

TASMANIAN TOURISM SNAPSHOT

YEAR ENDING DECEMBER 2021

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

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Year ending December 2021

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 an interactive always-on and up-to-date dashboard for visitation data, and has been recently upgraded to allow analysis on a variety of visitor characteristics.



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

Tasmania welcomed 682,300 interstate and international visitors in the year to December 2021, up 41% from 2020. Total nights were up 65% to 7.33 million, and visitor spend was \$1.86 billion, up 68% on the year ending December 2020.

Visitation to Tasmania in 2021 was almost entirely supplemented by interstate visitors, with 677,500 mainland Australians visiting state. This is 59% of the domestic visitation seen in 2019.

Tasmania's border generally remained open throughout the year to domestic travellers, with tighter restrictions primarily from winter through to summer for Victoria and New South Wales, and periods of high-risk area restrictions from other states. Domestic travel resumed with limited restrictions from all states from December 15, 2021. Limited international travel temporarily resumed between April and June 2021 from New Zealand, with a direct Hobart-Auckland flight for the first time in 20 years.

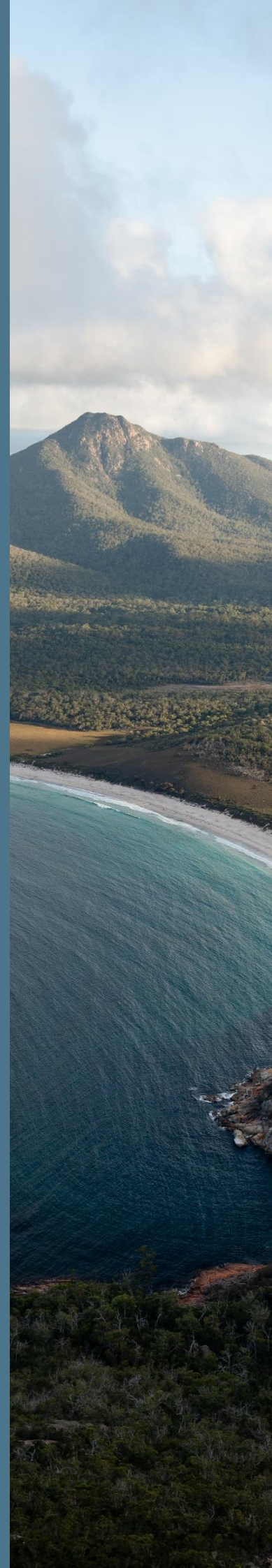


Tourism Tasmania's activity remained in-market throughout the year, including interstate and international campaigns and providing travel vouchers to interstate audiences for the first time.

The 'Come Down for Air' campaign was active in most interstate markets from summer 2020-21 through to autumn, with the 'Off Season' campaign in the cooler months. As NSW and VIC were challenged by further COVID-19 outbreaks, attention was shifted to QLD, SA and WA, and in the lead up to summer 2021-22, these markets were invited to apply for a Tassie Holiday Voucher for use through November and December.

Tasmanians were encouraged to travel their own state throughout the year, via the 'Make Yourself at Home' intrastate campaign. MYAH campaign was active from autumn through to spring for Tasmanians, and the voucher program was managed by the Department of State Growth.

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



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Year ending
December 2021



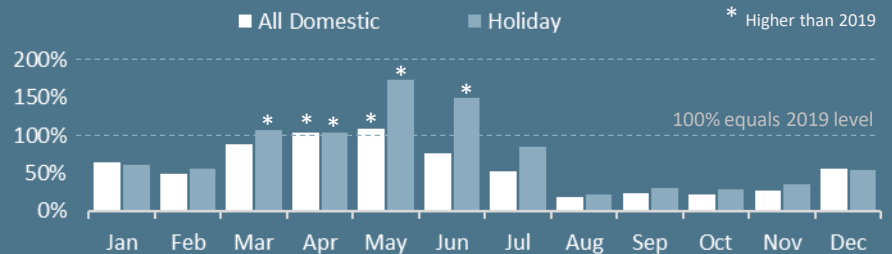
Comparing 2021 to pre-COVID

Ongoing changes to travel restrictions within Australia through 2021 resulted in varied visitation patterns to Tasmania, including state of origin and purpose of visit. Using 2019 as a baseline for tracking recovery of domestic visitation, the below charts show each month's 'recovery rate' against the same months in 2019, demonstrating how changes in visitor type resulted in higher rates of spend and more nights in the state compared to numbers of visitors.

Visitors

59%

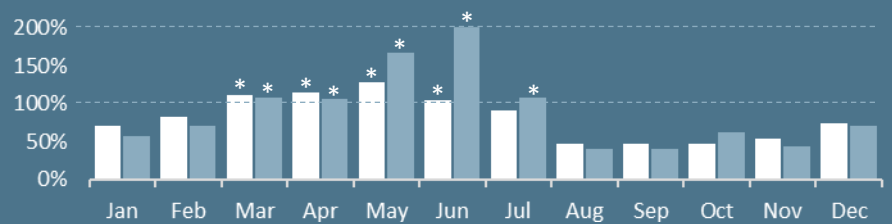
YE Dec 21 of
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Nights

83%

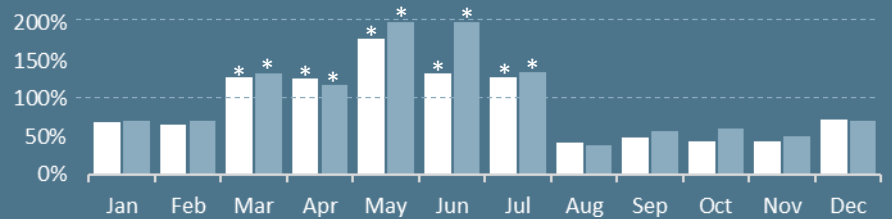
YE Dec 21 of
YE Dec 19



Spend

87%

YE Dec 21 of
YE Dec 19



Spend recovery continued to outpace visitation through 2021

Tasmania recorded five months where domestic spend was above the spend in the same months in 2019, or indeed any previous year. This spend was primarily from holiday visitors during a period where Tasmania was one of the few travel options for Australians and was seen as a relatively 'safe' destination in the pandemic.



Average spend per visitor (ASPV) reached record highs

With visitation recovery lagging behind spend, the average spend per domestic visitor (ASPV) has been substantially higher than in 2019. Although all markets saw some lift in ASPV, the overall gain was driven by two key factors:

- A significant drop in shorter stay, lower spending visitors from the two big markets of NSW and VIC primarily for visiting friends and family.
- An increase in visitors from longer stay, higher spending markets (WA, QLD).



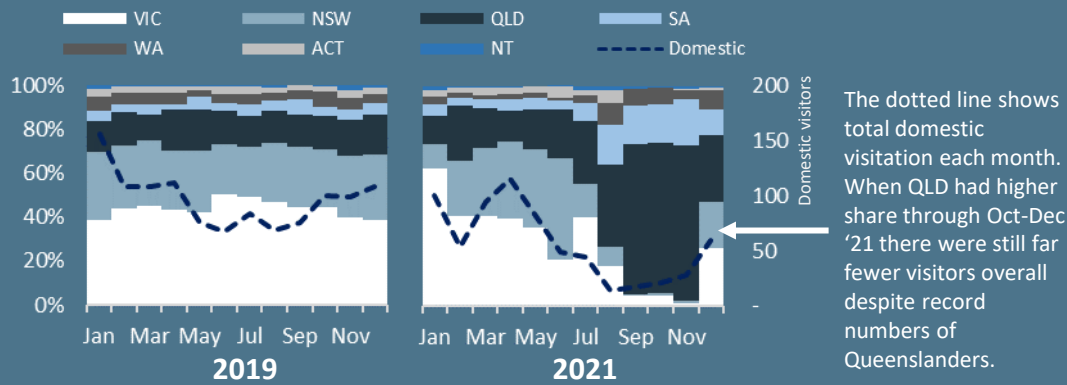
Like to see more numbers?

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

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

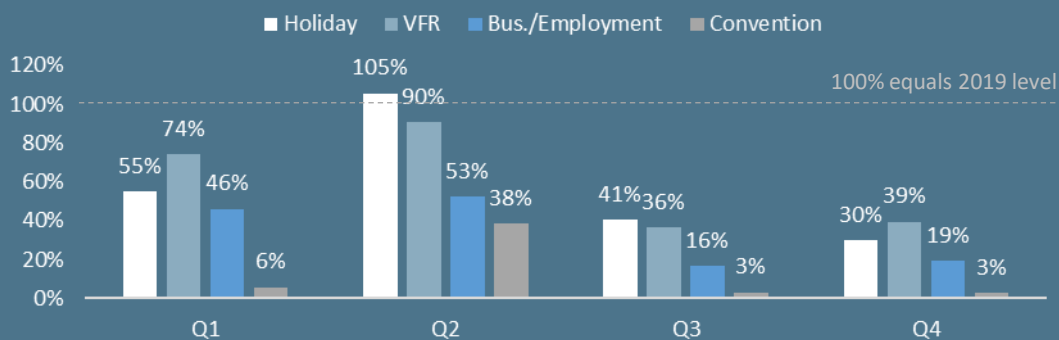
As travel restrictions disrupted traditional key domestic markets of Victoria and New South Wales in the second half of the year, Queenslanders became the dominant market

In 2019 there was relatively consistent market share across the states throughout the year. In 2021 as VIC and NSW were often under lockdowns it was Queenslanders who flocked to Tasmania, followed by South Australians. When looking at the full 12 months of 2021, there were overall fewer trips by Queenslanders; however, November and December set records for those months compared to previous years.



Holiday and VFR visitors were most responsive to changing travel restrictions; business has remained sluggish to recover

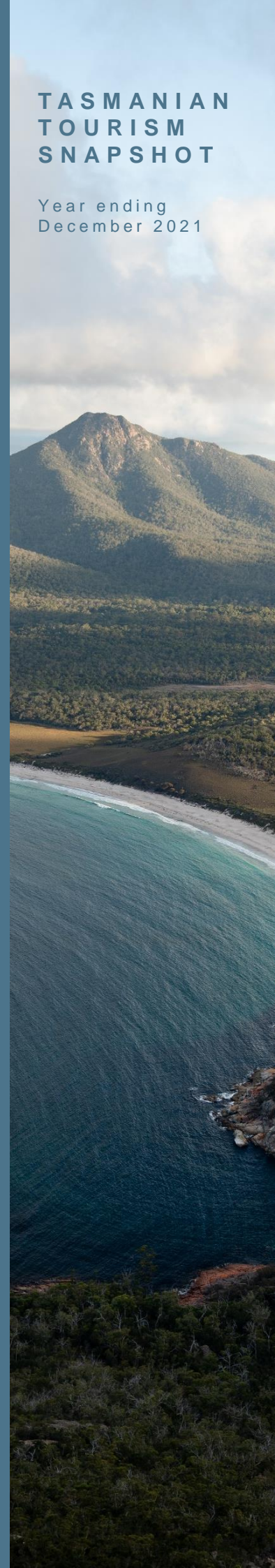
As some interstate travel resumed from late 2020, the first quarter of 2021 saw an influx of predominantly VFR visitors, flowing into quarter two where holiday visitation saw record levels of visitors, nights and spend. Although there was a surge in Queenslanders, the overall recovery of visitation declined through the second half of the year as restrictions tightened from key domestic markets.



Visitors increased their length of stay in Tasmania in 2021, averaging an extra 2.5 nights each compared to previous years

Significant increases were noted in the last quarter of the year as visitation was dominated by visitors from states further away from Tasmania – QLD, SA and WA – who typically stay longer than those from NSW or VIC. Despite fluctuations in visitation through the year, the average length of stay (ALOS) for interstate visitors increased on average 2.5 nights.

In terms of which towns and regions visitors spent their nights, 2021 generally returned to similar shares as 2019, despite fluctuations across individual months.



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The pandemic has increased the desirability of nature-based experiences and attractions, self-drive trips, and appeal of Tasmania's food, wine and beverages

Tasmania's natural landscapes and wildlife continue to be the top influences for holiday visitors to choose the state, in line with previous years. However the appeal of the state's wilderness, wildlife and natural scenery grew as holiday visitors' top influence from 60% to 65% between 2019-21, as people sought out more open-space places in response to the confinement of the pandemic, and perhaps a cautiousness of crowds.

The second influence to travel to Tasmania, 'to self-drive around' the state supports the dispersal of visitors along with a desire to experience the state's food, wine and beverages (third place) which also increased as Australians rediscovered their interest in local produce.

Rank	Influence	2021 % share	%pt change from 2019
1	To see wilderness, wildlife & natural scenery	65%	▲ +5%
2	To self-drive / tour around	55%	▲ +3%
3	To experience Tas. food and wine / beverages	46%	▲ +8%
4	To experience Tas. history / heritage	35%	▶ -1%
5	Wanted to return to see and do more	29%	▶ +2%



The strong influence of outdoor experiences also translates through to activity on the ground by domestic visitors, with bushwalking and hiking, visiting historic sites and national parks the top activities

Bushwalking (from a couple of hours to overnight trips) continued to be the top activity before and through COVID for domestic visitors, and gained a further 9%pts of the share of activities undertaken. Almost all the activities of the 35 surveyed in the TVS saw an increase in participation based on share, meaning visitors were each participating in more activities during their trip than in previous years. This is likely to contribute to the elevated spend per person through greater dispersal around the state.

For domestic holiday visitors, the trend was even more pronounced; 69% of them participated in some sort of bushwalk, which is the highest participation rate ever seen (up 5%pts from 2019).



The influences and activities are reflected in the attractions domestic holiday visitors experienced in 2021, as they visited more outdoor and nature-based places

While Salamanca Market, kunanyi / Mt Wellington and MONA remained in the top three visited attractions, Freycinet National Park moved substantially up the most-visited rankings from 7th to 4th (2019 to 2021) as visitors explored regional destinations. Cataract Gorge (5th) and Cradle Mountain (6th) maintained their rankings.



In 2019, around 21% of domestic holiday visitors stayed at least one night in self-contained accommodation, such as serviced apartments or houses; in 2021 this rose to 43%, as fewer visitors chose hotels and motels, guest houses or bed and breakfasts

The pandemic has influenced a shift in preferred accommodation styles, with hotels and motels being chosen for at least one night by 36% of domestic holiday visitors in 2021, down from over half (54%) in 2019. The length of stay in each also shifted, with those staying in self-contained accommodation moving closer to a week or more in 2021 compared to around 3 nights in 2019.

In terms of share of the *nights* spent in different accommodation types, domestic holiday visitors tripled their stays in self-contained accommodation, increasing from 7% share of nights in 2019 to 21% in 2021. Where nights were spent in hotel-style accommodation there was a shift to more higher-end and luxury stays.



When border rules allowed travel, interstate visitors were quick to come to Tasmania. Tasmanians, however, have been more cautious in resuming out-of-state travel

The TVS collects travel information of exiting travellers, including limited data of Tasmanians such as intended destination, purpose of travel and length of trip. Pre-COVID, Tasmanians took around 1 million out-of-state trips, with 86% of these to domestic destinations. Visiting friends or relatives (VFR) is traditionally the main reason for these trips (38% in 2019). In 2021, research by Tourism Australia showed there was caution around holiday travel (including catching or spreading COVID, being stuck due to changing border rules and limited destination choices). The TVS saw VFR trips increase to 48% share, whereas holiday share remained at 21%, due in part to a reduction in business and event travel. In 2021 VFR travel recovered to 54% of the number of trips in 2019, while holiday was 44%.

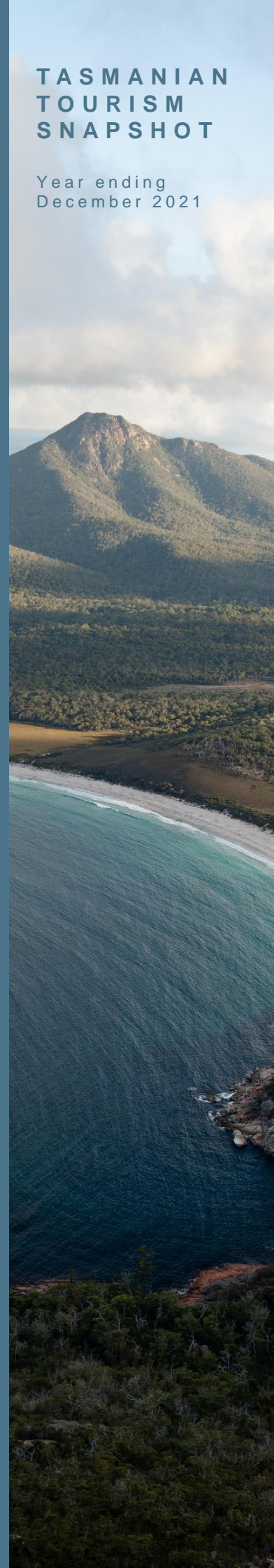
While there have been two months since November 2020 where interstate visitation has outpaced visitation in the same months in 2019 (April and May 2021), Tasmanians have been more reserved with out-of-state travel with the highest recovery rate only 68% - also in April and May 2021. Out-of-state trips by Tasmanians in 2021 totalled 387,870 or 38% of 2019. By comparison, trips to Tasmania by interstate visitors in 2021 recovered to 59% of 2019.



While Tasmanians have been cautious about resuming travel outside the state, they took the chance to explore more of their state – and setting records along the way

When border restrictions offered limited out-of-state travel, Tasmanians didn't sit at home and put off the desire to travel, instead getting out and seeing their own state with increased overnight and day trips. Five months in 2021 saw higher volumes of overnight intrastate trips than the same months in 2019, with overall Tasmanians taking 7% more overnight trips than in 2019. And, overnight trip spend also increased, up 14% from 2019 levels to \$882 million in 2021.

The lowest month for travel recovery was April 2021 (78% of 2019), coinciding with the period of high interstate visitation and the strongest recovery of out-of-state travel by Tasmanians.



INTERSTATE VISITORS TO TASMANIA

YEAR ENDING DECEMBER 2021

ALL VISITORS*

VISITORS
677k
▲63%

NIGHTS
6.97m
▲97%

SPEND
\$1.84b
▲105%

ALOS (nights)
10.3
▲21%

ASPV
\$2,717
▲26%

ASPN
\$264
▲4%

HOLIDAY VISITORS

VISITORS
351k
▲66%

NIGHTS
3.70m
▲95%

SPEND
\$1.28b
▲109%

ALOS (nights)
10.5
▲17%

ASPV
\$3,657
▲25%

ASPN
\$347
▲7%

State of origin

% Share visitors from state

	Visitors	Nights '000	Spend \$m	ALOS nights	ASPV	ASPN	% Share visitors from state			
							Holiday	VFR	Business	Other
NSW	161,800	1,628	\$461	10.1	\$2,760	\$283	54%	29%	10%	7%
VIC	246,700	2,071	\$557	8.4	\$2,261	\$269	49%	33%	14%	4%
QLD	169,200	2,001	\$513	11.8	\$3,072	\$257	55%	32%	11%	3%
SA	47,600	484	\$142	10.2	\$2,904	\$293	55%	28%	14%	3%
WA	23,800	455	\$102	19.1	\$4,307	\$223	42%	40%	11%	6%
ACT	18,300	175	\$44	9.5	\$2,417	\$255	48%	33%	13%	6%
NT	5,700	106	\$20	18.6	\$3,605	\$191	45%	41%	10%	4%

Recovery tracking by month of departure

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	Total
Visitors	101,200	53,600	94,700	115,600	80,800	49,400	44,600	13,100	17,800	20,800	27,100	58,700	667k
% 2019	65%	50%	88%	103%	108%	76%	53%	19%	23%	21%	27%	56%	59%
Nights ('000)	1,057	612	944	1,120	736	438	452	193	211	286	357	560	6.97m
% 2019	70%	83%	112%	114%	128%	104%	91%	46%	47%	48%	54%	74%	83%
Spend (\$m)	264.3	131.0	257.1	297.8	216.0	127.9	153.6	35.3	59.0	71.9	81.7	145.2	\$1.84b
% 2019	69%	66%	129%	127%	179%	133%	128%	41%	49%	44%	43%	73%	87%

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

% Change is from previous year.

*All visitors' on this page refers to Australian travellers, excluding Tasmanians.

ALOS: Average length of stay (nights);

ASPV: Average spend per visitor;

ASPN: Average spend per night.

Image: Wineglass Bay, Robert King Visuals

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 DECEMBER 2021

ALL VISITORS

VISITORS 4,800 ▼-94%	NIGHTS 292,500 ▼-79%	SPEND \$20m ▼-88%	ALOS (nights) 60.6 ▲260%	ASPV \$4,201 ▲96%	ASPN \$69 ▼-46%
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Rolling Annual Visitation to Tasmania



Share of all visitors to Australia

VISITORS 2.2% ▼ -2.6%pts	NIGHTS 1.8% ► -0.2%pts	SPEND 0.9% ► -0.7%pts
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Share of holiday visitors* to Australia

VISITORS 1.1% ▼ -6.6%pts	NIGHTS 0.4% ▼ -3.1%pts	SPEND 0.30% ▼ 4.2%pts
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Want more data?

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%.

ALOS: Average length of stay (nights);

ASPV: Average spend per visitor;

ASPN: Average spend per night.

Image: Wineglass Bay, Robert King Visuals

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.

INTRASTATE TRIPS WITHIN TASMANIA

YEAR ENDING DECEMBER 2021

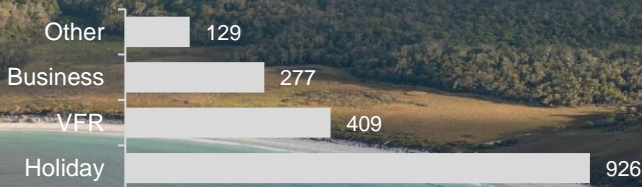
OVERNIGHT TRIPS

TRIPS 1.72m ▲9%	NIGHTS 4.24m ▶-2%	SPEND \$882m ▲25%	ALOS (nights) 2.5 ▼-10%	ASPV \$513 ▲15%	ASPN \$208 ▲28%
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HOLIDAY OVERNIGHT TRIPS*

VISITORS 926k ▲12%	NIGHTS 2.28m ▶-2%	SPEND \$475m ▲10%	ALOS (nights) 2.5 ▼-12%	ASPT \$513 ▶-1%	ASPN \$208 ▲13%
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PURPOSE OF OVERNIGHT TRIP ('000)



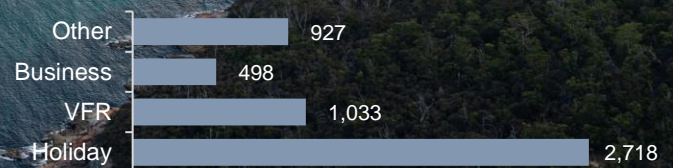
OVERNIGHT TRIPS IN REGIONS ('000)



DAY TRIPS

TRIPS 5.18m ▲9%	SPEND \$625m ▲13%	ASPT \$121 ▲3%
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PURPOSE OF DAY TRIP ('000)



HOLIDAY DAY TRIPS*

VISITORS 2.72m ▲23%	SPEND \$349m ▲23%	ASPT \$128 ▶1%
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Want more data?

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

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

Image: Wineglass Bay, Robert King Visuals

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



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.

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 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