲ 0.5%	▼ -6.5%

HOLIDAY DAY TRIPS^

3M	$426M	$135
Trips	Spend	ASPT
▲ 27.4%	▲ 12.7%	▼ -11.5%

PURPOSE OF DAY TRIP



▲ Increase
▼ Decrease

% 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%

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

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 December 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.

Tourism Tasmania

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.

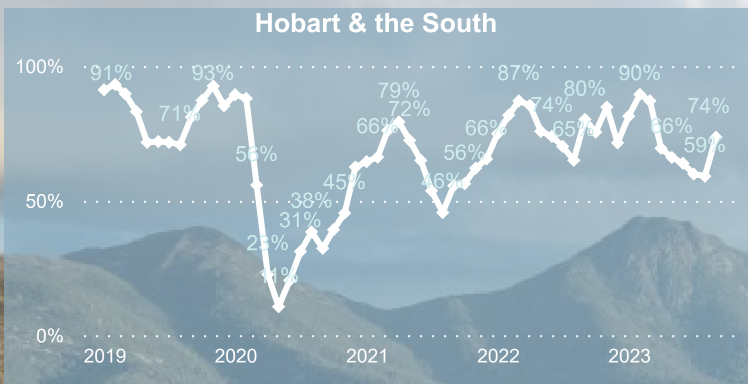
TASMANIA
COME DOWN FOR AIR

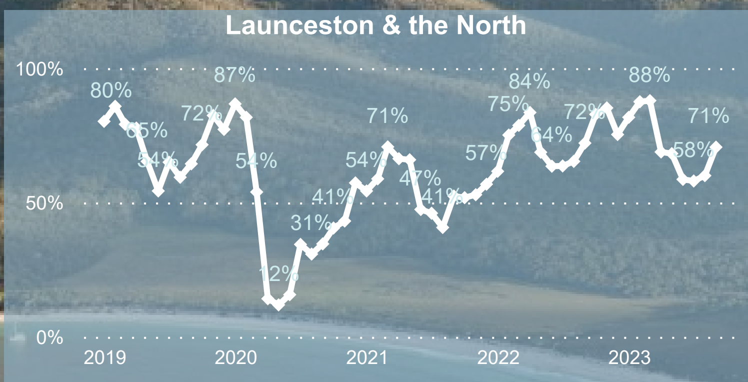
Tourism Tasmania

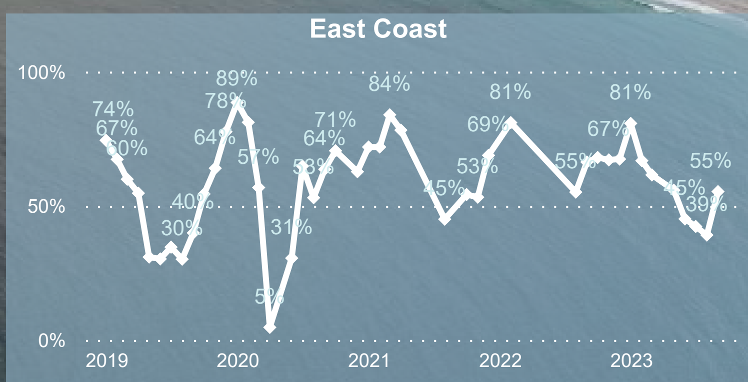
COMMERCIAL ACCOMMODATION IN TASMANIA

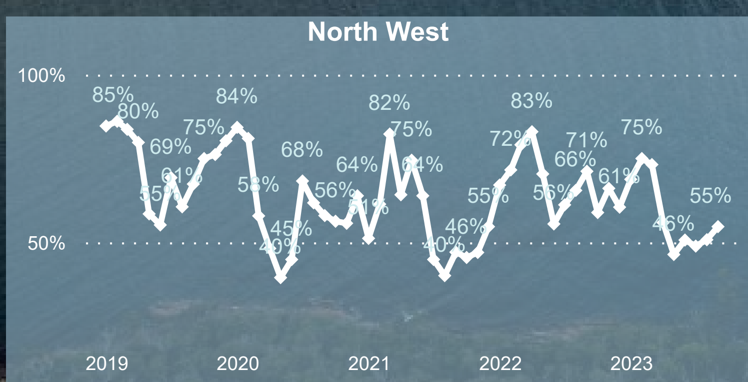
YEAR ENDING September 2023

OCCUPANCY BY MONTH

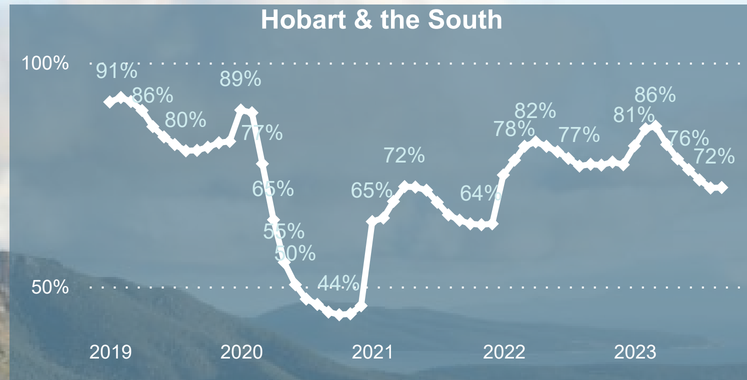


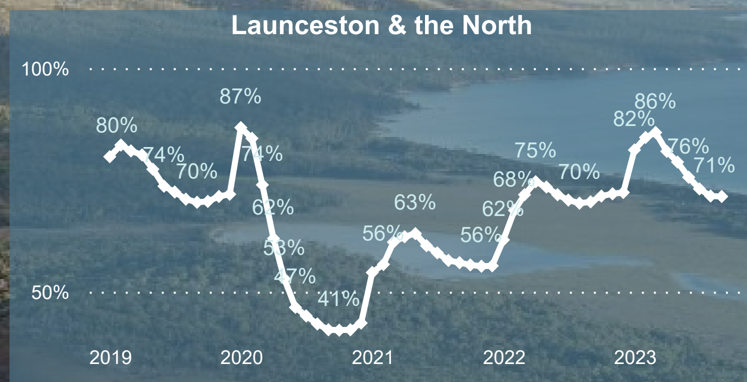


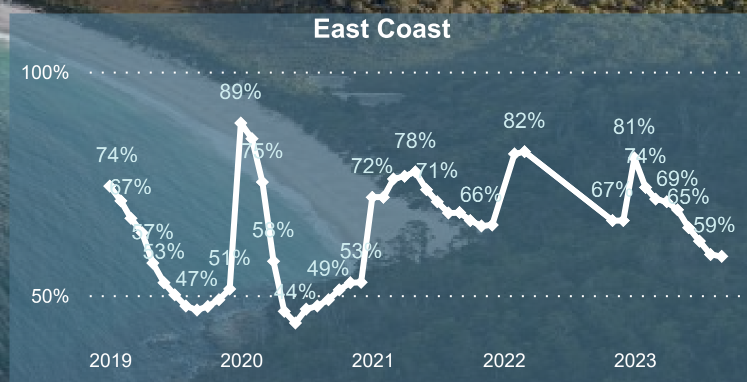


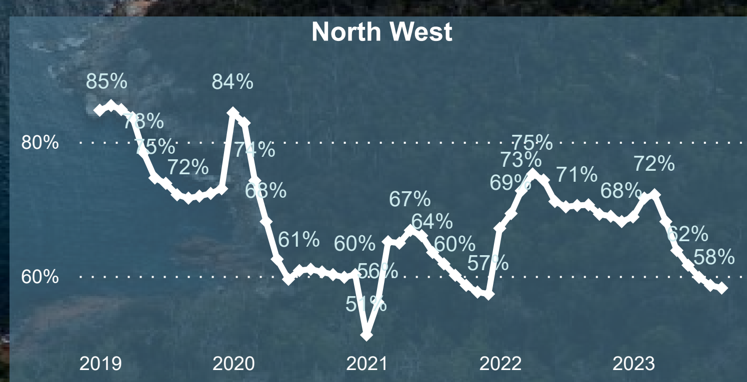


OCCUPANCY BY ROLLING YEAR ENDING









Source: CoSTAR UK

Image: Wineglass Bay, Robert King Visuals

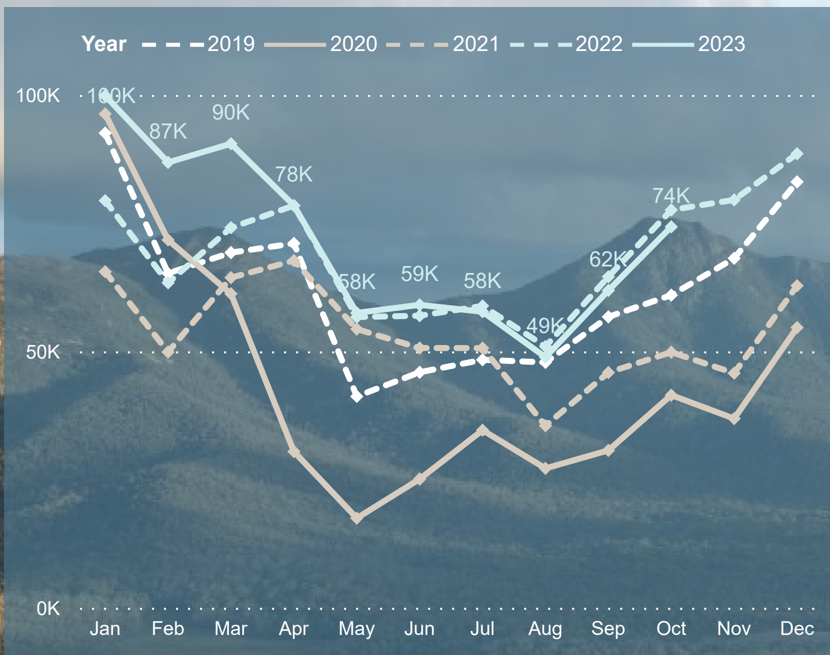
Some months are omitted due to insufficient sample.

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 2023

TASMANIA DEMAND (BOOKED NIGHTS)



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

YEAR ENDING SEPTEMBER

year	Demand ('000)	Supply ('000)	Occupancy	Available Listings
2019	724.8	1,361.7	53%	61,130
2020	612.9	1,166.3	50%	57,853
2021	622.4	1,084.0	57%	49,434
2022	756.7	1,200.7	63%	49,416
2023	889.6	1,384.4	64%	56,804

Total demand (booked nights) in Tasmania for the year to September 2023 was 22% higher than the same period in 2019, and 18% higher than 2022. Supply (nights available to book) also increased compared to 2022 (up 15%). Occupancy across the 56,800 available listings was 64% for the year, equivalent to occupancy in the same period in 2022 (53%) and up 11 percentage points compared to 2019. On a monthly basis, demand over the year ending September 2023 tracked higher or equivalent to the same months in the YE September 2022.

RECOVERY TRACKING BY MONTH

Year	Month	Demand	Demand % 2019	Supply	Supply % 2019	Occ. (%)	Occ. %pnts diff. 2019
2022	**Oct**	77,371	126%	109,979	94%	70%	18%
	Nov	80,037	117%	109,845	91%	73%	16%
	Dec	89,002	106%	122,637	88%	73%	12%
2023	**Jan**	100,165	108%	120,342	89%	83%	15%
	Feb	87,277	134%	110,976	102%	79%	19%
	Mar	91,004	131%	124,399	103%	73%	16%
	Apr	79,422	111%	120,615	98%	66%	8%
	May	57,535	139%	114,800	116%	50%	8%
	Jun	59,130	128%	115,698	113%	51%	6%
	Jul	57,833	119%	113,862	106%	51%	5%
	Aug	49,022	102%	107,157	96%	46%	3%
	Sep	61,838	108%	114,092	106%	54%	1%

Source: AirDNA

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

Data shown are for 'entire properties' only, therefore excludes listing there are only shared or private rooms within a property.

Recovery is shown as% share of the same month in 2019.
Demand = booked nights
Supply = available nights
Available listings = total 'entire places' seen listed at least once in the year

Image: Wineglass Bay, Robert King Visuals

TASMANIA
COME DOWN FOR AIR
Tourism Tasmania

SHORT-STAY ACCOMMODATION IN TASMANIA

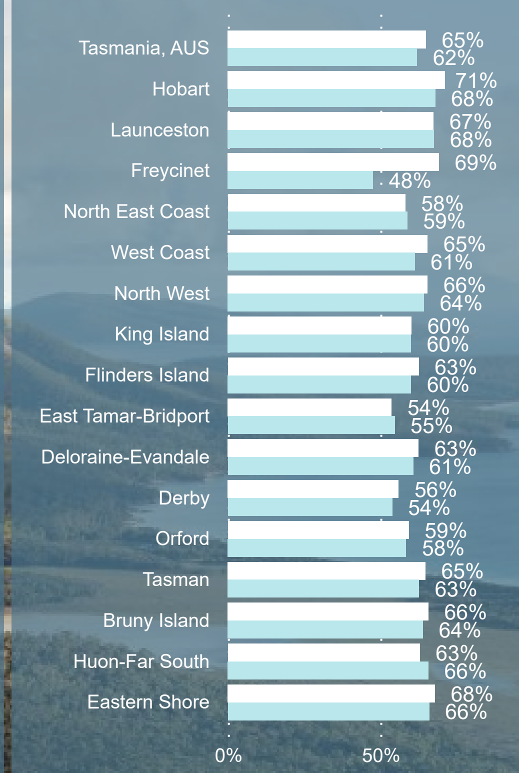
YEAR ENDING September 2023

Selected Year Ending   Previous Year Ending

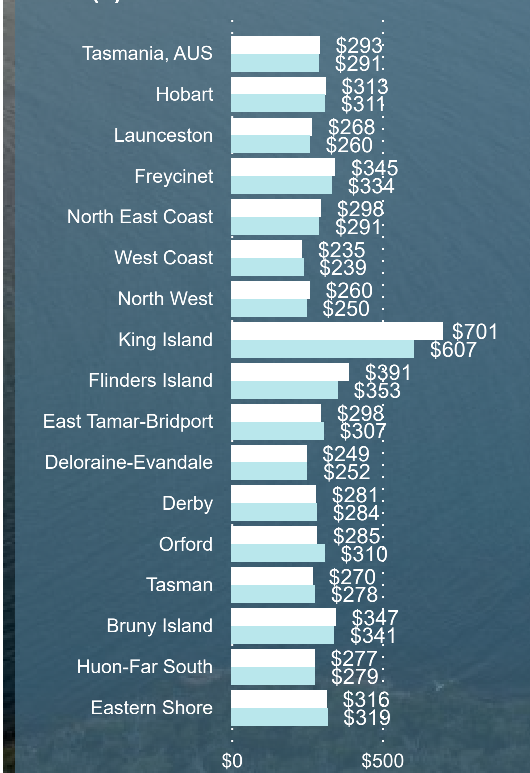
Supply (Nights Available)

Demand (Nights Booked)

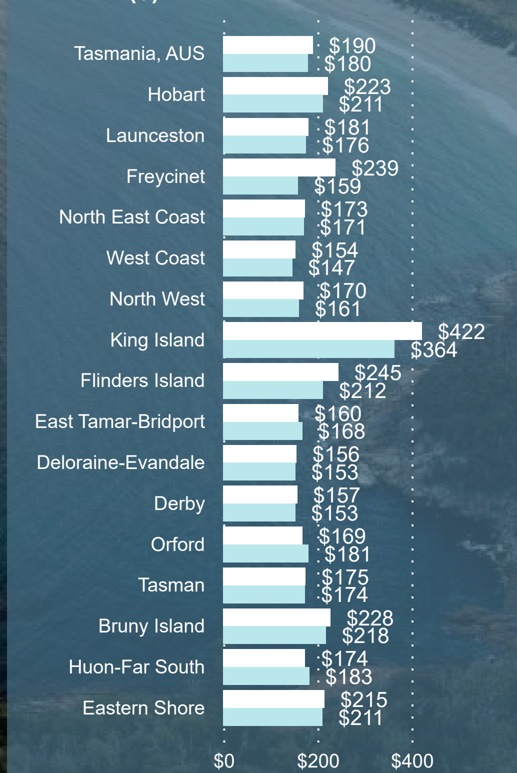
Occupancy (%)



ADR ($)



RevPAR ($)



Revenue Estimated ($m)

Source: AirDNA

Image: Wineglass Bay, Robert King Visuals

Data shown is for ‘entire properties’ only.

% change is compared to the previous year.
Revenue, ADR and RevPAR are converted from USD at exchange rate of 1.57 as at 8 September 2023 for YE June 2023 totals and therefore AUD contribution is estimated only.

TASMANIAN TOURISM SNAPSHOT

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).

- Between April 2020 and December 2022 the IVS utilised incoming passenger cards and algorithms supplemented by surveys. January 2023 saw the full re-introduction of survey-based sampling.

www.tra.gov.au/international

National Visitor Survey (NVS)

The NVS is also administered by Tourism Research Australia, sampling over 90,000 Australians annually pre-COVID. The survey 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

Like to see more numbers?

Explore the latest Tasmanian Visitor Survey data anytime through the **TVS Analyser** interactive dashboard, available at www.tvsnalayser.com.au

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