

YEAR ENDING JUNE 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

Year ending June 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 (<u>www.tvsanalyser.com.au</u>) is free, interactive and always-on dashboard of visitation data, allowing analysis on a variety of visitor behaviours with the most recent data.

 $\bigcirc$ 

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

Tasmania welcomed 797,300 interstate and international visitors in the year to June 2022, up 39% from 2021 (or 61 per cent of the visitation levels of the year ending June 2019). Total nights were up 50% from 2021 to 8.74 million (80 per cent the level of 2019), and visitor spend was \$2.39 billion, up 64% on the year ending June 2021 (96 per cent the level of 2019 spend).

Visitation to Tasmania in the last 12 months was almost entirely supplemented by interstate visitors, with 768,300 mainland Australians visiting the state. This is 69% of the domestic visitation seen in calendar year 2019.

Tasmania's border was unrestricted for travellers for six of the 12 months to June 2022, with restrictions through July-December 2021 primarily for Victorian and New South Wales travellers, with limited periods of high-risk area restrictions from other states. Domestic travel resumed from all states from December 15, 2021. Limited international travel resumed from the same time, however the direct Hobart – Auckland flights did not operate within the 12 months to June 2022.

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 late in 2021, 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.

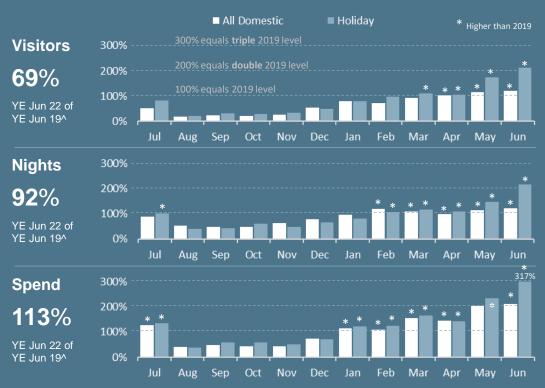
Further information about Tourism Tasmania's campaigns, including how local industry can get involved, can be found at <u>www.tourismtasmania.com.au/marketing/campaigns</u>

Year ending June 2022



Ongoing changes to travel restrictions within Australia through the second half of 2021 resulted in significantly reduced travel to Tasmania. 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 restrictions, and changes in visitor types, resulted in higher rates of spend and more nights in the state compared to recovery of number of visitors.

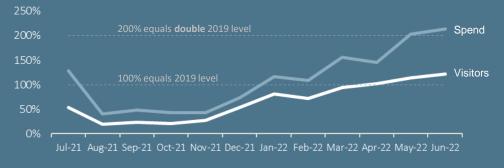
Demand was strong as unrestricted travel resumed to Tasmania from December 2021, with record levels of domestic visitation from April to June 2022 compared to the same months in 2019.



AYear ending June comparison is July 2018 to June 2019 and July 2021 to June 2022 for domestic visitors only.

#### Spend recovery continued to outpace visitation

In the year to June 2022, Tasmania recorded seven months of domestic spend above the same months in any previous year. This spend was primarily spend by holiday visitors. In contrast, only three months saw higher domestic visitation (April to June 2022) compared to the same months in 2019.



Like to see more numbers?

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

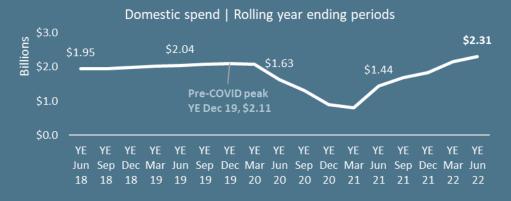
Further research on Tasmania's visitor economy can be found on Tourism Tasmania's corporate site <u>www.tourismtasmania.com.au/research</u>

### Visitors spent more in the June quarter of 2022 than they've ever spent in any previous June quarter

For the first time in a June quarter, more than 300,000 interstate and international people visited Tasmania (6% more than the June quarter of 2019). These visitors set a new June quarter record for expenditure in the state (\$846.9m, up 63% from \$518.4m in June quarter 2019). Of this spend, domestic visitors contributed \$794.2m (up 76% on 2019, was \$452.4m.

For the year to June 2022, total visitor spend was \$2.39 billion, up 64% on the year ending June 2021 (96 per cent the level of 2019 spend).

Domestic visitor spend in the year to June 2022 was \$2.312 billion, the *highest annual domestic spend on record*, and up 60 per cent from the \$1.441 billion total domestic spend in the year to June 2021. Domestic visitor expenditure is now 113 per cent the levels of the year ending June 2019 (was \$2.037 billion).

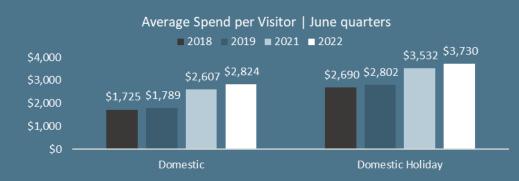


#### Average spend per visitor (ASPV) remains elevated

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 June 2022 recorded higher average spend per domestic visitor (ASPV) compared to the same months in 2019.

Domestic *holiday* ASPV (\$3,730) in the June quarter 2022 was higher than any previous June quarter, and up 33% on pre-COVID (June 2019). However, their ASPV was below the highs of the preceding two quarters, which both exceeded \$4,000.

For all domestic visitors, their ASPV of \$2,824 in the June quarter 2022 was the third highest quarterly ASPV for domestic visitors of any previous quarter, and up 58% on pre-COVID (June quarter 2019).



### TASMANIAN TOURISM SNAPSHOT

Year ending June 2022

Year ending June 2022

## The June quarter of 2022 is the first quarter to fully recover visitation, nights, and spend, compared to pre-COVID levels

The June quarter 2022 was the first quarter to not only surpass pre-COVID spend and nights, but also visitation. An 11% increase in domestic visitation in this quarter (from 2019) was significant enough to completely offset the much slower return of international visitors, and with a 41% increase, holiday visitors from mainland Australia continue to be the core drivers of recovery.

> June qtr '22 % recovery of June qtr '19 ■ Holiday ■ VFR ■ All domestic



### Average length of stay (ALOS) in the state by interstate visitors in the June quarter of 2022 was on par with pre-COVID nights

Unlike the preceding March quarter where interstate visitors were staying around 2 nights longer in the state compared to the same quarter in 2019, visitors in the June quarter spent a similar length of time in the state (9 nights) to pre-COVID.

The relative stabilisation of ALOS in this quarter compared to prepandemic years is primarily due to holiday visitors staying just under a night less each in the state compared to 2019, although at 10.4 nights they remain above the longer term trend prior to 2019.

Across Tasmania's four tourism regions the preference seen in previous quarters for regional stays remains strong for the East Coast, which in the June quarter 2022 recorded 22% more domestic visitor nights than the June quarter 2019. The Northern tourism region was the only region to see a decline in domestic visitor nights from 2021, and also below 2019; however, the June quarter 2022 was the next highest behind these two periods, and well above all other previous June quarters.

June quarter	Domestic Visitors 2022	% Change Visitors 2021	% Share Visitors 2019	Domestic Nights 2022	% Change Nights 2021	% Share Nights 2019
Southern	215,000	9%	109%	1,083,000	4%	100%
Northern	155,000	12%	119%	441,000	-16%	87%
WxNW	114,000	13%	128%	491,000	11%	112%
East Coast	82,000	8%	133%	227,000	4%	122%

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

### Queensland became the second largest domestic market for the first time in the year to June 2022

For the first time in any 12 month period, Queensland surpassed NSW as the second largest market (behind Victoria), increasing share from 16% pre-COVID to 26% this year. The gain in share is the result of a record number of Queenslanders (201,400) combined with a restricted travel from VIC and NSW through late 2021. Holiday (up 46% on YE June 2019) and VFR (up 3%) both set new visitation records.

Queenslanders overall did not significantly change the average length of their trip to Tasmania, however they did increase their spend. Each visitor spent on average 44% more each than in the year to June 2019, taking ASPV to \$3,308 in 2022, or an extra \$1,000. Holiday visitor ASPV was \$4,494, up 36% on 2019.



## For all domestic visitors, travelling with a partner / as a couple has extended its lead as the primary travel party type

Travelling with a partner / as a couple remained the dominant travel party type, increasing share from 32% pre-COVID to 37% in the year to June 2022, where as the second largest cohort – travelling alone – has decreased to 23% from 27% pre-COVID. All other travel party types, including families with children and groups of family or friends, have remained relatively stable.

## The lure of Tasmania's wilderness and wildlife as a driver of influence to visit extended its strength as the top driver

46% of domestic visitors stated the opportunity to see Tasmania's wilderness and wildlife as the top influence to visit, up from 35% in YE June 2019. For domestic holiday visitors, the pull of the wild was substantially higher, at 66% (up from 60%), with experiencing Tasmania's food and beverage also gaining share with the these visitors, at 44%, up from 39% in 2019.

Through the same period, a number of influences have significantly increased in power for all domestic visitors:

- To self drive / tour around: 35%, up from 28%
- To experience Tasmanian food and beverages: 31%, up from 24%
- To experience Tasmania's history and heritage: 25%, up from 21%
- To go hiking: 11%, up from 6%

### TASMANIAN TOURISM SNAPSHOT

Year ending June 2022

Year ending June 2022

## Travel by Tasmanians within the state appears to be softening following the re-opening of our border in December 2021

Trips taken by Tasmanians within the state appear to be softening, compared to periods of significantly higher travel through late 2020 when interstate and international travel was heavily restricted.

Overall, compared to pre-COVID intrastate travel remained strong through the year as Tasmanians took 1.81m overnight trips within the state in the year to June 2022, remaining elevated above the same period in 2019 (up 6%), and down 6% on year to June 2021. Just over half (54%, 985k) of intrastate overnight trips in the year to June 2022 were holiday trips, also down on the same period in 2021 (down 6%) and above 2019 (up 15%).

A total of 4.23m nights were spent by Tasmanians on trips within the state, down 13% from the year to June 2021, and down 5% on June 2019. The decline was impacted by fewer trips for holiday (down 12% on 2021) and visiting friends or family (down 24%).

Fewer overnight trips, and shorter stays, resulted in spend also declining (down 9%) from 2021, to \$763m . However, because Tasmanians continue to spend more per trip since COVID, their overall expenditure was 24% higher than the same period in 2019.

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

### International visitors are beginning to return to the state, with the June quarter seeing strongest positive signs of recovery

International travel, although largely unrestricted alongside domestic travel from December 2021, is expected to be slower to recover to pre-COVID levels. In the year to June 2022 Tasmania welcomed 31,000 international visitors, and while this remains well down on the same period in 2019 (down 85%), the June quarter individually shows demand is building as this quarter was at 37% of the international visitation of the June quarter of 2019. Of the 31,000 visitors in the past year, 20,100 (65%) visited in the June quarter.

The UK, USA, Singapore and New Zealand were the top source markets in the year to June 2022, accounting for 41% of international visitors. Direct flights resumed between Hobart and Auckland in the second quarter of 2021, however were paused mid that year and did not operate within the 12 months to June 2022.

The first two quarters of 2022 have seen a steady return of holiday visitors to the state, with almost comparable visitation in terms of share of reason for visiting to pre-COVID now emerging. Holiday was traditionally the largest segment of travellers, and has taken back dominant share again.

International visitors				ors	% sł	nare	reas	on fc	or sto	pove	er pe	r qua	arter				
	Jun-18	Sep-18	Dec-18	Mar-19	Jun-19	Sep-19	Dec-19	Mar-20	Jun-20	Sep-20	Dec-20	Mar-21	Jun-21	Sep-21	Dec-21	Mar-22	Jun-22
Holiday	77%	76%	82%	82%	83%	75%	77%	80%	0%	0%	1%	1%	4%	14%	2%	65%	72%
VFR	18%	12%	15%	14%	12%	15%	19%	20%	28%	42%	21%	18%	88%	36%	23%	25%	20%
Business	6%	8%	4%	4%	4%	7%	4%	2%	7%	19%	9%	4%	5%	6%	5%	4%	5%
Employment	1%	3%	0%	1%	2%	2%	1%	3%	28%	16%	60%	68%	3%	29%	57%	5%	4%
Education	2%	4%	2%	4%	3%	5%	2%	3%	33%	5%	0%	2%	0%	2%	2%	7%	6%
Other	2%	2%	0%	1%	2%	6%	1%	1%	5%	16%	8%	8%	1%	13%	11%	1%	1%
VISITORS (000)	52.9	47.7	89.2	109.1	54.2	40.5	79.2	80.6	0.0	0.0	0.4	0.4	2.9	0.7	1.8	8.6	20.1

International data from Tourism Research Australia's International Visitor Survey



## INTERSTATE VISITORS TO TASMANIA

YEAR ENDING JUNE 2022

#### **ALL** VISITORS\*

VISITORS	NIGHTS	SPEND	ALOS (nights)	ASPV	ASPN
<b>768</b> k	<b>8.01</b> m	<b>\$2.31b</b>	<b>10.4</b>	<b>\$3,009</b>	<b>\$289</b>
▲34%	▲39%	▲60%	▲4%	▲19%	▲15%
69% of 2019^	92% of 2019	113% of 2019	134% of 2019	165% of 2019	123% of 2019
HOLIDAY VISITO	RS		A Contraction		
VISITORS	NIGHTS	SPEND	ALOS (nights)	ASPV	ASPN
<b>406k</b>	<b>4.29</b> m	<b>\$1.62</b> b	<b>10.5</b>	<b>\$3,991</b>	<b>\$379</b>
▲ 44%	▲46%	▲64%	► 2%	▲14%	▲12%
85% of 2019^	96% of 2019	124% of 2019	114% of 2019	146% of 2019	124% of 2019
		and the second			

#### State of origin

% Share visitors from state

and the second	Visitors	Nights '000	Spend \$m	ALOS nights	ASPV	ASPN	Holiday	VFR	Business	Other
VIC	265,200	2,193	645	8.3	\$2,434	\$294	48%	28%	18%	6%
NSW	195,900	2,155	636	11.0	\$3,247	\$295	55%	24%	13%	8%
QLD	201,400	2,239	666	11.1	\$3,308	\$298	58%	29%	10%	3%
SA	53,900	601	168	11.2	\$3,119	\$279	58%	19%	16%	7%
WA	24,700	491	111	19.9	\$4,501	\$227	46%	35%	16%	3%
ACT	19,700	210	58	10.6	\$2,934	\$276	46%	29%	18%	7%
NT	6,600	106	25	16.2	\$3,744	\$231	56%	43%	0%	1%

#### Recovery tracking by month of departure

					Related and							
			20	21		2022						
	JUL	AUG	SEP	ост	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN
Visitors	44,200	13,300	17,800	20,800	27,200	58,800	126,300	77,800	100,900	114,800	85,900	80,500
% 2019 #	53%	19%	24%	21%	28%	54%	81%	72%	94%	103%	115%	122%
Nights ('000)	437	221	215	285	406	646	1,449	896	951	1,114	770	619
% 2019 #	88%	53%	49%	47%	62%	78%	97%	119%	109%	100%	114%	122%
Spend (\$m)	153.6	35.3	59.0	71.9	81.7	145.2	444.2	215.5	311.0	343.2	246.0	205.1
% 2019 #	128%	41%	49%	44%	43%	73%	116%	109%	156%	146%	203%	213%

Increase

Steady (-2% to +2% change)

V 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 JUNE 2022



VISITORS	NIGHTS	SPEND	VISITORS	NIGHTS	SPEND
2.8%	1.6%	1.3%	5.1%	2.4%	2.2%
►0.1%pts	►-0.3%pts	▼-0.5%pts	▲4.2%pts	▲1.9%pts	▲1.8%pts

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

Increase

Steady (-2% to +2% change)

V 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. The IVS is conducted by Tourism Research Australia



## INTRASTATE TRIPS WITHIN TASMANIA

YEAR ENDING JUNE 2022



#### Want more data? Visit the National Visitor Survey website at <u>www.tra.gov.au/domestic</u>

Increase

Steady (-2% to +2% change)
Decrease

% Change is from previous year. \*The NVS records purpose of visit per stopover, so a single 'trip' will include multiple purposes and therefore may add to more than 100% ALOS: Average length of stay (nights); ASPT: Average spend per trip; ASPN: Average spend per night.

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 <u>www.tourismtasmania.com.au/research</u> and via the interactive TVS Analyser <u>www.tvsanalyser.com.au</u>

### 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  $\leq$  2 per cent are shown as remaining steady due to sampling variability, please view the Confidence Interval Tables available at <u>www.tourismtasmania.com.au/research/tvs</u> 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. <u>www.tra.gov.au/international</u>

### 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. <u>www.tra.gov.au/domestic</u>

TASMANIAN TOURISM SNAPSHOT Year ending June 2022