Tourism Tasmania

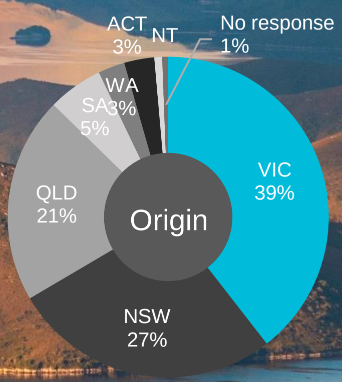
Tourism **Snapshot**

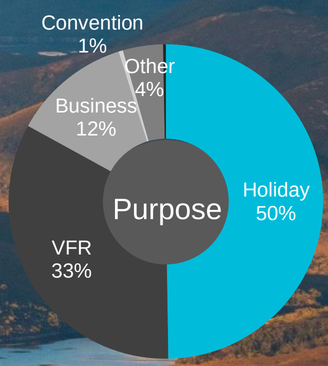
Year ending September **2021**

651,500 Visitors	▼ -16%
6.73 M Visitor Nights	▲ 8%
$1.71 B Visitor Spend	▲ 5%

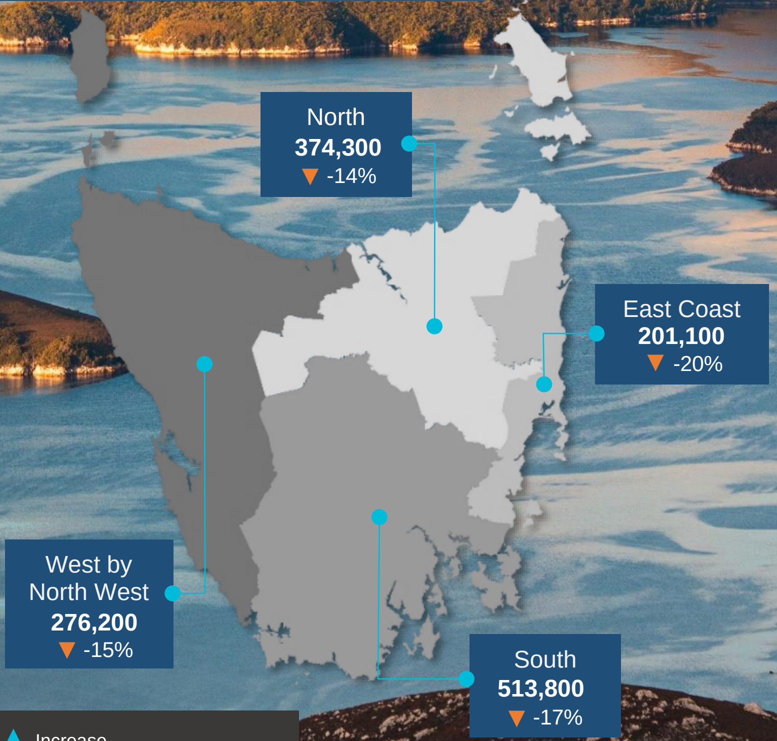
Interstate*	Visitors	**646,700**	► 0%
	Nights	**6.49** M	▲ 34%
	Spend	**$1.69** B	▲ 30%

% Share

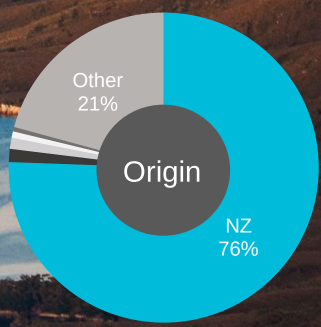




Visitors to Tourism **Regions**



International^	Visitors	**4,400**	▼ -97%
	Spend	**$15** m	▼ -95%



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

Latest Tasmanian visitation statistics are available anytime via the interactive TVS Analyser at **http://www.tvsanalyser.com.au**

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

*Source: Tasmanian Visitor Survey (TVS)
^Source: International Visitor Survey (IVS)

Image: Matt Donovan
Bathurst Harbour, South West

Important context due to COVID-19

COVID-19 has continued to impact Tasmania's visitor economy since 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. Since, there have been ongoing interstate travel open between states and territories, however this has been punctuated by lockdowns and travel restrictions, particularly for New South Wales and Victoria.

Limited international leisure travel to Australia recommenced in April 2021 with the introduction of an Australian-New Zealand travel bubble, including direct flights between Hobart and Auckland. However, due to COVID-19 outbreaks and lockdowns in both Australia and New Zealand the trans-Taman travel bubble was suspended at multiple stages during the June quarter 2021, and remained suspended for the September quarter 2021. 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 November & December 2020, January to September 2021. Therefore the year ending September 2021 period contains 11 months of data: November 2020 to September 2021.
  Since the TVS was paused in 2020 due to COVID-19, then restarted in late October 2020, therefore, comparing the current and previous years' data should be treated with caution.
+ **NVS**: Continued throughout 2020 and 2021 as it is conducted via mobile phone calls.
+ **IVS**: Paused in March 2020, has not resumed.
  - Therefore, year ending September 2021 data is comprised of a full twelve months whereby Australia's international border was closed, and the data should be understood in that context.
  - Tourism Research Australia is utilising supplementary data sources to provide figures from April 2020-September 2021, including passenger cards.

Monitoring recovery

Comparing visitation by month through 2020-21 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. While international travel remains restricted, the comparison includes only interstate visitors.

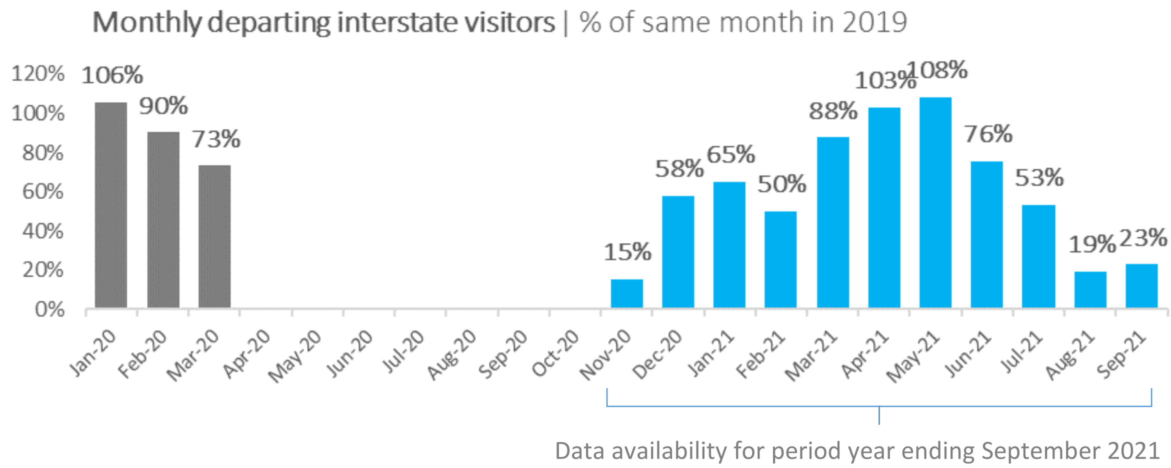
As the TVS is a departure survey at the end of a visitors' trip, it is likely that there were more visitors in the state in the month of November 2020 that is not evident in the data. Visitation in December 2020 was just over half that experienced in the same month in 2019, with March to June 2021 seeing some of the highest ever domestic holiday visitation to the state, which highlights demand for travel has been strong when restrictions allow movement.

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.

The blue columns in the chart over the page represent the months the TVS was operational, and also highlight that the year ending September 2021 data in this report refers to these 11 months. This is an important consideration when comparing year on year changes in visitation. Visitation from July to September 2021 were affected by extensive lockdowns of mainland states.

Tourism Snapshot

Year ending September 2021



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 sixteen indicator regions around Tasmania, across multiple metrics. This sector is more prevalent in regional areas. Short-stay accommodation insights are provided from page 14 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 from page 20 of this report.

Get the latest visitation data, any time

+ TVS Analyser. The online TVS Analyser makes available a range of further data from the Tasmanian Visitor Survey on an interactive dashboard, allowing filtering of key metrics across selected time periods. The Analyser displays the most recently available data on visitation to Tasmania.
+ Industry recovery reporting. Tourism Tasmania publishes a monthly report focusing on traveller sentiment, consumer confidence and forward-looking accommodation demand to provide the industry with a high-level indication of recovery tracking.
+ Find all of Tourism Tasmania's research and insights reports at https://www.tourismtasmania.com.au/research/visitors

Recovery Tracking | Domestic Visitors - Monthly

The Tasmanian Visitor Survey (TVS) recommenced visitor interviews in November 2020, in line with easing of travel restrictions from most interstate markets. Further COVID outbreaks and associated lockdowns have continued to occur, particularly in Tasmania's two largest markets of New South Wales and Victoria. However, demand for Tasmania has been strong, with July to September recording higher spend and more nights than seen in each of their respective months in 2019.

Following the trends observed in New Zealand and overseas, visitation to the state in the initial re-opened months saw a signficant swing towards people reconnecting with friends and family, with holidays taking a lesser share of trips. This swing eased by the end of the first quarter of 2021 to be on par with past trends; Holiday returned to be the primary purpose of visit in January while VFR remained elevated until settling to pre-COVID share in March. With travel restricted from two domanint VFR market, Victoria and New South Wales, holiday visitation has take more share through the September 2021 quarter.

The table below provides an overview of topline measures from November 2020, highlighting domestic visitors, nights and spend, comparing recovery months to the same months in 2019 as a reference point.

Please note: Monthly visitation figures have only recently been provided in the Tasmanian Tourism Snapshot. As the TVS is an exit survey it therefore records visitation in the **month of departure** only. For example, if a visitor arrived in December and departed in January, their trip is recorded against January only. Quarterly and year ending visiation figures therefore provide a more complete view of total visitation and can also be found in this Snapshot.

Domestic visitors	Oct 20	Nov 20	Dec 20	Jan 21	Feb 21	Mar 21	Apr 21	May 21	Jun 21	Jul 21	Aug 21	Sep 21
Visitors (000)												
2020-21	*	15	61	101	54	95	116	81	49	45	13	18
2019	*	101	105	155	107	108	112	75	65	84	68	78
% 2019 month	*	15%	58%	65%	50%	88%	103%	108%	76%	53%	19%	23%
Nights (000)												
2020-21	*	181	540	1057	612	944	1120	736	438	452	193	211
2019	*	661	758	1501	738	841	979	574	420	497	416	450
% 2019 month	*	27%	71%	70%	83%	112%	114%	128%	104%	91%	46%	47%
Spend ($m)												
2020-21	*	27	120	264	131	257	298	216	128	154	35	59
2019	*	189	198	382	197	199	235	121	96	120	86	121
% 2019 month	*	14%	61%	69%	66%	129%	127%	179%	133%	128%	41%	49%

Figures in blue represent months where the volume (visitors, nights or spend) in that month was higher than the same month in 2019.

** No TVS interviews were conducted due to COVID-19.*

Tourism Snapshot

Year ending September 2021

Recovery Tracking | Domestic Visitors - Monthly

Tasmanian Visitor Survey

Visitors

Tasmania has seen a strong return of domestic visitation, with an increasing share of holiday visitors and decreasing share of those visiting friends and family and business trips since January 2021.

Significant demand for domestic travel was evident in the first two quarters of 2021, especially May to June when visitors exceeded 2019 months.

Monthly visitation from June to September 2021 was below 2019 levels, although nights and spend held up better, but not fully recovered.

Nights

Nights spent in Tasmania saw an immediate improvement over visitor trips, particularly led by VFR visitors who were staying longer than pre-COVID as family and friends reconnect after mainland lockdowns. From January 2021 onwards nights were driven by domestic holiday visitors.

Each of the months March to June 2021 recorded higher levels of nights stayed in Tasmania by domestic visitors when compared to the same period in 2019. Nights in July 2021 were 91% the level of the same month in 2019.

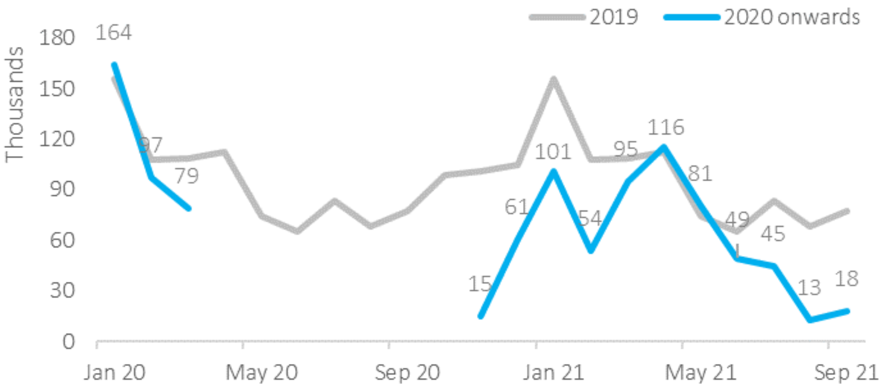
Spend

When Tasmania's border reopened in late 2020 visitor spend began tracking in line with visitor demand, however spend from March 2021 onwards has outpaced both visitor and nights recovery against the same months in 2019.

Average spend per visitor (ASPV) continues to increase, and has been above 2019 levels from December 2020 to September 2021.
Average spend per domestic visitor in July 2021 was $3,447, 40% higher than in 2019; with August and September 2021 ASPV 14% and 13% higher than 2019, respectively. This is being significantly impacted by the absence of short-stay, short-visit VFR visitors from VIC and NSW due to restrictions.

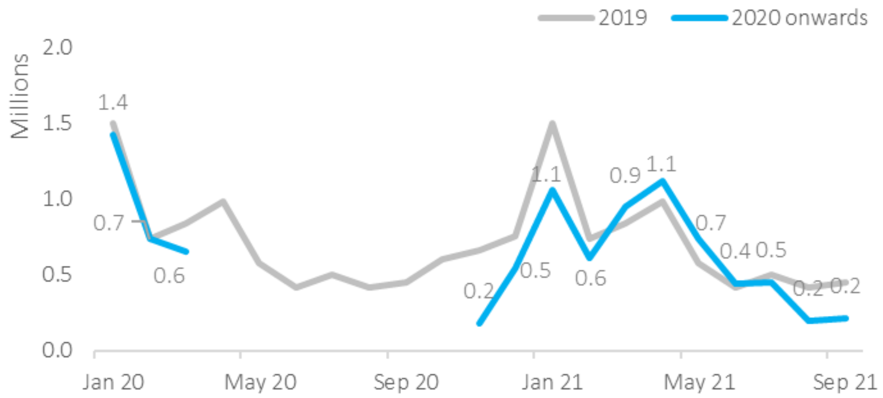
Recovery Tracking | Visitors

TVS | Visitors departing per month



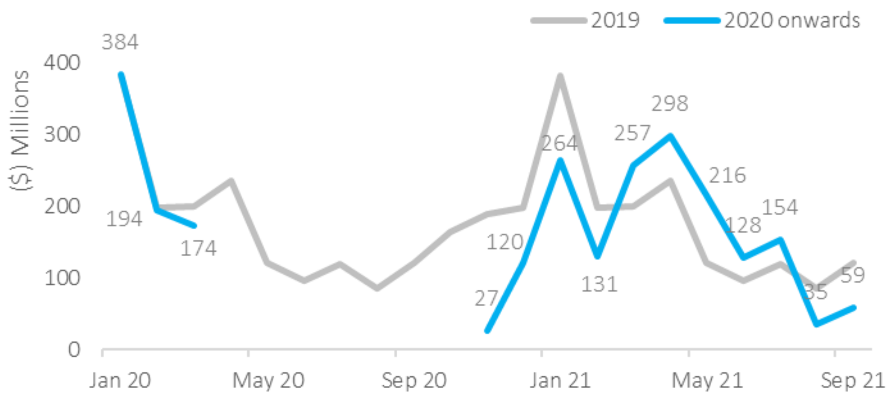
Recovery Tracking | Nights

TVS | Nights in TAS by visitors departing per month



Recovery Tracking | Spend

TVS | Spend in TAS by visitors departing per month



Tourism **Snapshot**

Year ending September 2021

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

Total visitation to Tasmania

Tasmanian Visitor Survey results **YE September 2021**

Total visitors	651,500	▼	-16%
Total nights	6.73 million	▲	8%
Visitor expenditure	$1.71 billion	▲	5%
Interstate visitors	646,700	►	0%
Day visitors	11,400	▼	-36%

As with all destinations globally, Tasmania has seen significant declines in visitation due to COVID-19, although the past year has been a mix of record domestic visitation and closed borders.

Tasmania welcomed 651,500 interstate and international visitors in the year to September 2021, down 16 per cent from the previous year. Total nights were up 8 per cent.

Total visitor spending in Tasmania was $1.71 billion, up 5 per cent on the year ending September 2020.

Purpose of travel

Visitation for all purposes of travel experienced significant declines, and disruption, through 2020 and into 2021. The first 7 months of 2020 were severely impacted by travel restrictions. In November and December 2020, visiting friends or family (VFR) gained substantial share as people reconnected as borders eased.

Share of visitors by purpose stabilised through mid-2020 to reflect similar long-term trends, however the September quarter saw holiday gain share in the absence of VFR visitors from VIC and NSW and more holiday visitors from QLD, SA and WA.

Holiday visitors	323,700	▼	-22%
Holiday nights	3.34 million	▼	-6%
Holiday expenditure	$1.14 billion	►	-1%
VFR visitors	216,600	▲	11%
VFR nights	2.12 million	▲	31%
VFR expenditure	$276 million	▲	27%
Business visitors	79,500	▼	-32%

Mode of departure from Tasmania

Scheduled air	86%	▼	-17%
Spirit of Tasmania	14%	▼	-7%

Despite rolling interruptions to services, scheduled air and sea services operated continuously through the pandemic. Visitor departures via the Spirit of Tasmania were 93 per cent of the levels of the year ending September 2020. Visitor departures via scheduled air services were 83 per cent of the levels of the previous year. However, the previous year contained 7 months whereby travel was heavily impacted by travel restrictions

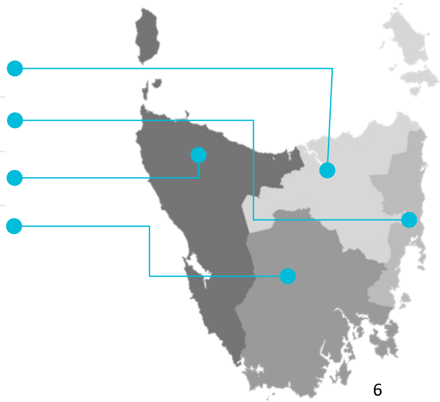
Regional visitation

In-line with state visitation, interstate and international visitors to regions were down in the 12 months to September 2021. However, all regions are seeing increased share of domestic visitors, indicating people are visiting more places on their trips.

Compared to **2019** visitation levels:

+ Northern: 53 per cent of 2019
+ East Coast: 57 per cent
+ West by North West: 54 per cent
+ Southern: 49 per cent.

374,300	▼	-14%	North
201,100	▼	-20%	East Coast
276,200	▼	-15%	WxNW
513,800	▼	-17%	South



Tourism Snapshot

Year ending September 2021

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

Interstate visitation to Tasmania

Visitors	646,700	▶	0%
Nights	6.49 million	▲	34%
Expenditure	$1.69 billion	▲	30%
Average length of stay	10.0 nights	▲	34%
Average spend per visitor	$2,611	▲	29%

Tasmanian Visitor Survey results **YE September 2021**

Visitation to Tasmania was almost entirely supplemented by interstate visitors in the year ending September 2021, with 646,700 interstate visitors coming to the state. Interstate visitation to Tasmania is currently at the level of October 2019-March 2020 (year ending September 2020 period, impacted due to COVID-19). Since Tasmania reopened its border in November 2020, interstate visitor spend totalled $1.69 billion, 30 per cent above the previous year (and 81 per cent of year ending September 2019). Average length of stay has increased by two nights to 10.0 nights, up from both 2020 and 2019 levels.

Interstate purpose of visit

Visitors

The main purposes of travel by interstate visitors in the 12 months to September 2021 were holiday (50 per cent share), visiting friends and relatives (VFR) (33 per cent), and business or employment (12 per cent). The September quarter seen continued elevation in the share of purpose of visit to be predominately holiday as the major purpose, followed by VFR. Business has not recovered.

Holiday	321,800	▶	1%
VFR	214,900	▲	23%
Business	78,500	▼	-29%

Nights

51 per cent of interstate nights were spent by those in Tasmania visiting friends and relatives, with holiday visitors holding 32 per cent share of nights. VFR and holiday nights are showing strong recovery for the year ending September 2021, with VFR up 61 per cent compared to the previous year period, and holiday nights up 23 percent.

Holiday	3,305,800	▲	23%
VFR	2,068,700	▲	61%
Business	857,500	▲	32%

Spend

Holiday visitors contributed to 67 per cent of interstate spend in the year ending September 2021, with VFR making up 16 per cent share of spend. Holiday and VFR spend are showing strong recovery for the year ending September 2021. The average spend per holiday visitor was $3,541 for the year ending September 2021, up 27 per cent from the previous year (was $2,804).

Holiday	$1.14 billion	▲	27%
VFR	$269 million	▲	48%
Business	$191 million	▲	29%

Interstate origin of visitors

Victoria	255,400	▼	-8%
NSW	174,900	▶	-1%
Queensland	134,500	▲	38%
South Australia	36,000	▲	15%
A.C.T.	19,600	▲	24%
Western Australia	17,400	▼	-50%
N.T.	5,100	▼	-16%

Victoria and New South Wales remained our key domestic markets for the year ending September 2021, however this was largely supplemented in the first two quarters of 2021, prior to their respective lockdowns. Growth in visitation from Queensland and South Australia were seen with these markets open for quarantine-free travel the vast majority of October 2020 to September 2021. Growth in ACT visitors has been supported by increased air access.

Outbreaks and travel restrictions impacted travel this quarter, with Queensland the leading domestic market for the September quarter 2021 (40 per cent share), well above normal September quarter levels (was 15 per cent share in 2019). Share by Victorian visitors (29 per cent) was down from previous September quarters (47 per cent in 2019).

Tourism Snapshot

Year ending September 2021

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

Total visitors to Tasmania

Total visitors to Tasmania on scheduled air & sea services

	YE September 2020	YE September 2021		% Change
Visitors				
Total visitors	771,100	651,500	▼	-16%
Day visitors	18,200	11,400	▼	-37%
Overnight visitors	752,900	640,000	▼	-15%
Nights				
Nights (million)	6.25	6.73	▲	8%
Average length of stay (nights)	8.1	10.3	▲	28%
Holiday nights (million)	3.57	3.34	▼	-6%
Expenditure				
Expenditure ($million)	$1,624	$1,708	▲	5%
Average spend per visitor	$2,106	$2,622	▲	24%
Average spend per night	$260	$254	►	-2%
Holiday spend ($million)	$1,154	$1,144	►	-1%
Purpose of Visit				
Holiday	414,200	323,700	▼	-22%
Visit friends or relatives (VFR)	195,500	216,600	▲	11%
Total leisure (Holiday+VFR)	609,700	540,300	▼	-11%
Business or employment	117,700	79,500	▼	-32%
Convention/conference/seminar	14,600	3,100	▼	-79%
Regions Visited				
Southern	616,600	513,800	▼	-17%
East Coast	252,500	201,100	▼	-20%
Northern	433,800	374,300	▼	-14%
WxNW	323,700	276,200	▼	-15%
Mode of departure				
Air visitors	674,900	562,500	▼	-17%
Sea visitors	96,100	89,000	▼	-7%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

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

Interstate visitation to Tasmania

Interstate visitors to Tasmania on scheduled air & sea services

	YE September 2020	YE September 2021		% Change
Visitors				
Total interstate visitors	644,900	646,700	►	0%
Day visitors	17,800	11,400	▼	-36%
Overnight visitors	627,200	635,300	►	1%
Nights				
Nights (million)	4.83	6.49	▲	34%
Average length of stay (nights)	7.5	10.0	▲	34%
Holiday nights (million)	2.70	3.31	▲	23%
Expenditure				
Expenditure ($million)	$1,303	$1,689	▲	30%
Average spend per visitor	$2,020	$2,611	▲	29%
Average spend per night	$270	$260	▼	-4%
Holiday spend ($million)	$898	$1,139	▲	27%
Purpose of Visit				
Holiday	318,300	321,800	►	1%
Visit friends or relatives (VFR)	175,300	214,900	▲	23%
Total leisure (Holiday+VFR)	493,600	536,700	▲	9%
Business or employment	110,700	78,500	▼	-29%
Convention/conference/seminar	13,100	3,100	▼	-77%
Regions Visited				
Southern	501,400	509,400	►	2%
East Coast	185,400	199,300	▲	8%
Northern	357,600	370,800	▲	4%
WxNW	259,300	274,500	▲	6%
Mode of departure				
Air visitors	555,700	558,600	►	1%
Sea visitors	89,200	88,100	►	-1%
State of Origin				
Victoria	276,500	255,400	▼	-8%
N.S.W.	177,100	174,900	►	-1%
Queensland	97,600	134,500	▲	38%
Western Australia	35,000	17,400	▼	-50%
South Australia	31,300	36,000	▲	15%
A.C.T.	15,900	19,600	▲	24%
N.T.	6,000	5,100	▼	-16%

Source: Tasmanian Visitor Survey (TVS), Tourism Tasmania

Tourism Snapshot

Year ending September 2021

Percentage change refers to the same quarter period in 2019.

Tasmanian Visitor Survey results
July – September 2021

Quarterly visitation to Tasmania

The TVS reports the following key findings for all visitors during the September 2021 quarter.

Key statistics – Quarter 3 2021

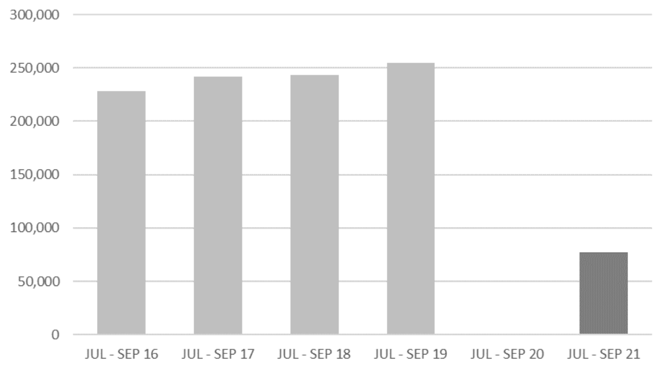
Q3 Total visitors	76,900	▼	-70%
Q3 Total nights	907,000	▼	-22%
Q3 Visitor expenditure	$251 million	▼	-33%
Q3 Holiday visitors	38,700	▼	-59%
Q3 VFR visitors	24,700	▼	-64%
Q3 Business visitors	10,800	▼	-84%
Q3 Average visitor spend	$3,268	▲	217%
Q3 Average stay	11.8 nights	▲	192%

Visitation for the September 2021 quarter was down 70 per cent compared to the same quarter in 2019, or at 30 per cent of the level of visitation in that quarter.

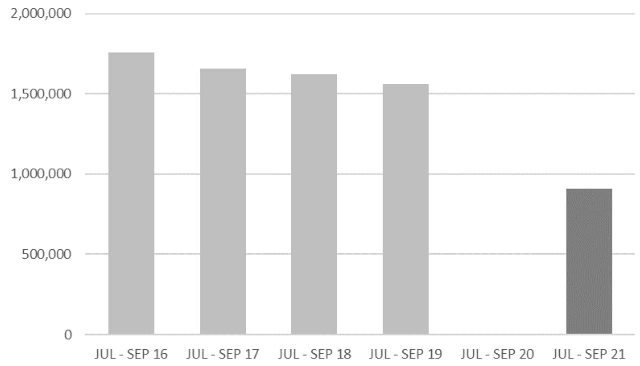
Visitor expenditure totalled $251 million, 67 per cent of the levels of the September quarter 2019. Average spend per visitor has more than doubled to $3,268, up from $1,474 in 2019. Average length of stay increased to 11.8 nights in the September quarter 2021, up from 6.1 nights in 2019.

Holiday visitors have driven the spend for the September quarter 2021, with average spend by holiday visitors increasing to $3,862, up from $2,176 in the September quarter 2019. Average spend by VFR visitors increased to $1,348, up from $934 in 2019.

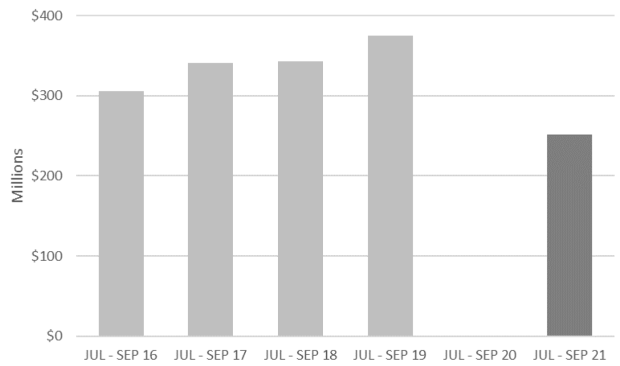
Total Visitors by Quarter



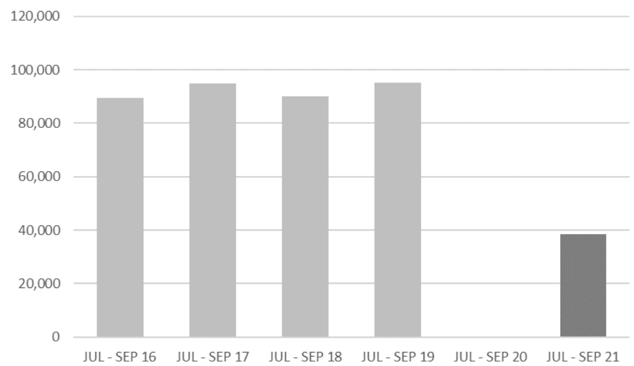
Total Nights by Quarter



Total Expenditure by Quarter



Total Holiday visitors by Quarter



Tourism Snapshot

Year ending September 2021

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

Intrastate visitation

National Visitor Survey results **YE September 2021**

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 through the pandemic.

Overnight Trips for **Australia**

Overnight trips	66.8 million	▲	9%
Expenditure	$35.7 billion	▲	35%

Australians were generally able to travel within their own states, and to a lesser-extent interstate, with 66.8 million *intrastate* overnight trips taken in the 12 months to September 2021, up 9 per cent from the previous year. Expenditure from these trips totalled $37.5 billion, up 35 per cent. Domestic travel continued to be driven by pent up demand to travel, especially with continuing international travel restrictions in place. Average spend per overnight trip was up 24 per cent to $534 ($432 in 2020).

for **Tasmania**

Overnight trips	1.70 million	▲	21%
Expenditure	$804 million	▲	59%

Following a period of travel restrictions, Tasmanians have enjoyed unrestricted intrastate travel since June 2020. In the year ending September 2021 Tasmanians took 1.70 million trips, up 21 per cent compared to the previous year. Expenditure from intrastate overnight trips totalled $804 million, up 59 per cent from year previous year. Average spend per overnight trip increased 31 per cent to $470, up from $359 the previous year. The Make Yourself At Home campaign and travel vouchers encouraged Tasmanians to holiday at within their home state.

Overnight Trips by purpose for **Australia**

Holiday trips	30.7 million	▲	27%
VFR trips	20.6 million	►	-1%
Business trips	10.7 million	▼	-8%

Holiday (46% share), visiting friends and relatives (31%), and business (16%) were the main purposes of intrastate overnight trips nationally.

for **Tasmania**

Holiday trips	963,000	▲	43%
VFR trips	424,000	►	-1%
Business trips	236,000	▲	13%

The three main purposes for intrastate overnight trips in Tasmania were holiday (56% share), visiting friends and relatives (25%), and business (14%).

Day trips for **Australia**

Day trips	159.5 million	▼	-7%
Expenditure	$17.5 billion	►	-2%

Intrastate day trips in Australia totalled 159.5 million trips in the year to September 2021, down 7 per cent from the previous year. Expenditure from intrastate day trips totalled $17.5 billion.

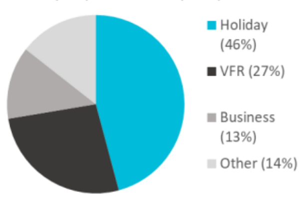
for **Tasmania**

Day trips	5.27 million	▲	3%
Expenditure	$698 million	▲	7%

Tasmanians went on 5.27 million day trips within the state, up 3 per cent compared to the year ending September 2020. Expenditure from these day trips totalled $698 million.

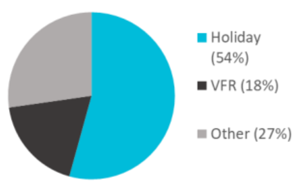
Day trips by purpose for **Australia**

Holiday trips	73.1 million	▼	-3%
VFR trips	42.3 million	▼	-13%
Business trips	21.0 million	▼	-12%



for **Tasmania**

Holiday trips	2.86 million	▲	19%
VFR trips	974,000	▼	-17%



Tourism Snapshot

Year ending September 2021

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

Intrastate visitation

National Visitor Survey results **YE September 2021**

Intrastate Overnight Travel

	to Tasmania				to Australia			
	YE September 2020	YE September 2021		% Change	YE September 2020	YE September 2021		% Change
Trips								
Overnight trips ('000s)	1,413	1,708	▲	21%	61,465	66,880	▲	9%
Nights								
Nights ('000s)	3,861	4,286	▲	11%	196,835	222,673	▲	13%
Average Length of stay (nights)	2.7	2.5	▼	-8%	3.2	3.3	▲	4%
Expenditure								
Expenditure ($million)	$507	$804	▲	59%	$26,548	$35,715	▲	35%
Average spend per trip	$359	$470	▲	31%	$432	$534	▲	24%
Average spend per night	$131	$188	▲	43%	$135	$160	▲	19%
Purpose - Trips ('000s)								
Holiday	672	963	▲	43%	24,138	30,747	▲	27%
Visit friends & relatives (VFR)	431	424	►	-1%	20,962	20,665	►	-1%
Business	209	236	▲	13%	11,727	10,775	▼	-8%
Other Reason	116	119	▲	3%	3,861	3,917	►	1%
Total intrastate overnight trips	1,413	1,708	▲	21%	61,465	66,880	▲	9%

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

Intrastate Day Travel

	to Tasmania				to Australia			
	YE September 2020	YE September 2021		% Change	YE September 2020	YE September 2021		% Change
Trips								
Day trips ('000s)	5,133	5,277	▲	3%	171,515	159,554	▼	-7%
Total intrastate Day+Overnight trips ('000s)	6,546	6,985	▲	7%	232,980	226,434	▼	-3%
Expenditure								
Expenditure ($million)	$578	$602	▲	4%	$17,957	$17,512	►	-2%
Average spend per trip	$113	$114	►	1%	$105	$110	▲	5%
Purpose - Trips ('000s)								
Holiday	2,407	2,866	▲	19%	75,063	73,112	▼	-3%
Visit friends & relatives (VFR)	1,178	974	▼	-17%	48,890	42,375	▼	-13%
Business	614	570	▼	-7%	23,902	21,021	▼	-12%
Other Reason	934	868	▼	-7%	23,660	23,046	▼	-3%
Total intrastate day trips	5,133	5,277	▲	3%	171,515	159,554	▼	-7%

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

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

Tourism Snapshot

Year ending September 2021

International visitation

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

International Visitor Survey results **YE September 2021**

International visitors to **Australia**

Visitors	155,500	▼	-96%
Nights	10.4 million	▼	-92%
Expenditure	$812 million	▼	-95%

The International Visitor Survey ceased interviews with departing visitors in March 2020. Quarantine-free travel between Australia and New Zealand resumed on 18 April 2021, and was suspended in July 2021 due to COVID outbreaks.

The year ending September 2021 period therefore contains approximately 9 months where Australia closed its international border to leisure travellers.

In this context, approximately 155,500 international visitors came to Australia in the year ending September 2021, a 96 per cent decrease from the previous year. Total nights and spend by international visitors declined 92 and 95 per cent respectively.

to Australia

Origin of visitors	Year ending September 2020	Year ending September 2021		%Change
New Zealand	581,500	88,800	▼	-85%
Japan	214,700	1,300	▼	-99%
Hong Kong	130,500	2,000	▼	-98%
Singapore	172,700	3,800	▼	-98%
Malaysia	133,300	900	▼	-99%
Indonesia	83,300	1,500	▼	-98%
Taiwan	75,000	300	▼	-100%
Thailand	39,500	600	▼	-98%
Korea	116,700	700	▼	-99%
China	487,200	3,400	▼	-99%
India	184,100	3,500	▼	-98%
Other Asia	208,500	5,100	▼	-98%
USA	400,000	8,800	▼	-98%
Canada	102,800	1,400	▼	-99%
United Kingdom	423,600	7,600	▼	-98%
Germany	114,500	1,400	▼	-99%
Scandinavia	65,500	900	▼	-99%
France	73,400	1,300	▼	-98%
Italy	37,300	900	▼	-98%
Netherlands	35,100	700	▼	-98%
Switzerland	29,900	400	▼	-99%
Other Europe	158,500	4,600	▼	-97%
Other Countries	274,400	15,500	▼	-94%
Total	4,142,000	155,500	▼	-96%

International visitors to **Tasmania**

Visitors	4,400	▼	-97%
Nights	202,000	▼	-91%
Expenditure	$15 million	▼	-95%

Tasmania’s international visitor numbers saw a substantial drop to 4,400 visitors in the year ending September 2021. Expenditure by international visitors decreased by 95 per cent in the year to September 2021.

Direct flights between Tasmania and New Zealand were introduced in April 2021. Since the flights commenced in April, Tasmania remained open to New Zealand travellers for the duration of the June quarter 2021, however was paused, then ceased in late July 2021. These did not resume for the remainder of the September quarter 2021.

Due to low sample size, Tasmania’s international source markets, and purpose of visiting Tasmania, are not reported.

Tourism Snapshot

Year ending September 2021

Tourism Tasmania

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

International visitation

International Visitor Survey results **YE September 2021**

	to Tasmania			to Australia		
	YE September 2020	YE September 2021	% Change	YE September 2020	YE September 2021	% Change
Visitors						
International visitors	159,800	4,400	▼ -97%	4,142,000	155,500	▼ -96%
Nights						
Nights (000)	2,257	202	▼ -91%	134,118	10,423	▼ -92%
Average Length of stay (nights)	14.1	46.1	▲ 227%	32.4	67.0	▲ 107%
Expenditure						
Expenditure ($million)	$314	$15	▼ -95%	$15,013	$812	▼ -95%
Average spend per visitor	$1,967	$3,411	▲ 73%	$3,625	$5,222	▲ 44%
Average spend per night	$139	$74	▼ -47%	$112	$78	▼ -30%
Holiday spend ($million)	$171	$0	▼ -100%	$4,996	$41	▼ -99%
Purpose - Visitors						
Holiday	125,600	210	▼ -100%	2,201,200	16,200	▼ -99%
Visit friends & relatives (VFR)	31,000	3,300	▼ -90%	1,715,600	88,700	▼ -95%
Business	4,100	200	▼ -95%	440,100	22,000	▼ -95%
Education	3,800	0	▼ -100%	287,600	2,800	▼ -99%
Employment	3,000	700	▼ -78%	105,800	20,100	▼ -81%
Other Reason	1,700	100	▼ -92%	301,700	24,800	▼ -92%
International visitors	159,800	4,400	▼ -97%	4,142,000	155,500	▼ -96%

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

	YE September 2020	YE September 2021	% Change	YE September 2020	YE September 2021	% Point difference
State/territory visited	**Visitors**			**National Market Share**		
New South Wales	2,072,800	75,700	▼ -96%	50.0%	48.7%	▼ -1.4%
Victoria	1,500,600	33,200	▼ -98%	36.2%	21.4%	▼ -14.8%
Queensland	1,269,100	57,300	▼ -95%	30.6%	36.8%	▲ 6.2%
South Australia	261,600	9,000	▼ -97%	6.3%	5.8%	▼ -0.5%
Western Australia	515,900	14,100	▼ -97%	12.5%	9.1%	▼ -3.4%
Tasmania	159,800	4,400	▼ -97%	3.9%	2.8%	▼ -1.0%
Northern Territory	141,000	4,200	▼ -97%	3.4%	2.7%	▼ -0.7%
ACT	113,800	3,000	▼ -97%	2.7%	1.9%	▼ -0.8%
Total visitors to Australia	4,142,000	155,500	▼ -96%	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)

Tourism Snapshot

Year ending September 2021

Tourism Tasmania

Short-stay accommodation Tasmania

AirDNA

The short-stay accommodation sector provides an alternative to stays in hotel, motel and lodges and other styles, 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 broader 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.

Where available, data is presented for Hobart, Launceston, and up to 14 regional zones. The zones have been created to represent a range of urban and regional areas and collectively cover 77% 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.

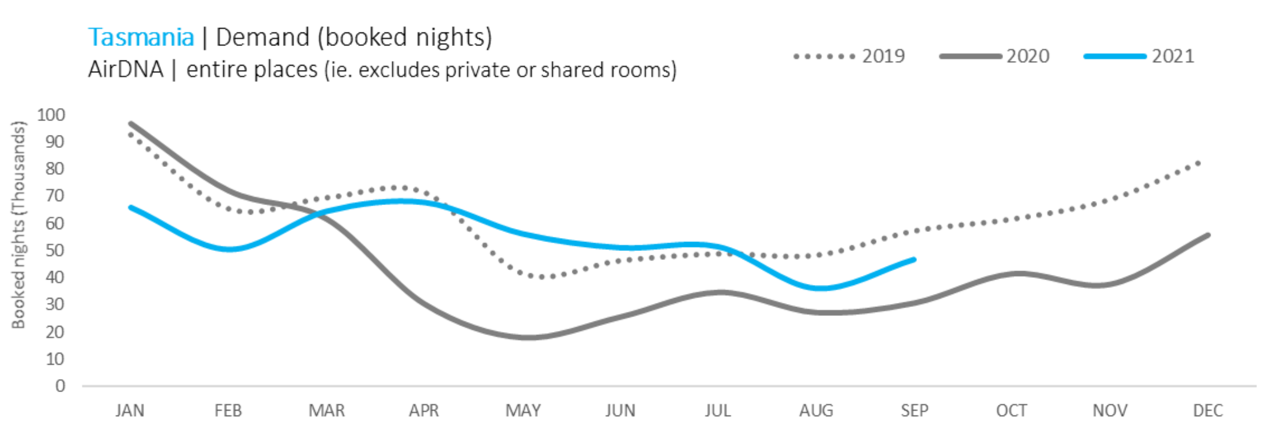
Hobart Hobart City Council	Launceston Launceston ABS SA3	West Coast West Coast Council	Tasman Peninsula
North East Coast Bay of Fires and St Helens to Falmouth	North West 7 LGAs: Circular Head to Latrobe	Deloraine – Evandale Mole Creek, Westbury, Longford	East Tamar - Bridport Georgetown, Low Head, Pipers Brook
Freycinet Swansea, Coles Bay, Swanwick, Bicheno	Huon – Far South Huonville, Geeveston, Cygnet, Dover, Cockle Creek	Eastern Shore Risdon to Tranmere, Bellerive to Mornington	Derby Branxholm, Pioneer, Ringarooma
King Island	Flinders Island	Bruny Island	Orford

Demand (nights booked) Entire place properties

Tasmania's short-stay accommodation sector comprised around 6,000 available properties in the year ending September 2021, down 10% from 2020, and down 18% 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 September 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, intrastate travel was limited only between April and late June. Demand never appeared to reach zero, likely maintained by a combination of visitors remaining in the state, people self-isolating if not required to be in government quarantine, or bookings not being released again after cancellations.

Given interstate travel was restricted for around five months (October and November 2020, and July to September 2021) of the year ending September period, Tasmanians were assumed to be the primary drivers of demand through these months, significantly contributing to supporting the short-stay accommodation sector particularly in regional areas.

As border restrictions eased through quarter three of 2020, demand began to lift as more interstate visitors resumed travel to Tasmania. Demand recovery gained strength through the period, with May, June and July 2021 recording higher demand than the respective months in 2019.



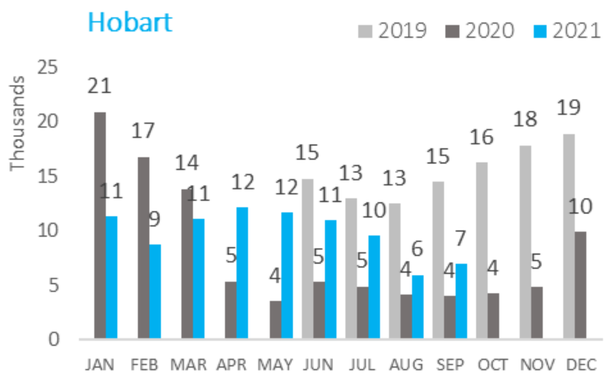
The state-level figures provide an indication of the performance of the sector, however demand continued to be mixed across urban and regional areas. Historically, Hobart has been the anchor destination with 72% of visitors in 2019 spending some time in the capital. During 2020, with demand primarily 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 at substantially lower levels; in contrast, some regional areas demand outpaced previous years; the North East Coast area recorded 72% more short-stay accommodation nights booked in September 2021 than the same month in 2019.

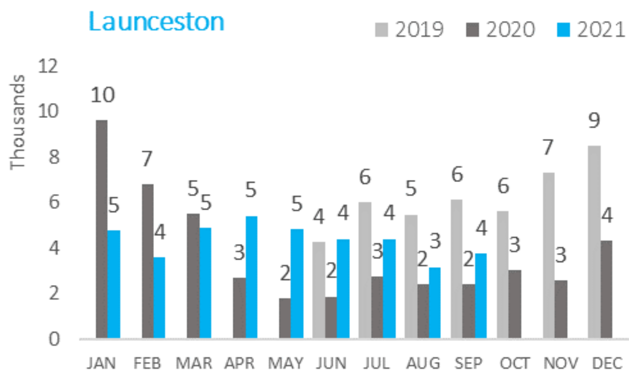
The following pages provide a breakdown by indicative regions. Tourism Tasmania partnered with AirDNA in response to the pandemic to monitor and track recovery of the tourism industry while traditional measurement tools, such as the Tasmanian Visitor Survey, were offline. As such the data for regional areas is limited; six regions are available for individual months from June 2020 (with a comparison back to June 2019 onwards) while an additional ten regions were added in 2021, limiting their comparison to 2020.

Demand (booked nights) Share of same month previous year

The table below shows the demand (booked nights) for short-stay accommodation for the state, by month, expressed as a percentage share of the same month the previous year.

	% share of same month in 2019											
	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Jul-21	Aug-21	Sep-21
Tasmania	69%	55%	67%	71%	77%	93%	95%	136%	110%	106%	75%	82%





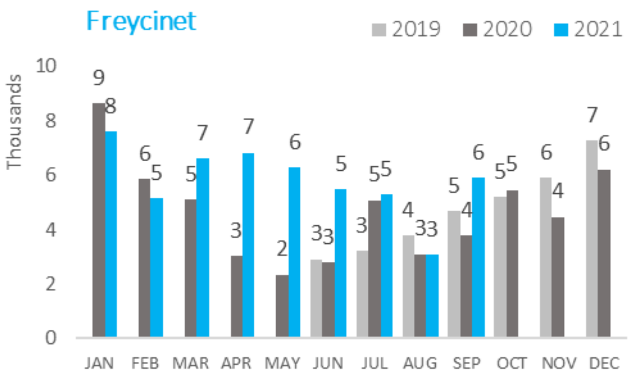
Tasmania's capital city experienced the greatest drop in demand through COVID across the indicator regions, with the deepest trough in 2020 through September to November, with improvement through March to July 2021.

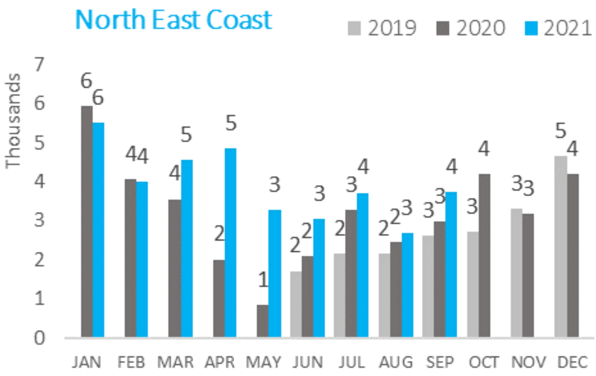
The lockdown of NSW and Victoria in mid-2021 is evident, as Hobart's improving recovery trend regressed to similar levels seen in late 2020. This is expected to continue until at least late December, once interstate border re-open.

As the largest urban area outside Hobart, Launceston also saw low demand through the back end of 2020. April 2021 was the strongest performing month in the period in line with high domestic visitaton to the state, with the following months declining as interstate lockdowns extended.

Tourism Snapshot

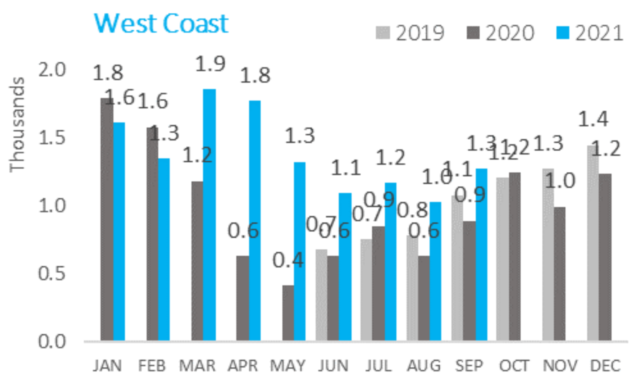
Year ending September 2021

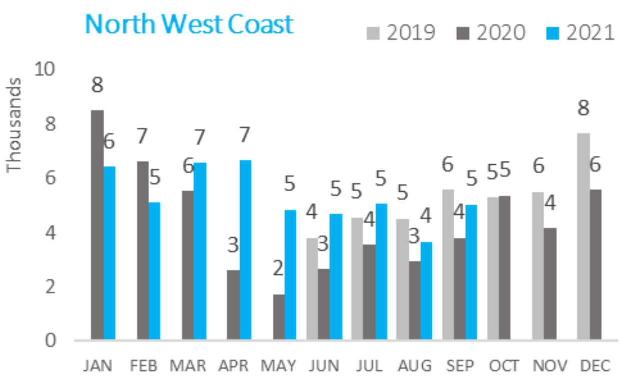




The Freycinet short-stay accommodation sector saw strong demand through 2021 compared to Hobart and Launceston, with January 2021 almost reaching 2019 demand. The area generally maintained the healthy performance, including higher demand through winter this year than in 2019.

The North East Coast region was a strong performer of the indicator regions, with demand outpacing 2019 (where data is available), including through winter where July demand was double that seen in July 2019.





The West Coast region saw relatively healthy demand for short-stay accommodation, particularly through in 2021 as regional trips maintained popularity with interstate options limited. July to September 2021 saw higher demand than in the same period in 2019.

The North West region saw softer demand overall until the first two quarters of 2021, with winter 2021 reaching just below 2019 levels. Although Cradle Mountain is a key attraction in this region, the accomodation mix there is different to other destinations, with mostly hotel, lodge and cabin commercial acommodation. It is therefore likely demand for nights is higher than this data indicates.

Tourism **Snapshot**

Year ending September 2021

Short-stay accomodation Year ending total and % change

		TAS	Hobart	Launceston	Orford-Freycinet	NE Coast	West Coast	North West	King Is	Flinders Is
Supply (nights available)	YE Sep 21	1,079,900	178,500	82,700	165,400	79,300	28,700	105,400	7,500	10,300
	YE Sep 20	1,148,500	211,300	106,300	163,700	75,900	25,700	111,700	9,200	7,200
	% change	▼-6%	▼-16%	▼-22%	►1%	▲4%	▲12%	▼-6%	▼-18%	▲44%
Demand (nights booked)	YE Sep 21	620,200	106,300	50,900	73,500	46,600	15,800	63,000	4,600	6,200
	YE Sep 20	604,100	131,300	59,800	65,200	37,600	12,500	55,500	4,100	2,900
	% change	▲3%	▼-19%	▼-15%	▲13%	▲24%	▲26%	▲13%	▲12%	▲117%
Occupancy	YE Sep 21	57%	60%	62%	44%	59%	55%	60%	61%	60%
	YE Sep 20	53%	62%	56%	40%	50%	49%	50%	44%	40%
	% change	▲9%	▼-4%	▲9%	▲11%	▲18%	▲13%	▲20%	▲38%	▲51%
ADR $	YE Sep 21	227	243	197	258	240	189	191	466	244
	YE Sep 20	182	194	155	217	197	165	160	330	200
	% change	▲25%	▲25%	▲28%	▲19%	▲22%	▲14%	▲19%	▲41%	▲22%
RevPAR $	YE Sep 21	130	145	121	115	141	104	114	282	147
	YE Sep 20	96	121	87	87	98	81	79	145	80
	% change	▲36%	▲20%	▲40%	▲32%	▲45%	▲29%	▲43%	▲94%	▲85%
Revenue $m	YE Sep 21	140.7	25.8	10.0	19.0	11.2	3.0	12.0	2.1	1.5
	YE Sep 20	110.0	25.5	9.3	14.2	7.4	2.1	8.9	1.3	0.6
	% change	▲28%	►1%	▲9%	▲34%	▲51%	▲44%	▲35%	▲59%	▲166%

		East Tamar - Bridport	Deloraine Evandale	Derby	Orford	Tasman Peninsula	Bruny Is	Huon Far South	Eastern Shore
Supply (nights available)	YE Sep 21	28,200	30,400	22,800	23,200	36,800	46,200	44,400	25,400
	YE Sep 20	27,600	30,400	19,600	22,800	33,900	44,200	44,200	31,900
	% change	►2%	►0%	▲16%	►2%	▲9%	▲5%	►1%	▼-20%
Demand (nights booked)	YE Sep 21	14,100	16,500	12,200	13,000	21,500	30,100	28,100	15,300
	YE Sep 20	13,700	14,200	10,800	10,100	16,200	23,700	22,200	21,000
	% change	▲3%	▲16%	▲13%	▲28%	▲33%	▲27%	▲26%	▼-27%
Occupancy	YE Sep 21	50%	54%	53%	56%	59%	65%	63%	60%
	YE Sep 20	50%	47%	55%	44%	48%	54%	50%	66%
	% change	►1%	▲17%	▼-3%	▲25%	▲22%	▲22%	▲26%	▼-9%
ADR $	YE Sep 21	234	197	231	218	216	269	227	242
	YE Sep 20	197	159	200	182	162	220	185	179
	% change	▲19%	▲23%	▲16%	▲20%	▲33%	▲22%	▲23%	▲35%
RevPAR $	YE Sep 21	117	107	123	121	126	175	144	145
	YE Sep 20	98	74	110	81	78	118	93	118
	% change	▲20%	▲44%	▲12%	▲50%	▲63%	▲48%	▲54%	▲23%
Revenue $m	YE Sep 21	3.3	3.3	2.8	2.8	4.7	8.1	6.4	3.7
	YE Sep 20	2.7	2.3	2.2	1.8	2.6	5.2	4.1	3.8
	% change	▲22%	▲44%	▲30%	▲53%	▲77%	▲55%	▲55%	►-2%

Tourism Snapshot

Year ending September 2021

Short-stay accommodation Percentage share of previous year

The table below shows the percentage share of the year ending September 2021 available listings of 'entire place' properties, compared to the year ending September 2020. If the values are the same, then that would equal 100%; for example, available listings in the state for the year ending September 2021 were 90% of the number in 2020.

	Available Listings		Booked Listings	
Tasmania	**6033**	**90%**	**5,526**	**89%**
Hobart	1,119	88%	1,062	86%
Launceston	561	83%	538	89%
Freycinet	469	96%	430	93%
NE Coast	394	97%	369	96%
West Coast	126	93%	116	100%
North West	577	88%	522	86%
King Island	35	88%	34	88%
Flinders Island	49	116%	45	115%
East Tamar-Bridport	142	101%	135	100%
Deloraine-Evandale	160	89%	149	94%
Derby	92	108%	90	110%
Orford	114	86%	111	91%
Tasman	164	98%	151	97%
Bruny Island	218	92%	206	94%
Huon-Far South	243	91%	213	88%
Eastern Shore	171	92%	162	91%

Figures in blue represent months where the available or booked listings were higher in year ending June 2021 than the same period in 2020.

Tourism Snapshot

Year ending September 2021

Commercial accommodation

STR Global

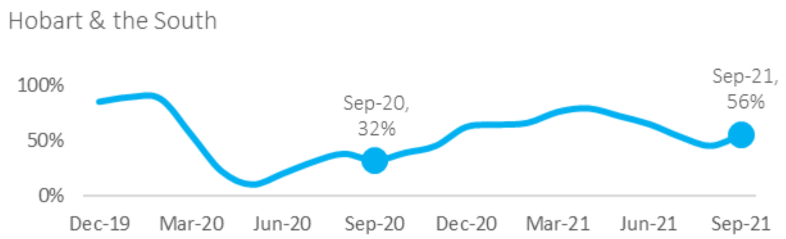
Tourism Tasmania has worked with STR Global to increase the representation of Tasmanian hotel, motel and other commercial accommodation operators in this platform as an important indicator for tracking our recovery to provide decision makers with a better idea of how industry is faring. STR provides 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 2020, 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 2020. Occupancy across all regions has been steadily improving through the peak summer travel period, and into autumn and winter. Interstate travel restrictions from June 2021 and the traditionally cooler periods in winter are evident, however there was a slight lift in occupancy in September, which included the start of school holidays, and Tasmanian intrastate holiday voucher period.

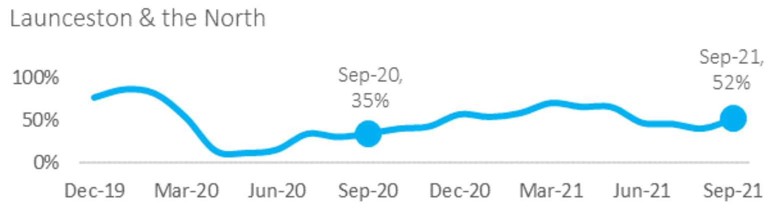
Hobart & the South

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. While occupancy rates are yet to return to pre-COVID levels, there has been steady improvement in demand for city stays.



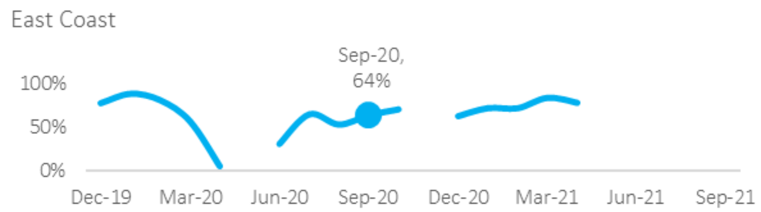
Launceston & the North

Occupancy rates in Launceston were slower to recover than Hobart, however by March 2021 were within 10% of 2019 levels. Occupancy plateaued through the first quarter of 2021 and has remained steady since.



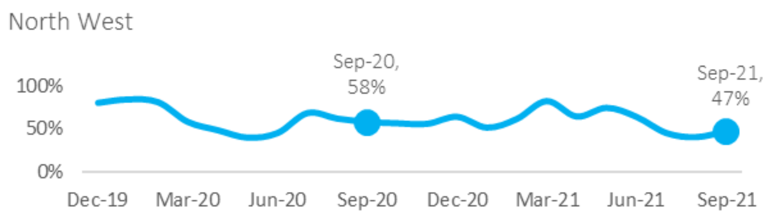
East Coast

The East Coast saw stronger recovery than the urban centres, benefiting from intrastate travel by Tasmanians while interstate trips were not possible. The East Coast returned to similar occupancy rates in early 2021 to those seen in peak summer periods in 2018-19 and 2019-20. The breaks in series are due to low samples in those periods.



North West

Occupancy rates in the North West were least impacted by COVID, with demand in in the first quarter of 2021 on par with pre-pandemic levels. This has remained fairly stable.



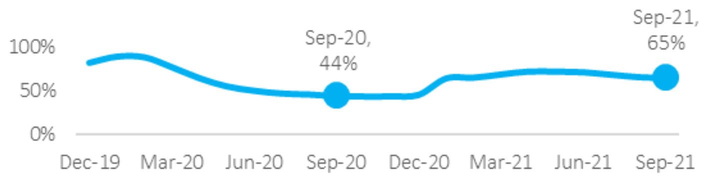
Tourism **Snapshot**

Year ending September 2021

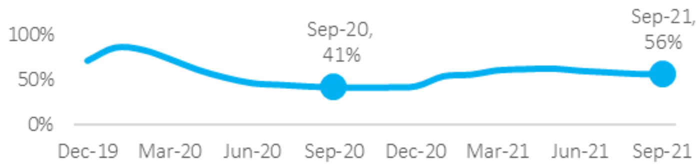
Occupancy **by rolling year ending**

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 bushfires as interstate visitors extended trips in Tasmania or diverted planned trips away from affected areas. Occupancy for the year to September 2021 generally improved for all regions over the year, taking into account the year ending September 2020 comparison included around three months of border restrictions (April-September 2020), and 2021 had five significantly restricted periods (October and November 2020, and July to September 2021). In this context occupancy has held up well, though remain below 2019 rates.

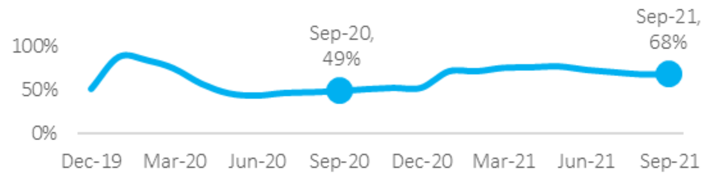
Hobart & the South



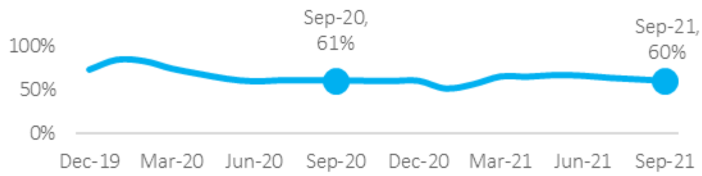
Launceston & the North



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 September 2021

About the Tasmanian Tourism 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 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 the year ending September 2021 was reduced slightly to approximately 9,100 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, April 2020 onwards has 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 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.