Tourism Tasmania

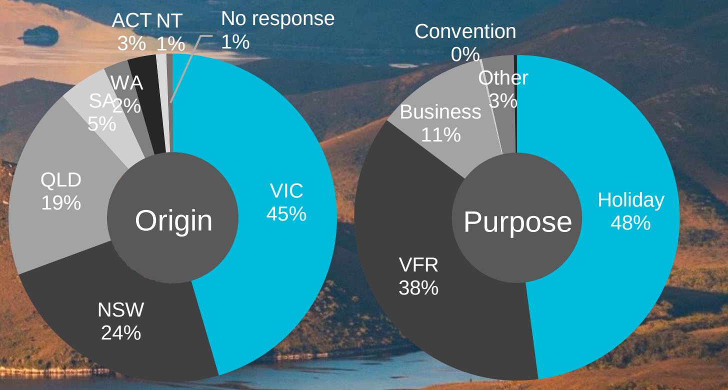
Tourism Snapshot

Year ending March **2021**

327,600 Visitors	▼ -75%
3.46 M Visitor Nights	▼ -67%
$813 M Visitor Spend	▼ -68%

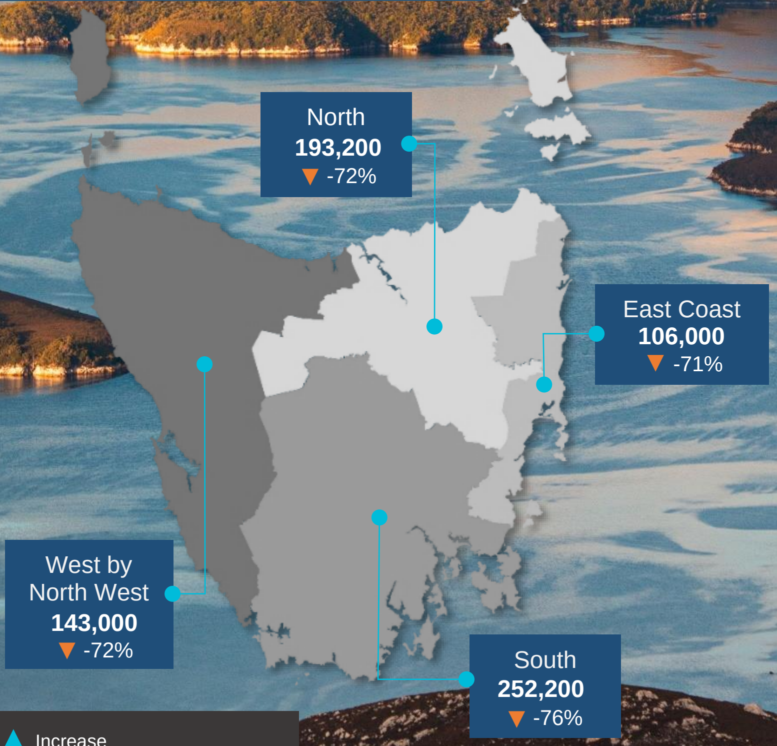
Interstate*	Visitors	**325,400**	▼ -71%
	Nights	**3.34** m	▼ -59%
	Spend	**$799** m	▼ -62%

% Share



International^	Visitors	**900**	▼ -100%
	Spend	**$9** m	▼ -98%

Visitors to Tourism **Regions**



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

Image: Matt Donovan
Bathurst Harbour, South West

Percentage change refers to the same period in the previous year.

*Source: Tasmanian Visitor Survey (TVS)
^Source: International Visitor Survey (IVS)

More detailed Tasmanian tourism statistics are available on Tourism Tasmania's corporate website at http://www.tourismtasmania.com.au/research.

Tourism Snapshot

Year ending March 2021

Tourism Tasmania

Important context due to COVID-19

COVID-19 severely impacted Tasmania's visitor economy throughout 2020, with border restrictions in place for all non-essential travellers from 19 March 2020. Cruise ship visits were suspended on 15 March 2020, with Tasmania recording its first confirmed case on 2 March 2020. Interstate travel restrictions to Tasmania began to be lifted on 26 October 2020, with restrictions from medium and high risk areas not easing until mid- to late-November 2020.

International leisure travel to Australia has not recommenced, although a small number of international visitors are still travelling within the country and may visit Tasmania. Additionally, Australians remain unable to take overseas leisure trips. All states and territories and Tourism Australia are undertaking marketing campaigns to encourage intrastate and interstate travel including encouraging travellers who normally would have taken an international trip to substitute for interstate trips.

Availability of data

+ **TVS**: In-field January-March 2020, November & December 2020, January to March 2021. Therefore the year ending March 2021 period contains five months of data: November 2020 to March 2021.
+ **NVS**: Continued throughout 2020 as it is conducted via mobile phone calls.
+ **IVS**: Paused in March 2020, has not resumed.
    - Therefore, year ending March 2021 data is comprised of a full twelve months whereby Australia's international border was closed, and the data should be understood in that context.
    - Tourism Research Australia is utilising supplementary data sources to provide figures from April 2020-March 2021.

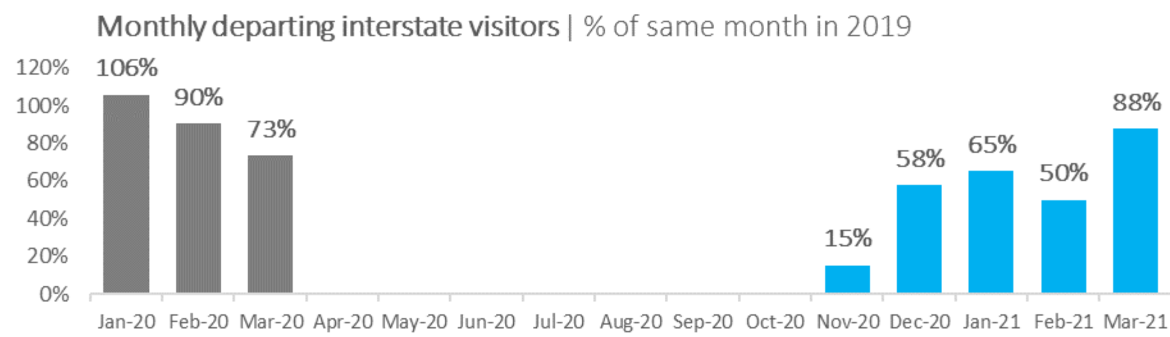
Monitoring recovery

Comparing visitation by month through 2020 to the same months in 2019 provides a high-level indication of how the visitor economy may be recovering, while noting that not all sectors are recovering at the same rate. While international travel remains restricted, the comparison includes only interstate visitors.

As the TVS is a departure survey at the end of a visitors' trip, it is likely that there were more visitors in the state in the month of November that is not evident in the below data. Visitation in December 2020 was just over half that experienced in the same month in 2019, which highlights demand for travel was rebuilding.

During the period where the TVS was not conducting interviews (April to October 2020), people could still enter Tasmania; primarily essential workers and returning Tasmanians. While some people would have met the definition of a 'visitor', the total volume of arrivals, and therefore potential visitors, in this period was negligible compared to the same period in 2019.

The blue columns in the chart below represent the months the TVS was operational, and also highlight that the year ending March 2021 data in this report refers only to these five months. This is an important consideration when comparing year on year changes in visitation.



Accommodation indicators

Accommodation booking indicators have assisted Tourism Tasmania monitor industry recovery, allowing a view of past performance as well as future demand. While just one component of the industry, the demand for accommodation is a lead indicator of overall recovery and movement of visitors through regions. These sources provide insights on:

+ **Short-stay accommodation**: AirDNA provides insight into this sector at the state level as well as six indicator regions around Tasmania, across multiple metrics. This sectors is more prevalent in regional areas. Short-stay accommodation insights are provided from page 8 of this report.

+ **Commercial accommodation (hotels, motels and lodges)**: STR Global provides occupancy rates for four regions across the state for hotels, motels and lodges with three or more rooms. This data enables a view of larger commercial operations, particularly for urban areas. Commercial accommodation insights are provided from page 13 of this report.

Complementary publications

+ TVS Analyser. The TVS Analyser makes available a range of further data from the Tasmanian Visitor Survey on an interactive dashboard, allowing filtering of key metrics across selected time periods. The Analyser displays the most recently available data on visitation to Tasmania.
+ Industry recovery reporting. Tourism Tasmania publishes a monthly report focusing on traveller sentiment, consumer confidence and forward-looking accommodation demand to provide the industry with a high level indication of recovery tracking.

Tourism Snapshot

Year ending March 2021

Recovery Tracking | Domestic Visitors - Monthly

Tasmanian Visitor Survey

The Tasmanian Visitor Survey (TVS) recommenced visitor interviews in November 2020, in line with easing of travel restrictions from most interstate markets. Further COVID outbreaks and associated lockdowns have continued to occur, particularly in Tasmania's two largest markets – New South Wales and Victoria. However, demand for Tasmania has been strong, with March 2021 recording higher spend and more nights than seen in March 2019.

Following the trends observed in New Zealand and overseas, visitation to the state in the initial re-opened months saw a signficant swing towards people reconnecting with friends and family, with holidays taking a lesser share of trips. This swing eased by the end of the first quarter of 2021 to be on par with past trends; Holiday returned to be the primary purpose of visit in January while VFR remained elevated until settling to pre-COVID share in March.

The table below provides an overview of topline measures from November 2020, highlighting domestic visitors, nights and spend, comparing recovery months to the same months in 2019 as a reference point.

Please note: Monthly visitation figures have not previously been provided in the Tasmanian Tourism Snapshot. As the TVS is an exit survey it therefore records visitation in the **month of departure** only. For example, if a visitor arrived in December and departed in January, their trip is recorded against January only. Quarterly and year ending visiation figures therefore provide a more complete view of total visitation and can also be found in this Snapshot.

Domestic visitors	Apr 20	May 20	Jun 20	Jul 20	Aug 20	Sep 20	Oct 20	Nov 20	Dec 20	Jan 21	Feb 21	Mar 21
Visitors (000)												
2020-21	TVS interviews paused							15	61	101	54	95
2019	112	75	65	84	68	78	99	101	105	155	107	108
% 2019 month								15%	58%	65%	50%	88%
Nights (000)												
2020-21	TVS interviews paused							181	540	1,057	612	944
2019	979	574	420	497	416	450	602	661	758	1,501	738	841
% 2019 month								27%	71%	70%	83%	**112%**
Spend ($m)												
2020-21	TVS interviews paused							27	120	264	131	257
2019	235	121	96	120	86	121	165	189	198	382	197	199
% 2019 month								14%	61%	69%	66%	**129%**

Tourism Snapshot

Year ending March 2021

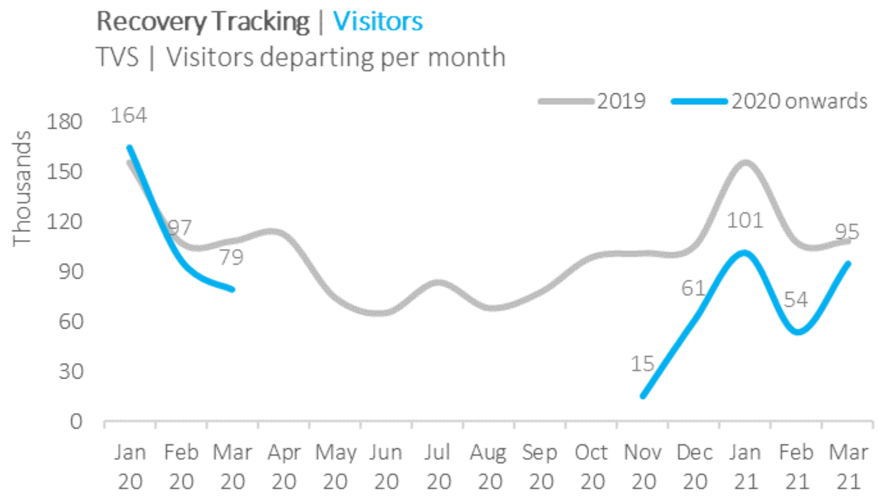
Recovery Tracking | Domestic Visitors - Monthly

Tasmanian Visitor Survey

Visitors

Tasmania has seen a strong return of domestic visitation, with the summer period seeing an increasing share of holiday visitors and decreasing share of those visiting friends and family.

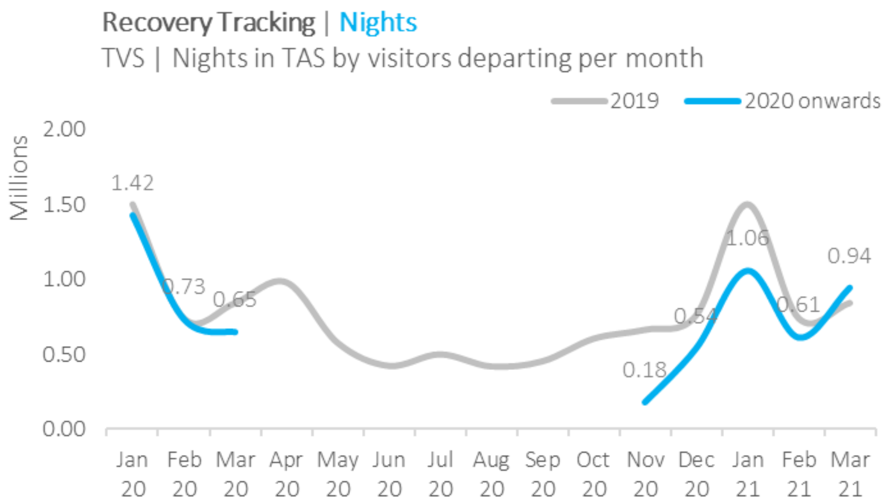
March 2021 visitation was 88% of the same month in 2019, a significant indication of ongoing demand for travel top the state and health of the tourism brand.



Nights

Nights spent in Tasmania saw an immediate improvement over visitor trips, particularly led by VFR visitors who were staying longer than pre-COVID as family and friends reconnect after mainland lockdowns.

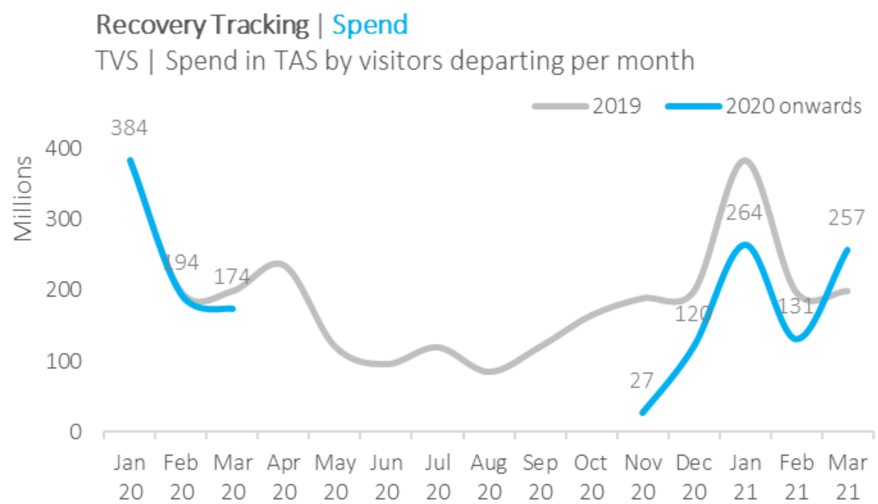
These are trends seen in other destinations, with the average length of stay up 5 nights in November 2020 (compared to 2019) and still up 2.2 nights in March 2021 (from 2019), with a noticeable swing to self-contained and luxury accommodation.



Spend

Visitor spend began tracking in line with visitor demand, however spend in March outpaced both visitor and nights recovery against the same months in 2019.

Domestic visitors spent 29% more in the state in March 2021 compared to March 2019. Average spend per visitor (ASPV) is therefore also up, and has been above 2019 levels from December 2020 to March; March 2021 was 48% higher spend per visitor than March 2019.



Tourism Snapshot

Year ending March 2021

Tourism Tasmania

Percentage change refers to the same period in the previous year.

Total visitation to Tasmania

Tasmanian Visitor Survey results **YE March 2021**

Total visitors	327,600	▼	-75%
Total nights	3.46 million	▼	-67%
Visitor expenditure	$813 million	▼	-68%
Interstate visitors	325,400	▼	-71%
Day visitors	5,400	▼	-86%

As with all destinations globally, Tasmania recorded significant declines in visitation in 2020 due to COVID-19. The Tasmanian Visitor Survey was in-field for only five months of the year ending March 2021 period: November-December 2020, and January -March 2021.

Tasmania welcomed 327,600 interstate and international visitors in the year to March 2021, down 75 per cent from the previous year. Total nights were down 67 per cent.
Total visitor spending in Tasmania was $813 million, down 68 per cent on the previous year.

Purpose of travel

Visitation for all purposes of travel experienced significant declines, and disruption, through 2020 and into 2021. The first 7 months of 2020 was severely impacted by travel restrictions. In November and December 2021, visiting friends or family (VFR) gained substantial share as people reconnected as borders eased.

Share of visitors by purpose has stabilised in the year ending March 2021 to reflect similar long-term trends, currently comprising of holiday (48 per cent), VFR (37 per cent), and business or employment (11 per cent).

Holiday visitors	157,100	▼	-75%
Holiday nights	1.57 million	▼	-72%
Holiday expenditure	$544 million	▼	-68%
VFR visitors	122,100	▼	-64%
VFR nights	1.33 million	▼	-48%
VFR expenditure	$160 million	▼	-56%
Business visitors	36,200	▼	-85%

Mode of departure from Tasmania

Scheduled air	87%	▼	-65%
Spirit of Tasmania	13%	▼	-58%

Border closures and travel restrictions impacted scheduled air and sea services, however both operated continuously through the pandemic. Visitor departures via the Spirit of Tasmania were 35 per cent of the levels of the year ending March 2020. Visitor departures via scheduled air services were 42 per cent of the levels of the previous year.

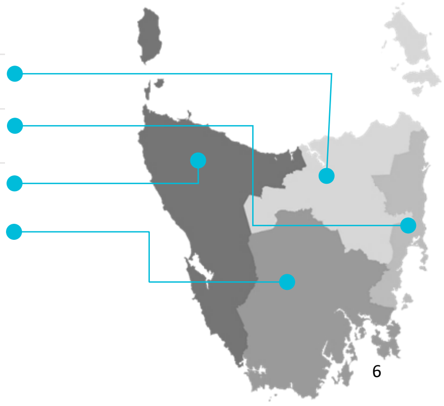
Regional visitation

In-line with state visitation, interstate and international visitors to regions were significantly down in the 12 months to March 2021. However, all regions are seeing increased share of domestic visitors, indicating people are seeing more places on their trips.

Compared to 2019 visitation levels:

- Northern: 27 per cent of 2019
- East Coast: 30 per cent
- West by North West: 37 per cent
- Southern: 24 per cent.

193,200	▼	-72%	North
106,000	▼	-71%	East Coast
143,000	▼	-72%	WxNW
252,200	▼	-76%	South



Tourism Snapshot

Year ending March 2021

Percentage change refers to the same period in the previous year.

Interstate visitation to Tasmania

Tasmanian Visitor Survey results **YE March 2021**

Visitors	325,400	▼	-71%
Nights	3.34 million	▼	-59%
Expenditure	$799 million	▼	-62%
Average length of stay	10.3 nights	▲	41%
Average spend per visitor	$2,456	▲	33%

Visitation to Tasmania was almost entirely supplemented by interstate visitors in the year ending March 2021, with 325,400 interstate visitors coming to the state, down 71 per cent compared to the previous 12 month period.
By late November 2020, Tasmania had quarantine-free travel from all states. While outbreaks impacted travel from several key states interstate visitors spent $799 million in Tasmania, down 62 per cent. Average length of stay has increased to 10.3 nights in the year ending March 2021, up from 7.2 nights in the previous year.

Interstate purpose of visit

Visitors

The main purposes of travel by interstate visitors in the 12 months to March 2021 were holiday (48 per cent share), visiting friends and relatives (VFR) (37 per cent), and business or employment (11 per cent). The December quarter of 2020 saw a large swing to VFR as people reconnected post lockdowns; 54% of interstate visitors in 2020, compared to 29% in the same quarter in 2019. The March quarter 2021 has seen a return of holiday visitation as the major purpose, followed by VFR.

Holiday	155,900	▼	-69%
VFR	121,500	▼	-61%
Business	35,900	▼	-84%

Nights

47 per cent of interstate nights were spent by visitors on holiday, with visiting friends and relatives holding 39 per cent share of nights.
Average length of stay by interstate holiday visitors increased to 10.3 nights in the March quarter 2021, up from 9.1 nights in 2020, yet comparable to 10.0 in 2019. Average stay by VFR visitors increased to 10.7 nights, up from 8.3 nights in 2020, and 7.8 nights in the March quarter 2019.

Holiday	1,555,000	▼	-64%
VFR	1,287,800	▼	-39%
Business	409,700	▼	-69%

Interstate origin of visitors

Victoria	148,000	▼	-70%
NSW	77,800	▼	-74%
Queensland	61,500	▼	-66%
South Australia	15,800	▼	-70%
A.C.T.	9,200	▼	-67%
Western Australia	7,900	▼	-86%
N.T.	3,300	▼	-60%

Victoria and New South Wales remained our largest domestic markets for the year ending March 2021, with all markets recording similar declines.
Despite border restrictions not easing equally – in terms of timing or whole state/hotspots – the domestic markets retained similar levels of market share across year ending March periods 2019 to 2021.

Share of visitation in the March quarter 2021 by Victorian visitors (49 per cent share) remained similar to 2020 and 2019 levels. Share by New South Wales share (21 per cent) was slightly lower than previous March quarters in 2019 (27 per cent) and 2019 (29 per cent). Queensland remained steady (18 per cent), slightly up from 2019 and 2020 share (14 per cent).

Tourism Snapshot

Year ending March 2021

Percentage change refers to the same period in the previous year.

Total visitors to Tasmania

Total visitors to Tasmania on scheduled air & sea services

	YE March 2020	YE March 2021		% Change
Visitors				
Total visitors	1,308,600	327,600	▼	-75%
Day visitors	38,000	5,400	▼	-86%
Overnight visitors	1,270,600	322,100	▼	-75%
Nights				
Nights (million)	10.54	3.46	▼	-67%
Average length of stay (nights)	8.1	10.6	▲	31%
Holiday nights (million)	5.58	1.58	▼	-72%
Expenditure				
Expenditure ($million)	$2,518	$813	▼	-68%
Average spend per visitor	$1,924	$2,483	▲	29%
Average spend per night	$239	$235	►	-2%
Holiday spend ($million)	$1,686	$544	▼	-68%
Purpose of Visit				
Holiday	630,800	157,100	▼	-75%
Visit friends or relatives (VFR)	340,700	122,100	▼	-64%
Total leisure (Holiday+VFR)	971,500	279,200	▼	-71%
Business or employment	245,100	36,200	▼	-85%
Convention/conference/seminar	29,600	800	▼	-97%
Regions Visited				
Southern	1,036,100	252,200	▼	-76%
East Coast	365,100	106,000	▼	-71%
Northern	698,700	193,200	▼	-72%
WxNW	505,300	143,000	▼	-72%
Mode of departure				
Air visitors	1,158,200	277,200	▼	-76%
Sea visitors	150,400	50,300	▼	-67%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

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

Interstate visitation to Tasmania

Interstate visitors to Tasmania on scheduled air & sea services

	YE March 2020	YE March 2021		% Change
Visitors				
Total interstate visitors	1,126,800	325,400	▼	-71%
Day visitors	37,200	5,400	▼	-85%
Overnight visitors	1,089,600	320,000	▼	-71%
Nights				
Nights (million)	8.16	3.34	▼	-59%
Average length of stay (nights)	7.2	10.3	▲	41%
Holiday nights (million)	4.26	1.55	▼	-64%
Expenditure				
Expenditure ($million)	$2,082	$799	▼	-62%
Average spend per visitor	$1,848	$2,456	▲	33%
Average spend per night	$255	$240	▼	-6%
Holiday spend ($million)	$1,362	$540	▼	-60%
Purpose of Visit				
Holiday	497,900	155,900	▼	-69%
Visit friends or relatives (VFR)	311,900	121,500	▼	-61%
Total leisure (Holiday+VFR)	809,800	277,400	▼	-66%
Business or employment	231,000	35,900	▼	-84%
Convention/conference/seminar	26,200	800	▼	-97%
Regions Visited				
Southern	868,700	249,900	▼	-71%
East Coast	277,100	105,100	▼	-62%
Northern	591,200	191,500	▼	-68%
WxNW	416,500	141,900	▼	-66%
Mode of departure				
Air visitors	986,700	275,800	▼	-72%
Sea visitors	140,000	49,600	▼	-65%
State of Origin				
Victoria	496,900	148,000	▼	-70%
N.S.W.	298,600	77,800	▼	-74%
Queensland	178,600	61,500	▼	-66%
Western Australia	54,900	7,900	▼	-86%
South Australia	53,300	15,800	▼	-70%
A.C.T.	27,600	9,200	▼	-67%
N.T.	8,200	3,300	▼	-60%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

Tourism Snapshot

Year ending March 2021

Percentage change refers to the same period in the previous year.

Tasmanian Visitor Survey results
January – March 2021

Quarterly visitation to Tasmania

The TVS reports the following key findings for all visitors during the January – March 2021 quarter.

Key statistics – Quarter 1 2021

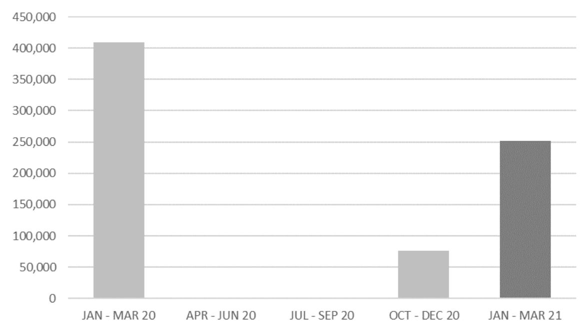
Q1 Total visitors	251,200	▼	-39%
Q1 Total nights	2.71 million	▼	-27%
Q1 Visitor expenditure	$662 million	▼	-31%
Q1 Holiday visitors	134,300	▼	-44%
Q1 VFR visitors	81,000	▼	-19%
Q1 Business visitors	25,800	▼	-48%
Q1 Conference visitors	400	▼	-80%
Q1 Average visitor spend	$2,635	▲	13%
Q1 Average stay	10.8 nights	▲	19%

Visitation for the March 2021 quarter was down 39 per cent compared to the same quarter in 2020. This equates to this quarter being 61 per cent of the level of visitation in the same quarter in 2020.

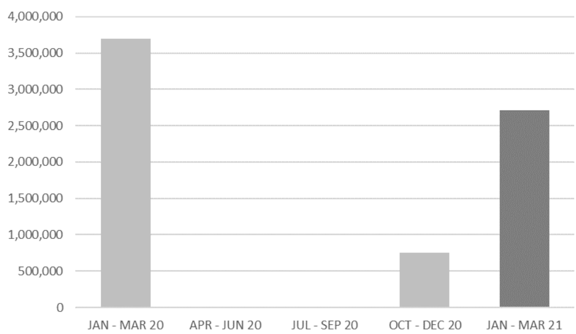
Visitor expenditure decreased 31 per cent to $662 million. Average spend per visitor increased by 13 per cent to $2,635, up from $2,336 in 2020.
Average length of stay increased by 19 per cent to 10.8 nights, up from 9.0 nights in the March quarter 2020.

Average spend by holiday visitors increased by 19 per cent to $3,517, up from $2,964 in the March quarter 2020.
Average spend by VFR visitors increased to $1,374, up from $1,223 compared to the same period 12 months prior.

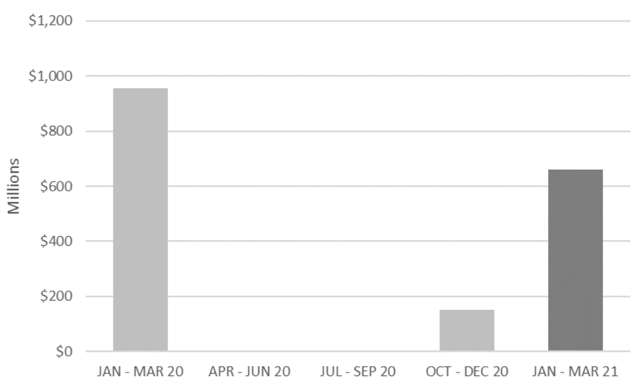
Total Visitors by Quarter



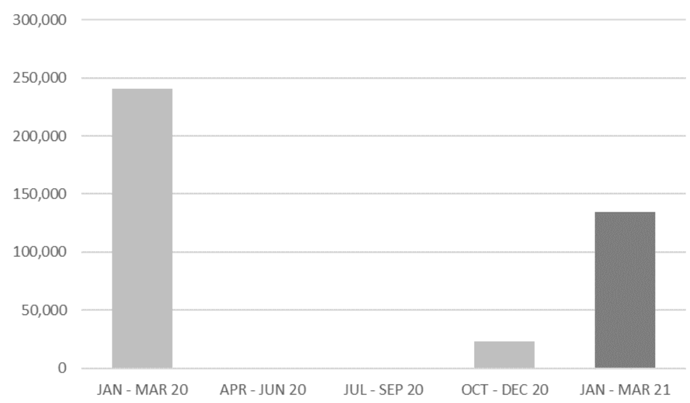
Total Nights by Quarter



Total Expenditure by Quarter



Total Holiday visitors by Quarter



Tourism Snapshot

Year ending March 2021

Percentage change refers to the same period in the previous year.

Intrastate visitation

National Visitor Survey results **YE March 2021**

Please note that these results are from the National Visitor Survey (NVS) and are the only source of intrastate travel data for Tasmania. Due to a decrease in Tasmanian sample size and issues with weighting the data, Tourism Tasmania advises caution in using the Tasmanian results. As the NVS is conducted by mobile phone, it was able to run continuously through the pandemic.

Overnight Trips for **Australia**

Overnight trips	62.2 million	▼	-20%
Expenditure	$30.9 billion	▼	-4%

Australians were able to travel within their own states and territories well before interstate travel resumed. 62.2 million intrastate overnight trips were taken in the 12 months to March 2021, down 20 per cent from the previous year. Expenditure from these trips totalled $30.9 billion, down 4 per cent. Average spend per overnight trip increased 20 per cent to $498.

for **Tasmania**

Overnight trips	1.68 million	▲	11%
Expenditure	$694 million	▲	36%

Intrastate overnight trips were not possible from late March until June 2020. In the year ending March 2021 Tasmanians took 1.68 million trips, up 11 per cent compared to the previous year. Expenditure from intrastate overnight trips totalled $694 million, up 36 per cent from year previous year. Average spend per overnight trip increased 23 per cent to $412. The Make Yourself At Home campaign and travel vouchers encouraged Tasmanians to holiday at home.

Overnight Trips by purpose for **Australia**

Holiday trips	27.5 million	▼	-11%
VFR trips	20.1 million	▼	-25%
Business trips	10.5 million	▼	-25%

Holiday (44% share), visiting friends and relatives (32%), and business (17%) were the main purposes of intrastate overnight trips nationally.

for **Tasmania**

Holiday trips	922,000	▲	23%
VFR trips	471,000	▲	11%
Business trips	213,000	▼	-14%

The three main purposes for intrastate overnight trips in Tasmania were holiday (55% share), visiting friends and relatives (28%), and business (13%).

Day trips for **Australia**

Day trips	153.7 million	▼	-32%
Expenditure	$16.0 billion	▼	-33%

Intrastate day trips in Australia totalled 153.7 million trips in the year to March 2021, down 32 per cent from the previous year. Expenditure from intrastate day trips totalled $16.0 billion.

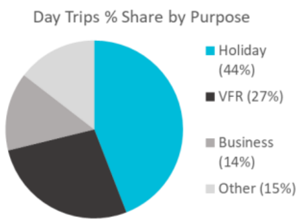
for **Tasmania**

Day trips	4.88 million	▼	-29%
Expenditure	$588 million	▼	-17%

Tasmanians went on 4.88 million day trips within the state, down 29 per cent compared to the year ending March 2020. Expenditure from these day trips totalled $588 million.

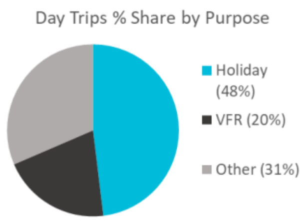
Day trips by purpose for **Australia**

Holiday trips	67.8 million	▼	-34%
VFR trips	41.6 million	▼	-35%
Business trips	21.9 million	▼	-29%



for **Tasmania**

Holiday trips	2.35 million	▼	-30%
VFR trips	1.00 million	▼	-29%



Tourism Snapshot

Year ending March 2021

Tourism Tasmania

Percentage change refers to the same period in the previous year.

Intrastate visitation

National Visitor Survey results **YE March 2021**

Intrastate Overnight Travel

	to Tasmania				to Australia			
	YE March 2020	YE March 2021		% Change	YE March 2020	YE March 2021		% Change
Trips								
Overnight trips ('000s)	1,520	1,685	▲	11%	77,850	62,208	▼	-20%
Nights								
Nights ('000s)	3,957	4,462	▲	13%	228,170	210,261	▼	-8%
Average Length of stay (nights)	2.6	2.6	▶	2%	2.9	3.4	▲	15%
Expenditure								
Expenditure ($million)	$510	$694	▲	36%	$32,390	$30,984	▼	-4%
Average spend per trip	$336	$412	▲	23%	$416	$498	▲	20%
Average spend per night	$129	$156	▲	21%	$142	$147	▲	4%
Purpose - Trips ('000s)								
Holiday	749	922	▲	23%	30,893	27,517	▼	-11%
Visit friends & relatives (VFR)	425	471	▲	11%	26,736	20,100	▼	-25%
Business	247	213	▼	-14%	14,073	10,580	▼	-25%
Other Reason	110	107	▼	-3%	4,554	3,675	▼	-19%
Total intrastate overnight trips	1,520	1,685	▲	11%	77,850	62,208	▼	-20%

Source: National Visitor Survey (NVS), Tourism Research Australia

Intrastate Day Travel

	to Tasmania				to Australia			
	YE March 2020	YE March 2021		% Change	YE March 2020	YE March 2021		% Change
Trips								
Day trips ('000s)	6,841	4,889	▼	-29%	226,856	153,759	▼	-32%
Total intrastate Day+Overnight trips ('000s)	8,361	6,574	▼	-21%	304,706	215,967	▼	-29%
Expenditure								
Expenditure ($million)	$705	$588	▼	-17%	$24,054	$16,073	▼	-33%
Average spend per trip	$103	$120	▲	17%	$106	$105	▶	-1%
Purpose - Trips ('000s)								
Holiday	3,357	2,350	▼	-30%	103,183	67,809	▼	-34%
Visit friends & relatives (VFR)	1,412	1,000	▼	-29%	63,771	41,658	▼	-35%
Business	928	615	▼	-34%	30,779	21,922	▼	-29%
Other Reason	1,145	923	▼	-19%	29,123	22,371	▼	-23%
Total intrastate day trips	6,841	4,889	▼	-29%	226,856	153,759	▼	-32%

Source: National Visitor Survey (NVS), Tourism Research Australia

International visitation

International Visitor Survey results **YE March 2021**

International visitors to **Australia**

Visitors	60,200	▼	-99%
Nights	6.2 million	▼	-98%
Expenditure	$505 million	▼	-98%

The IVS ceased interviews with departing visitors in March 2020. The year ending March 2021 period marks 12 months since Australia closed its international border.

In this context, 60,200 international visitors came to Australia in the year ending March 2021, a 99 per cent decrease from the previous year. Total nights and spend by international visitors declined 98 per cent.

Travel between Australia and New Zealand resumed on 18 April 2021, therefore is not captured in the time period of this Snapshot.

to Australia

Origin of international visitors	Year ending March 2020	Year ending March 2021		% Change
New Zealand	1,241,512	13,283	▼	-98.9
Japan	425,315	829	▼	-99.8
Hong Kong	268,935	1,640	▼	-99.4
Singapore	387,568	2,413	▼	-99.4
Malaysia	318,608	667	▼	-99.8
Indonesia	190,045	1,094	▼	-99.4
Taiwan	162,408	287	▼	-99.8
Thailand	89,614	489	▼	-99.5
Korea	222,788	468	▼	-99.8
China	1,081,118	2,564	▼	-99.8
India	368,151	2,678	▼	-99.3
Other Asia	423,486	3,203	▼	-99.2
United States of America	713,835	7,127	▼	-99.0
Canada	164,921	1,081	▼	-99.3
United Kingdom	637,399	5,925	▼	-99.1
Germany	183,349	1,053	▼	-99.4
Scandinavia	96,497	681	▼	-99.3
France	129,886	855	▼	-99.3
Italy	68,134	633	▼	-99.1
Netherlands	58,786	560	▼	-99.0
Switzerland	47,013	325	▼	-99.3
Other Europe	254,899	3,839	▼	-98.5
Other Countries	516,658	8,519	▼	-98.4
Total	8,050,925	60,212	▼	-99.3

International visitors to **Tasmania**

Visitors	900	▼	-100%
Nights	146,000	▼	-96%
Expenditure	$9 million	▼	-98%

Tasmania’s international visitor numbers saw a substantial drop to 9,00 in the year ending March 2021. Expenditure by international visitors decreased by 98 per cent in the year to March 2021.

Due to low sample size, Tasmania’s international source markets, and purpose of visiting Tasmania, are not reported.

Tourism Snapshot

Year ending March 2021

Short-stay accommodation Tasmania

AirDNA

The short-stay accommodation sector provides an alternative to stays in hotel, motel and other options, commonly grouped as ‘commercial accommodation’, and has particular significance for regional communities and economies where there may be fewer hotel-style accommodation options.

AirDNA provides an indicative view of the short-stay accommodation sector, covering metrics including listings, demand (nights booked), occupancy rates, and some financial modelling for rates and revenue. Tourism Tasmania is also publishing forward booking data in the monthly **Industry Research & Insights Update**, available through our Industry Recovery website.

This sector includes holiday homes, shacks and homes, as well as some traditional bed and breakfasts if they list on Airbnb or VRBO. However, data in this snapshot refers only to ‘entire properties’, where guests have the whole home to themselves; approximately 85% of listed properties in Tasmania. While only one sector of the industry, and a dataset that includes Tasmanians seeing their own state, the accommodation measures provide a general insight into the general recovery of the industry.

Six key measures are explored through the following pages:

Supply (Nights) Total number of Available Nights and Booked Nights from Active Listings	Demand (Nights) Total number of Booked Nights during the reporting period	Occupancy Rate Occupancy Rate = Total Booked Days / (Total Booked Days + Total Available Days). Calculation only includes rentals with at least one Booked Night.
Average daily rate (ADR) ($) ADR = Total Revenue / Booked Nights	RevPAR ($) Revenue Per Available Rental = ADR * Occupancy Rate	Revenue ($) Total revenue earned during the reporting period. Includes the advertised price from the time of booking, as well as cleaning fees.

Data is presented for Hobart, Launceston, and four regional zones. The zones have been created to represent a range of urban and regional areas and collectively cover 51% of listed ‘entire places’ in the state on Airbnb and VRBO, with duplications across sites taken into account. The state level data includes all ‘entire places’ listed in Tasmania in the period.

Hobart Hobart City Council	Launceston Launceston ABS SA3	West Coast West Coast Council
Orford - Freycinet Orford, Swansea, Coles Bay, Swanwick, Bicheno	North East Coast Bay of Fires and St Helens to Falmouth	North West 7 LGAs: Circular Head, Waratah-Wynyard, Burnie, Devonport, Central Coast, Kentish and Latrobe

Tourism Snapshot

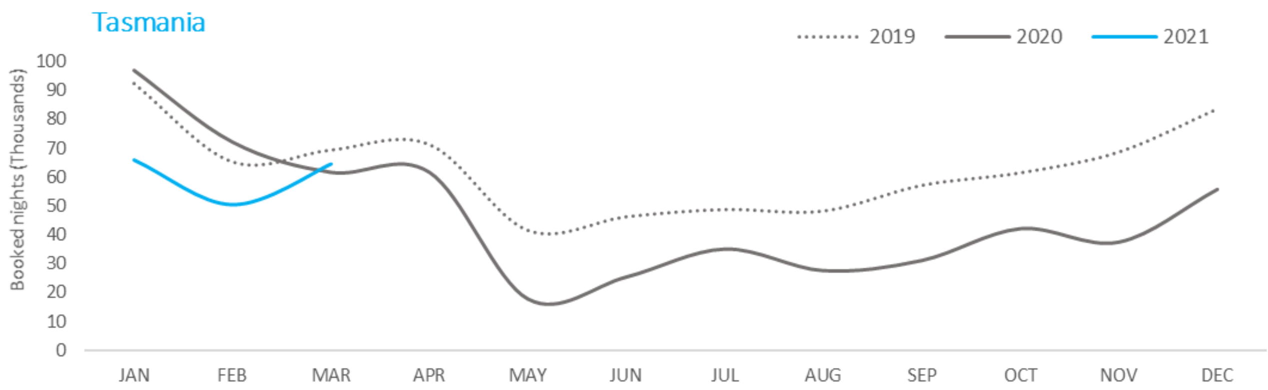
Year ending March 2021

Demand (nights booked) Entire place properties

Tasmania's short-stay accommodation sector comprised around 6,300 available properties in the year ending March 2021, down 11% from 2020. Available listings tend to fluctuate from month to month as demand (booked nights) changes. The chart below shows demand by month from January 2019 to March 2021, with the impacts of border restrictions due to COVID-19 reducing nights from March 2020 onwards. Whilst Tasmania's border was restricted to essential travellers from April to October 2020, and intrastate travel was not permitted between April and late June, it is clear that there was still demand for short-stay accommodation throughout the year. Predominantly this would be a combination of visitors remaining in the state and people self-isolating if not required to be in government quarantine.

April and May 2020 recorded the lowest demand for short-stay accommodation, at 43% of demand relative to their respective months in 2019. Comparing arrivals – that is all people on scheduled flights and Spirit of Tasmania sailings, not just visitors - into the state to the same period, April and May 2020 only saw 1% and 2% respectively compared to the same months in 2019. It can therefore be presumed that Tasmanians were the primary drivers of demand through the last two-thirds of 2020 and have significantly contributed to supporting this sector.

As border restrictions eased through quarter three of 2020, demand began to lift as more interstate visitors resumed travel to Tasmania. Demand in December 2020 was 67% of the same month in 2019.



The state-level figures provide an indication of the performance of the sector, however demand was not consistent across urban and regional areas. Historically, Hobart has been the anchor destination with 72% of visitors in 2019 spending some time in the capital. During 2020, with demand primarily coming from Tasmanians unable to travel outside the state and with 46% of Tasmanians living in the greater Hobart area, this trend shifted weight to regional areas. For Hobart and Launceston, demand has been substantially lower levels; in contrast, some regional areas demand outpaced previous years; the North East Coast area recorded 55% more short-stay accommodation nights booked in October 2020 than the same month the previous year.

The following pages provide a breakdown by six indicative regions. Tourism Tasmania partnered with AirDNA in response to the pandemic to monitor and track recovery of the tourism industry while traditional measurement tools, such as the Tasmanian Visitor Survey, were offline. As such the data for regional areas is only available for individual months from June 2020 with a comparison back to June 2019 onwards.

Tourism Snapshot

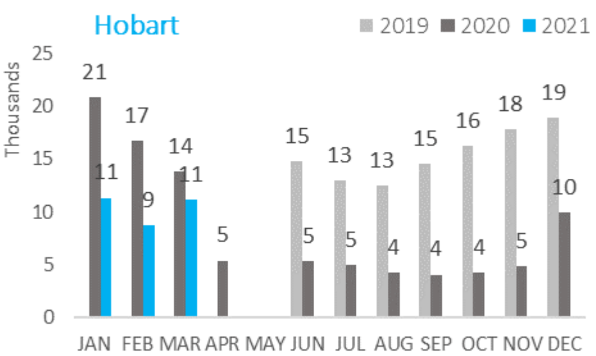
Year ending March 2021

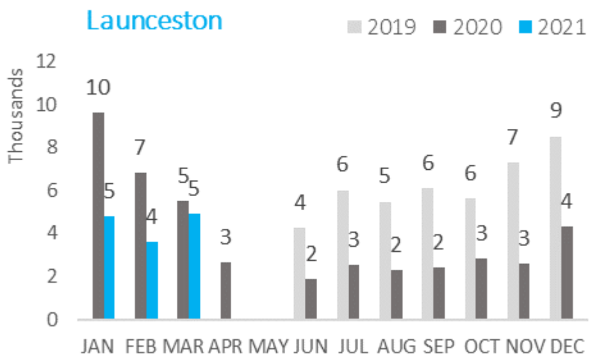
Demand (booked nights) Share of same month previous year

The table below shows the demand (booked nights) for short-stay accommodation for the state, and across the six indicator regions, by month, expressed as a percentage share of the same month the previous year.

+ This means June to December 2020 are compared to the same months in 2019.
+ January to March 2021 are compared to the same months in 2020; this means March 2021 to June 2021 will be compared to Tasmania's restricted travel period.

	% share of same month in 2019							% share same month in 2020		
	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21
Tasmania	55%	72%	57%	55%	69%	55%	67%	68%	70%	**105%**
Hobart	44%	42%	42%	39%	50%	35%	51%	54%	52%	80%
Launceston	36%	38%	33%	28%	26%	27%	52%	50%	53%	89%
Freycinet	36%	38%	33%	28%	26%	27%	52%	88%	88%	**129%**
North East Coast	**122%**	**150%**	**114%**	**114%**	**155%**	96%	90%	93%	99%	**128%**
West Coast	92%	**114%**	81%	83%	**103%**	78%	86%	90%	85%	**157%**
North West	70%	86%	73%	68%	**102%**	75%	73%	75%	77%	**118%**



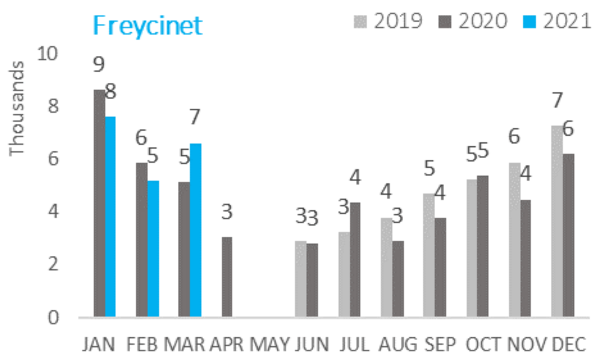


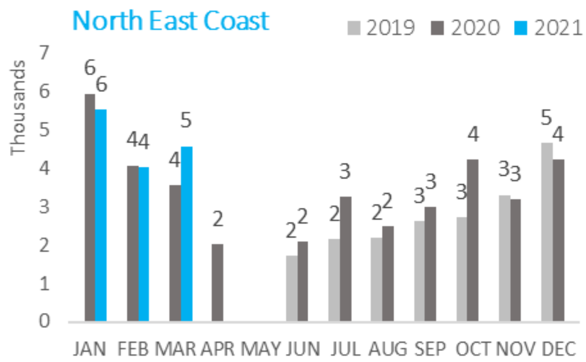
Tasmania's capital city experienced the greatest drop in demand across the indicator regions, with the deepest trough through September to November. This period coincides with the Tasmanian Government's Make Yourself At Home travel voucher initiative, which encouraged stays and experiences across the state. There are positive signs of demand growth through the first quarter of 2021.

As the largest urban area outside Hobart, Launceston also saw low demand through the back end of 2020; however, it did sustain a greater share of nights than Hobart compared to the year before. March 2021 was the strongest performing month in the period.

Tourism Snapshot

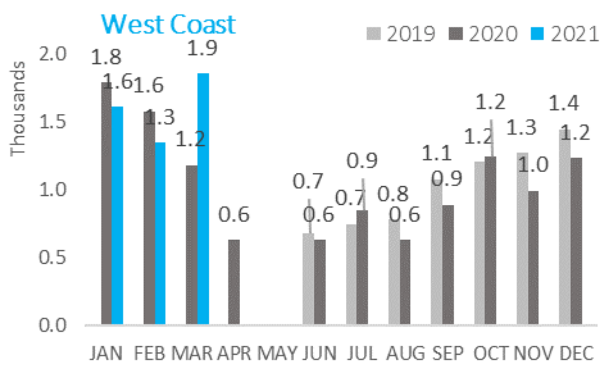
Year ending March 2021

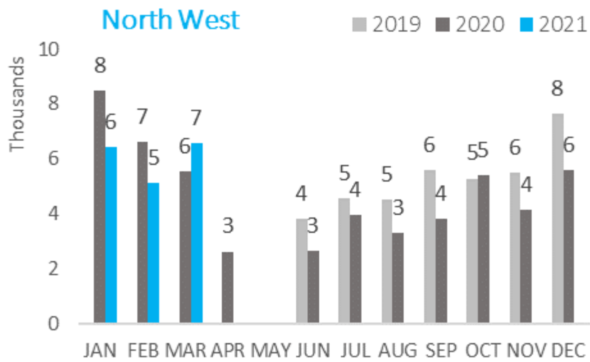




The Orford-Freycinet short-stay accommodation sector saw relatively strong demand through 2020 compared to Hobart and Launceston, with July and October seeing more nights booked than the same nights in 2019, with summer 2020-21 performing well.

The North East Coast region was the strongest performer of the indicator regions, with five of the seven months of available data showing more nights booked than the same months in 2019, and the summer peak period continuing the strong demand.





The West Coast region saw relatively healthy demand for short-stay accommodation, particularly through the two school holiday periods in July and October where demand was higher than the same time last year. March 2021 recorded the highest demand in the past 21 months.

The North West region saw demand rise through the school holiday periods in line with other regional areas, though saw softer demand overall until the first quarter of 2021. Cradle Mountain is in this region which saw strong visitation to the area from June; however, the accomodation mix there is different to other destinations, with mostly hotel, lodge and cabin commercial acommodation. It is therefore likely demand for nights is higher than this data indicates.

Tourism Snapshot

Year ending March 2021

Short-stay accomodation Year ending total and % change

		Tasmania	Hobart	Launceston	Orford-Freycinet	NE Coast	West Coast	North West
Supply (nights available)	YE Mar 21	934,300	148,400	69,300	116,100	70,700	25,300	92,800
	YE Mar 20	1,388,000	285,300	132,100	136,200	81,800	28,700	130,700
	% change	▼ -33%	▼ -48%	▼ -48%	▼ -15%	▼ -14%	▼ -12%	▼ -29%
Demand (nights booked)	YE Mar 21	476,600	77,400	36,300	52,200	39,000	12,300	49,300
	YE Mar 20	747,000	187,300	76,700	60,100	38,000	13,900	63,000
	% change	▼ -36%	▼ -59%	▼ -53%	▼ -13%	▲ 2%	▼ -11%	▼ -22%
Occupancy	YE Mar 21	51%	52%	52%	45%	55%	49%	53%
	YE Mar 20	54%	66%	58%	44%	46%	48%	48%
	% change	▼ -5%	▼ -21%	▼ -10%	▲ 2%	▲ 19%	► 1%	▲ 10%
ADR $	YE Mar 21	159	166	135	182	173	137	137
	YE Mar 20	136	146	115	160	150	124	119
	% change	▲ 17%	▲ 13%	▲ 17%	▲ 14%	▲ 15%	▲ 11%	▲ 15%
RevPAR $	YE Mar 21	81	86	71	82	95	67	73
	YE Mar 20	73	96	67	70	70	60	57
	% change	▲ 11%	▼ -10%	▲ 6%	▲ 16%	▲ 37%	▲ 11%	▲ 26%
Revenue $m	YE Mar 21	99.5	16.8	6.4	12.4	8.8	2.2	8.8
	YE Mar 20	133.1	35.9	11.6	12.6	7.5	2.3	9.8
	% change	▼ -26%	▼ -48%	▼ -38%	▼ -10%	▲ 9%	▼ -12%	▼ -15%

Short-stay accommodation Percentage share of previous year

The table below shows the percentage share of the year ending March 2021 figures compared to the year ending March 2020. If the values are the same, then that would equal 100%; for example, available listings in the state for the year ending March 2021 were 89% of the number in 2020.

	Tasmania	Hobart	Launceston	Orford-Freycinet	NE Coast	West Coast	North West
Available Listings	6,319	1,204	601	617	394	134	589
% of 2020	89%	86%	89%	91%	96%	96%	87%
Booked Listings	5,567	1,070	517	534	360	120	503
% of 2020	86%	81%	84%	89%	95%	98%	83%
Occupancy Rate	95%	79%	90%	102%	119%	101%	110%
Supply (Nights)	67%	52%	52%	85%	86%	88%	71%
Demand (Nights)	64%	41%	47%	87%	102%	89%	78%
Revenue	75%	47%	55%	99%	118%	98%	90%
ADR	117%	113%	117%	114%	115%	111%	115%
RevPAR	111%	90%	106%	116%	137%	111%	126%

Tourism **Snapshot**

Year ending March 2021

Commercial accommodation

STR Global

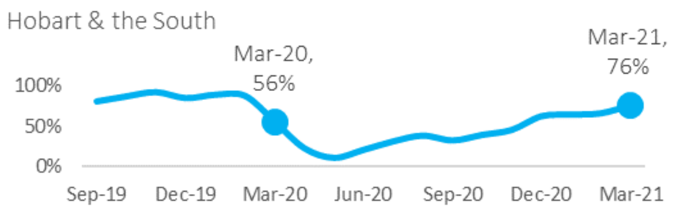
Tourism Tasmania has worked with STR Global to increase the representation of Tasmanian hotel, motel and other commercial accommodation operators in this platform as an important indicator for tracking our recovery to provide decision makers with a better idea of how industry is faring. STR provides a broad capture of platforms and booking systems used by operators, enabling a wider range of accommodation types to be included across the commercial accommodation market, taking into account operator size, rating, brand affiliation and rates.

Occupancy by month

Occupancy was lowest immediately following border restrictions beginning late March 2020, with lows around 10% across the four regions monitored by STR, and did not begin to significantly lift until intrastate travel was allowed from late June 2020. Occupancy across all regions has been steadily improving through the peak summer travel period.

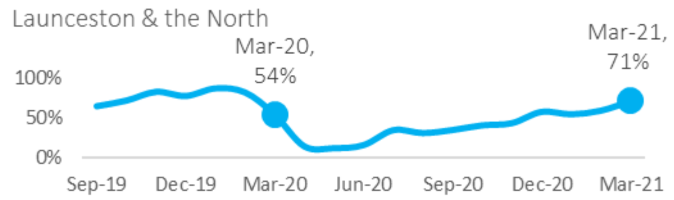
Hobart & the South

Tasmania's capital city accommodation was the hardest hit from border closures. With around 45% of the states' population living in the Hobart area, intrastate travel into the city was weaker compared to regional areas.
While occupancy rates are yet to return to pre-COVID levels, there has been steady improvement in demand for city stays.



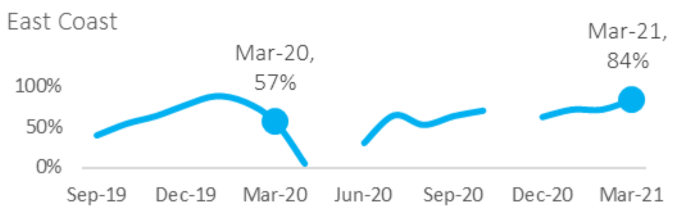
Launceston & the North

Occupancy rates in Launceston were slower to recover than Hobart, however by March 2021 were within 10% of 2019 levels.



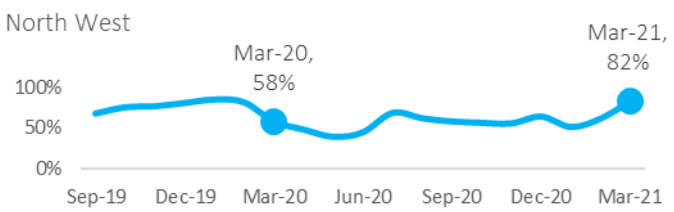
East Coast

The East Coast saw stronger recovery than the urban centres, benefiting from intrastate travel by Tasmanians while interstate trips were not possible. The East Coast returned to similar occupancy rates in early 2021 to those seen in peak summer periods in 2018-19 and 2019-20. The breaks in series are due to low samples in those periods.



North West

Occupancy rates in the North West were least impacted by COVID, with demand in in the first quarter of 2021 on par with pre-pandemic levels.

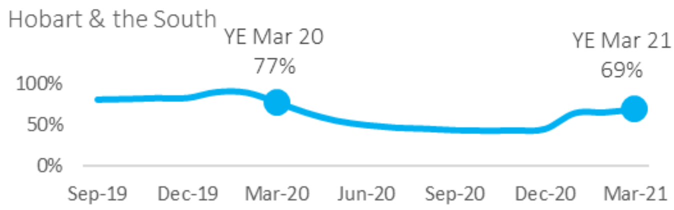


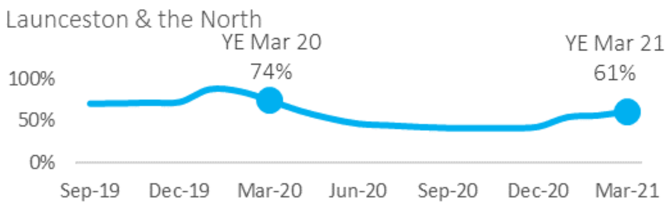
Tourism Snapshot

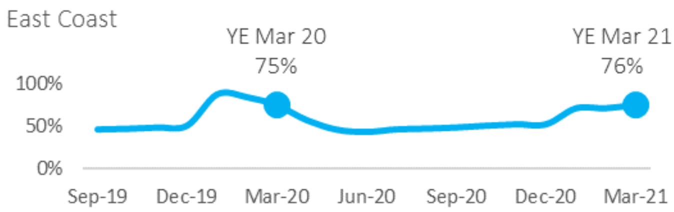
Year ending March 2021

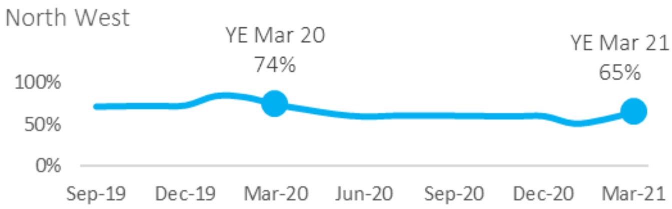
Occupancy by rolling year ending

All regions were showing signs of a strong year for occupancy through the first quarter of 2020, possibly due to impacts on travel by the mainland Australia bushfires as interstate visitors extended trips in Tasmania or diverted planned trips away from affected areas. Occupancy for the year to March 2021 was down for Hobart & the South, Launceston & the North and the North West, while the East Coast was on par with the previous twelve months.









Help us improve this data

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 Tom tchappel@str.com to access your own bespoke complimentary report and contribute anonymously to industry insights and monitoring.

Tourism Snapshot

Year ending March 2021

About the Tasmanian Tourism 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 a statistical overview about international and interstate visitors to Tasmania, as well as intrastate travel by Tasmanians.

While the Tasmanian Tourism Snapshot provides a useful overview of visitors to Tasmania, more detailed statistics are available at Tourism Tasmania's corporate website at http://www.tourismtasmania.com.au/research/tvs .

Where do the statistics 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. As an island, Tasmania has a natural advantage over other destinations when it comes to surveys of this type, because visitors can be more accurately counted as they depart via air and sea ports.

More detailed statistics from the TVS are also available through Tourism Tasmania's corporate website at www.tvsanalyser.com.au. The TVS Analyser service provides you with easy online access to a range of other useful visitor statistics and tables from the TVS which you can investigate and print for your own use.

- Due to COVID, the sample for the year ending March 2021 was reduced to approximately 4,800 interstate and international visitors.

National Visitor Survey (NVS)

The NVS is also administered by Tourism Research Australia. The NVS measures the characteristics and travel patterns of domestic tourists within Australia, including intrastate day and overnight travel. In 2019 there was a change in sampling methodology of the NVS. This has seen a break in series, so please exercise caution when comparing 2019 results with previous time periods. The survey results come from mobile phone interviews conducted with an annual sample of 120,000 Australian residents. The survey collects details about their recent travel for day trips, trips involving overnight stays and overseas travel. The NVS provides the only source of information about day and overnight travel by Tasmanians in their own state.

- Interviews continued through 2020, with the overall sample only slightly reduced. However, fewer Australians were travelling which impacted the usable sample of 'travelling Australians'.

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. The survey gathers information from visitors about, among other things; the number of nights they stayed in Australia, travel arrangements, reasons for visiting, places visited, information sources they used to find out about Australia prior to leaving home, impressions of aspects of Australia, income earned and expenditure on the trip. The IVS samples 40,000 departing, short-term international travellers in the departure lounges of eight international airports across Australia - Sydney, Melbourne, Brisbane, Cairns, Perth, Adelaide, Darwin and the Gold Coast.

- Due to COVID, the sampling for January to March was unchanged; however April-December utilised incoming passenger cards and algorithms instead of interviews.

Why the TVS and IVS figures don't match up

The International Visitor Survey that features in this Snapshot report captures the profiles of international visitors to Australia, including those travelling to Tasmania. The IVS and TVS are each conducted by a different organisation which uses different sampling and 'weighting' methods to determine total numbers. As a result, the statistics from each survey will give differing results for identical subjects and are unlikely to tally if added together.

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. They may be different from the real figure if data from 100% of all visitors could have been collected. Therefore, these estimates may be subject to chance variation, or sampling error. Smaller estimates under 1000 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.