

Tourism Snapshot

Year ending December 2020

485,300

Visitors

▼ -64%

4.45 M

Visitor Nights

▼ -59%

\$1.11 B

Visitor Spend

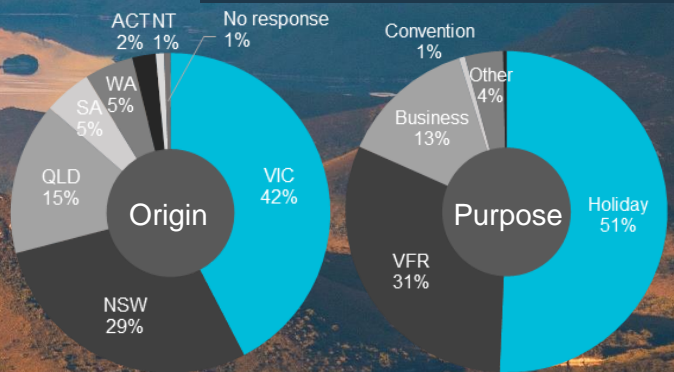
▼ -56%

Interstate* Visitors **416,200** ▼ -64%

Nights **3.53 m** ▼ -58%

Spend **\$898 m** ▼ -57%

% Share



Visitors to Tourism Regions

North
282,100
▼ -60%

East Coast
169,900
▼ -52%

West by North West
207,300
▼ -60%

South
386,300
▼ -64%

International^ Visitors **81,000** ▼ -71%

Spend **\$174 m** ▼ -69%

% Share

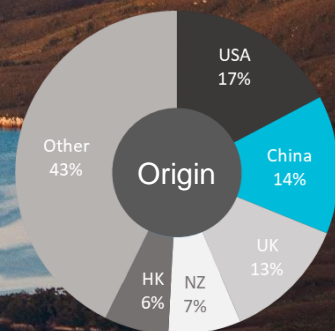


Image: Matt Donovan
Bathurst Harbour, South West

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>.

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

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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, November & December 2020.
- + **NVS:** Continued throughout 2020 as it is conducted via mobile phone calls.
- + **IVS:** Paused in March 2020, has not resumed.
 - o Therefore, year ending December 2020 data is comprised of visitation recorded only in the March quarter of 2020, and the data should be understood in that context.
 - o Tourism Research Australia is utilising supplementary data sources to provide figures for April-December 2020.
 - o **Tasmania:** 99.4 per cent of the international visitation in the year ending December 2020 was in the March quarter 2020
 - o **Australia:** 97.7 per cent of the international visitation in the year ending December 2020 was in the March quarter 2020.

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.

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 under 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.



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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 sector is more prevalent in regional areas. Short-stay accommodation insights are provided in pages 13-17 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 in pages 18-19 of this report.

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Year ending December 2020



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

Total visitation to Tasmania

Tasmanian Visitor Survey results YE December 2020

Total visitors	485,300	▼	-64%
Total nights	4.45 million	▼	-59%
Visitor expenditure	\$1.11 billion	▼	-56%
Interstate visitors	416,200	▼	-64%
Day visitors	7,900	▼	-81%

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 in 2020; January-March and November-December.

Tasmania welcomed 485,300 interstate and international visitors in the year to December 2020, down 64 per cent from 2019. Total nights were down 59 per cent.

Total visitor spending in Tasmania was \$1.11 billion, down 56 per cent on the previous year.

Purpose of travel

Visitation for all purposes of travel experienced significant declines, and disruption, through 2020. In January-March Tasmania was recording higher than average share of holiday visitors due to the mainland Australia bushfires. In November and December, visiting friends and family gained substantial share as people reconnected as borders eased.

Holiday visitation comprised 54 per cent share of visitation for the year, followed by 29 per cent visiting friends and relatives, and 12 per cent business visitors.

Holiday visitors	263,600	▼	-58%
Holiday nights	2.44 million	▼	-57%
Holiday expenditure	\$785 million	▼	-53%
VFR visitors	140,900	▼	-60%
Business visitors	59,800	▼	-76%
Conference visitors	2,700	▼	-92%

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 December 2019. Visitor departures via scheduled air services were 42 per cent of the levels of the previous year.

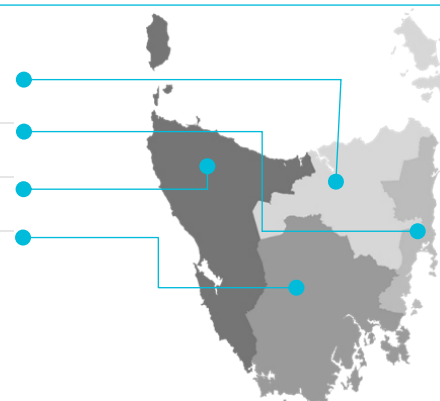
Regional visitation

In-line with state visitation, interstate and international visitors to regions were significantly down in 2020.

Compared to 2019 visitation levels:

- + Northern: 40 per cent of 2019
- + East Coast: 48 per cent
- + West by North West: 40 per cent
- + Southern: 34 per cent.

282,100	▼	-60%	North
169,900	▼	-52%	East Coast
207,300	▼	-60%	WxNW
386,300	▼	-64%	South



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Year ending December 2020



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Interstate visitation to Tasmania

Tasmanian Visitor Survey results YE December 2020

Visitors	416,200	▼	-64%
Nights	3.53 million	▼	-58%
Expenditure	\$898 million	▼	-57%

Visitation to Tasmania was largely supplemented by interstate visitors in the year ending December 2020, with 416,200 interstate visitors coming to the state, down 64 per cent compared to the previous 12 month period. By late November 2020, Tasmania had quarantine-free travel from all states, with some high-risk areas remaining until the new year. Interstate visitors spent \$898 million in Tasmania, down 57 per cent.

Interstate purpose of visit

Visitors

The main purposes of travel by interstate visitors were holiday (51 per cent share), visiting friends and relatives (VFR) (31 per cent), and business (13 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.

Holiday	210,900	▼	-57%
VFR	128,900	▼	-60%
Business	56,500	▼	-76%
Conference	2,600	▼	-92%

Nights

54 per cent of interstate nights were spent by visitors on holiday, with visiting friends and relatives holding 33 per cent share of nights. As with visitors, nights were predominantly by those visiting friends and family when interstate travel resumed; 59% in December quarter 2020, compared to 27% share in the same quarter in 2019.

Holiday	1,896,600	▼	-57%
VFR	1,152,900	▼	-46%
Business	374,700	▼	-71%
Conference	15,400	▼	-88%

Interstate origin of visitors

Victoria	176,400	▼	-65%
NSW	118,900	▼	-62%
Queensland	64,200	▼	-65%
Western Australia	20,600	▼	-64%
South Australia	20,100	▼	-63%
A.C.T.	9,900	▼	-67%
N.T.	3,400	▼	-62%

Victoria and New South Wales remained our largest domestic markets for the year ending December 2020, 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 from 2019 to 2020.

Tourism Snapshot

Year ending December 2020



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

International visitation

International Visitor Survey results YE December 2020

International visitors to Australia

Visitors	1.71 million	▼	-80%
Nights	68.8 million	▼	-75%
Average length of stay	40 nights	▲	28%
Expenditure	\$7.8 billion	▼	-75%

The IVS ceased interviews with departing visitors in March 2020, and as international travel is restricted, the year ending December results overwhelmingly relates to the March quarter only: **97.7 per cent of 2020 visitation was in the March quarter**. In this context, 1.71 million international visitors came to Australia in the year ending December 2020, an 80 per cent decrease from the previous year. Total nights and spend by international visitors declined 75 per cent.

International purpose of visit to Australia

Holiday	719,700	▼	-82%
VFR	514,000	▼	-80%
Holiday expenditure	\$2.0 billion	▼	-81%

Holiday visitation and spend by international visitors decreased, down 82 and 81 per cent respectively. International travellers visiting friends and relatives decreased 80 per cent.

International origin of visitors to Australia

New Zealand	220,600	▼	-83%
United Kingdom	193,900	▼	-71%
China	184,000	▼	-86%
USA	182,400	▼	-76%
Japan	87,400	▼	-81%
India	80,400	▼	-79%

New Zealand was Australia's key international market for the year to December 2020, followed by the United Kingdom, China and the USA.

International visitors to Tasmania

Visitors	81,000	▼	-71%
Nights	1.36 million	▼	-68%
Average length of stay	17 nights	▲	12%
Expenditure	\$174 million	▼	-69%

Tasmania's international visitor numbers saw a substantial drop to 81,000 in the year ending December 2020. Expenditure by international visitors decreased by 69 per cent in the year to December 2020.

Taking into account that **99.4 per cent of international visitation to Tasmania in 2020 was in the March quarter**, average length of stay increased to 17 nights, and average spend per visitor increased by 9 per cent to \$2,143 per visitor.

to Tasmania

Holiday	64,500	▼	-71%
VFR	16,200	▼	-62%
Holiday expenditure	\$91 million	▼	-71%

International holiday visitation and spend in Tasmania both declined by 71 per cent in the year to December 2020. Travellers visiting friends or relatives decreased by 62 per cent compared to the previous year.

to Tasmania

United States of America	14,000	▼	-66%
China	11,200	▼	-74%
United Kingdom	10,100	▼	-63%
New Zealand	5,900	▼	-71%
Hong Kong	5,200	▼	-81%
Share of visitors to AUS	4.8%	▲	1.5%

The USA was Tasmania's leading international market for the year ending December 2020, followed by China, the United Kingdom, New Zealand and Hong Kong.

Tasmania held a 4.8 per cent share of international visitation to Australia, up 1.5 percentage points.

Tourism Snapshot

Year ending December 2020



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Intrastate visitation

National Visitor Survey results December 2020

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 throughout 2020.

Overnight Trips for Australia

Overnight trips	59.9 million	▼	-26%
Expenditure	\$28.3 billion	▼	-15%

Australians were able to travel within their own states and territories well before interstate travel resumed. 59.9 million intrastate overnight trips were taken in 2020, down 26 per cent from the previous year. Expenditure from these trips totalled \$28.3 billion, down 15 per cent. Average spend per trip increased 16 per cent to \$472.

Overnight Trips by purpose for Australia

Holiday trips	25.0 million	▼	-24%
VFR trips	19.7 million	▼	-29%
Business trips	10.9 million	▼	-24%

Holiday (42% share), visiting friends and relatives (33%), and business (18%) were the main purposes of intrastate overnight trips nationally.

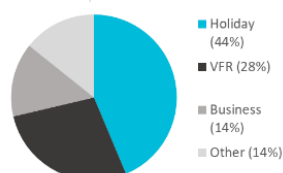
Day trips for Australia

Day trips	158.5 million	▼	-33%
Expenditure	\$17.4 billion	▼	-34%

Intrastate day trips in Australia totalled 158.5 million trips in the year to December 2020, down 33 per cent from the previous year. Expenditure from intrastate day trips totalled \$17.4 billion.

Day trips by purpose for Australia

Holiday trips	69.2 million	▼	-36%
VFR trips	43.8 million	▼	-35%
Business trips	22.8 million	▼	-28%



for Tasmania

Overnight trips	1.58 million	▶	-2%
Expenditure	\$629 million	▲	19%

Intrastate overnight trips were not possible between late March until June 2020. In the year ending December 2020, Tasmanians took 1.58 million trips in 2020, down 2 per cent, compared to the previous year. Expenditure from intrastate overnight trips totalled \$629 million, up 19 per cent from 2019. The Make Yourself At Home campaign and travel vouchers encouraged Tasmanians to holiday at home.

for Tasmania

Holiday trips	828,000	▶	-1%
VFR trips	480,000	▲	21%
Business trips	183,000	▼	-36%

The three main purposes for intrastate overnight trips in Tasmania were holiday (52% share), visiting friends and relatives (30%), and business (12%). Intrastate trips for visiting friends and relatives increased 21 per cent compared to 2019.

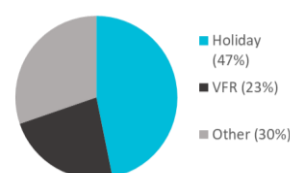
for Tasmania

Day trips	4.74 million	▼	-35%
Expenditure	\$555 million	▼	-29%

Tasmanians went on 4.74 million day trips within the state, down 35 per cent compared to 2019. Expenditure from these day trips totalled \$555 million.

for Tasmania

Holiday trips	2.21 million	▼	-36%
VFR trips	1.08 million	▼	-33%



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Total visitors to Tasmania

Interstate visitation to Tasmania

	YE December 2019	YE December 2020	% Change
Visitors			
Total visitors	1,351,500	485,300	▼ -64%
Day visitors	41,100	7,900	▼ -81%
Overnight visitors	1,310,400	477,400	▼ -64%
Nights			
Nights (million)	10.87	4.45	▼ -59%
Average length of stay (nights)	8.0	9.2	▲ 14%
Holiday nights (million)	5.73	2.44	▼ -57%
Expenditure			
Expenditure (\$million)	\$2,543	\$1,107	▼ -56%
Average spend per visitor	\$1,881	\$2,281	▲ 21%
Average spend per night	\$234	\$249	▲ 6%
Holiday spend (\$million)	\$1,673	\$785	▼ -53%
Purpose of Visit			
Holiday	635,100	263,600	▼ -58%
Visit friends or relatives (VFR)	350,400	140,900	▼ -60%
Total leisure (Holiday+VFR)	985,500	404,500	▼ -59%
Business or employment	251,600	59,800	▼ -76%
Convention/conference/seminar	35,100	2,700	▼ -92%
Regions Visited			
Southern	1,070,900	386,300	▼ -64%
East Coast	357,400	169,900	▼ -52%
Northern	711,700	282,100	▼ -60%
WxNW	512,900	207,300	▼ -60%
Mode of departure			
Air visitors	1,198,400	420,500	▼ -65%
Sea visitors	153,200	64,800	▼ -58%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

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

	YE December 2019	YE December 2020	% Change
Visitors			
Total interstate visitors	1,157,400	416,200	▼ -64%
Day visitors	39,900	7,800	▼ -81%
Overnight visitors	1,117,500	408,400	▼ -63%
Nights			
Nights (million)	8.44	3.53	▼ -58%
Average length of stay (nights)	7.3	8.5	▲ 16%
Holiday nights (million)	4.40	1.90	▼ -57%
Expenditure			
Expenditure (\$million)	\$2,109	\$898	▼ -57%
Average spend per visitor	\$1,822	\$2,158	▲ 18%
Average spend per night	\$250	\$254	▶ 2%
Holiday spend (\$million)	\$1,359	\$613	▼ -55%
Purpose of Visit			
Holiday	494,800	210,900	▼ -57%
Visit friends or relatives (VFR)	318,900	128,900	▼ -60%
Total leisure (Holiday+VFR)	813,700	339,800	▼ -58%
Business or employment	236,200	56,500	▼ -76%
Convention/conference/seminar	31,200	2,600	▼ -92%
Regions Visited			
Southern	894,100	321,900	▼ -64%
East Coast	266,000	130,200	▼ -51%
Northern	593,700	239,300	▼ -60%
WxNW	419,700	170,100	▼ -59%
Mode of departure			
Air visitors	1,015,000	355,800	▼ -65%
Sea visitors	142,500	60,400	▼ -58%
State of Origin			
Victoria	498,500	176,400	▼ -65%
N.S.W.	312,200	118,900	▼ -62%
Queensland	183,800	64,200	▼ -65%
Western Australia	57,900	20,600	▼ -64%
South Australia	54,200	20,100	▼ -63%
A.C.T.	30,400	9,900	▼ -67%
N.T.	9,100	3,400	▼ -62%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

Tourism Snapshot

Year ending December 2020



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International visitation

International Visitor Survey results December 2020

	to Tasmania			to Australia		
	YE December 2019	YE December 2020	% Change	YE December 2019	YE December 2020	% Change
Visitors						
International visitors	282,900	81,000	▼ -71%	8,708,600	1,705,100	▼ -80%
Nights						
Nights	4,247	1,362	▼ -68%	273,962,300	68,809,700	▼ -75%
Average Length of stay (nights)	15.0	16.8	▲ 12%	31.5	40.4	▲ 28%
Expenditure						
Expenditure (\$million)	\$555	\$174	▼ -69%	\$31,438	\$7,783	▼ -75%
Average spend per visitor	\$1,962	\$2,143	▲ 9%	\$3,610	\$4,564	▲ 26%
Average spend per night	\$131	\$127	▼ -3%	\$115	\$113	► -1%
Holiday spend (\$million)	\$313	\$91	▼ -71%	\$10,616	\$2,031	▼ -81%
Purpose - Visitors						
Holiday	225,700	64,500	▼ -71%	4,007,800	719,700	▼ -82%
Visit friends & relatives (VFR)	42,100	16,200	▼ -62%	2,612,200	514,000	▼ -80%
Business	12,600	1,300	▼ -90%	1,013,300	162,800	▼ -84%
Education	9,300	2,200	▼ -77%	594,000	175,300	▼ -70%
Employment	4,600	2,300	▼ -50%	212,500	65,700	▼ -69%
Other Reason	4,500	1,200	▼ -74%	268,700	67,700	▼ -75%
International visitors	282,900	81,000	▼ -71%	8,708,600	1,705,100	▼ -80%

Source: International Visitor Survey (IVS), Tourism Research Australia

Notes: Modelled expenditure includes package expenditure. The sum of the reasons for visiting Tasmania may be greater than the total as a visitor can give more than one reason for their visit. The total expenditure in Australia does not include small amounts that cannot be allocated to a particular state/territory.

International visitors to States/ Territories

State/territory visited	Visitors			National Market Share		
	YE December 2019	YE December 2020	% Change	YE December 2019	YE December 2020	% Point difference
New South Wales	4,384,300	838,700	▼ -81%	50.3%	49.2%	▼ -1.2%
Victoria	3,137,600	615,300	▼ -80%	36.0%	36.1%	► 0.1%
Queensland	2,782,700	492,900	▼ -82%	32.0%	28.9%	▼ -3.0%
South Australia	487,600	105,900	▼ -78%	5.6%	6.2%	▲ 0.6%
Western Australia	995,700	220,200	▼ -78%	11.4%	12.9%	▲ 1.5%
Tasmania	282,900	81,000	▼ -71%	3.2%	4.8%	▲ 1.5%
Northern Territory	298,600	50,100	▼ -83%	3.4%	2.9%	▼ -0.5%
ACT	269,800	39,500	▼ -85%	3.1%	2.3%	▼ -0.8%
Total visitors to Australia	8,708,600	1,705,100	▼ -80%	100.0%	100.0%	► 0.0%

Source: International Visitor Survey, Tourism Research Australia

% point difference - the difference between two percentages (i.e. the difference between 3% and 3.5% is 0.5 percentage points)

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International visitation

International Visitor Survey results December 2020

Origin of international visitors

Country of origin	Visitors to Tasmania			National Market Share		
	YE December 2019	YE December 2020	% Change	YE December 2019	YE December 2020	% Point difference
New Zealand	20,200	5,900 ▼	-71%	1.6%	2.7% ▶	-0.1%
Japan	6,400	2,200 ▼	-65%	1.4%	2.5% ▶	0.1%
Hong Kong	28,100	5,200 ▼	-81%	9.8%	9.5% ▲	1.5%
Singapore	15,300	3,400 ▼	-78%	3.7%	6.4% ▼	-1.0%
Malaysia	11,000	1,300 ▼	-88%	3.2%	3.1% ▼	-0.7%
Indonesia	5,100	1,000 ▼	-81%	2.6%	3.0% ▼	-0.9%
Taiwan	5,600	1,900 ▼	-65%	3.2%	6.0% ▲	1.0%
Thailand	2,400	700 ▼	-70%	2.5%	5.1% ▼	-1.3%
Korea	4,100	200 ▼	-96%	1.6%	0.3% ▲	0.7%
China	42,700	11,200 ▼	-74%	3.2%	6.1% ▼	-0.9%
India	2,700	1,500 ▼	-46%	0.7%	1.8% ▼	-2.0%
Other Asia	16,500	2,800 ▼	-83%	3.8%	3.1% ▲	0.7%
United States of America	41,700	14,000 ▼	-66%	5.4%	7.7% ▲	0.3%
Canada	10,000	2,400 ▼	-77%	5.6%	4.8% ▼	-0.5%
United Kingdom	27,000	10,100 ▼	-63%	4.0%	5.2% ▲	0.4%
Germany	8,300	4,000 ▼	-52%	4.2%	7.9% ▼	-0.9%
Scandinavia	2,200	1,200 ▼	-44%	2.2%	4.4% ▼	-1.5%
France	5,900	2,800 ▼	-52%	4.3%	8.6% ▼	-2.3%
Italy	1,500	900 ▼	-41%	2.0%	6.1% ▲	0.9%
Netherlands	4,600	1,200 ▼	-75%	7.5%	7.9% ▼	-3.7%
Switzerland	1,400	1,000 ▼	-27%	2.7%	8.1% ▼	-1.3%
Other Europe	8,300	3,000 ▼	-63%	3.1%	4.3% ▼	-0.9%
Other Countries	11,900	3,000 ▼	-74%	2.2%	2.6% ▲	0.6%
Total	282,900	81,000 ▼	-71%	3.2%	4.8% ▶	-0.2%

Source: International Visitor Survey, Tourism Research Australia

np - not published as the sample size is too small to be reliable.

% point difference - the difference between two percentages (i.e. the difference between 3% and 3.5% is 0.5 percentage points)

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

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Intrastate visitation

National Visitor Survey results YE December 2020

Intrastate Overnight Travel

	to Tasmania			to Australia		
	YE December 2019	YE December 2020	% Change	YE December 2019	YE December 2020	% Change
Trips						
Overnight trips ('000s)	1,610	1,583	▶ -2%	81,375	59,965	▼ -26%
Nights						
Nights ('000s)	4,021	4,330	▲ 8%	236,455	199,715	▼ -16%
Average Length of stay (nights)	2.5	2.7	▲ 10%	2.9	3.3	▲ 15%
Expenditure						
Expenditure (\$million)	\$528	\$629	▲ 19%	\$33,193	\$28,329	▼ -15%
Average spend per trip	\$328	\$397	▲ 21%	\$408	\$472	▲ 16%
Average spend per night	\$131	\$145	▲ 10%	\$140	\$142	▶ 1%
Purpose - Trips ('000s)						
Holiday	840	828	▶ -1%	32,896	25,006	▼ -24%
Visit friends & relatives (VFR)	397	480	▲ 21%	27,868	19,796	▼ -29%
Business	284	183	▼ -36%	14,450	10,985	▼ -24%
Other Reason	96	117	▲ 22%	4,608	3,744	▼ -19%
Total intrastate overnight trips	1,610	1,583	▶ -2%	81,375	59,965	▼ -26%

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

Intrastate Day Travel

	to Tasmania			to Australia		
	YE December 2019	YE December 2020	% Change	YE December 2019	YE December 2020	% Change
Trips						
Day trips ('000s)	7,241	4,741	▼ -35%	236,324	158,582	▼ -33%
Total intrastate Day+Overnight trips ('000s)	8,851	6,324	▼ -29%	317,699	218,547	▼ -31%
Expenditure						
Expenditure (\$million)	\$783	\$555	▼ -29%	\$26,338	\$17,433	▼ -34%
Average spend per trip	\$108	\$117	▲ 8%	\$111	\$110	▶ -1%
Purpose - Trips ('000s)						
Holiday	3,455	2,219	▼ -36%	107,575	69,257	▼ -36%
Visit friends & relatives (VFR)	1,613	1,087	▼ -33%	67,043	43,833	▼ -35%
Business	874	622	▼ -29%	31,770	22,880	▼ -28%
Other Reason	1,299	813	▼ -37%	29,936	22,613	▼ -24%
Total intrastate day trips	7,241	4,741	▼ -35%	236,324	158,582	▼ -33%

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

Tourism Snapshot

Year ending December 2020



Percentage change refers to the same period in the previous year.
Tasmanian Visitor Survey results
October – December 2020

Quarterly visitation to Tasmania

The TVS reports the following key findings for all visitors during the October – December 2020 quarter.

Due to Tasmania's border reopening in late October 2020, the Tasmanian Visitor Survey (TVS) resumed sampling of visitors from this date onwards. *This quarter's data largely captures visitation from November and December 2020.

Key statistics – Quarter 4 2020

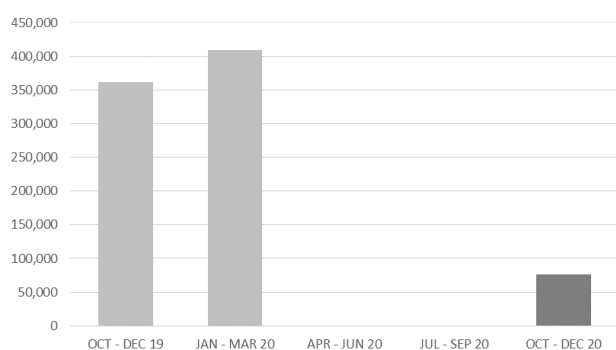
Q4 Total visitors	76,300	▼	-79%
Q4 Total nights	754,600	▼	-70%
Q4 Visitor expenditure	\$151 million	▼	-77%
Q4 Holiday visitors	22,800	▼	-87%
Q4 VFR visitors	41,100	▼	-57%
Q4 Business visitors	10,400	▼	-85%
Q4 Conference visitors	400	▼	-97%

Visitation for the December 2020 quarter* decreased by 79 per cent, compared to the same quarter in 2019. This equates to this quarter being 21 per cent of the level of visitation in the same quarter in 2019.

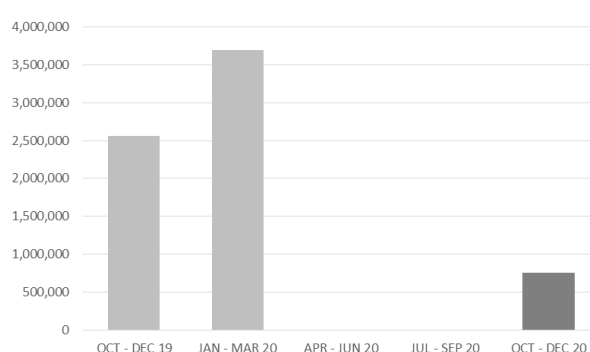
Visitor expenditure decreased 77 per cent to \$151 million. Average spend per visitor increased by 7 per cent to \$1,984, up from \$1,846 in 2019.

Average length of stay increased by 40 per cent to 9.9 nights, up from 7.1 nights in the December quarter 2019.

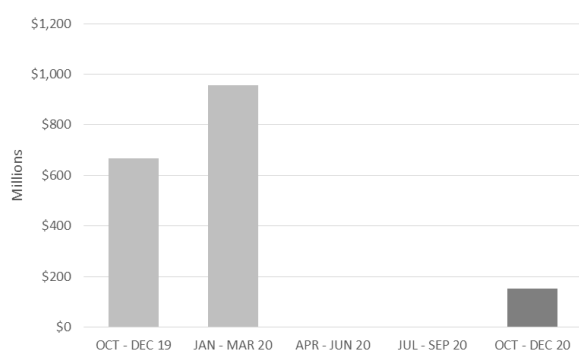
Total Visitors by Quarter



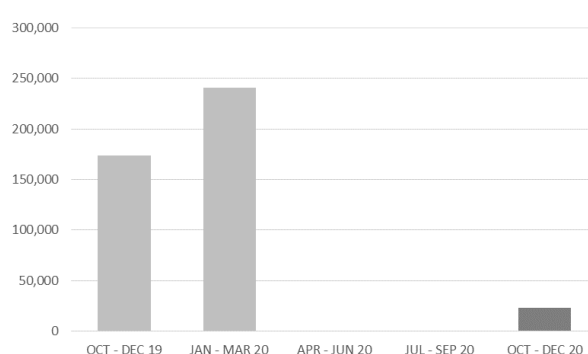
Total Nights by Quarter



Total Expenditure by Quarter



Total Holiday visitors by Quarter



Tourism Snapshot

Year ending December 2020



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.

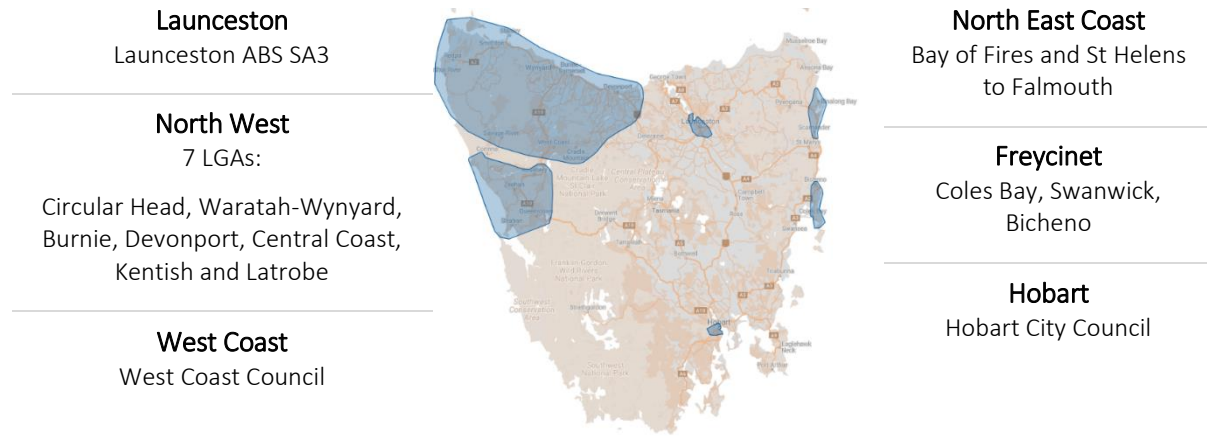
Six key measures are explored through the following pages:

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.

Tourism Snapshot

Year ending December 2020

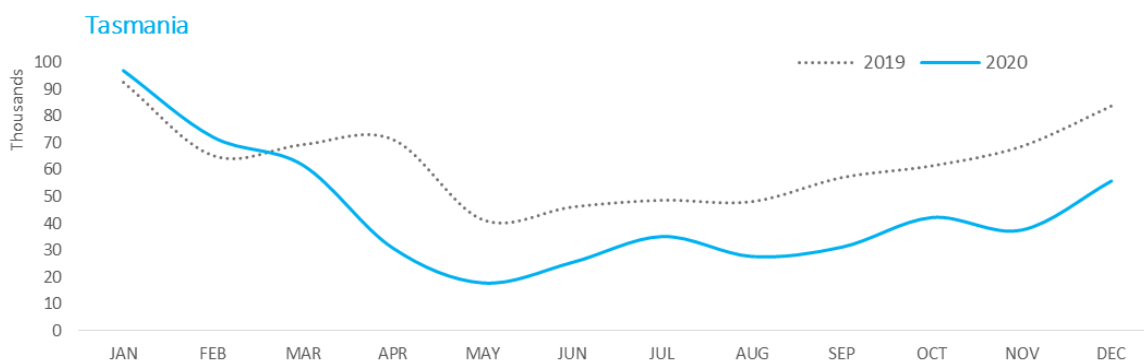


Demand (nights booked) Entire place properties

Tasmania’s short-stay accommodation sector comprised around 8,000 available properties in 2020, down 13% from 2019. 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 January 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 was 67% of the same month in 2019.



Tourism Snapshot

Year ending December 2020



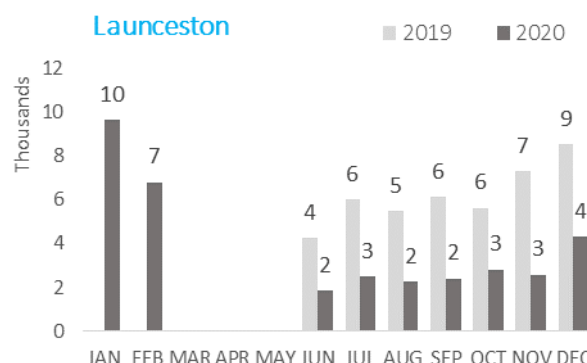
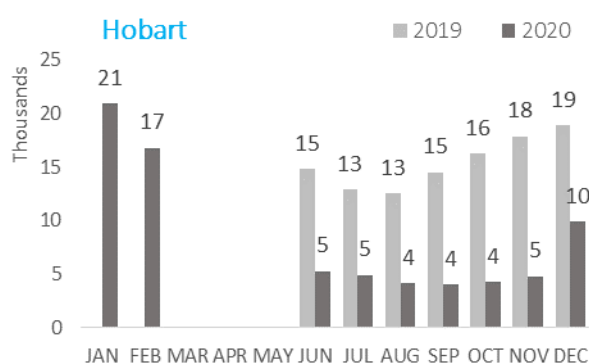
The state-level figures provide an indication of the performance of the sector, however demand was not consistent across urban and regional areas. Historically, Hobart has been the anchor destination with 72% of visitors in 2019 spending some time in the capital. During 2020, with demand primarily coming 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 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.

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.

	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20
Tasmania	55%	72%	57%	55%	69%	55%	67%
Hobart	44%	42%	42%	39%	50%	35%	51%
Launceston	36%	38%	33%	28%	26%	27%	52%
Freycinet	36%	38%	33%	28%	26%	27%	52%
North East Coast	122%	150%	114%	114%	155%	96%	90%
West Coast	92%	114%	81%	83%	103%	78%	86%
North West	70%	86%	73%	68%	102%	75%	73%

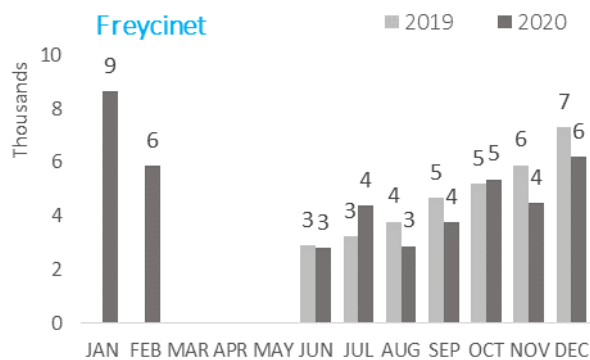


Tasmania's capital city experienced the lowest demand across the indicator regions, with the deepest trough through September to November. This period coincides with the Tasmanian Government's Make Yourself At Home travel voucher initiative, which encouraged stays and experiences across the state.

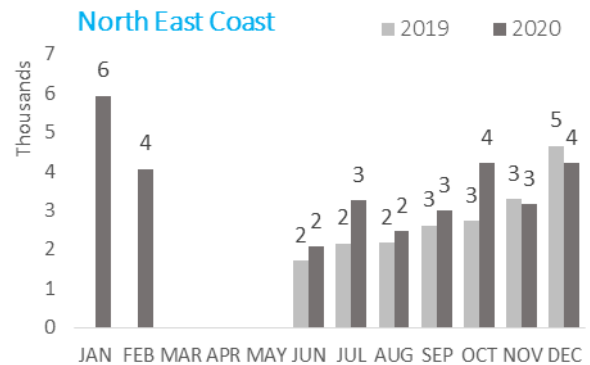
As the largest urban area outside Hobart, Launceston also saw low demand across the period; however, it did sustain a greater share of nights than Hobart compared to the year before. December 2020 recorded half the demand of the same month previous year, showing some recovery from the low of 39% in September 2020 compared to 2019.

Tourism Snapshot

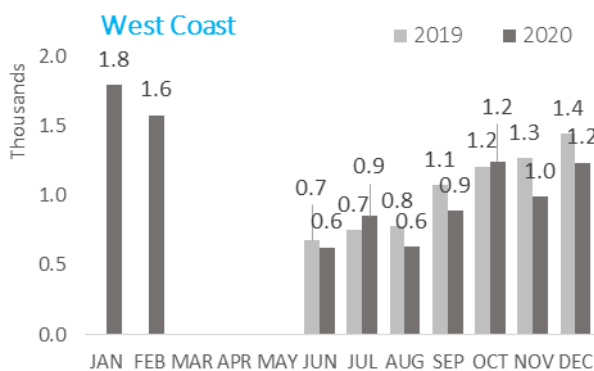
Year ending December 2020



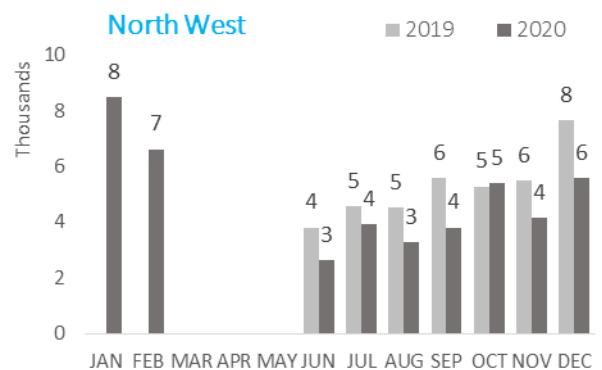
The east coast short-stay accommodation sector saw relatively strong demand through 2020 compared to Hobart and Launceston, with July and October seeing more nights booked than the same nights in 2019; both months include Tasmanian school holidays, and as the state border was still mostly restricted it can be presumed the majority of stays were Tasmanians.



The north west 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. The NE is one of the states' most popular coastal holiday locations for Tasmanians. Notably, this region does not include the mountain biking hub of Derby which would have added to the level of 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.



The NW region saw demand rise through the school holiday periods inline with other regional areas, though saw softer demand overall. Cradle Mountain is in this region which saw strong visitation to the area from June; however, the accommodation mix there is different to other destinations, with mostly hotel, lodge and cabin commercial accommodation; it is therefore likely demand for nights is higher than this data indicates.

Tourism Snapshot

Year ending December 2020



Short-stay accommodation Year ending total and % change

		Tasmania	Hobart	Launceston	Freycinet	NE Coast	West Coast	North West
Supply (nights available)	YE Dec 20	1,055,200	176,200	84,800	126,200	74,900	25,400	103,000
	YE Dec 19	1,393,700	285,900	130,800	140,100	77,000	29,300	132,900
	% change	▼ -24%	▼ -38%	▼ -35%	▼ -10%	▼ -3%	▼ -13%	▼ -22%
Demand (nights booked)	YE Dec 20	534,300	98,000	45,300	55,100	38,800	12,100	52,600
	YE Dec 19	753,200	191,400	76,800	62,400	36,000	14,000	64,000
	% change	▼ -29%	▼ -49%	▼ -41%	▼ -12%	▲ 8%	▼ -14%	▼ -18%
Occupancy	YE Dec 20	51%	56%	53%	44%	52%	47%	51%
	YE Dec 19	54%	67%	59%	44%	47%	48%	48%
	% change	▼ -6%	▼ -17%	▼ -9%	▼ -2%	▲ 11%	► 0%	▼ 6%
ADR \$	YE Dec 20	186	193	157	217	201	165	162
	YE Dec 19	178	190	149	213	198	162	156
	% change	▲ 4%	▲ 1%	▲ 6%	▲ 2%	► 1%	▲ 2%	▲ 4%
RevPAR \$	YE Dec 20	94	107	84	95	104	78	83
	YE Dec 19	96	127	87	95	93	77	75
	% change	▼ -2%	▼ -16%	▼ -4%	► 0%	▼ 12%	► 1%	▼ 10%
Revenue \$m	YE Dec 20	99.2	18.9	7.1	12.0	7.8	2.0	8.5
	YE Dec 19	134.4	36.4	11.4	13.3	7.1	2.3	10.0
	% 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 December 2020 figures compared to the year ending December 2019. If the values are the same, then that would equal 100%; for example, available listings in the state for the year ending December 2020 were 89% of the number in 2019.

	Tasmania	Hobart	Launceston	Freycinet	NE Coast	West Coast	North West
Available Listings	6,712	1,268	632	659	420	138	634
% of 2019	89%	84%	92%	87%	101%	96%	89%
Booked Listings	6,143	1,191	576	589	391	123	570
% of 2019	88%	84%	90%	85%	101%	96%	89%
Occupancy Rate	94%	83%	91%	98%	111%	100%	106%
Supply (Nights)	76%	62%	65%	90%	97%	87%	78%
Demand (Nights)	71%	51%	59%	88%	108%	86%	82%
Revenue	74%	52%	62%	90%	109%	88%	85%
ADR	104%	101%	106%	102%	101%	102%	104%
RevPAR	98%	84%	96%	100%	112%	101%	110%

Tourism Snapshot

Year ending December 2020



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.

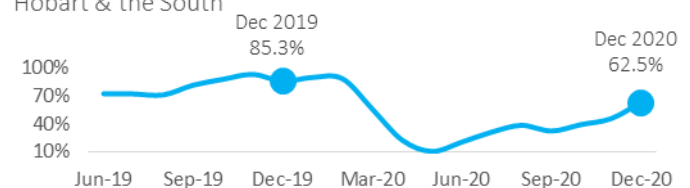
Occupancy by month

Occupancy was lowest immediately following border restrictions beginning late March, 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.

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.

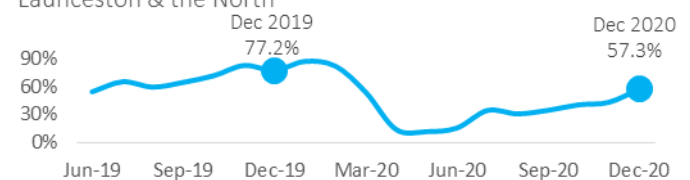
Hobart & the South



Launceston & the North

Occupancy rates in Launceston were slower to recover than Hobart, however school holidays periods saw increased demand.

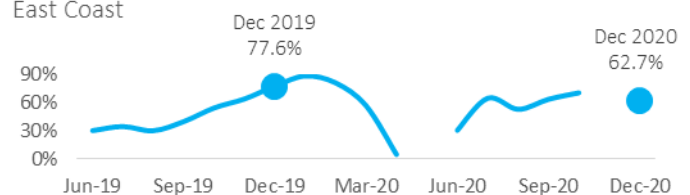
Launceston & the North



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 breaks in series are due to low samples in those periods.

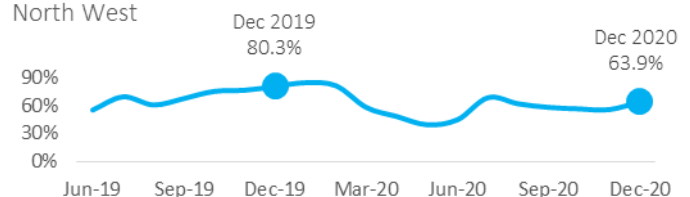
East Coast



North West

Occupancy rates in the North West were least impacted by COVID, with demand through the July school holiday period particularly strong.

North West



Tourism Snapshot

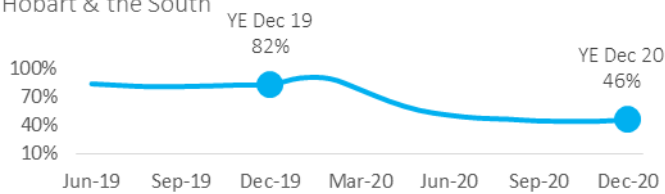
Year ending December 2020



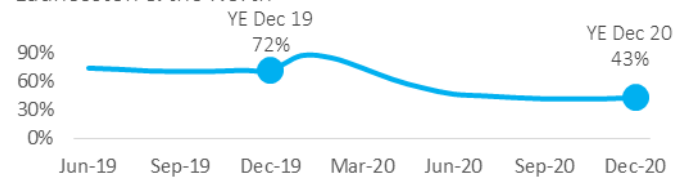
Occupancy by rolling year ending

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 fires as interstate visitors extended trips in Tasmania or diverted planned trips away from affected areas. Full-year occupancy for 2020 was similar to 2019 for the East Coast and North West, while the regions dominated by Hobart and Launceston remained well down on the previous year.

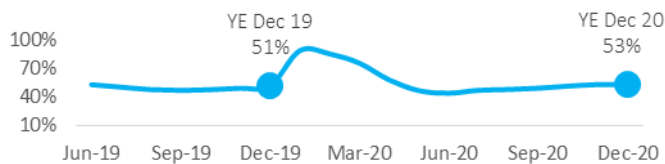
Hobart & the South



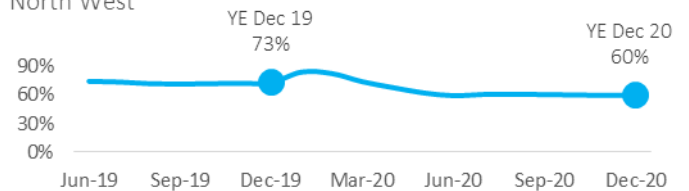
Launceston & the North



East Coast



North West



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 December 2020



About the Tasmanian Tourism Snapshot

The Tasmanian Tourism Snapshot is published every quarter, using the latest figures from the Tasmanian Visitor Survey (TVS), the International Visitor Survey (IVS) and the National Visitor Survey (NVS) 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 2020 was reduced to approximately 4,700 interstate and international visitors.

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.

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'.

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.