Tourism Tasmania

TASMANIAN TOURISM SNAPSHOT

YEAR ENDING DECEMBER 2022

Image: Wineglass Bay, Robert King Visuals

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

TASMANIAN TOURISM SNAPSHOT

Year ending December 2022

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

Total interstate and international visitation

	YE Dec 21	YE Dec 22	% Change 2021	% Change 2019
Visitors	682,300	**1,191,500**	▲ 75%	▼ 12%
Nights	7.33m	**11.15m**	▲ 52%	▲ 3%
Spend	$1.856b	**$3.476b**	▲ 87%	▲ 37%

% change is calculated from unrounded figures.

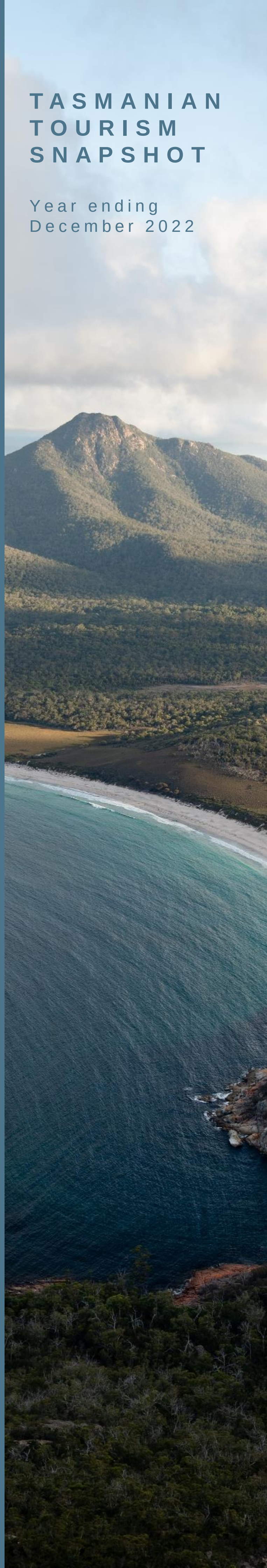
Tasmania has enjoyed a buoyant recovery through 2022, with no periods of restricted domestic borders and international travel resuming from early in the year. Although international visitors have been increasingly returning to the state, visitation overall was almost overwhelmingly interstate visitors (93% share), with 1,111,400 mainland Australians visiting the state. This is 96% of the domestic visitation seen in calendar year 2019.

Direct Hobart – Auckland flights resumed in July 2022, re-opening a direct gateway to New Zealand and a single stop from North America. The flights operated continuously through the reminder of the year.

Marketing activity was continuous throughout the year, covering interstate, intrastate and international campaigns

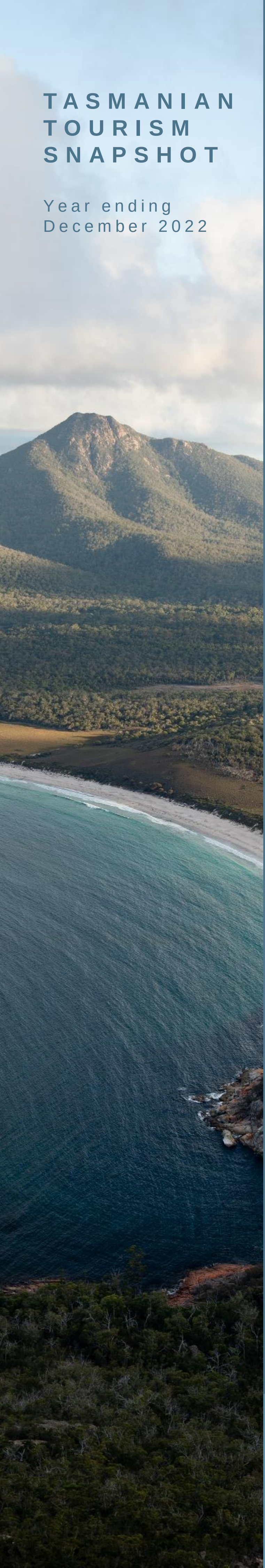
Campaign	Active period	Markets
Come Down for Air	Summer + Autumn	Mainland Australia
Off Season	April to August	
Spring road trips	October + November	
Intrastate	Continuous	Tasmania

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


TASMANIAN TOURISM SNAPSHOT
Year ending December 2022

TASMANIAN TOURISM SNAPSHOT

Year ending December 2022



The year to December 2022 is the first full year period for domestic visitation to not be constrained by travel restrictions, and therefore provides a strong picture of recovery from before COVID-19 impacts

Using 2019 as a baseline for tracking recovery of **domestic** visitation, the below charts show each months' 'recovery rate' against the *same months in 2019*, demonstrating the demand for travel remained high through the year with continued higher rates of spend and more nights in the state compared to recovery of number of visitors.

Tasmania saw record levels of monthly domestic holiday visitation from March to November 2022.

DOMESTIC VISITORS

Visitors

96%

YE Dec 22 of YE Dec 19^

Nights

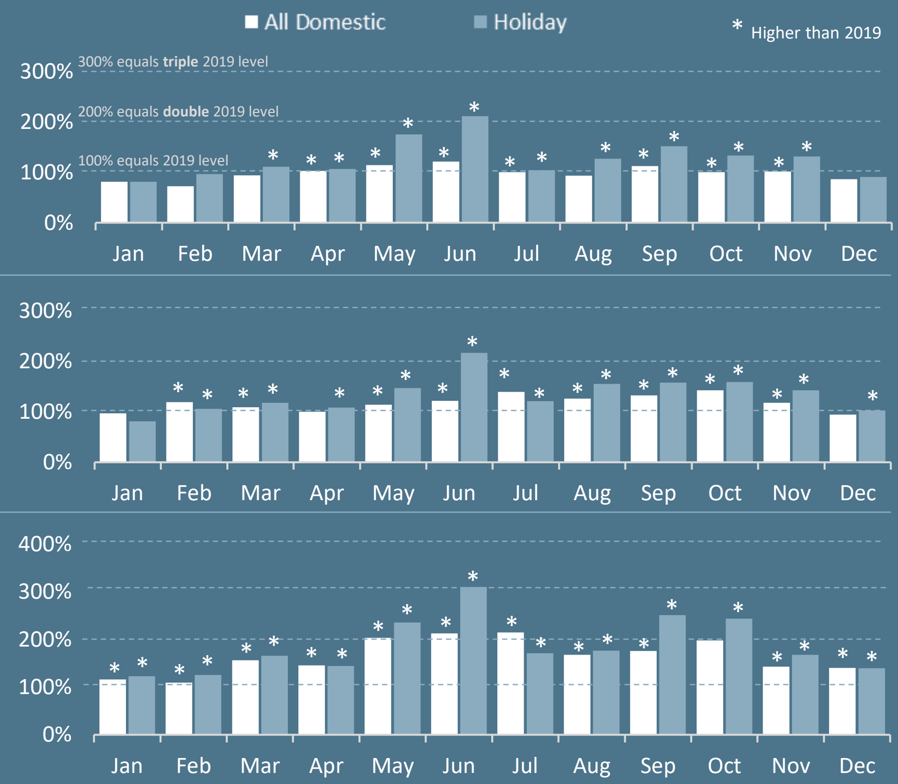
113%

YE Dec 22 of YE Dec 19^

Spend

154%

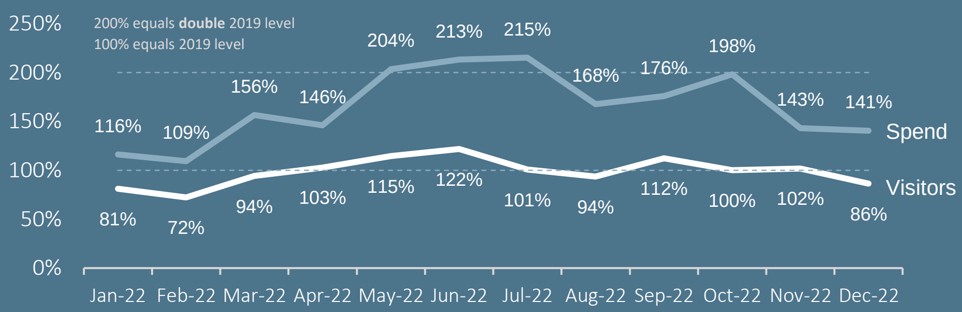
YE Dec 22 of YE Dec 19^



^Year ending Dec comparison is calendar year 2022 compared to calendar year 2019 for domestic visitors only.

Spend recovery continued to outpace visitation, though some softening emerging

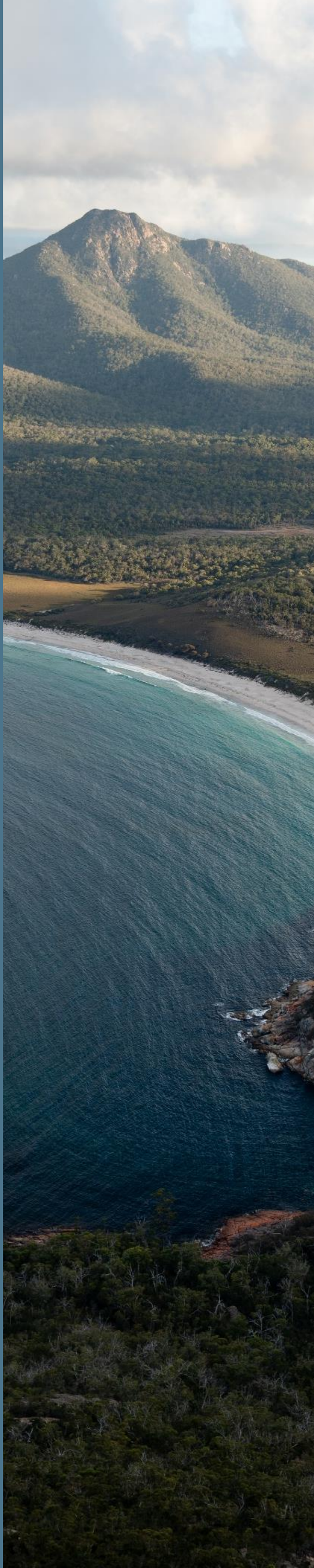
Through every month in the year to December 2022, Tasmania recorded stronger domestic spend than the same months in any previous year, driven primarily from holiday visitors. Seven months saw greater domestic visitation (April to November 2022, excluding August) compared to the same months in 2019.



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

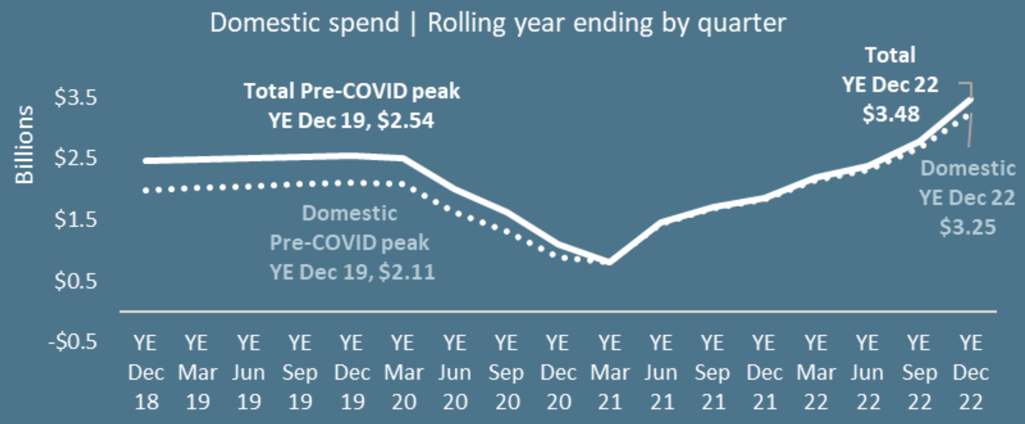


Visitors collectively spent more in the December quarter of 2022 than they've ever spent in any previous December quarter – and the second highest spend of any quarters

Although total visitation in the December quarter of 2022 was just below visitation in the same quarter of 2019 (down 8%), these visitors set a new December quarter record for expenditure in the state ($987.6m, up 48% from $668.6m in December quarter 2019). Of this spend, domestic visitors contributed $875.4m (up 59% on 2019, was $551.8m).

For the year to December 2022, total visitor spend was $3.476b, up 87% on the year ending September 2021 (137 per cent the level of 2019 spend). This annual total spend record substantially surpasses the 2020 target set by T21 to recover spend to $2.5b by December 2022.

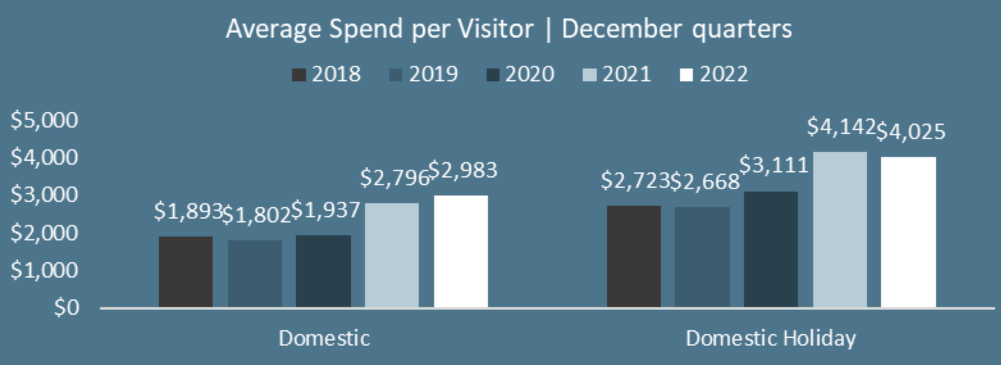
Domestic visitor spend in the year to December 2022 was $3.254b, the highest annual domestic spend on record, and up 77 per cent from the $1.841b total domestic spend in the year to December 2021. Domestic visitor expenditure was 154% of the levels of 2019 (was $2.542b).



Since Tasmania's border first re-opened in late 2020, visitors have consistently been spending more each in Tasmania

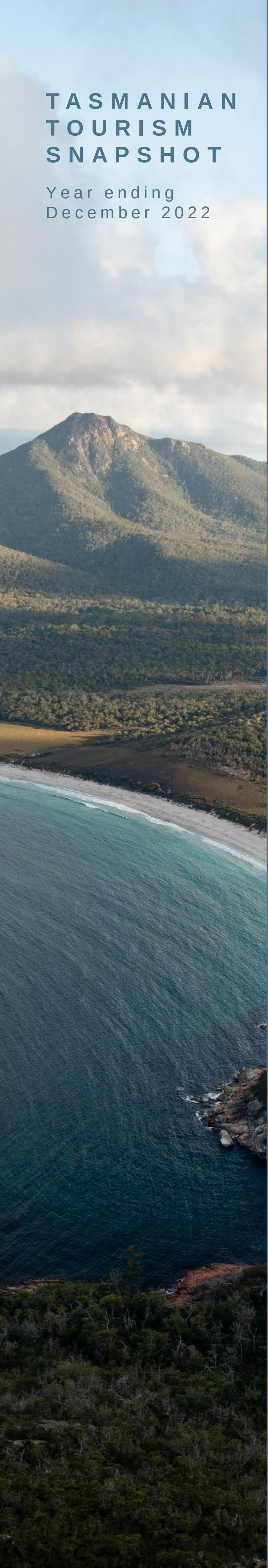
- Every month within the 12 months to December 2022 recorded higher average spend per domestic visitor (ASPV) compared to the same months in 2019.
- Domestic *holiday* ASPV ($4,025) in the December quarter 2022 was higher than any previous December quarter, and up 51% on pre-COVID (December quarter 2019) and the third highest recorded ASPV for these visitors (peak $4,186 March quarter 2022, second $4,142 December quarter 2021).

For all domestic visitors, ASPV of $2,983 in the December quarter 2022 was also the third highest quarterly ASPV for domestic visitors of any previous quarter, and up 65% on pre-COVID.



TASMANIAN TOURISM SNAPSHOT

Year ending December 2022

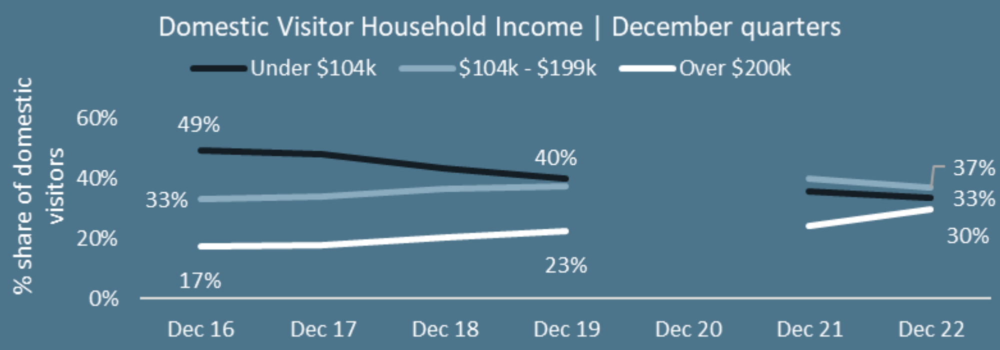


An increasing number of domestic visitors from higher income households were visiting Tasmania before COVID, with this trend continuing

Of all domestic visitors that reported their household income (HHI), the $200k or more HHI bracket represented 30% share of domestic visitors in the December quarter 2022, up from 23% share in the same quarter in 2019.

- The over $200k HHI bracket has experienced the greatest annual increase in visitors of all income brackets since 2019, up 27%.
- The middle bracket, $104k to $199k, decreased 5%.
- HHI under $104k decreased 19% over the same period.

Visitors from NSW and VIC drove the growth in the >$200k group this quarter. Although the cohort overall remains the smallest of the three HHI categories, the trend indicates future change.



Although average length of stay (ALOS, nights) by interstate visitors softened through 2022, yet remains above pre-COVID

Two of Tasmania's four tourism regions, Southern and East Coast, recorded their highest number of domestic visitor nights in a December quarter

All four tourism regions saw average length of stay in their region by domestic visitors remain above 2019 duration.

December quarter	Domestic Visitors 2022	% Change Visitors 2021	% of Visitors in 2019*	Domestic Nights 2022	% Change Nights 2021	% of Nights In 2019*
Southern	235,000	▲ 176%	100%	1,154,000	▲ 87%	115%
Northern	158,000	▲ 151%	100%	467,000	▲ 52%	123%
WxNW	124,000	▲ 177%	109%	427,000	▲ 75%	100%
East Coast	90,000	▲ 165%	127%	209,000	▲ 105%	124%

% of 2019 compares the December quarter 2022 to the December quarter 2019.

More than one in ten domestic visitors have previously lived in Tasmania, accounting for more than a third of VFR visitors

A new question was added to the TVS in July 2022 which begins to explore the behaviour of visitors who have previously lived in Tasmania, as these visitors likely have different travel decision points, knowledge of Tasmania and be influenced by their local hosts for things to see and do.

In the six-months from July to December 2022:

14% Of domestic visitors previously lived in Tasmania

70% Of past residents were visiting for VFR

35% Of domestic VFR visitors had previously lived in Tasmania

Around 28% of domestic visitors in this period were in the state to visit friends or relatives living here; 35% of these were visitors who had lived in Tasmania themselves previously. Further, these visitors are frequent travellers - 69% returned less than a year since their last visit. 50% of returning past residents had made two or more trips to Tasmania in the past year.

Since the pandemic there has been an increased share of visitors choosing self-contained accommodation for at least part of their trip

- 31% of domestic visitors spent at least one night in self-contained accommodation, up from 14% share in 2019.
- They're also allocating more of their trip nights into this category, with 18% of domestic nights were in self-contained accommodation, up from 6% in 2019.
- Self-contained is the second largest accommodation category for domestic nights, following staying at a friend or relatives property; this category held 20% share of domestic nights, down from 25% in 2019.

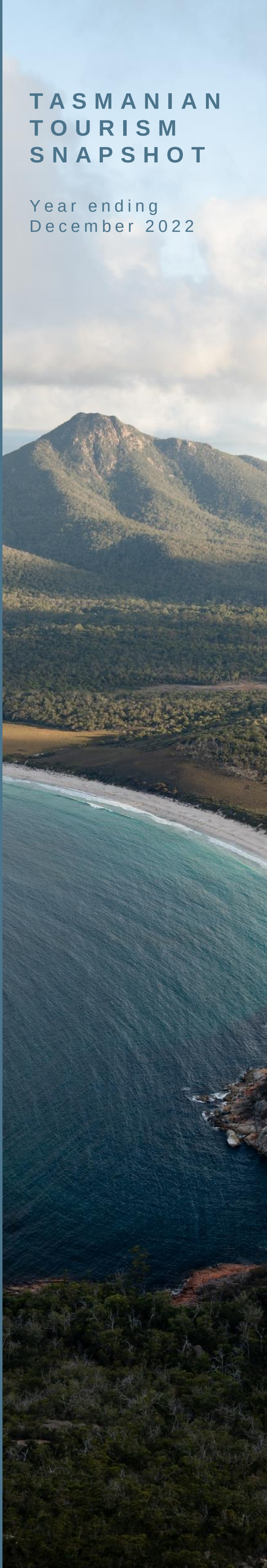
The TVS categorises spend into accommodation, transport, and other.

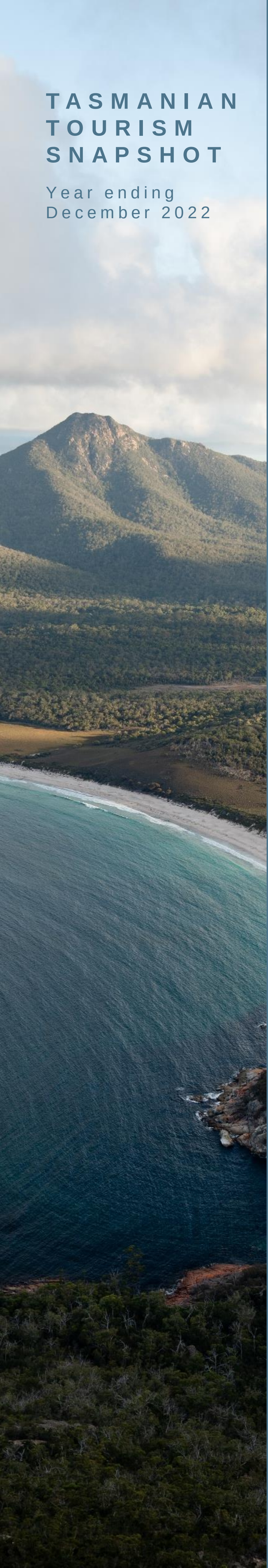
- In the quarter, and year ending, December 2022 the proportion of domestic visitors' trip spend on accommodation was the highest on record; 44% share for the quarter, and 43% for year ending.
- The 'other' spend category is traditionally just above accommodation in share. Share of spend on transport has consistent around 18%.

Domestic holiday visitors are even more likely to re-visit Tasmania since the pandemic began

- 85% of domestic holiday visitors intend to take another trip to Tasmania, up from 80% in 2019; just 1.4% of domestic holiday visitors would be unlikely to take another trip to Tasmania, the lowest rate for any calendar year in the last ten years.

Interestingly, although the rate of intention to return has increased, there has been no change since COVID for when that return trip might be: 89% within the next four years, 11% in more than four years.





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

Tasmania's natural landscapes and wildlife continue to be the top influences for domestic 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 2019-22, as people sought out more open-space places in response to the confinement of the pandemic, and perhaps a cautiousness of crowds.

The second strongest influence to travel to Tasmania, 'to self-drive around' supports the dispersal of visitors, along with a desire to experience the state's food, wine and beverages and history and heritage. The largest share increase was in hiking, up from 10% share in 2019, to 16% in 2022.

Rank	Influence	2022 % share	%pt chg from 2019
1	To see wilderness, wildlife & natural scenery	**65%**	▲ 5%
2	To self-drive / tour around	**52%**	► %
3	To experience Tas. food and wine / beverages	**43%**	▲ 5%
4	To experience Tas. history / heritage	**38%**	▲ 2%
5	Wanted to return to see and do more	**26%**	▼ 1%

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

- Pre-CVOID, Bushwalking (from a couple of hours to overnight trips) was the top activity before and through to 2021 for domestic holiday visitors, however in 2022 visiting historic sites and attractions regained the top spot, lifting 10% share.
- Many activities listed in the TVS saw an increase in participation, 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 of time around the state.

The influences and activities are reflected in the attractions visitors experienced in 2022 as they visited more outdoor and nature-based places, particularly out in the regions

While Salamanca Market, kunanyi / Mt Wellington and MONA remained in the top three visited attractions, Port Arthur Historic Site moved up the most-visited rankings from 6th to 4th (2019 to 2022). Further, two (see highlighted rows) of the top ten saw record calendar year *total* visitation.

Rank	Top ten visited attractions	2022 visitors	2019 visitors	% chg 2019
1	Saturday Salamanca Market	**378,100**	434,900	▼ 13%
2	kunanyi / Mount Wellington	**333,400**	345,700	▼ 4%
3	MONA	**309,200**	360,200	▼ 14%
4	Port Arthur Historic Site	**234,000**	262,900	▼ 9%
5	Freycinet National Park / Wineglass Bay	**239,100**	243,300	▼ 2%
6	Cataract Gorge	**220,400**	219,700	► 0%
7	Cradle Mountain / Valley	**219,700**	231,800	▼ 5%
8	Royal Tasmanian Botanical Gardens	**185,800**	179,700	▲ 3%
9	Bay of Fires	**176,200**	168,600	▲ 5%
10	Tasman Arch / Blow Hole	**149,500**	161,600	▼ 8%

Intrastate travel by Tasmanians

	YE Dec 22	% Chg 2021	% Chg 2019
Overnight trips	1.56m	▼ 9%	▼ 3%
Nights	3.74m	▼ 12%	▼ 7%
Spend	$946m	▲ 7%	▲ 22%
Day trips	5.633m	▲ 9%	▼ 22%
Spend	$769m	▲ 23%	▼ 1%

Just over half (51%, 801k) of intrastate overnight trips in the year to December 2022 were holiday trips, down on 2021 (down 13%) and down on 2019 visitors (down 5%).

This decline continued with nights stayed by those travelling on holiday (down 11%) and to visit friends or relatives (down 11%).

Despite the reduction in visitors numbers for holiday travel and shorter stays for VFR, travel spend was up 7% from 2021, to $946m. Tasmanians' spend per trip was 18% higher than the same period in 2021 and 26% higher than Pre Covid (December 2019).

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

International travel continues to be slower to recover to pre-COVID levels due to varying timings of travel restrictions lifting, particularly for China and Hong Kong

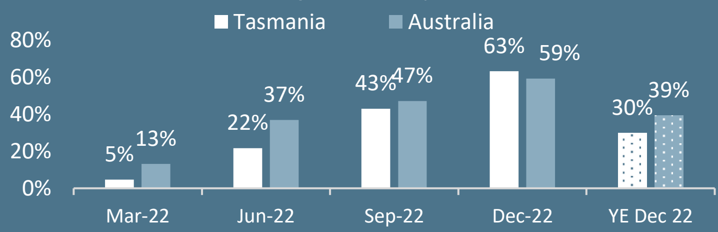
Nationally

- **3.4m visitors** (down 61% from 8.7m in 2019)
- **$12.74b spend** (down 50% $31.4b 2019)
- **126.1m nights** (down 54% from 274.5m in 2019)

Tasmania

- **84,200 visitors** (up 1,377% on 2021, down 70% on 2019)
- **$153.1m spend** (up 361% on 2021, down 72% on 2019)
- **1.35m nights** (up 167% on 2021, down 68% on 2019)
- Tasmania has a 2.5% share of international visitors to Australia; Prior to COVID, this share remained around 3.5% share.

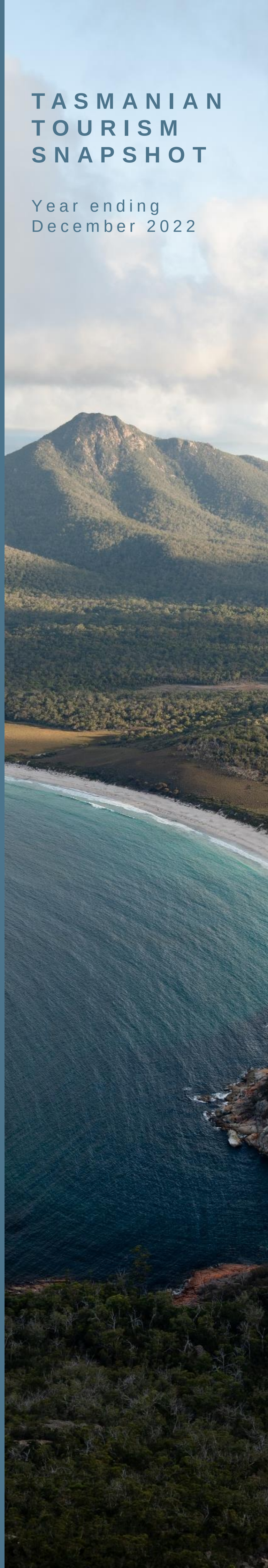
Visitation recovery % same quarter & YE in 2019



64% of int'l visitors

Country of origin – top six	2022 visitors	2019 visitors	% chg 2019
Singapore	**18,710**	15,332	▲ 22%
New Zealand	**12,030**	20,224	▼ 41%
United Kingdom	**11,430**	27,042	▼ 58%
United States of America	**18,710**	41,661	▼ 81%
Canada	**12,030**	10,048	▼ 61%
India	**2,257**	2,697	▼ 16%
TOTAL INTERNATIONAL VISITORS	84,200	282,900	▼ 70%

International data from Tourism Research Australia's International Visitor Survey



TOTAL VISITORS TO TASMANIA

YEAR ENDING DECEMBER 2022

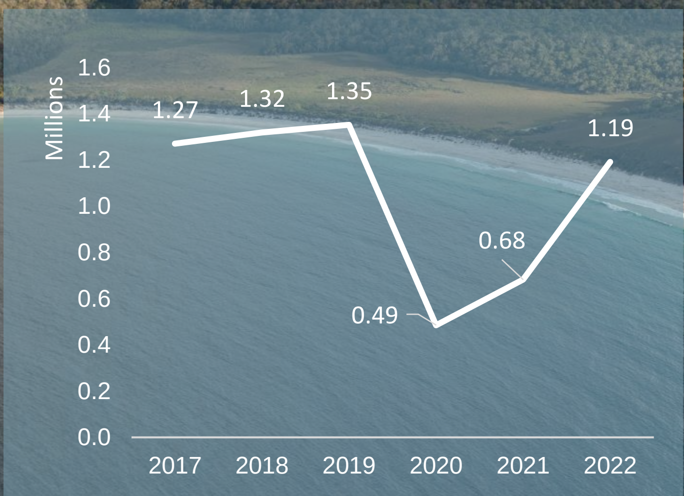
ALL VISITORS*

VISITORS	NIGHTS	SPEND	ALOS (nights)	ASPV	ASPN
1.191m	11.15m	$3.48b	9.4	$2,917	$312
▲75%	▲52%	▲87%	▼-13%	▲7%	▲23%
88% of 2019^	103% of 2019	137% of 2019	116% of 2019	155% of 2019	133% of 2019

ALL HOLIDAY VISITORS

VISITORS	NIGHTS	SPEND	ALOS (nights)	ASPV	ASPN
617k	5.90m	$2.39b	9.6	$3,874	$405
▲75%	▲58%	▲86%	▼-10%	▲6%	▲18%
97% of 2019^	103% of 2019	143% of 2019	106% of 2019	147% of 2019	139% of 2019

Rolling Annual Visitation to **Tasmania**



Purpose of visit to **Tasmania**

Recovery tracking by month of departure | green shaded calls denote recovery equal or above same month in 2019

	2022											
	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Visitors	127,700	79,500	105,900	119,700	92,600	87,900	87,800	67,400	90,900	110,200	112,800	109,200
% 2019 #	69%	59%	80%	93%	110%	125%	96%	89%	104%	97%	96%	83%
Nights ('000)	1,477	909	1,053	1,459	881	703	706	555	631	961	874	935
% 2019 #	81%	87%	92%	108%	104%	130%	121%	120%	122%	134%	109%	90%
Spend ($m)	448.4	217.5	327.7	360.0	265.9	221.0	269.6	150.1	227.9	360.1	300.6	326.9
% 2019 #	215%	168%	176%	198%	143%	141%	116%	109%	156%	146%	203%	213%

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

% Change is from previous year.
* Total visitors is interstate and international, excluding Tasmanians.
^ % 2019 refers to comparison to year ending December 2019.
# % 2019 monthly data refers to % share of the same month in 2019.

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

More data available at www.tvsanalyser.com.au

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

INTERSTATE VISITORS TO TASMANIA

YEAR ENDING DECEMBER 2022

ALL INTERSTATE VISITORS*

VISITORS	NIGHTS	SPEND	ALOS (nights)	ASPV	ASPN
1.111m	10.0m	$3.25b	9.0	$2,928	$325
▲64%	▲38%	▲77%	▼-16%	▲8%	▲28%
96% of 2019^	113% of 2019	154% of 2019	118% of 2019	160% of 2019	136% of 2019

INTERSTATE HOLIDAY VISITORS

VISITORS	NIGHTS	SPEND	ALOS (nights)	ASPV	ASPN
572k	5.48m	$2.25b	9.6	$3,930	$410
▲63%	▲47%	▲75%	▼-10%	▲7%	▲19%
115% of 2019^	119% of 2019	165% of 2019	104% of 2019	144% of 2019	139% of 2019

State of origin

							% Share visitors from state			
	Visitors	Nights '000	Spend $m	ALOS nights	ASPV	ASPN	Holiday	VFR	Business	Other
VIC	413,100	3,111	1040	7.5	$2,519	$334	46%	27%	20%	7%
NSW	330,900	3,058	1018	9.2	$3,076	$333	57%	23%	13%	8%
QLD	224,700	2,334	760	10.4	$3,380	$326	57%	27%	11%	4%
SA	59,600	502	165	8.4	$2,776	$330	46%	30%	13%	10%
WA	43,400	611	157	14.1	$3,608	$256	47%	37%	14%	2%
ACT	30,700	270	89	8.8	$2,898	$329	40%	30%	22%	8%
NT	8,100	104	24	12.8	$2,934	$229	46%	54%	0%	0%

Recovery tracking by month of departure | green shaded calls denote recovery equal or above same month in 2019

	2022											
	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Visitors	126,300	77,800	100,900	114,800	85,900	80,500	83,800	63,800	84,200	99,500	100,500	93,500
% 2019 #	81%	72%	94%	103%	115%	122%	101%	94%	112%	100%	102%	86%
Nights ('000)	1,449	896	951	1,114	770	619	688	520	581	868	765	783
% 2019 #	97%	119%	109%	100%	114%	122%	139%	126%	133%	143%	118%	94%
Spend ($m)	444.2	215.5	311.0	343.2	246.0	205.1	258.4	143.5	212.1	326.6	270.2	278.6
% 2019 #	116%	109%	156%	146%	203%	213%	215%	168%	176%	198%	143%	141%

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

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

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

More data available at www.tvsanalyser.com.au

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INTERNATIONAL VISITORS TO TASMANIA

YEAR ENDING DECEMBER 2022

ALL VISITORS

VISITORS	NIGHTS	SPEND	ALOS (nights)	ASPV	ASPN
84,200	**1.35m**	**$153.1m**	16.1	**$1,819**	**$113**
▲1377%⁺	▲167%	▲361%	▼-82%	▼-69%	▲73%
30% of 2019^	32% of 2019^	28% of 2019	2019: 15.0	2019: $1,962	2019: $131

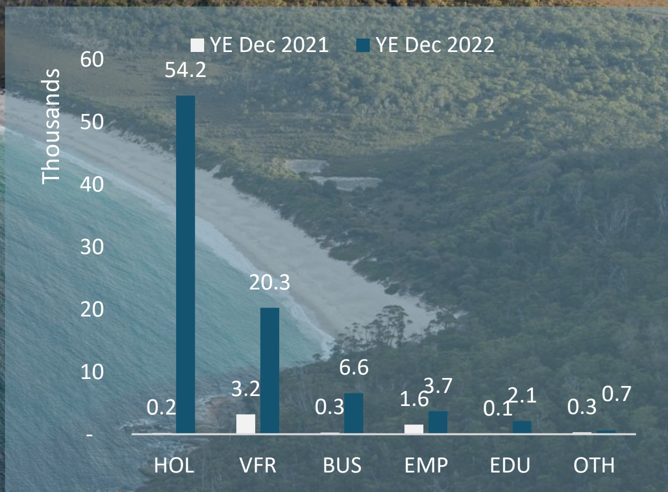
International visitation was lagging the national level for the first three quarters of 2022, however improved in the December quarter 2022 (up 187% on the September 2022 quarter). Nights are generally recovering ahead of visitation, boosted by seasonal workers and families reconnecting as border restrictions eased. The key markets of Singapore, UK, NZ, USA and Canada made up 68 per cent of international visitors to Tasmania. Singapore stands out as the only country to see more visitors in the year ending December 2022 than in same period in 2019.

HOLIDAY VISITORS*

VISITORS	NIGHTS	SPEND	ALOS (nights)	ASPV	ASPN
54,200	**396,300**	**$73.7m**	**7.3**	**$1,358**	**$186**
24% of 2019^	20% of 2019	24% of 2019	2019: 8.8	2019: $1,386	2019: $158

Rolling Annual Visitation to **Tasmania**

Purpose of Stopovers* within **Tasmania**



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

VISITORS	NIGHTS	SPEND
2.5%	**1.1%**	**1.2%**
▼0.1%pts	▼-2.0%pts	▼-1.1%pts

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

VISITORS	NIGHTS	SPEND
4.39%	**1.9%**	**2.6%**
▲3.2%pts	▲0.9%pts	▲1.7%pts

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

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

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

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

INTRASTATE TRIPS WITHIN TASMANIA

YEAR ENDING DECEMBER 2022

Tourism Tasmania

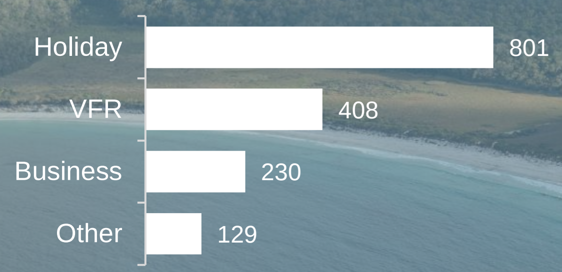
OVERNIGHT TRIPS

TRIPS	NIGHTS	SPEND	ALOS (nights)	ASPT	ASPN
1.56m	3.74m	$946m	2.4	$605	$253
▼-9%	▼-12%	▲7%	▼-3%	▲18%	▲34%

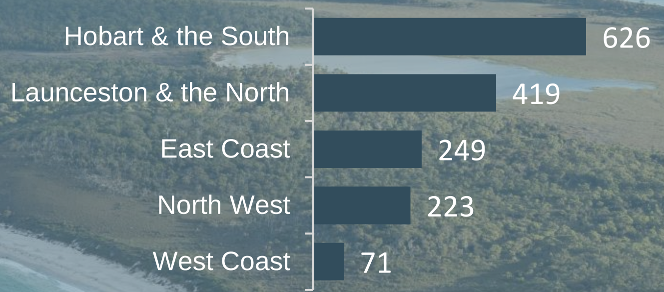
HOLIDAY OVERNIGHT TRIPS*

TRIPS	NIGHTS	SPEND	ALOS (nights)	ASPT	ASPN
801k	2.04m	$410m	2.6	$472	$201
▼-13%	▼-11%	▼-14%	▼-3%	▶0%	▼-4%

PURPOSE OF OVERNIGHT TRIP ('000)



OVERNIGHT TRIPS IN REGIONS ('000)



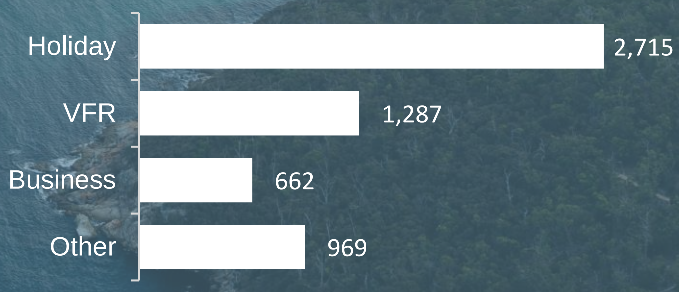
DAY TRIPS

TRIPS	SPEND	ASPT
5.63m	$769m	$136
▲9%	▲23%	▲13%

HOLIDAY DAY TRIPS*

TRIPS	SPEND	ASPT
2.72m	$421.9m	$155
▶0%	▲21%	▲21%

PURPOSE OF DAY TRIP ('000)



Want more intrastate data?
Visit the National Visitor Survey website at www.tra.gov.au/domestic

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

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

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

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

TASMANIAN ACCOMMODATION

Year ending 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

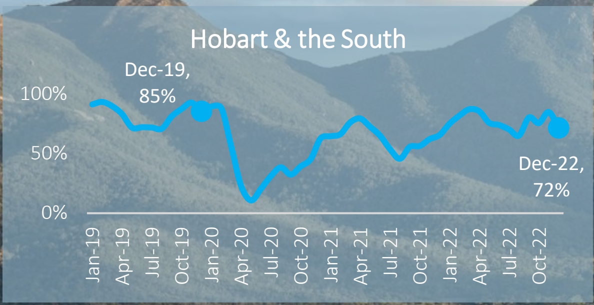
AirDNA provides an indicative view of the short-stay accommodation sector, including holiday homes, shacks, homes and self-contained apartments, as well as some traditional bed and breakfasts if they list on Airbnb or VRBO.

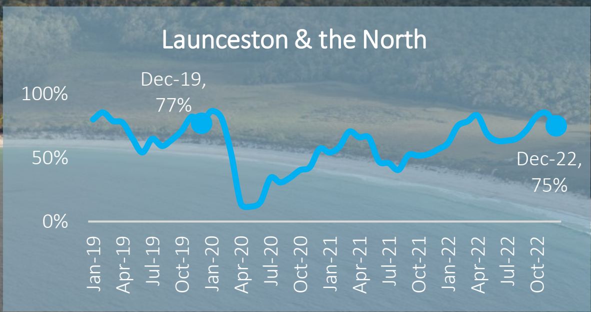
Data is provided across multiple indicator regions, offering a view of urban and regional performance. Data in this snapshot refers only to 'entire properties', where guests have the whole home to themselves; approximately 85% of listed properties in Tasmania. This can be a standalone building or self-contained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

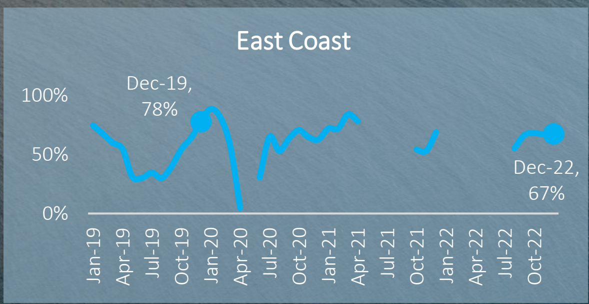
COMMERCIAL ACCOMMODATION IN TASMANIA

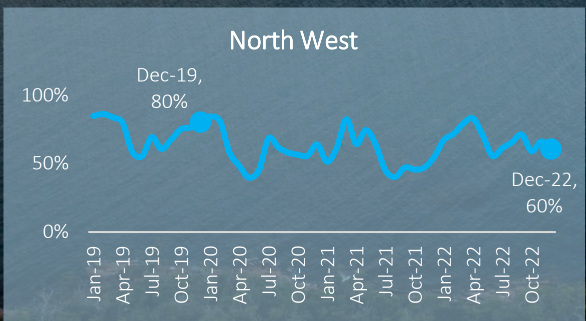
YEAR ENDING DECEMBER 2022

OCCUPANCY **BY MONTH**

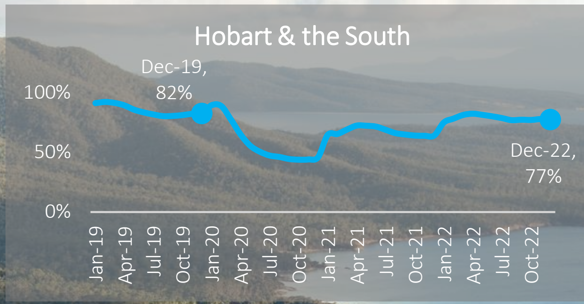


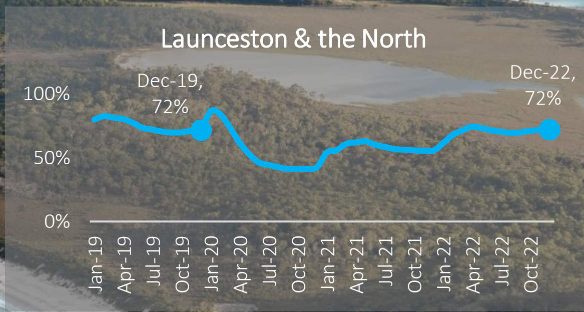


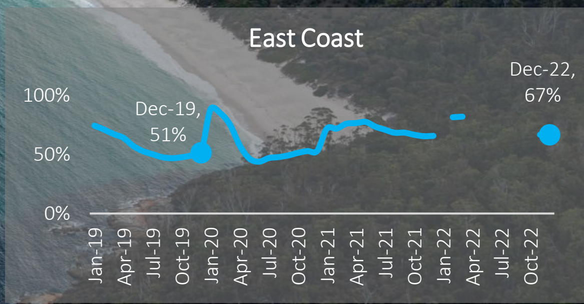


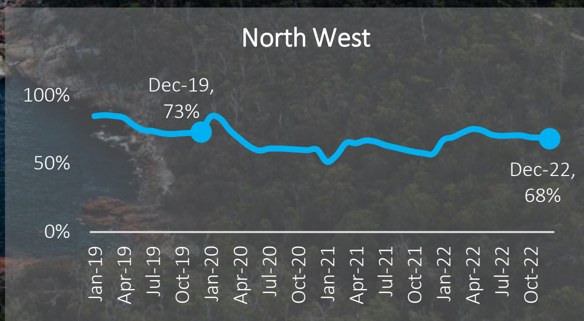


OCCUPANCY BY **ROLLING YEAR ENDING**









Source: STR

Image: Wineglass Bay, Robert King Visuals

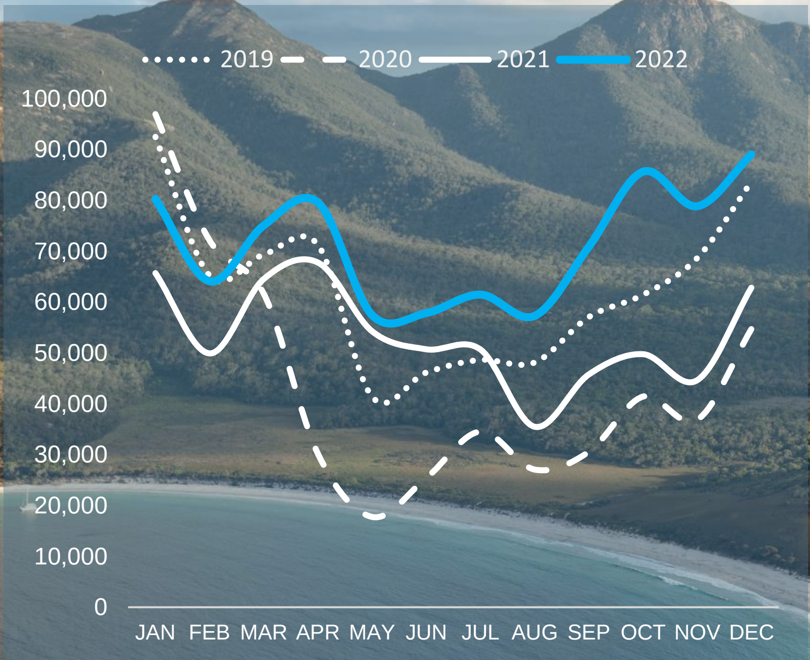
Some months are omitted due to insufficient sample.

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

SHORT-STAY ACCOMMODATION IN TASMANIA

YEAR ENDING DECEMBER 2022

TASMANIA | **DEMAND** (BOOKED NIGHTS)



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

YEAR ENDING DECEMBER

	2019	2020	2021	2022
DEMAND ('000)	753.2	526.5	640.7	828.2
SUPPLY ('000)	1,393.7	1,038.8	1,101.1	1,237.4
OCCUPANCY (%)	54%	51%	58%	67%
AVAILABLE LISTINGS	7,505	6,587	5,838	5,988

Demand (booked nights) in Tasmania for the year to December 2022 was 110% of demand recorded in the same period in 2019, and 156% of 2020. An 11% decline in Supply (nights available to book) from 2019 to 2022 resulted in an overall increase in Occupancy rate of 13 percentage points.

Ten months, March to December, saw stronger demand than previous years. These months align with the sustained strong domestic visitation, nights and spend in Tasmania, as captured in the Tasmanian Visitor Survey (TVS).

Recovery tracking by **month**

	2022											
	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Demand (booked nights)	80,300	64,100	75,100	79,600	57,400	57,800	61,500	57,300	70,900	85,600	78,800	89,000
% 2019*	87%	98%	108%	112%	139%	125%	126%	119%	124%	139%	115%	106%
Supply (available nights)	104,300	91,700	103,300	101,500	98,900	100,500	99,300	95,400	100,100	110,000	109,800	122,600
% 2019	77%	84%	86%	83%	100%	98%	93%	85%	93%	94%	91%	88%
Occ. (%)	76%	69%	72%	77%	58%	57%	59%	52%	64%	70%	73%	73%
%pts diff. 2019	8%	9%	14%	19%	16%	12%	14%	9%	11%	18%	16%	12%

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

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.

SHORT-STAY ACCOMMODATION IN TASMANIA

YEAR ENDING DECEMBER 2022

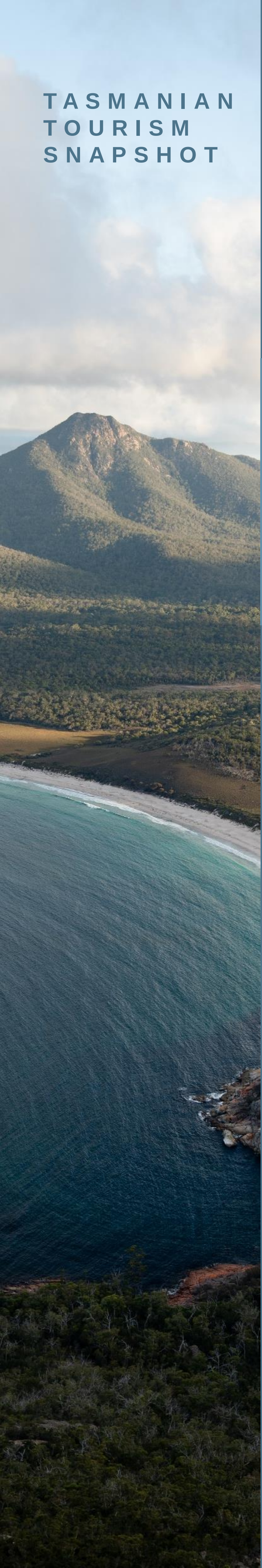
		TAS	Hobart	Laun-ceston	Freycinet	NE Coast	West Coast	North West	King Is.	Flinders Is.	East Tamar - Bridport	Deloraine Evandale	Derby	Orford	Tasman Peninsula	Bruny Is.	Huon Far South	Eastern Shore
Supply (nights available)	YE Dec 22	1,237,400	213,100	102,700	179,200	88,900	28,500	118,100	7,700	11,100	34,600	35,100	28,500	24,600	34,500	51,400	54,000	32,900
	YE Dec 21	1,101,100	184,200	84,000	165,200	80,200	28,500	109,600	7,000	10,800	29,000	31,500	23,700	23,100	35,800	46,900	44,900	25,800
	% change	12%	16%	22%	8%	11%	0%	8%	9%	2%	19%	11%	20%	7%	-4%	10%	20%	28%
Demand (nights booked)	YE Dec 22	828,200	159,900	73,500	106,400	53,000	19,100	81,300	4,800	6,700	19,200	22,900	16,200	14,400	22,800	34,800	36,400	24,000
	YE Dec 21	640,700	112,200	53,300	71,600	47,500	16,100	65,300	4,500	6,400	14,900	17,600	12,800	13,100	21,500	30,200	28,500	15,300
	% change	29%	42%	38%	49%	11%	19%	25%	7%	5%	29%	30%	26%	11%	6%	15%	28%	57%
Occupancy (%)	YE Dec 22	67%	75%	72%	59%	60%	67%	69%	63%	60%	56%	65%	57%	59%	66%	68%	67%	73%
	YE Dec 21	58%	61%	63%	43%	59%	56%	60%	64%	59%	51%	56%	54%	57%	60%	64%	64%	59%
	% change	15%	23%	13%	37%	1%	19%	16%	-2%	3%	8%	17%	5%	4%	10%	5%	6%	23%
ADR ($)	YE Dec 22	281	301	254	341	279	227	242	620	367	292	243	269	291	266	329	264	300
	YE Dec 21	267	283	235	310	281	220	225	540	289	281	232	270	267	256	316	260	294
	% change	5%	6%	8%	10%	-1%	3%	8%	15%	27%	4%	5%	0%	9%	4%	4%	1%	2%
RevPAR ($)	YE Dec 22	188	226	182	202	166	153	167	388	222	162	159	153	171	175	223	178	219
	YE Dec 21	155	172	149	134	167	124	134	344	170	144	130	146	151	153	204	165	175
	% change	21%	31%	22%	51%	0%	23%	24%	13%	30%	13%	22%	5%	13%	14%	9%	8%	25%
Revenue ($m) *Estimated*	YE Dec 22	232.7	48.1	18.6	36.3	14.8	4.3	19.7	3.0	2.5	5.6	5.6	4.4	4.2	6.1	11.5	9.6	7.2
	YE Dec 21	171.1	31.7	12.5	22.2	13.4	3.5	14.7	2.4	1.8	4.2	4.1	3.5	3.5	5.5	9.6	7.4	4.5
	% change	36%	52%	49%	64%	11%	23%	34%	23%	34%	34%	36%	26%	21%	10%	20%	30%	60%

Source: AirDNA

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 1.5 as at 14 March 2023 for YE Dec 2022 totals and therefore AUD contribution is estimated only.

Image: Wineglass Bay, Robert King Visuals

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).

- Since April 2020 the IVS has utilised incoming passenger cards and algorithms supplemented by surveys.

www.tra.gov.au/international

National Visitor Survey (NVS)

The NVS is also administered by Tourism Research Australia, sampling over 120,000 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