

TASMANIAN TOURISM SNAPSHOT

YEAR ENDING MARCH 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 March 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 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 744,200 interstate and international visitors in the year to March 2022, up 127% from 2021 (or 56 per cent of the visitation levels of 2019). Total nights were up 133% from 2021 to 8.06 million (76 per cent the level of 2019), and visitor spend was \$2.18 billion, up 169% on the year ending March 2021 (88 per cent the level of 2019 spend).

Visitation to Tasmania in the last 12 months was almost entirely supplemented by interstate visitors, with 733,100 mainland Australians visiting the state. This is 66% 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 early 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.

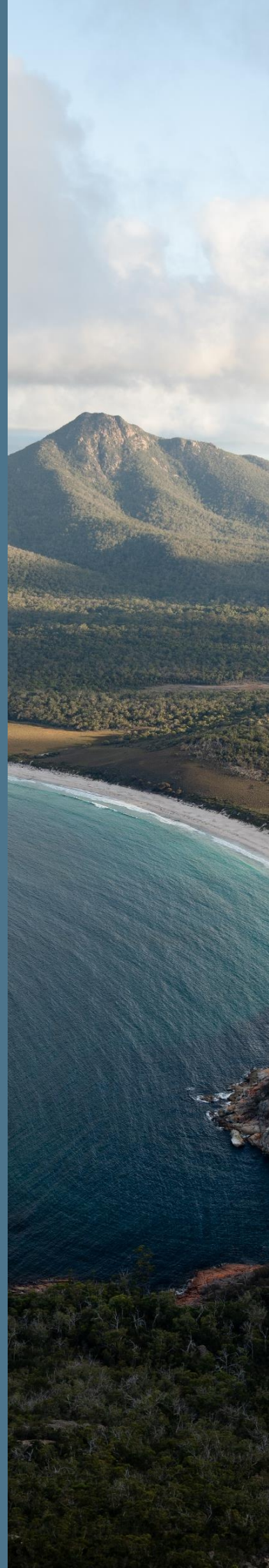


Tourism Tasmania's marketing activity remained in-market throughout the year, including interstate, intrastate and international campaigns

The 'Come Down for Air' campaign was active in most interstate markets through summer of 2021/22 and 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, including a voucher program 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 March 2022



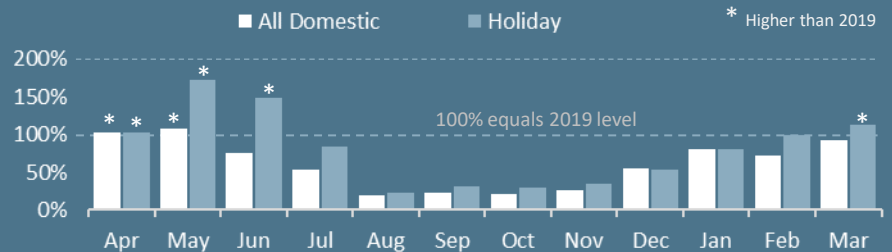
Comparing YE March 2022 to pre-COVID

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 months' '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

66%

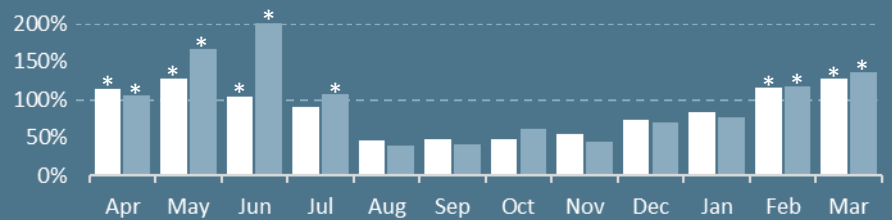
YE Mar 22 of YE Mar 19^



Nights

95%

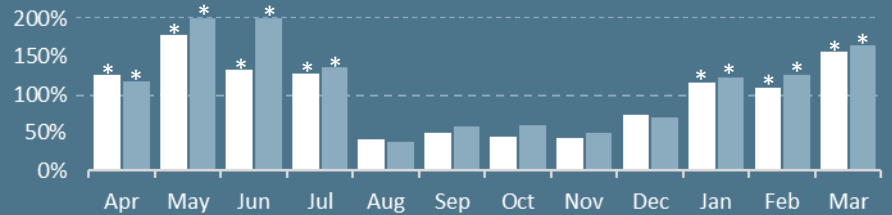
YE Mar 22 of YE Mar 19^



Spend

107%

YE Mar 22 of YE Mar 19^

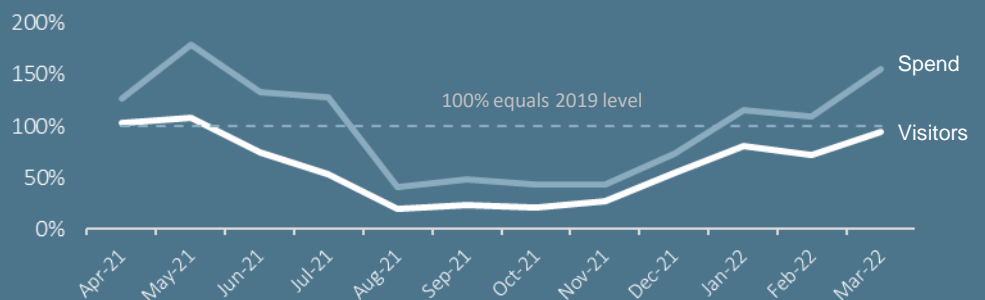


^Year ending March comparison is April 2018 to March 2019 and April 2021 to March 2022.



Spend recovery continued to outpace visitation

In the year to March 2022, Tasmania recorded seven months of domestic spend above the spend in the same months in 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. In contrast, only two months saw higher domestic visitation (April and May 2021) compared to the same months in 2019.



Like to see more numbers?

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

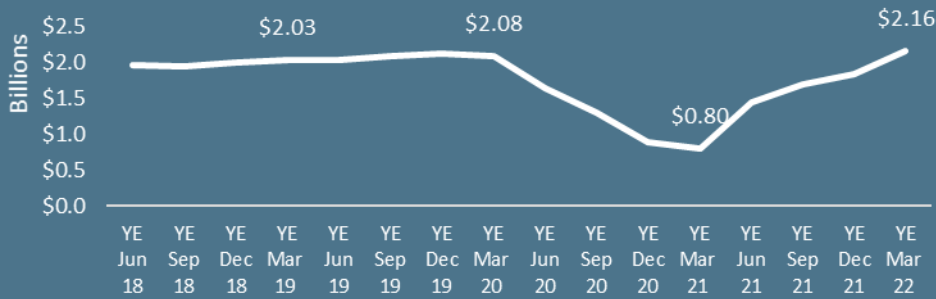
Further research on Tasmania's visitor economy can be found on Tourism Tasmania's corporate site www.tourismtasmania.com.au/research

→ **Visitors spent more in the March quarter of 2022 than they've ever spent in any previous quarter, despite fewer visitors**

Although total visitation (interstate and international) in the March quarter of 2022 had only recovered to 69% of the visitation of the same quarter in 2019, these visitors set a new record for expenditure in the state (\$993.6m, was \$980.2m in March quarter 2019). Of this spend, domestic visitors contributed \$970.7m (+\$25% on 2019), highlighting that in this quarter the domestic spend more than off-set the absence of significant numbers of international visitors.

For the year to March 2022, total visitor spend was \$2.187b, up 169% on the year to March 2021, yet remained down 12% on pre-COVID spend (\$2.495b) in year to March 2019. However, domestic spend (\$2.159b) was up 170% on March 2021, and up 7% on the year to March 2019 (\$2.025b), leading to a record 12 month period for domestic spend.

Domestic Spend | Rolling year ending periods



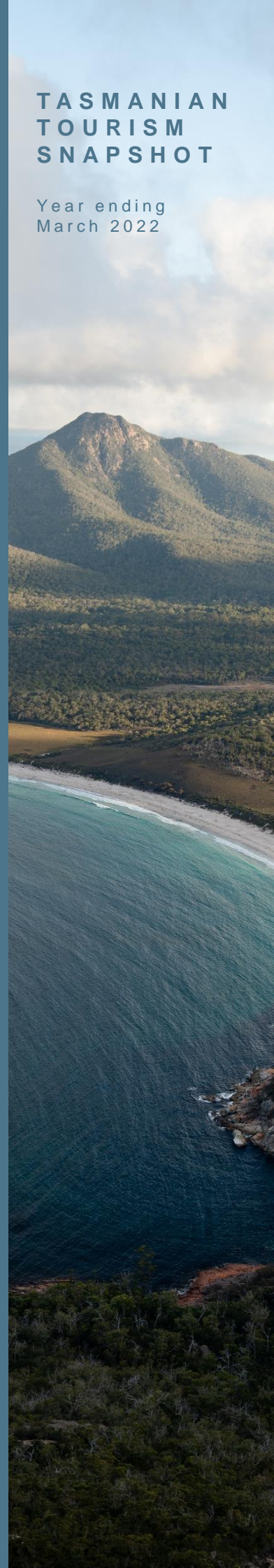
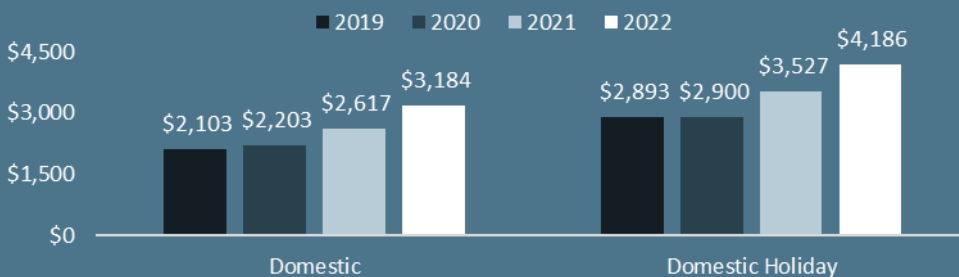
→ **Average spend per visitor (ASPV) remains elevated**

Since Tasmania's border first re-opened in late 2020, visitors are, on average, spending more each in Tasmania. Every month within the 12 months to March 2022 period has recorded higher average spend per domestic visitor (ASPV) compared to the same months in 2019.

Domestic *holiday* ASPV (\$4,186) in the March quarter 2022 is higher than any previous quarter, and a substantial 44% (+\$1,286) on March quarter 2020 (\$2,900, highest pre-COVID ASPV).

For all domestic visitors, the March quarter 2022 recorded the second highest quarterly ASPV for domestic visitors (\$3,184, up 51% on March 2019, but behind \$3,295 in the September quarter 2021).

Average Spend per Visitor | March quarters



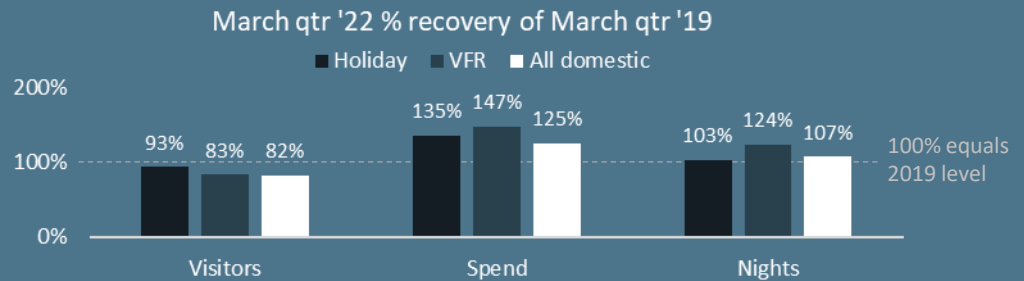
TASMANIAN TOURISM SNAPSHOT

Year ending
March 2022



Visitation recovery may be lagging, but the March quarter 2022 was the strongest return of domestic visitation since COVID began, driven by holiday and VFR

The March quarter 2022 saw full recovery of domestic spend and nights compared to the same quarter in 2019, and although visitation remained down on 2019, it was the strongest quarter in volume of interstate visitors since March quarter 2020.



Interstate visitors are staying on average just over an extra two nights each, with regional destinations seeing greater share of nights

The increased length of stay in the March quarter 2022 compared to pre-pandemic years is the result of two main factors:

- An increased share of holiday visitors, although their length of stay did not substantially change and,
- Visitors reconnecting with friends or family maintained their share of visitation, but also increased their length of stay by around two nights.


Pre-pandemic, interstate visitors spent 70% of their nights in the state outside of Hobart city; this has increased slightly to 72% in the March quarter 2022. However, because these visitors are staying longer overall in the state this has not resulted in a nett loss of nights for Hobart – the average length of stay in the capital actually increased by half a night.

The Tasmanian Visitor Survey (TVS) measures visitation to 55 towns and cities across the state, breaking down a 'visit' into three categories: passed through, stopped and looked around, or stayed overnight. A visitor can only meet one of these criteria per place. In the March quarter 2022, 64% of the listed places saw a positive conversion of visitors from 'passed through' or 'stopped', and into 'stayed overnight', with these places spread across all tourism regions.

Across Tasmania's four tourism regions, the preference for regional stays is particularly evident for the East Coast, which in the March quarter 2022 recorded 33% more domestic visitor nights than the March quarter 2019, and saw its highest volume of domestic visitors nights of any previous quarter.

March quarter	Domestic Visitors 2022	% Change Visitors 2021	% Share Visitors 2019	Domestic Nights 2022	% Change Nights 2021	% Share Nights 2019
Southern	244,000	25%	84%	1,469,700	14%	103%
Northern	175,500	16%	87%	584,400	22%	98%
WxNW	143,400	22%	96%	621,000	33%	98%
East Coast	114,800	28%	111%	354,900	35%	133%

% Share compares the March quarter 2022 to the March quarter 2019.




Travel by Tasmanians within the state remained strong; although they spent fewer nights away, they spent a little more money per trip

Overall, intrastate travel remained strong through the year to March 2022, continuing the trend of elevated travel within the state since the pandemic began. Tasmanians took 1.73m overnight trips within the state in the year to March 2022, remaining steady (+2%) from the previous year, and remaining on par with pre-COVID levels. Just over half (54%, 983k) of intrastate overnight trips were holiday trips, also remaining steady (+2%).

A total of 4.15m nights were spent by Tasmanians on trips within the state, down 7% from the year to March 2021. A decline in overnight trips to see family or friends (down 12%) drove the decline in total nights.

Although Tasmanians spent fewer nights travelling within the state, expenditure remained elevated, increasing 8% from the previous year, as travellers increased their average spend per night 16% to \$181, up from \$156 the year to March 2021.

The short trips with higher spend per night resulted in an overall increase in spend per overnight trip, to \$435 (up 8% from \$412 in the year to March 2021). Holiday trip spend comprised the majority of this expenditure, with average overnight holiday trip spend of \$525, up 4% from \$503 in the previous year.



International visitors are most likely to be from New Zealand, however seasonal workers from Pacific islands are substantially supporting recovery of nights and expenditure

International visitation to Tasmania was largely supplemented by New Zealand visitors (3,500). Whilst these visitors could travel to Tasmania via the mainland, some New Zealand visitors would have taken advantage of the direct Trans-Tasman flights between Hobart and Auckland, which were active from April to June 2021. Although New Zealanders were the dominant market (26% of international visitors) they contributed just 5% of nights and 8% of spend.

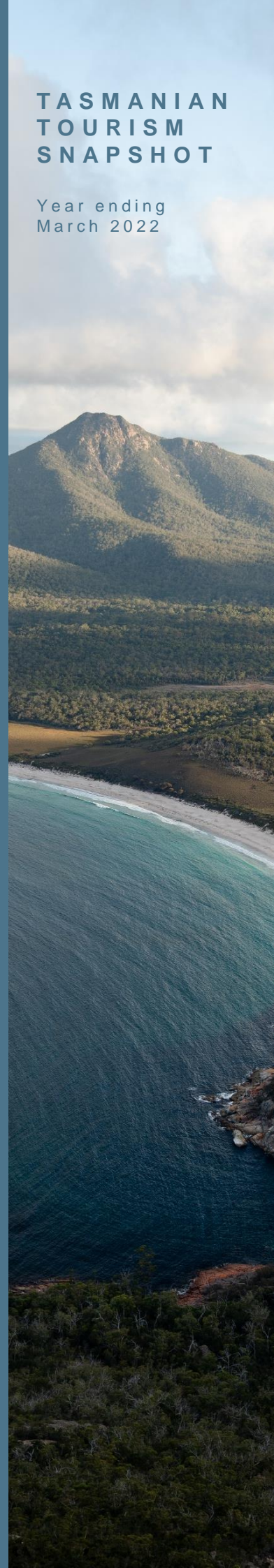
While international leisure travel only resumed from 15 December 2021, visitors on working holiday visas were welcomed from March 2021; these visitors are categorised in the International Visitor Survey (IVS) as visiting for 'employment'. Pre-COVID, employment visitors traditionally accounted for between 1-2% of Tasmania's international visitors. In the year to March 2022, they were 12 per cent of visitors.

The impact of seasonal workers was even more pronounced on nights and spend. Pre-COVID, international employment visitors accounted for 2-4% of spend and 8% of nights; in the year to March 2022 they contributed 48% of nights and 38% of spend.

Workers from Vanuatu, Samoa and Tonga were the key markets, with 71% of employment visitors coming from these three countries. Overall, these countries were collectively 10% of all international visitors to the state; far ahead of their pre-COVID collective market share of less than one percent.

TASMANIAN TOURISM SNAPSHOT

Year ending
March 2022



INTERSTATE VISITORS TO TASMANIA

YEAR ENDING MARCH 2022

ALL VISITORS*

VISITORS 733k ▲125% 63% of 2019 [^]	NIGHTS 7.86m ▲132% 89% of 2019	SPEND \$2.15b ▲170% 102% of 2019	ALOS (nights) 10.7 ▲3% 89% of 2019	ASPV \$2,945 ▲20% 161% of 2019	ASPN \$275 ▲16% 115% of 2019
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HOLIDAY VISITORS

VISITORS 392k ▲152% 78% of 2019 [^]	NIGHTS 4.19m ▲170% 91% of 2019	SPEND \$1.54b ▲186% 114% of 2019	ALOS (nights) 10.7 ▲7% 116% of 2019	ASPV \$3,937 ▲14% 145% of 2019	ASPN \$368 ▲6% 125% of 2019
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State of origin

% Share visitors from state

	Visitors	Nights '000	Spend \$m	ALOS nights	ASPV	ASPN	Holiday	VFR	Business	Other
VIC	241,500	2,128	595	8.8	\$2,466	\$280	48%	30%	15%	7%
NSW	209,200	2,279	646	10.9	\$3,088	\$283	58%	25%	10%	7%
QLD	186,000	2,092	593	11.2	\$3,189	\$284	56%	31%	11%	3%
SA	50,600	593	147	11.7	\$2,899	\$247	56%	22%	18%	4%
WA	20,200	439	98	21.7	\$4,863	\$224	48%	36%	13%	4%
ACT	19,000	211	55	11.1	\$2,899	\$261	48%	34%	14%	4%
NT	5,500	107	22	19.4	\$4,020	\$208	61%	34%	0%	4%

Recovery tracking by month of departure

	2021									2022		
	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR
Visitors	115,600	80,800	49,400	44,600	13,100	17,800	20,800	27,100	58,700	126,000	78,100	101,900
% 2019 #	103%	108%	76%	53%	19%	23%	21%	27%	56%	81%	73%	94%
Nights ('000)	1,120	736	438	452	193	211	286	357	560	1,341	857	981
% 2019 #	114%	128%	104%	91%	46%	47%	48%	54%	74%	89%	116%	117%
Spend (\$m)	297.8	216.0	127.9	153.6	35.3	59.0	71.9	81.7	145.2	444.2	215.5	311.0
% 2019 #	127%	179%	133%	128%	41%	49%	44%	43%	73%	116%	109%	156%

- ▲ 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 calendar year 2019 figures (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.

INTERNATIONAL VISITORS TO TASMANIA

YEAR ENDING MARCH 2022

ALL VISITORS

VISITORS

13,200

▲ 1,412%+
4% of 2019[^]

NIGHTS

721,500

▲ 394%
14% of 2019

SPEND

\$52m

▲ 489%
9% of 2019

ALOS (nights)

54.6

▼ -67%

ASPV

\$3,955

▼ -61%

ASPN

\$72

▲ 19%

Nights and ALOS are elevated due to seasonal workers from Samoa, Vanuatu and Tonga. These visitors came for 'employment' and represented 10% of visitors, and 39% of visitor nights. ALOS pre-COVID was traditionally ~15 nights for all visitors.

HOLIDAY VISITORS*

VISITORS

5,400

NIGHTS

82,900

SPEND

\$6m

ALOS (nights)

15.3

ASPV

\$1,257

ASPN

\$82

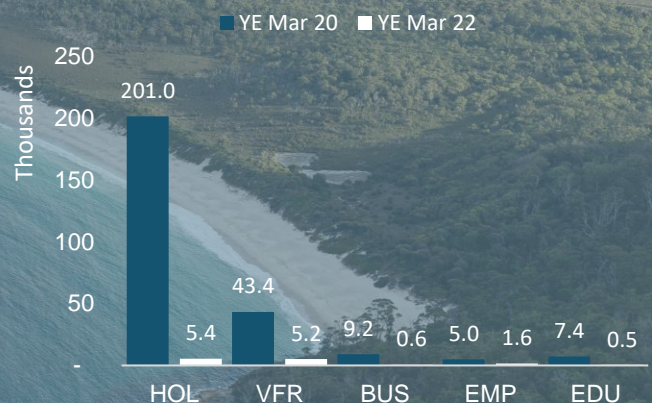
Rolling Annual Visitation to Tasmania

TOTAL INTERNATIONAL VISITORS TO TASMANIA | YE March



Purpose of Stopovers* within Tasmania

PURPOSE OF STOPOVER | TASMANIA



Share of all visitors to Australia

VISITORS

2.7%

▲ 1.3%pts

NIGHTS

1.9%

▼ -0.5%pts

SPEND

1.5%

► -0.3%pts

VISITORS

5.3%

▲ 4.9%pts

NIGHTS

2.1%

▲ 1.8%pts

SPEND

2.1%

▲ 1.8%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 records purpose of visit per stopover, so a single 'trip' will include multiple purposes and therefore may add to more than 100%.

[^] % 2019 refers to comparison to *calendar year* 2019 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.

INTRASTATE TRIPS WITHIN TASMANIA

YEAR ENDING MARCH 2022

OVERNIGHT TRIPS

TRIPS
1.73m
▶2%

NIGHTS
4.15m
▼-7%

SPEND
\$751m
▲8%

ALOS (nights)
2.4
▼-9%

ASPT
\$435
▲6%

ASPN
\$181
▲16%

HOLIDAY OVERNIGHT TRIPS*

TRIPS
938k
▶2%

NIGHTS
2.33m
▼-6%

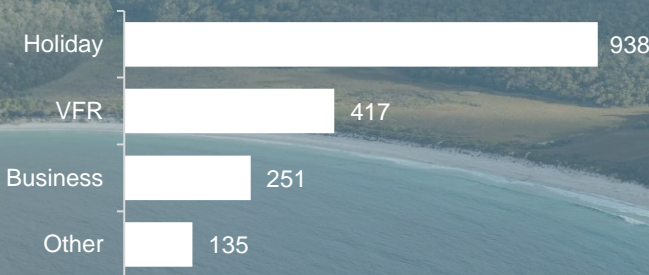
SPEND
\$492m
▲6%

ALOS (nights)
2.5
▼-8%

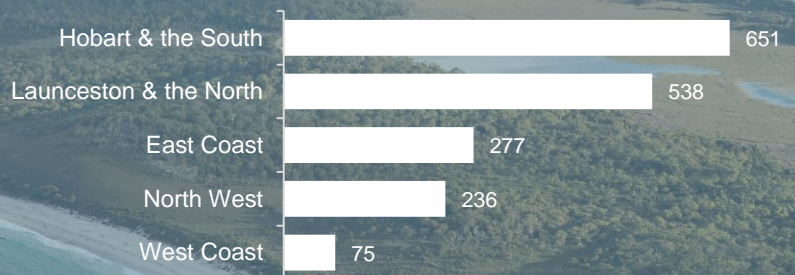
ASPT
\$525
▲4%

ASPN
\$212
▲13%

PURPOSE OF OVERNIGHT TRIP ('000)



OVERNIGHT TRIPS IN REGIONS ('000)



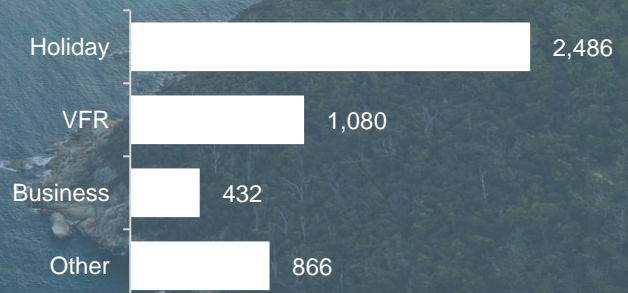
DAY TRIPS

TRIPS
4.86m
▶-1%

SPEND
\$617m
▲5%

ASPT
\$127
▲5%

PURPOSE OF DAY TRIP ('000)



HOLIDAY DAY TRIPS*

TRIPS
2.49m
▲6%

SPEND
\$329m
▲6%

ASPT
\$133
▶0%

Want more 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.

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