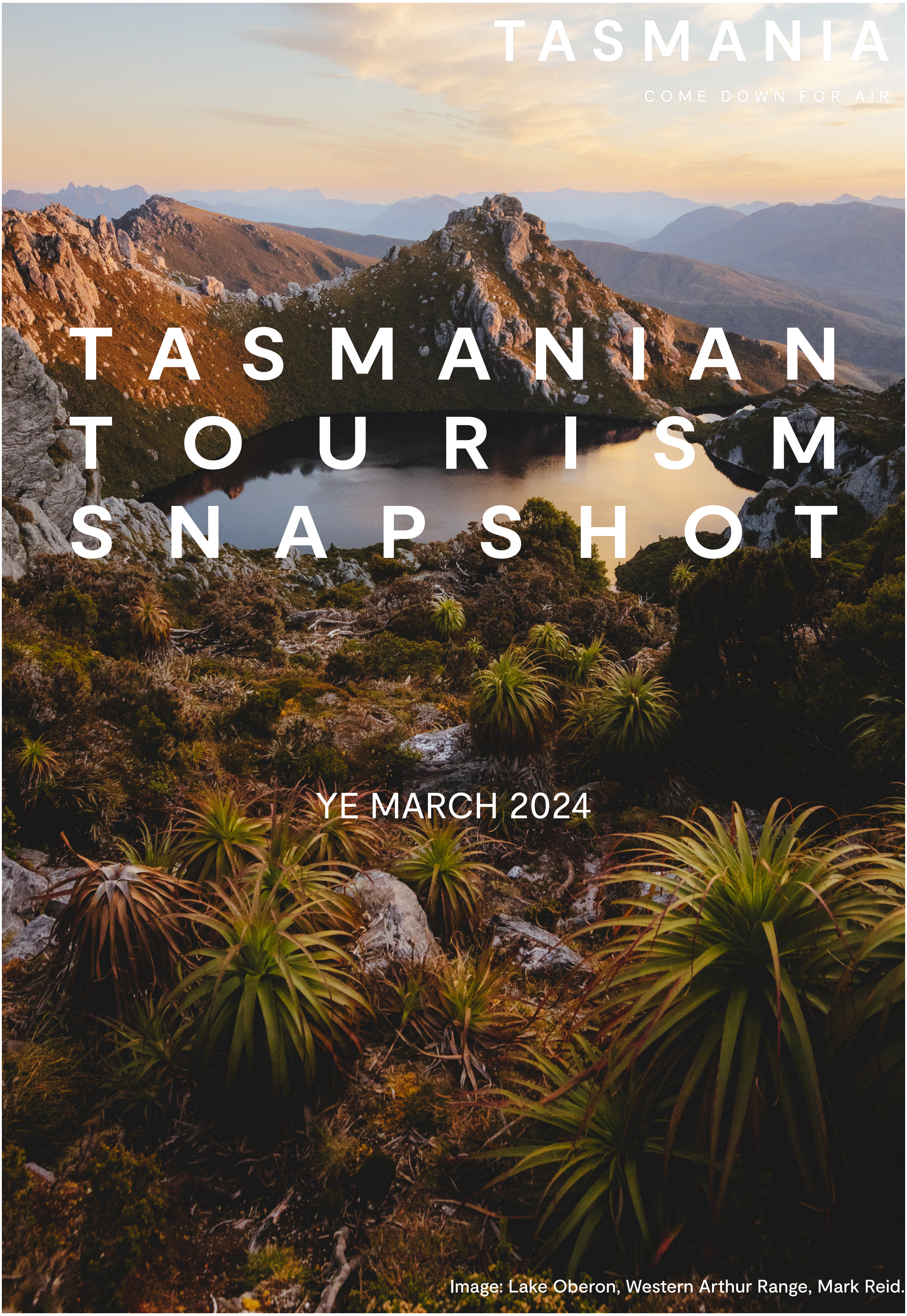


TASMANIA

COME DOWN FOR AIR

TASMANIAN TOURISM SNAPSHOT

YE MARCH 2024

Image: Lake Oberon, Western Arthur Range, Mark Reid.

TASMANIAN TOURISM SNAPSHOT

This snapshot explores the changes in visitation to Tasmania over the past year. Data and insights primarily come from the Tasmanian Visitor Survey (TVS), and are supplemented by the National and International Visitor Surveys (NVS & IVS, respectively), as well as statistics on commercial and short-stay accommodation.

The data presented in this report, as well as visitor behaviours and demographics, can be explored in greater detail using the free, online interactive TVS Analyser dashboard (www.tvsanalyser.com.au).

OVERVIEW AT YE MARCH 2024

Post-pandemic recovery peaked a year ago (year ending March 2023) when significant pent-up demand for travel among Australians saw Tasmania experience record spend and a near full recovery of visitation, despite very low levels of international travel at that time.

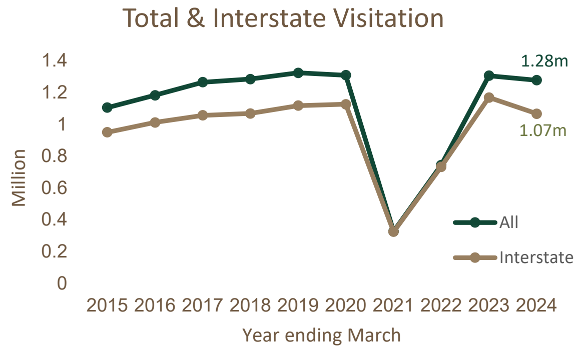
As international borders opened up and overseas outbound travel increased, the latter half of calendar year 2023 saw a softening in interstate travel by Australians into Tasmania. In year ending March 2024, however, a strong rebound in visitation through summer 2023-24, coupled with increasing rates of return from key international markets, drove a reversal of that trend, leading to elevated spend and nights (up 41% and 24%, respectively) and almost full recovery (down 5%) of visitation compared to the same period in 2019.

Meanwhile, the share of domestic vs international visitors to the state has settled to pre covid levels, with the market share for international visitation in the year ending March 2024 at 16.5% (up 0.9 ppts compared to 2019, however on par with the three-year average leading into 2020).

YEAR ENDING MARCH 2024

VISITOR SPEND

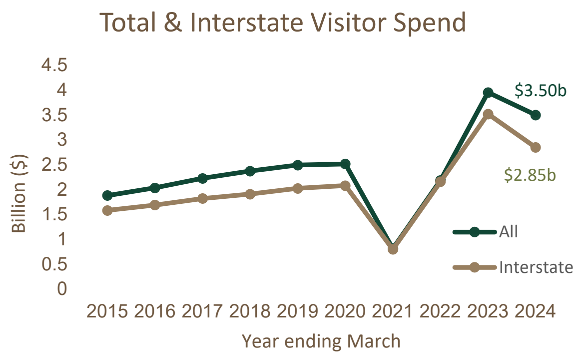
In the YE Mar 2024, total spend across all visitors was $3.5 billion, down 12% on the previous year. Declining visitor spend stems from falling average spend per visitor (ASPV), which declined by 10% across all visitors. ASPV was, however, 45% higher than the same period in 2019, with visitors spending around $860 more per trip.



VISITOR SPEND	YE Mar 23	YE Mar 24	Annual Change[1]	Change vs YE Mar 2019
ALL[2]	$3.955b	$3.500b	-12%	39%
INTERSTATE	$3.521b	$2.848b	-19%	37%

TOTAL VISITORS

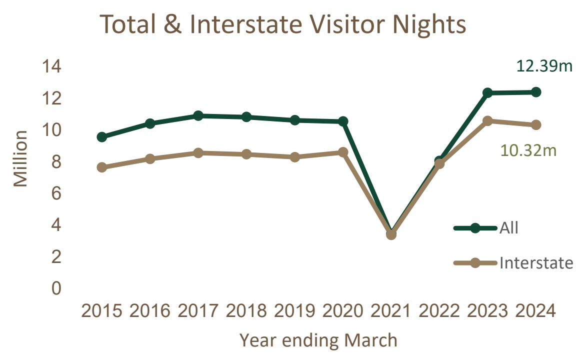
Tasmania welcomed 1.277m visitors in the year ending March 2024, of which 16.5% were international arrivals, signifying the return of Tasmania's international market share to pre-COVID levels.



TOTAL VISITORS	YE Mar 23	YE Mar 24	Annual Change	Change vs YE Mar 2019
ALL	1,305,404	1,277,483	-2%	-2%
INTERSTATE	1,168,675	1,067,127	-9%	-5%

VISITOR NIGHTS

The year ending March 2024 set a new record for total visitor nights (12.4m), primarily due to interstate visitors who spent an extra two nights, on average, in the state than they did in 2019 (average length of stay for all visitors was 9.7 nights).

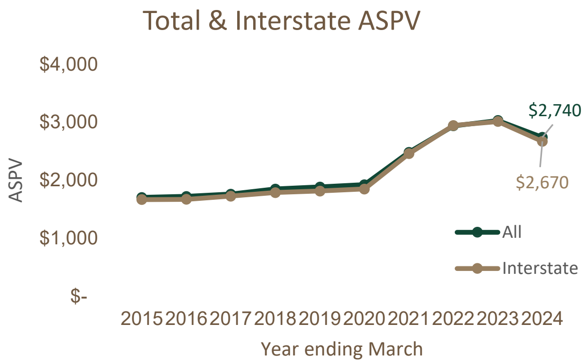


VISITOR NIGHTS	YE Mar 23	YE Mar 24	Annual Change	Change vs YE Mar 2019
ALL	12.35m	12.39m	0%	18%
INTERSTATE	10.59m	10.32m	-2%	20%

KEY METRICS

AVERAGE SPEND PER VISITOR (ASPV)

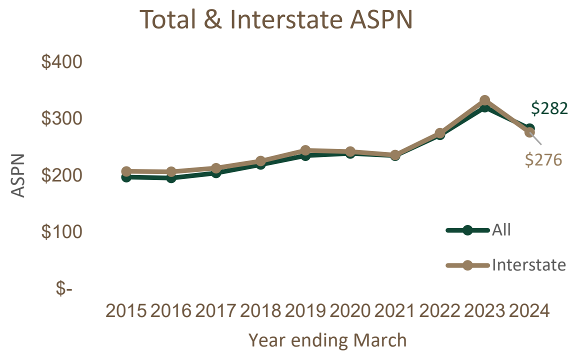
Average spend per visitor (ASPV) was $2,740 in year ending March 2024, 45% more than the same period in 2019, which is approximately triple the rate of inflation since 2019. Interstate holiday visitors spent an average $3,632 each (up 47% or +$928 from 2019). While visitors spent more per visit, this expenditure may not flow through to tourism businesses' bottom lines due to the rising costs of living and doing business. Accommodation is traditionally the largest spend category for interstate holiday visitors, and rose to 47% of their total spend in the year ending March 2024 (up from 43% in 2019).



ASPV	YE Mar 23	YE Mar 24	Annual Change	Change vs YE Mar 2019
ALL	$3,030	$2,740	-$290/visit	+$856/visit
INTERSTATE	$3,013	$2,670	-$343/visit	+$857/visit

AVERAGE SPEND PER NIGHT (ASPN)

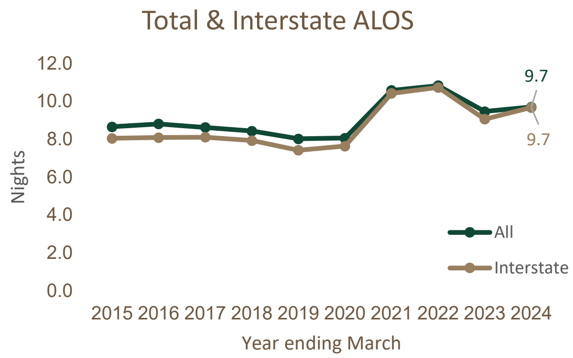
Although visitor expenditure remained elevated compared to 2019, longer stays in the state in year ending March 2024 led to overall declines in average spend per night for all visitors. ASPN was $282, up 20% on 2019, but down 12% on the post-COVID peak in 2023. Interstate holiday visitors spent an extra $57 per night compared to 2019, but $47 less than 2023 ($394).



ASPN	YE Mar 23	YE Mar 24	Annual Change	Change vs YE Mar 2019
ALL	$320	$282	-$38/night	+$48/night
INTERSTATE	$333	$276	-$57/night	+$32/night

AVERAGE LENGTH OF STAY (ALOS)

While average length of stay was up 1.7 nights on 2019 and on par with 2023, there has been a loss of around 1 night since the peaks in ALOS seen in 2021 and 2022. Elevated ALOS is primarily driven by interstate visitors, who are staying up to 2 nights longer on average; Of these, holiday-makers stayed 10.2 nights (up 1.2 nights on 2019 and similar to 2023) and VFR stayed 9.1 nights (up 2 nights on 2019 and half a night on 2023).



ALOS	YE Mar 23	YE Mar 24	Annual Change	Change vs YE Mar 2019
ALL	9.5	9.7	+0.2 nights	+1.7 nights
INTERSTATE	9.1	9.7	+0.6 nights	+2.3 nights

KEY MARKETS

INTERSTATE MARKETS

The vast majority of Tasmania's visitors are from interstate (84%), with VIC, NSW and QLD accounting for 70% of all visitors to the state (or 84% of interstate visitors).

VICTORIA

Traditionally the largest single market, VIC has still not fully recovered to pre-COVID visitation (down 17% on 2019), although expenditure is 29% higher than 2019. Holiday visitors saw a strong return in YE Mar 2024, but were down 4% on 2019.

NEW SOUTH WALES

Total NSW visitation did not recover to 2019 levels over the year (-5% on 2019), but spend was up 32%. NSW Holiday-makers did, however, exceed 2019 levels (+7%), with spend also up 35%.

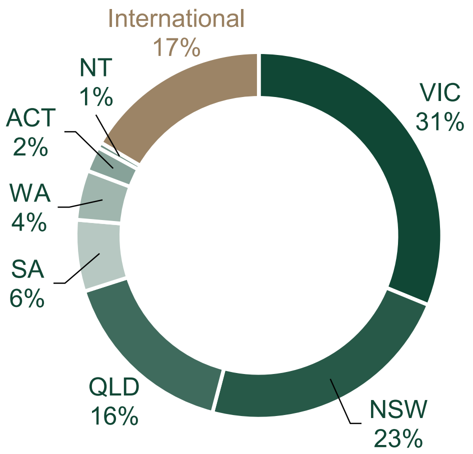
QUEENSLAND

QLD was the only market of the top three to see more visitors (+19%) and spend (+56%) than in 2019. QLD holiday visitors also exceeded pre-covid visitation (+42%) and expenditure (+75%) in the year ending March 2024.

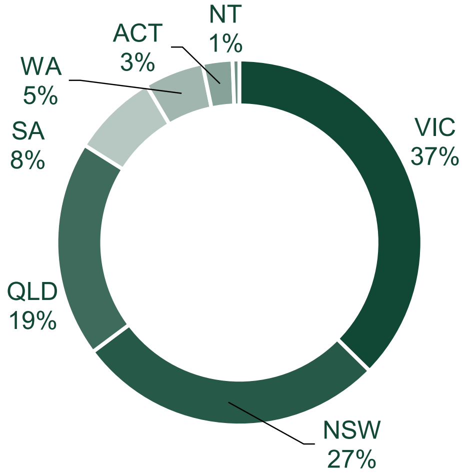
SOUTH AUSTRALIA

In the year ending March 2024, SA set spend and visitation records across both total and holiday visitors. This equates to an additional 20,000 South Australian visitor and $130m annually compared to 2019. As a result, South Australia's share of the interstate market increased to 8% (up 2 ppts from 2023 and 3 ppts from 2019).

ALL VISITORS



INTERSTATE VISITORS



INTERNATIONAL MARKETS

Tasmania's international visitor recovery is lagging slightly behind the national average, at 79% of YE March 2019 compared to 84% nationally. This is due to Tasmania traditionally seeing a higher than average proportion of its international visitors visiting for a holiday, rather than to see friends or relatives, on business, or for education.

In the year ending March 2024, Tasmania maintained it's pre-COVID share of holiday visitors to Australia at 4.35%, however, slower recovery of this market nationally (75% of 2019 levels) held Tasmania's overall international visitor recovery down. In contrast, VFR visitation into Australia has exceeded 2019 levels by 25%.

TASMANIA
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Tourism Tasmania

TOTAL VISITORS TO TASMANIA

YEAR ENDING December 2023

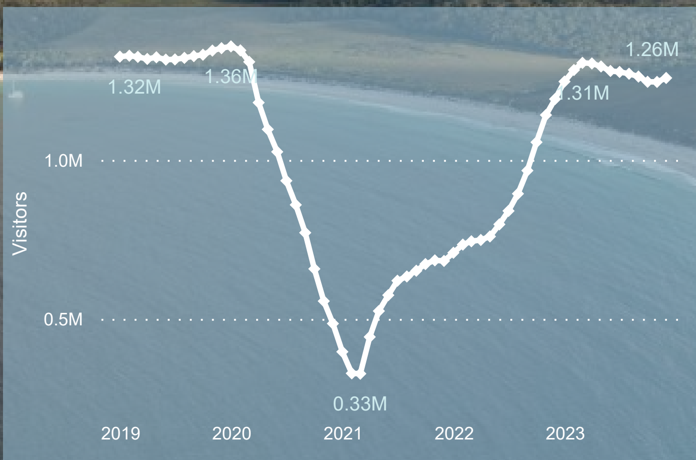
ALL VISITORS*

1.26M	12.23M	$3.63bn	9.7	$2.888K	$297
Visitors	Visitor Nights	Visitor Spend	ALOS (Nights)	ASPV	ASPN
▲ 5.6%	▲ 9.7%	▲ 4.5%	▲ 3.9%	▼ -1%	▼ -4.7%
93.1% of 2019	112.5% of 2019	142.9% of 2019	120.9% of 2019	153.5% of 2019	127% of 2019

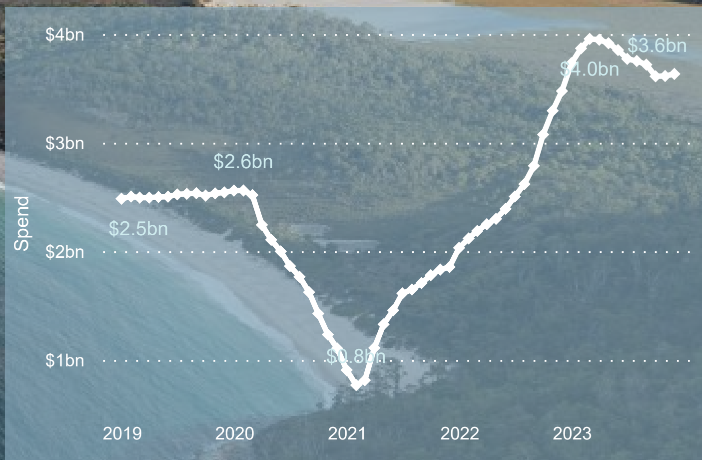
ALL HOLIDAY VISITORS

691.09K	6.98M	$2.61bn	10.1	$3.777K	$374
Visitors	Visitor Nights	Visitor Spend	ALOS (Nights)	ASPV	ASPN
▲ 12%	▲ 18.2%	▲ 9.2%	▲ 5.6%	▼ -2.5%	▼ -7.6%
108.8% of 2019	121.8% of 2019	156% of 2019	111.9% of 2019	143.4% of 2019	128.1% of 2019

ROLLING ANNUAL VISITATION TO TASMANIA



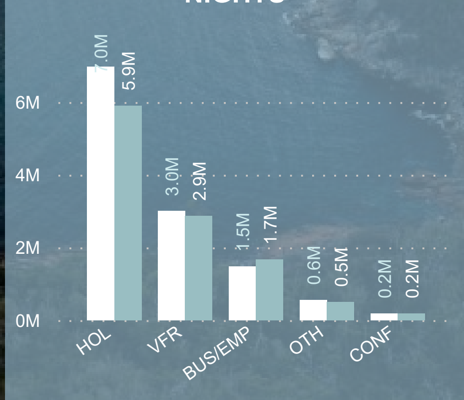
ROLLING ANNUAL SPEND IN TASMANIA



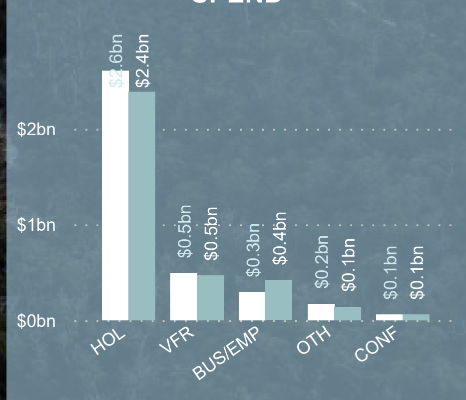
PURPOSE OF VISIT TO TASMANIA

VISITORS

NIGHTS



SPEND



▲ Increase
▼ Decrease

% Change is from previous year.
* Total visitors is interstate and international, excluding Tasmanians and cruise ships.

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.

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INTERSTATE VISITORS TO TASMANIA

YEAR ENDING December 2023

ALL INTERSTATE VISITORS*

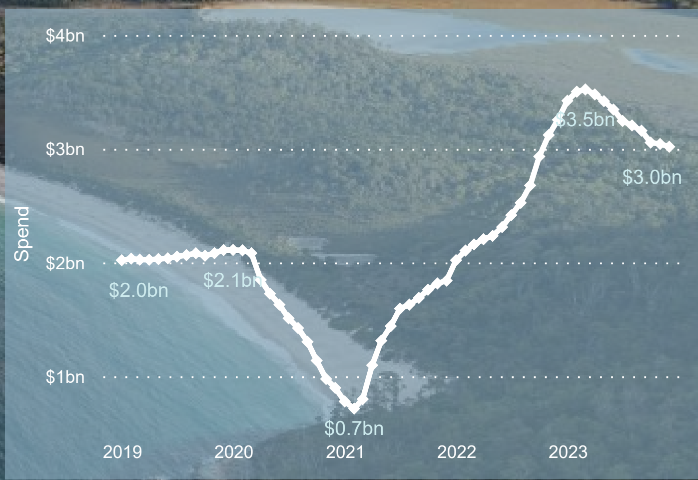
1.07M	10.26M	$3.02bn	9.6	$2.832K	$294
Visitors	Visitor Nights	Visitor Spend	ALOS (Nights)	ASPV	ASPN
▼ -4.1%	▲ 2.6%	▼ -7.3%	▲ 7%	▼ -3.3%	▼ -9.6%
92.2% of 2019	116% of 2019	143.1% of 2019	125.8% of 2019	155.1% of 2019	123.3% of 2019

INTERSTATE HOLIDAY VISITORS

555.60K	5.83M	$2.15bn	10.5	$3.869K	$369
Visitors	Visitor Nights	Visitor Spend	ALOS (Nights)	ASPV	ASPN
▼ -2.9%	▲ 6.4%	▼ -4.4%	▲ 9.6%	▼ -1.6%	▼ -10.2%
111.2% of 2019	126.4% of 2019	158.2% of 2019	113.6% of 2019	142.2% of 2019	125.2% of 2019

ROLLING ANNUAL VISITATION TO TASMANIA

ROLLING ANNUAL SPEND IN TASMANIA



STATE OF ORIGIN

States	Visitors	Nights '000	Spend $m	ALOS	ASPV	ASPN	% Share visitors from state: Holiday	VFR	Business	Other
VIC	391,100	2,976	$888	7.6	$2,271	$298	47%	27%	19%	5%
NSW	294,600	2,745	$864	9.3	$2,933	$315	56%	25%	13%	4%
QLD	210,300	2,463	$695	11.7	$3,305	$282	57%	25%	12%	4%
SA	73,900	689	$215	9.3	$2,907	$312	52%	25%	13%	7%
WA	58,800	886	$234	15.1	$3,980	$264	57%	28%	8%	3%
ACT	27,100	295	$76	10.9	$2,799	$257	40%	35%	13%	8%
NT	8,000	167	$39	20.9	$4,934	$236	53%	28%	9%	8%

▲ Increase
▼ Decrease

% Change is from previous year.
* Interstate refers to Australian travellers, excluding Tasmanians and cruise.

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.

REGIONAL VISITATION

While total visitation in year ending March 2024 was only slightly (2%) below the previous year, there were mixed results across the regions.
The Southern and East Coast tourism regions saw record visitation, whereas Northern and West by North West (WxNW) saw declines from the previous year. All regions saw declines in visitation from interstate visitors, indicating that the gains for the Southern and East regions was driven largely by international visitation rebounding.

The decline for the Northern tourism region follows a period of softening seen through 2023 as fewer visitors in the state for holidays or to visit friends or relatives included the region in their trip, though this significantly eased from late 2023 and through the peak summer season.
The WxNW tourism region has been, and continues to, follow a similar trend to the North.

In the year ending March 2024, a number of destinations around the state also individually saw new records for nights spent in their areas, including Stanley (+93%), Bruny Island (+81%), Bicheno (+38%), Derby (+26%) and Hobart City (+19%). The full list of where visitors go and how long they stay can be found on the interactive online TVS Analyser.

ALL VISITORS	Visitors			Nights		
	2024	Annual Change	Change on 2019	2024	Annual Change	Change on 2019
SOUTHERN	1,115,300	5%	7%	6,323,500	10%	28%
NORTHERN	663,100	-7%	-7%	1,863,700	-12%	-14%
W X NW	531,900	-6%	2%	2,301,600	-3%	12%
EAST	440,900	5%	25%	1,101,200	1%	37%

INTERSTATE VISITORS	Visitors			Nights		
	2024	Annual Change	Change on 2019	2024	Annual Change	Change on 2019
SOUTHERN	918,300	-2%	7%	5,231,100	6%	34%
NORTHERN	526,500	-17%	-10%	1,580,700	-17%	-5%
W X NW	432,800	-14%	2%	1,950,700	-2%	21%
EAST	332,600	-7%	28%	853,100	-7%	43%

ATTRACTIONS

Despite total visitation to the state remaining below levels seen before COVID, visitors are including more attractions per trip than before, including to attractions in regional areas. The 2023/24 summer season was primarily responsible for driving this trend.

Regional dispersal to attractions didn't come at the expense of attractions in Hobart, with Salamanca Market seeing an increase on summer 2022-23.

Tasmania's wilderness and wildlife are significant drivers of visitation to the state, with 43% of all visitors citing these experiences as an influence to visit, up 4ppts from 2019.

41% of all visitors to the state visited at least one national park, up 2ppts on 2019

47% of visitors undertook a bushwalk (any duration), up 3%pts on 2019

VISITATION TO TOURISM REGIONS
(INTERSTATE & INTERNATIONAL)

YEAR ENDING December 2023

VISITORS TO REGIONS

1.10M ▲ 16.7%	**652.32K** ▲ 1.1%	**536.77K** ▲ 6.6%	**432.16K** ▲ 17.6%
Southern	Northern	West x North West	East Coast
102.8% of 2019	91.7% of 2019	104.7% of 2019	120.9% of 2019

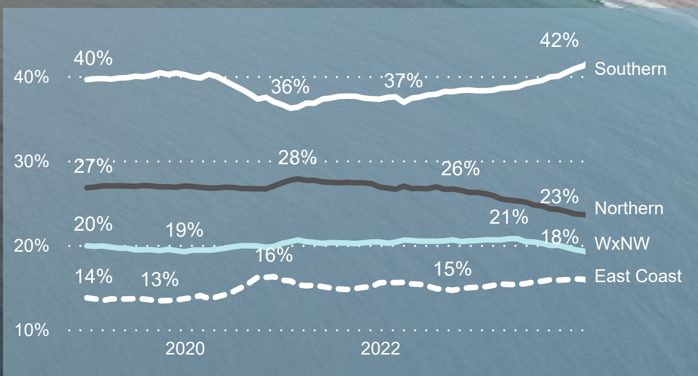
OVERNIGHT VISITORS^

1.03M ▲ 15.1%	**486.14K** ▼ -3.4%	**422.99K** ▲ 7.3%	**335.12K** ▲ 9.9%
Southern	Northern	West x North West	East Coast
103% of 2019	88.8% of 2019	107.9% of 2019	112.6% of 2019

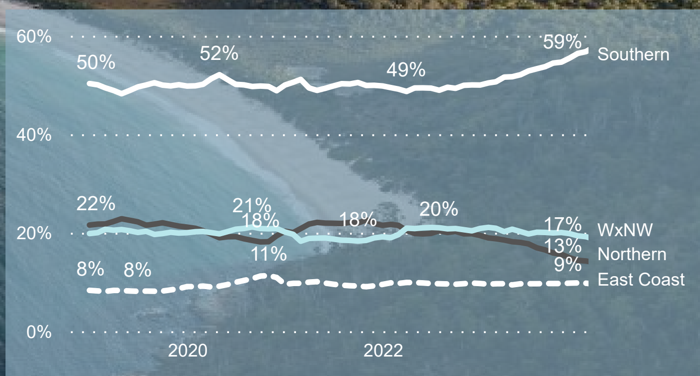
NIGHTS IN REGIONS

6.28M ▲ 22.1%	**1.69M** ▼ -16.…	**2.25M** ▲ 7.1%	**1.11M** ▲ 10%
Southern	Northern	West x North West	East Coast
5.7 ALOS	**2.6** ALOS	**4.2** ALOS	**2.6** ALOS

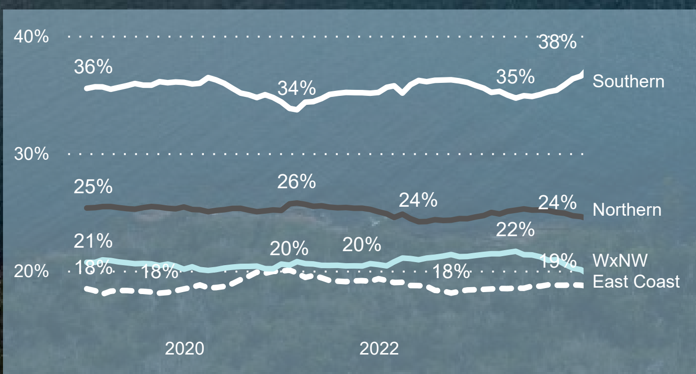
ROLLING ANNUAL SHARE* OF VISITORS BY REGION



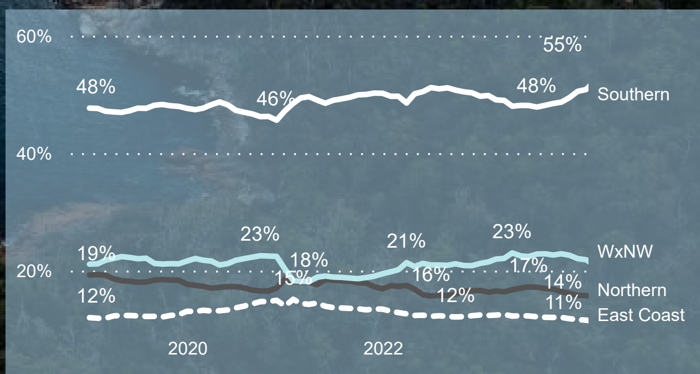
ROLLING ANNUAL SHARE OF NIGHTS BY REGION



ROLLING ANNUAL SHARE OF HOLIDAY VISITORS



ROLLING ANNUAL SHARE OF HOLIDAY NIGHTS



▲ Increase
▼ Decrease

% Change is from previous year.
^ Visitors who stayed at least one night in the region.
* Share of visitors refers to share of total to the state

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.

MARCH 2024 QUARTER

Spend in the March quarter of 2024 totalled $1.34b, falling 9% from the record high seen in the same quarter of 2023 ($1.47b), as visitors spent around 13% less each on their stay in Tasmania. Compared to 2019, visitors spent an additional $832 each on average in this quarter, leading to total expenditure increasing 38% - or $360m – over the last four years.

Average length of stay (10.5 nights) for interstate holiday visitors has returned to similar levels seen before COVID, however the average across all interstate visitors has remained at the elevated level of around 11 nights (10.8 March quarter 2024, up from 8.4 in 2019) seen since 2021 due to longer stays by trips to visit friends or relatives (VFR) in Tasmania, with slightly more of these visitors also having already visited once in the previous 12 months.

	Spend	Visitors	Nights	ASPV	ASPN	ALOS
ALL VISITORS	1,115,300	5%	7%	6,323,500	10%	28%
INTERSTATE	663,100	-7%	-7%	1,863,700	-12%	-14%

REGIONAL VISITATION

In the March quarter of 2024, the Southern and East Coast tourism regions set new visitation records for any previous quarter. All regions except the East Coast also set new records for nights in a quarter. Within the WxNW tourism region, both the North West and West Coast saw a 24% increase each in nights; however, as the North West accounts for around 79% of nights in the tourism region, it's growth in actual number of nights was almost four times greater than the West Coast, largely due to an influx of visitors in Tasmania to see friends or relatives.

ALL VISITORS	Visitors			Nights		
	2024	Annual Change	Change on 2019	2024	Annual Change	Change on 2019
SOUTHERN	380,200	4%	4%	2,205,200	2%	20%
NORTHERN	258,100	4%	1%	857,800	25%	11%
W X NW	205,600	-2%	8%	987,200	6%	24%
EAST	179,200	5%	22%	442,700	-1%	16%

INTERNATIONAL VISITATION

International visitation data on this page comes from Tourism Research Australia's International Visitor Survey (IVS).

Post-pandemic international travel into Australia and Tasmania continued to increase throughout 2023, with Tasmania's share of all international visitors to Australia at 3.1% (3.2% in 2019), and 4.6% of holiday visitors (5.1% in 2019).

	SPEND	VISITORS	NIGHTS
VISITATION TO AUSTRALIA	$46.794B +5% on 2019	7.178M -16% on 2019	266.67M -1% on 2019
VISITATION TO TASMANIA	$417.2M -15% on 2019	236,400 -21% on 2019	4.27M -4% on 2019

56% Int'l Visitors

TOP 5 VISITOR COUNTRY OF ORIGIN	YE Mar 2019	YE Mar 2024	Change on 2019
United States of America	41,300	41,400	+2%
United Kingdom	27,500	24,100	-12%
China	48,700	20,600	-58%
Hong Kong	25,700	18,100	-30%
New Zealand	21,400	16,200	-24%
Germany	10,100	11,500	+14%
Other Countries	124,200	104,500	-16%
TOTAL INTERNATIONAL VISITORS TO TASMANIA	298,900	236,400	-21%

INTRASTATE VISITATION

Intrastate visitation data on this page comes from Tourism Research Australia's National Visitor Survey (NVS).

Tasmanians spent over $1.8billion on trips within the state in the year ending March 2024, across overnight trips ($1.05b) and on day trips ($800m).

Tasmanians took 17% mroe overnight trips within the state compared to the previous year, with trips lasting an average of 2.4 nights away (on par with 2019). As Tasmanians didn't change their trip length, this has led to a decrease in spend per night to $252 (down 13%, or $38 per night).
Spend by Tasmanians taking overnight trips for a holiday was up 4% to $406million, with the number of trips taken up 16% on year ending March 2023.

	YE Mar 23	YE Mar 24	Annual Change	Change vs YE Mar 2019
OVERNIGHT TRIPS	1.48m	1.73m	+17%	+2%
SPEND	$1.03b	$1.05b	+2%	+21%
NIGHTS	3.54m	4.16m	+1%	-6%
DAY TRIPS	5.94m	5.23m	-12%	-20%
SPEND	$745m	$801m	+8%	+17%

INTERNATIONAL VISITORS TO TASMANIA

YEAR ENDING December 2023

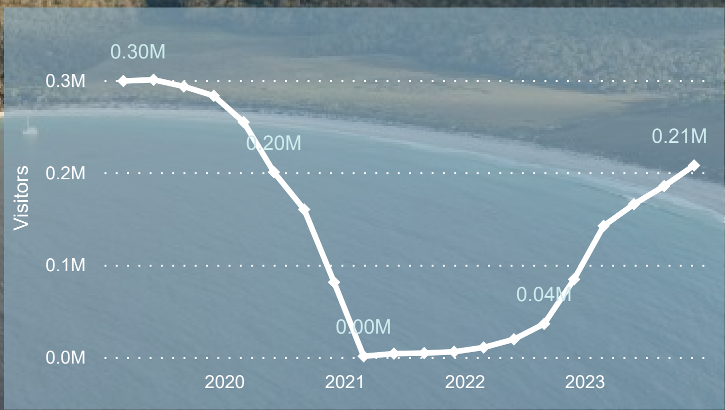
ALL VISITORS

207.48K	3.40M	$365M	16.37	$1,760	$108
Visitors	Nights	Spend**	ALOS (Nights)	ASPV	ASPN
▲ 146.5%	▲ 150.7%	▲ 138.4%	▲ 1.7%	▼ -3.3%	▼ -4.5%
73% of 2019	80% of 2019	66% of 2019	2019: 15	2019: $1962	2019: $131

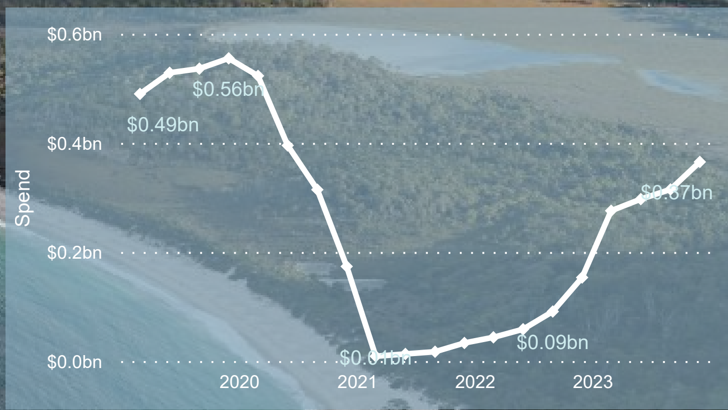
HOLIDAY VISITORS

149.32K	1.50M	$240M	10.07	$1,608	$160
Visitors	Nights	Spend**	ALOS (Nights)	ASPV	ASPN
66% of 2019	76% of 2019	77% of 2019	2019: 8.7	2019: $1386	2019: $158

ROLLING ANNUAL VISITATION TO TASMANIA



ROLLING ANNUAL SPEND IN TASMANIA



PRIMARY INTERNATIONAL SOURCE MARKETS

Markets	Visitors	Nights '000	Spend $m	ALOS (nights)	ASPV	% Share visitors from country*: HOL	VFR	BUS	EDU	Other
USA	40,300	420	50	10.4	$1,244	80%	18%			3%
UK	23,300	345	30	14.8	$1,291	58%	39%	4%	2%	8%
Hong Kong	16,700	198	42	11.8	$2,531	97%	5%		0%	16%
New Zealand	16,100	155	41	9.6	$2,537	76%	20%	7%		7%
China	15,600	133	25	8.5	$1,617	70%	28%		3%	
Singapore	5,600	37	12	6.5	$2,155	89%	11%			

▲ Increase
▼ Decrease
+ % Change is from previous year.
++ IVS data up to December 2022 is based on imputations from pre-COVID visitor behaviours. March quarter 2023 is the first period to be based on interviews
* 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

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. Between March 20 and Dec 22 the IVS scaled back interviews and primarily utilises passenger data cards. Interviews fully resumed from Jan 20. The IVS is conducted by Tourism Research Australia

INTRASTATE TRIPS WITHIN TASMANIA

YEAR ENDING December 2023

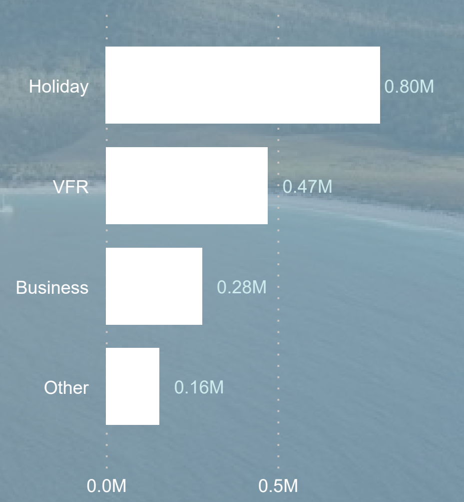
OVERNIGHT TRIPS

1.69M	4.02M	$1.13bn	2.4	$281	$668
Trips	Visitor Nights	Visitor Spend	ALOS (Nights)	ASPT	ASPN
▲ 8.3%	▲ 7.6%	▲ 19.5%	▼ -0.7%	▲ 11.1%	▲ 10.3%

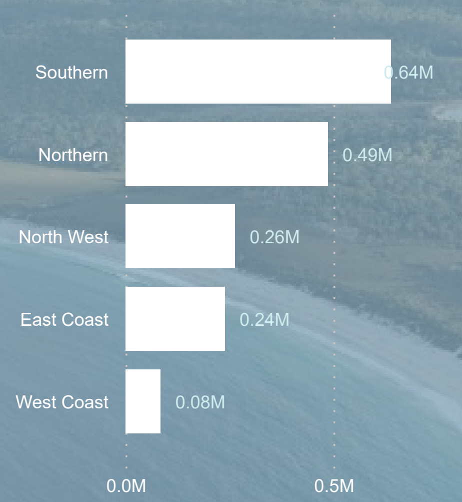
HOLIDAY OVERNIGHT TRIPS*

799.13K	1.88M	$409M	2.4	$218	$512
Trips	Visitor Nights	Visitor Spend	ALOS (Nights)	ASPT	ASPN
▼ -0.2%	▼ -7.8%	▼ -0.1%	▼ -7.6%	▲ 8.4%	▲ 0.1%

PURPOSE OF OVERNIGHT TRIP



OVERNIGHT TRIPS IN REGIONS



NIGHTS IN REGIONS

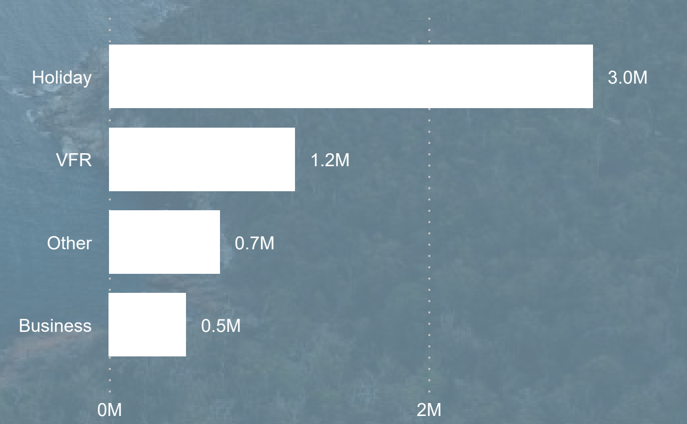
DAY TRIPS

5.37M	$768M	$143
Trips	Spend	ASPT
▼ -4.7%	▼ -0.1%	▲ 4.9%

HOLIDAY DAY TRIPS^

3.03M	$438M	$145
Trips	Spend	ASPT
▲ 11.6%	▲ 3.8%	▼ -6.9%

PURPOSE OF DAY TRIP



▲ Increase
▼ 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.

TASMANIAN ACCOMMODATION

Tourism Tasmania measures a range of metrics of visitation into the state and across the visitor economy. This has traditionally been an historical insight, predominantly through the Tasmanian Visitor Survey, National Visitor Survey and International Visitor Survey.

Accommodation demand is a key indicator of industry and community recovery, and Tourism Tasmania has engaged and works closely with two providers to deliver meaningful data that broadly represents the range of operators in Tasmania's accommodation sector.

- STR: Hotels, motels and other commercial accommodation with more than three rooms.
- AirDNA: Short-stay accommodation.

While only one sector of the visitor economy, accommodation data provides insight into the demand from of travellers in the state.

ACCOMMODATION DATA SOURCES

STR GLOBAL: COMMERCIAL ACCOMMODATION

STR provides accommodation operators an opt-in system to add their data to an anonymous aggregate report, drawing on a broad capture of platforms and booking systems, across a wide range of accommodation types. STR takes into account operator size, rating, brand affiliation and rates. Providers of hotel, motel, lodge and similar accommodation are invited to join the free STR program to help us monitor this important sector.

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

AIRDNA: SHORT-STAY ACCOMMODATION

AirDNA provides an indicative view of the shortstay accommodation sector, including holiday homes, shacks, homes and self-contained apartments, as well as some traditional bed and breakfasts if they list on Airbnb or VRBO.
Data is provided across multiple indicator regions, offering a view of urban and regional performance. Data in this snapshot refers only to 'entire properties', where guests have the entire home to themselves; approximately 85% of listed properties in Tasmania. This can be a standalone building or self-contained apartment.

TASMANIAN ACCOMMODATION REGIONS

COMMERCIAL ACCOMMODATION - STR GLOBAL

The STR commercial accommodation occupancy data provides insight into this sector of the industry for four regions; Hobart and the South, Launceston and the North, East Coast and North West. The zones align with the state's Tourism Regions, except for the North West which excludes the West Coast due to insufficient sample. Tourism Tasmania actively encourages property managers to contribute to this anonymous dataset to continually improve the reliability of the data. Please contact Jacqueline (jchoo@str.com) to contribute anonymously to industry insights and monitoring, and access your own bespoke complimentary report.

SHORT-STAY ACCOMMODATION - AIRDNA

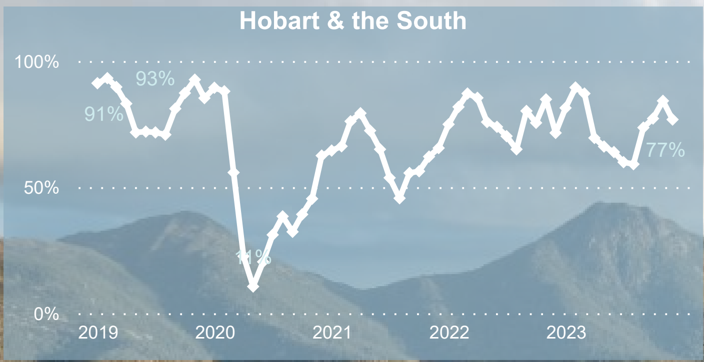
The AirDNA short-stay accommodation forward demand (booked nights) data provides insight into this sector of the industry at a state level plus Hobart, Launceston, and regional zones. The zones have been created to represent a range of urban and regional areas in the state on Airbnb and VRBO; the state level includes all 'entire places' listed in Tasmania in the period.

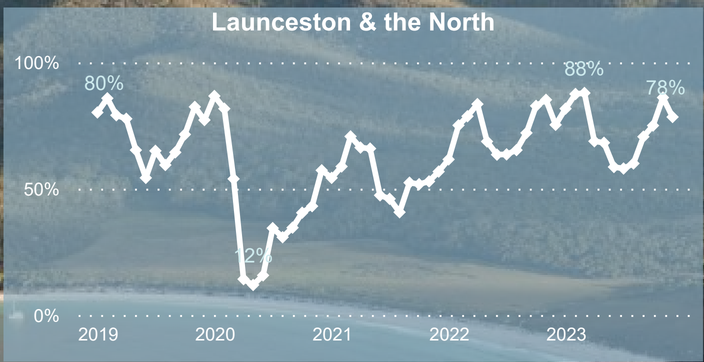
ZONE	REGIONS INCLUDED
HOBART	Hobart City Council
LAUNCESTON	Launceston City Council
WEST COAST	West Coast Council
BRUNY ISLAND	North & South Bruny Island
TASMAN PENINSULA	Tasman Council
HUON - FAR SOUTH	Huon Valley Council
KING ISLAND	King Island Council
FLINDERS ISLAND	Flinders Council
DERBY	Derby, Branxholm, Ringarooma, Pioneer
EASTERN SHORE (HOBART)	Geilston Bay to Transmere, incl. Mornington
ORFORD	Orford, Spring Beach, Triabunna, Little Swanport
FREYCINET	Coles Bay, Swanwick, Bicheno, Swansea
NORTH WEST	Circular Head, Waratah-Wynyard, Burnie, Devonport, Central Coast, Kentish & Latrobe LGAs
NORTH EAST COAST	Bay of Fires, St Helens, Wellborough, Douglas River
EAST TAMAR - BRIDPORT	George Town Council, Bridport
DELORAINE - EVANDALE	Deloraine, Mole Creek, Westbury, Evandale

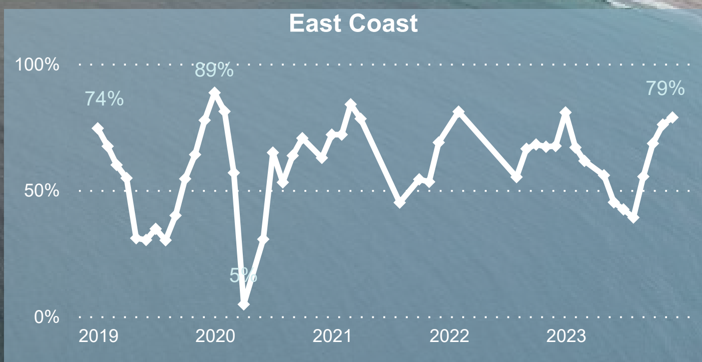
COMMERCIAL ACCOMMODATION IN TASMANIA

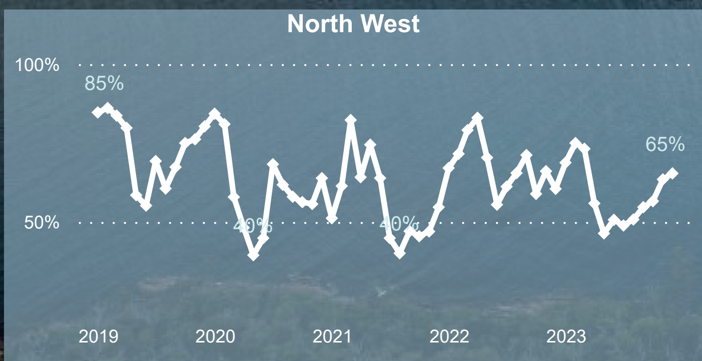
YEAR ENDING December 2023

OCCUPANCY BY MONTH

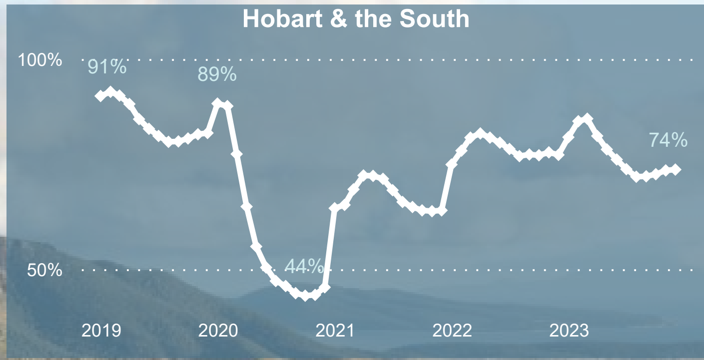


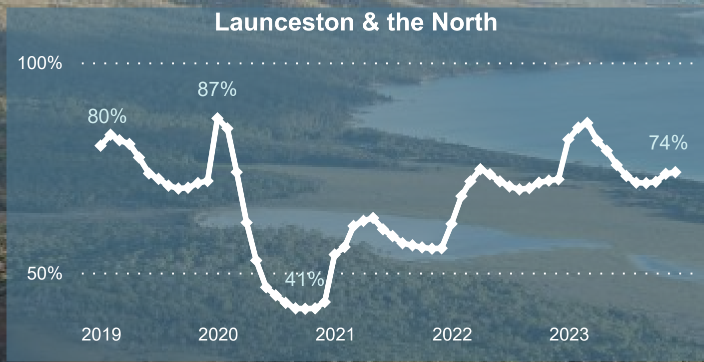


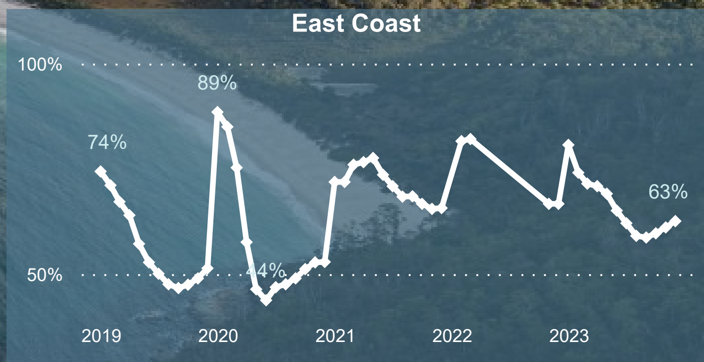


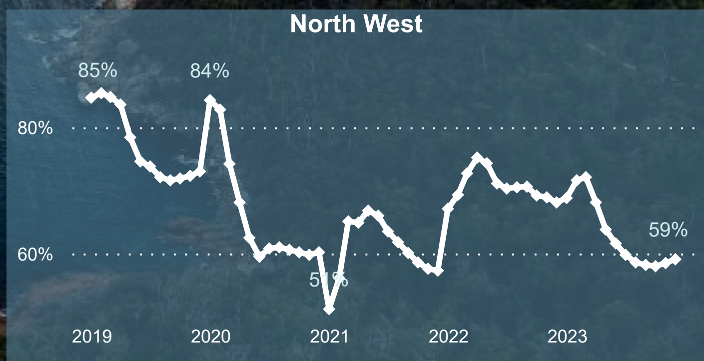


OCCUPANCY BY ROLLING YEAR ENDING









Source: CoSTAR UK

Image: Wineglass Bay, Robert King Visuals

Some months are omitted due to insufficient sample.

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

TASMANIA
COME DOWN FOR AIR
Tourism Tasmania

SHORT-STAY ACCOMMODATION IN TASMANIA

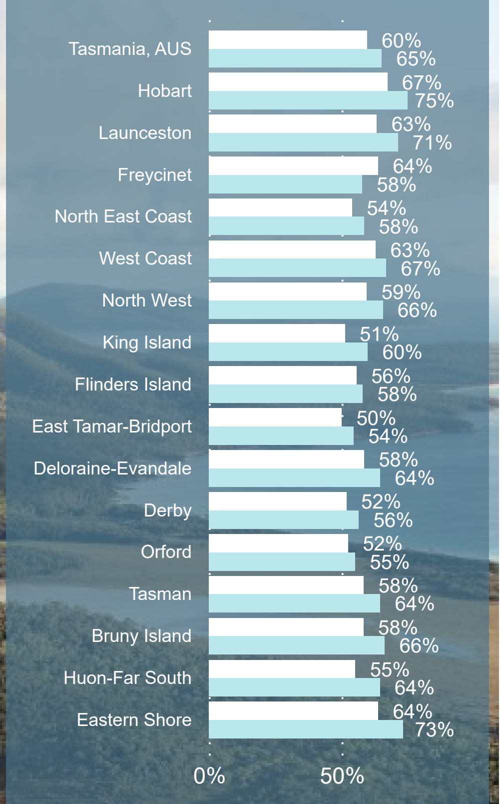
YEAR ENDING December 2023

Selected Year Ending   Previous Year Ending

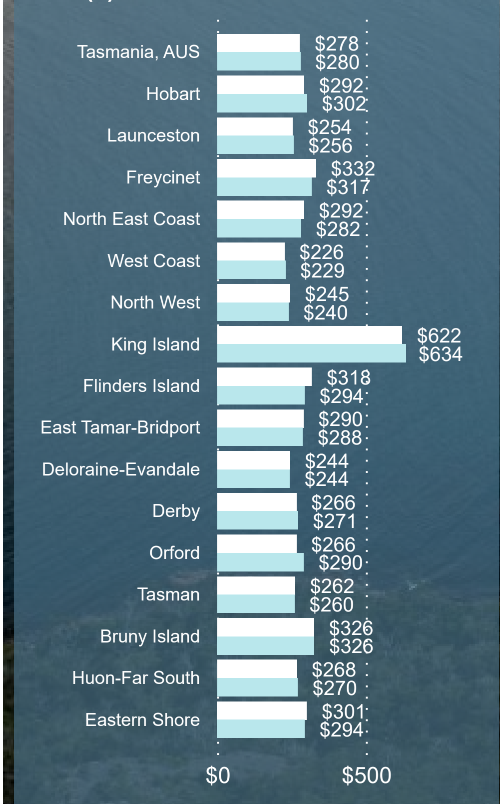
Supply (Nights Available)

Demand (Nights Booked)

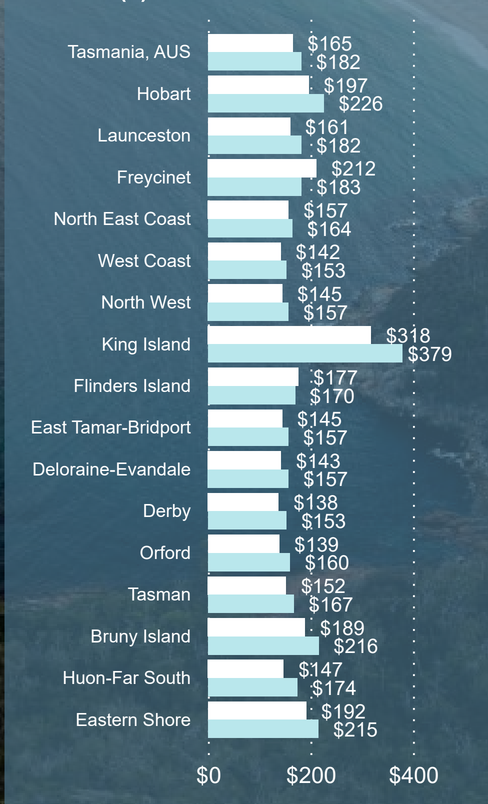
Occupancy (%)



ADR ($)



RevPAR ($)



Revenue Estimated ($m)

Source: AirDNA
Data shown is for 'entire properties' only.
% change is compared to the previous year.
Image: Wineglass Bay, Robert King visuals

Revenue, ADR and RevPAR are converted from USD at exchange rate of 1.51 as at 14 February 2023 for YE November 2023 totals and therefore AUD contribution is estimated only. Includes cleaning fees but not other Airbnb or VRBO service fees.

ABOUT THIS SNAPSHOT

The Tasmanian Tourism Snapshot is published every quarter, using the latest figures from the Tasmanian Visitor Survey (TVS) and supplementary sources to provide you with an overview about international and interstate visitors to Tasmania, as well as intrastate travel by Tasmanians. Accommodation data from AirDNA and STR are also featured. More detailed statistics are available at Tourism Tasmania's corporate website at www.tourismtasmania.com.au/research and via the interactive TVS Analyser www.tvsanalyser.com.au

A NOTE OF CAUTION

You are advised to exercise care when interpreting figures contained in this report or the TVS Analyser. Figures are an estimate based on a sample of visitors, and may, therefore, 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 for further information, available at www.tourismtasmania.com.au/research/tvs.

DATA SOURCES

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 on visitors to Tasmania, and is based on a sample of more than 9,000 departing visitors per year. Interviews take place at the states' four main airports, as well as the Spirit of Tasmania terminal. 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. Prior to COVID-19 the IVS sampled, on average, 40,000 departing, short-term international travellers in the departure lounges of eight international airports across Australia (not including Hobart). Between April 2020 and December 2022 the IVS utilised incoming passenger cards and algorithms supplemented by surveys. January 2023 saw the full re-introduction of survey-based sampling. www.tra.gov.au/international

NATIONAL VISITOR SURVEY (NVS)

The NVS is also administered by Tourism Research Australia, and samples approximately 90,000 Australians annually. Unlike the IVS, the NVS continued uninterrupted during the COVID pandemic as it is entirely based on mobile phone calls. The NVS provides the only nationally comparable travel data for Tasmanians within their own state. www.tra.gov.au/domestic

NOTES

1. Annual change refers to the percentage change between the year covered by this snapshot compared to the year prior.
2. All visitors refers to interstate and international, excludes intrastate (Tasmanians).