

VISITOR DATA SNAPSHOT

YEAR ENDING DECEMBER 2024



Pirates Bay Beach,
Teralina/Eaglehawk Neck
Stu Gibson

TASMANIA

COME DOWN FOR AIR



TASMANIAN TOURISM SNAPSHOT

KEY INSIGHTS AT QUARTER AND YEAR END DECEMBER 2024

DECEMBER QUARTER 2024

- Visitors spent \$853.2m in the state in the December quarter of 2024, down 5% from \$901.8m from 2023.
- Despite visitors staying on average an extra night in the state, they were spending around 7% less each, resulting in a net overall decline in spend.
- Compared to the same quarter in 2019, visitors spent on average an additional \$722 each in the December quarter of 2024; leading to an additional spend in December quarters of \$185m (+28%) over the last five years.
- Meanwhile, visitation increased slightly this quarter (332k, up 1.4%), with the Northern and East Coast regions welcoming more visitors this quarter than any previous December quarter, led by visitors on holiday, and those visiting friends or relatives in Tasmania.

YEAR ENDING DECEMBER 2024

- Visitors spent \$3.413b in the state in 2024, down 6.1% from \$3.633b in 2023, though \$568m (+34%) more than in 2019.
- Visitors are spending less overall on their trips while maintaining their average length of stay (ALOS) in the state, placing downward pressure on average spend per night (ASPN), which dropped 9% (-\$25) from 2023.
- Tasmania welcomed 1.310m visitors in 2024, up 4.2% on 2023, and only 3% below the 1.352m visitors in YE December 2019.
- The buoyant visitation is driven by visitors from interstate, with 6% more making the trip across Bass Strait, with annual visitation back up to the elevated levels last recorded in early 2023.
- Queensland out-performed other states, being the only interstate market to see increases over the year across the three key measures of spend, visitors and nights.
- Tasmania welcomed more international visitors in 2024, who spent more each and stayed for longer, compared to 2023. These visitors spent \$551m in the state, up significantly on 2023 (+48%, or \$178m more) with each visitor on average spending an additional \$337 and staying almost four nights longer.
- Tasmanians took more overnight trips for holidays within the state (873k, up 9.2%) and stayed away from home for longer (2.155m nights, up 14.75). However, they too have reduced their spending, with overnight holiday trips down 11.2%, to \$363m.

EXPLORE MORE OF THE DATA

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

December quarter 2024

Tasmanian Visitor Survey
Tourism Tasmania

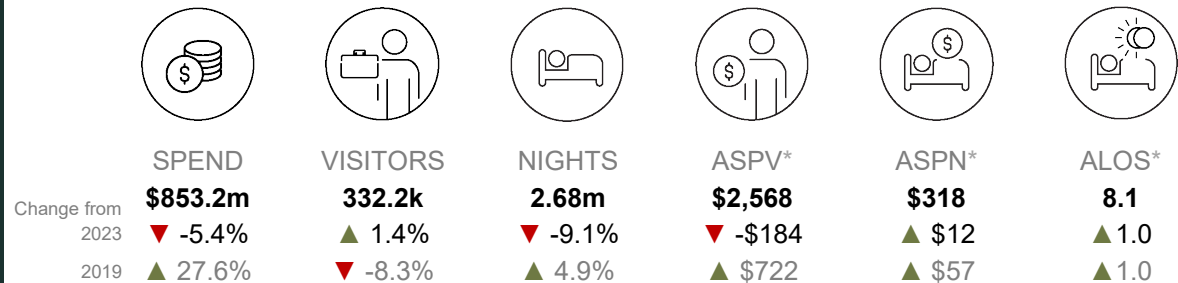
ALL VISITORS

- Visitors spent \$853.2m in the state in the December quarter of 2024, down 5% from \$901.8m from 2023.
- The fall in total spend is despite visitors spending an extra night in the state, resulting in a net overall decline in spend.
- Compared to 2019, visitors spent on average an additional \$722 each in the December quarter of 2024, an overall increase in spend into the state of \$185m (+28%) over the last five years.
- The state welcomed 332.2k visitors this quarter, slightly more than the same quarter last year.

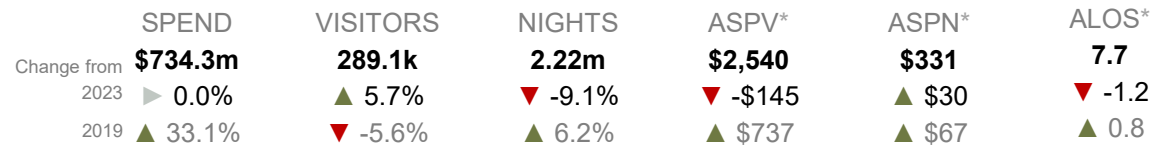
INTERSTATE VISITORS

- Interstate visitors spent \$734.4m in the December quarter of 2024, on par with 2023.
- These visitors spent 10% more per night of their stay, however they also shortened their trips by around 1 night on average, leading to their overall spend remaining the same as last year.
- Almost half (48%) of interstate visitors were in the state for a holiday (139.6k), with slightly fewer (-1%) visiting this quarter compared to last year.
- Interstate holiday visitors also spent on average 10.6% less each this quarter (\$3,561), bringing their total spend in the state down 3.7% to \$497.1m.

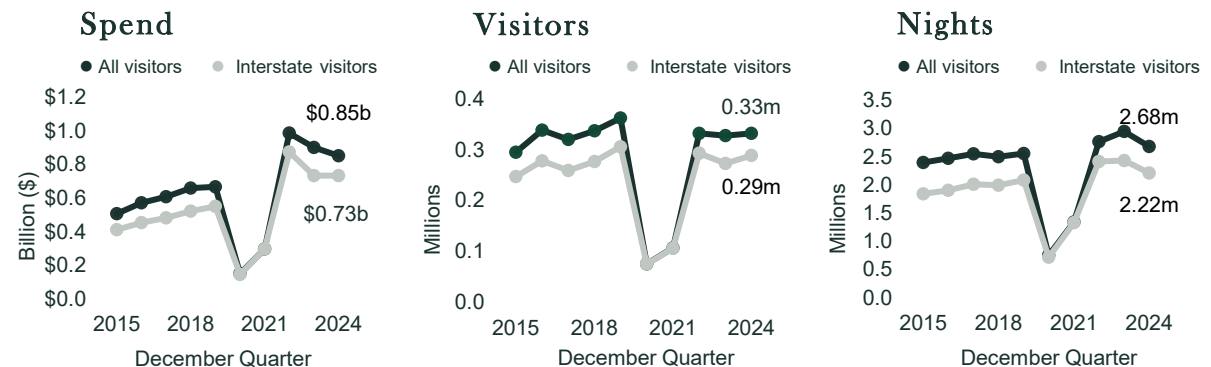
ALL VISITORS (INTERSTATE + INTERNATIONAL)



INTERSTATE VISITORS



DECEMBER QUARTERLY VISITATION



December quarter 2024

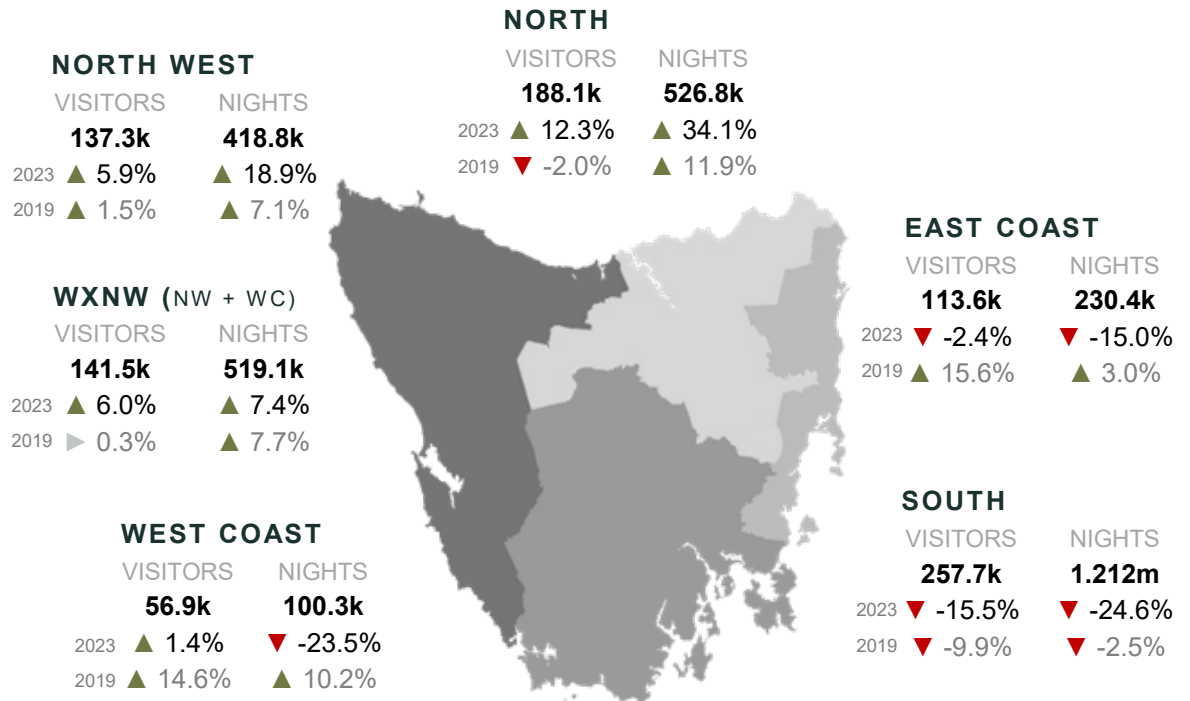
Tasmanian Visitor Survey
Roy Morgan

Visitation to the state increased slightly this quarter from last year (+1.4%), though there were mixed results across the regions for visitation and nights stayed.

REGIONAL VISITATION

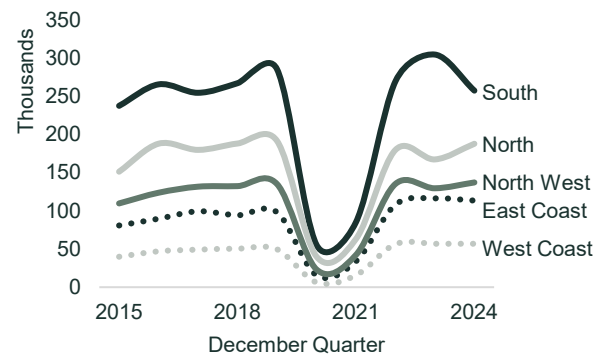
- The **South** saw a softening in visitation this quarter compared to the same quarter in 2023, although was at a similar level to 2022, as fewer visitors on holiday or visiting friends or relatives (VFR) in the state spent time in the region.
- The **North** experienced its strongest December quarter since before the pandemic, led by more holiday and VFR visitors – a reversal of the trend seen in the South.
- Visitation for the **East Coast** this quarter is the second-strongest December quarter for the region; the small decline from last year reflects that 2023 was the record visitation December quarter.
- The **North West** region recorded its strongest December quarter for visitation in 2024, with nights also increasing substantially, mainly driven by holiday and VFR visitors.
- The **West Coast** has now recorded three consecutive December quarters of 56k visitors, with visitors on holiday maintaining elevated levels of visitation since 2022.

REGIONAL VISITATION



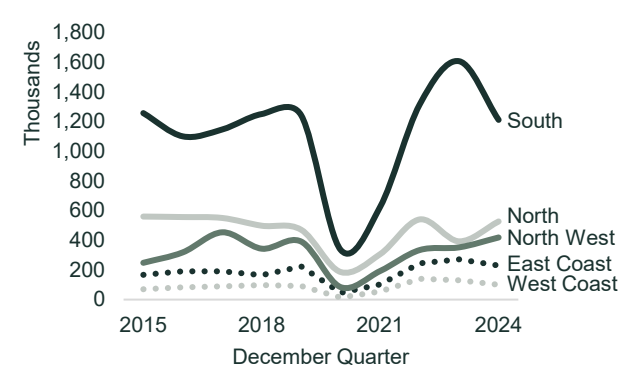
Visitors

10 years – December quarters



Nights

10 years – December quarters



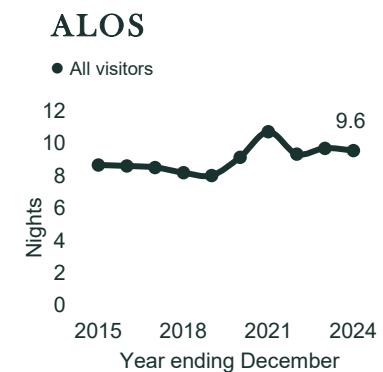
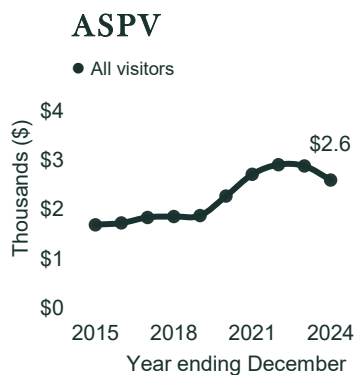
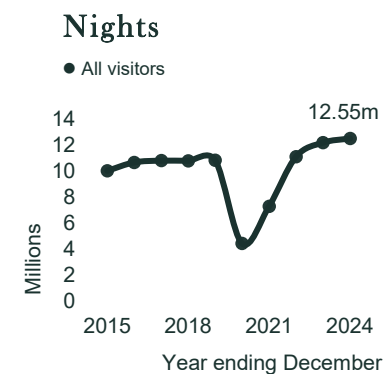
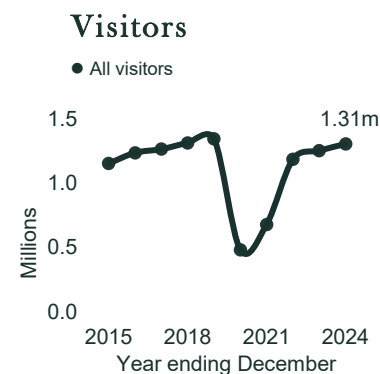
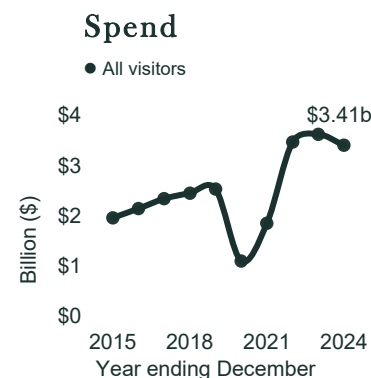
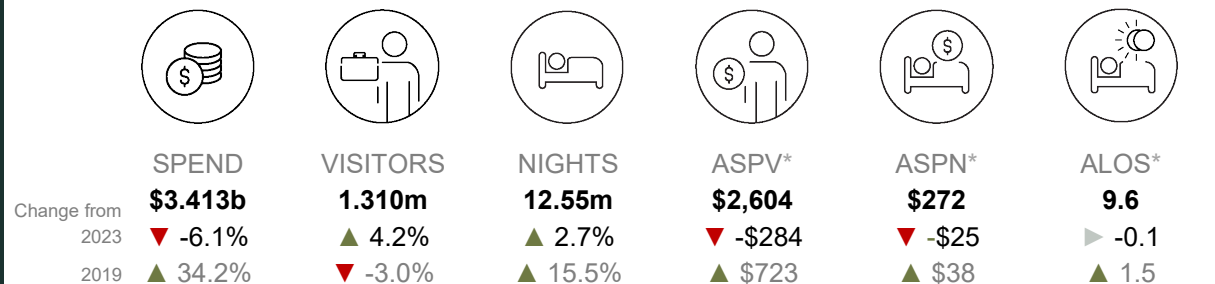
Year ending December 2024

Tasmanian Visitor Survey
Roy Morgan

ALL VISITORS

- Visitors spent \$3.413b in the state in 2024, down 6.1% from \$3.633b in 2023, and \$870m (+34%) more than in 2019 (\$2.548b).
- Visitors are spending less overall on their trips while maintaining their average length of stay (ALOS) in the state. This places downward pressure on average spend per night (ASPN), which dropped 9% (-\$25) from 2023.
- Average spend per visitor (ASPV) was \$2,604, down 10% (-\$284) from 2023, though is \$723 (+38%) more than in 2019.
- Tasmania welcomed 1.310m visitors in 2024, up 4.2% on 2023, and only 3% below the 1.352m visitors in YE December 2019.
- Visitors stayed a total of 12.55m nights in the state, up 2.7% year-on-year and 15.5% on 2019.
- While average length of stay was on par with 2023, visitors are still staying around 1.5 nights longer than in 2019, with ALOS remaining at the mid to high 9-night level since year ending September 2022.
- At year ending December 2024, 13.7% of visitors were from overseas, just slightly below the 14.5% share in 2019.

ALL VISITORS (INTERSTATE + INTERNATIONAL)



Interstate Visitors

Tasmanian Visitor Survey, YE December 2024
Roy Morgan

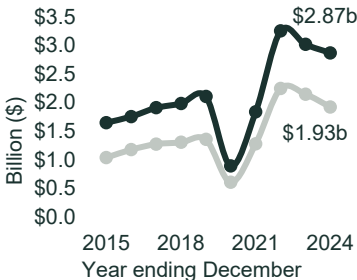
INTERSTATE VISITORS

- Visitors from mainland Australia spent \$2.87b in Tasmania in 2024, down 4.9% (-\$147m) from 2023 (\$3.018b), and \$762m (+36.1%) more than in 2019.
- Tasmania welcomed 1.13m interstate visitors in 2024, up 6.1% on last year. Interstate visitation has been steadily increasing over the past year, with year ending December now on par with the elevated levels last seen at year ending May 2023.
- Interstate visitors are spending a little less per night (-\$20), and as they are also staying on average around half a night less, this has resulted in a decline in their average spend per visit and therefore total spend in the state.
- However, length of trip, spend per night and spend per visitor all remain well above 2019.
- As **holiday** visitors are the largest share of interstate visitation (49%), changes in their behaviours are more likely to affect overall visitation trends.
- This market has maintained three years of elevated visitation of around 550k, though they are spending less, and staying for shorter trips, than last year, which has pulled down overall results for the state.
- Significantly for **interstate holiday** visitation, the reverse is true in comparison to 2019; spend, visitation and nights are all up substantially, highlighting this core markets appeal for Tasmania is strong.

INTERSTATE VISITORS

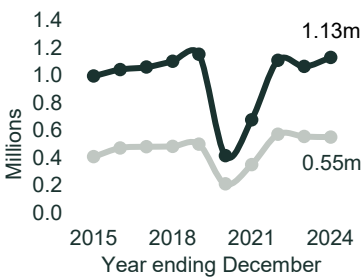
Spend

● All visitors ● Holiday



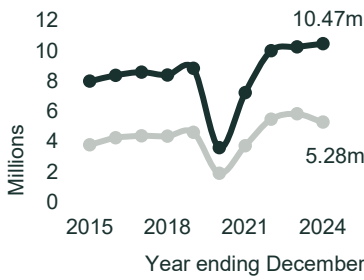
Visitors

● All visitors ● Holiday



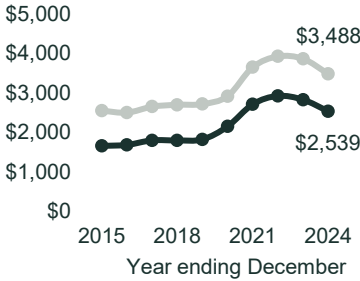
Nights

● All visitors ● Holiday



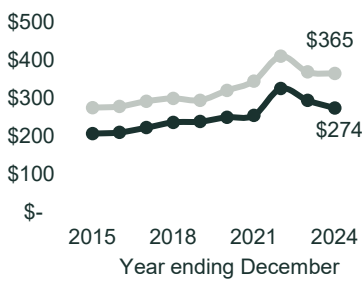
ASPV

● All visitors ● Holiday



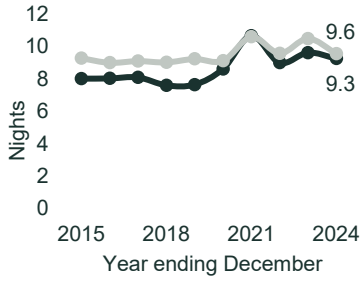
ASPN

● All visitors ● Holiday



ALOS

● All visitors ● Holiday



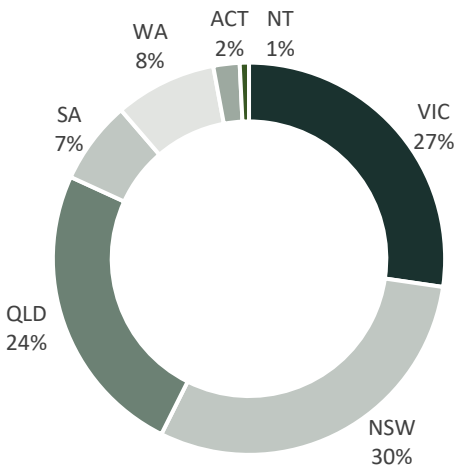
	SPEND	VISITORS	NIGHTS	ASPV	ASPN	ALOS
Interstate	\$2.871b	1.131m	10.47m	\$2,539	\$274	9.3
Change from 2023	▼ -4.9%	▲ 6.1%	▲ 2.0%	▼ -\$292	▼ -\$20	▼ -0.4
Change from 2019	▲ 36.1%	▼ -2.2%	▲ 18.4%	▲ \$714	▲ \$36	▲ 1.6
Interstate holiday	\$1.927b	552k	5.28m	\$3,488	\$365	9.6
Change from 2023	▼ -10.4%	▼ -0.6%	▼ -9.4%	▼ -\$381	▼ -\$4	▼ -0.9
Change from 2019	▲ 41.8%	▲ 10.6%	▲ 14.5%	▲ \$767	▲ \$70	▲ 0.3

* ASPV – average spend per visitor. ASPN – average spend per night. ALOS – average length of stay (nights)

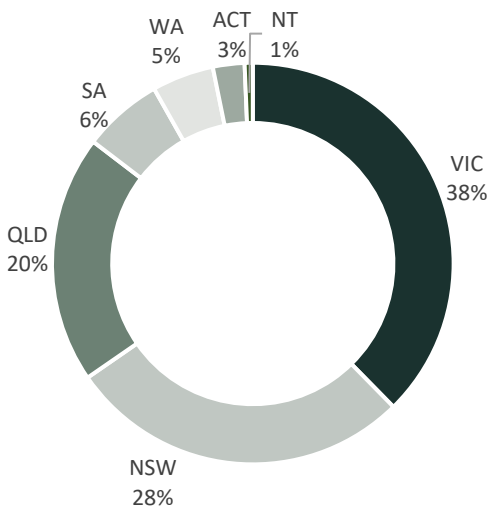
Interstate Visitors

Tasmanian Visitor Survey, YE December 2024
Roy Morgan

Spend share



Visitor share



Purpose of visit share by state of origin

	HOLIDAY	VFR	BUSINESS /CONF.	OTHER	LEISURE HOL+VFR
VIC	43%	27%	25%	5%	70%
NSW	53%	28%	15%	4%	81%
QLD	52%	31%	14%	4%	82%
SA	53%	24%	19%	4%	77%
WA	58%	27%	9%	6%	85%
ACT	38%	36%	20%	6%	74%
NT^	47%	35%	13%	5%	82%
AUS	49%	28%	19%	4%	77%

	SPEND (m)	Change from 2023	VISITORS (000)	Change from 2023	NIGHTS (000)	Change from 2023	ASPV	Change from 2023	ASPN	Change from 2023	ALOS (nights)	Change from 2023
VIC	\$783.7	-11.8%	425.5	8.8%	2,906	-2.3%	\$1,842	-\$430	\$146	\$15	6.8	-0.8
NSW	\$863.1	-0.1%	313.4	6.4%	2,988	8.8%	\$2,754	-\$179	\$105	-\$2	9.5	0.2
QLD	\$702.3	1.0%	226.1	7.5%	2,569	4.3%	\$3,107	-\$198	\$88	\$3	11.4	-0.3
SA	\$196.6	-8.5%	72.8	-1.6%	720	4.4%	\$2,701	-\$204	\$101	-\$6	9.9	0.6
WA	\$240.7	2.8%	56.3	-4.4%	945	6.7%	\$4,278	\$301	\$60	-\$7	16.8	1.7
ACT	\$62.2	-17.9%	28.8	6.5%	253	-14.4%	\$2,161	-\$643	\$114	\$22	8.8	-2.1
NT^	\$21.8	-44.7%	7.4	-8.2%	89	-46.9%	\$2,958	-\$1,954	\$83	\$35	12.0	-8.8
AUS	\$2,870.8	-4.9%	1,130.5	6.1%	10,471	2.0%	\$2,539	-\$292	\$108	\$4	9.3	-0.4

Interstate Visitors

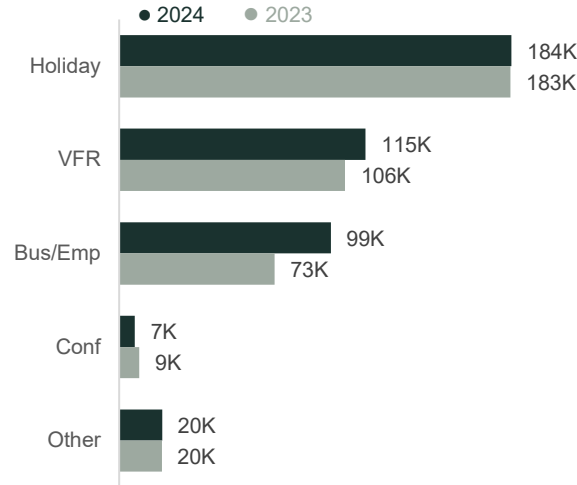
Tasmanian Visitor Survey, YE December 2024
Roy Morgan

VICTORIA

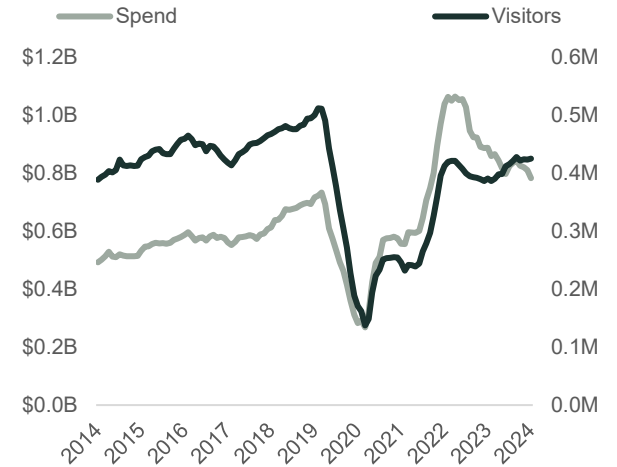
- Total spend (\$784m) was down 11.8% on 2023, as Victorians spent around \$430 less each per trip.
- The recovery pattern in spending has not aligned with trends observed in visitation from other states, with Victorian visitor spend on a downward trajectory since August 2024. This appears to be led by holiday and VFR visitors, though these purposes of visit remain up significantly compared to 2019.
- Victoria is traditionally Tasmania's largest market, though is the only market of the top three markets (VIC, NSW, QLD) to have not yet fully recovered to 2019 levels of visitation, although did see an 8.8% lift in visitation from last year.
- Holiday visitation has remained at the same level as 2023.
- There has been a significant rebound year-on-year for visitors coming for business or employment in 2024 (+36% on 2023) which has assisted in lifting overall visitation.
- Victorians stayed a total 2.91 million nights in the state, down 2% on 2023, and stayed for an average of 6.8 nights, down just under a night.

VICTORIA

Visitors



Rolling YE Spend and Visitation



Summit of Kunanyi / Mount Wellington
Samuel Shelley

Interstate Visitors

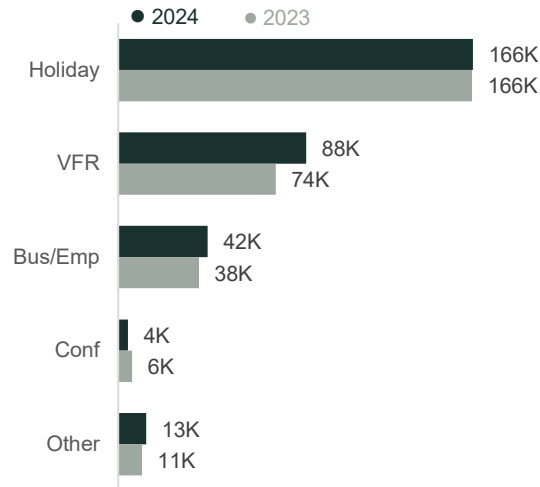
Tasmanian Visitor Survey, YE December 2024
Roy Morgan

NEW SOUTH WALES

- Spend has remained stable year-on-year at \$863m, with visitors spending marginally longer in the state but spending slightly less per night, resulting in average spend per visitor dropping.
- Total visitation from NSW exceeded 2019 levels in early 2023, and has remained elevated since, with 2024 (313k visitors), up 6% from last year.
- These visitors spent a total of 3 million nights in the state, 9% more than in 2023.
- Where QLD saw a large increase in conference or convention visitors, NSW has seen the inverse with a -30% drop in visitors coming for this purpose in 2024.
- Holiday visitation has remained stable compared to last year, and above 2019 (+10%).

NEW SOUTH WALES

Visitors



Rolling YE Spend and Visitation



Interstate Visitors

Tasmanian Visitor Survey, YE December 2024
Roy Morgan

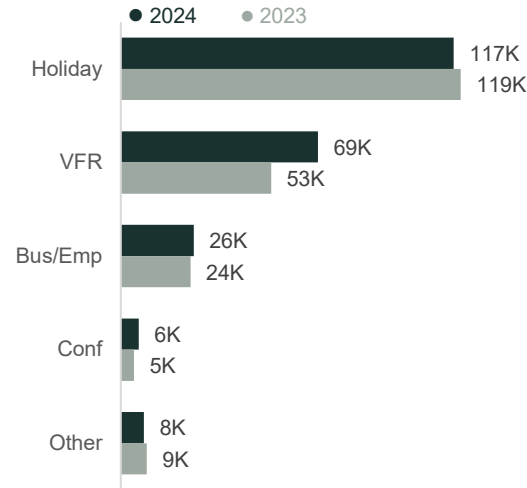
QUEENSLAND

- Queensland was the only state that saw increases across the key measures of spend, visitors and nights from 2023.
- Queenslanders spent just over \$700m in the state in 2024, up slightly (1%) on last year.
- Of all Australian states, Queensland visitors have increased spend the most since 2019, contributing an additional \$281.5m in 2024 compared to 2019.
- Tasmania welcomed 226k Queenslanders to the state in 2024, a 7% increase on 2023, and as with spend, is where the largest increase in visitation has occurred for Tasmania, with 45.6k (+39%) more compared to 2019.
- Queenslanders spent a total of 2.57m nights in the state, a 4% increase year-on-year, and a 32% increase on 2019.
- Average spend per visitor was down, though there was only marginal changes for spend per night and length of stay.
- More Queenslanders travelled to visit friends or family (+31%) and those travelling for a conference or convention (+36%) year-on-year.

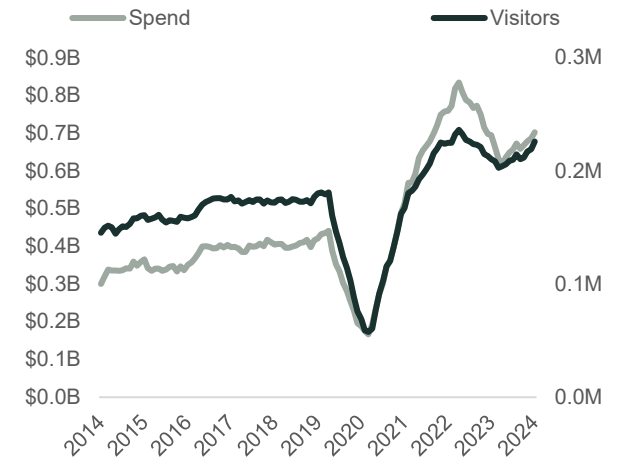
TASMANIAN TOURISM SNAPSHOT

QUEENSLAND

Visitors



Rolling YE Spend and Visitation



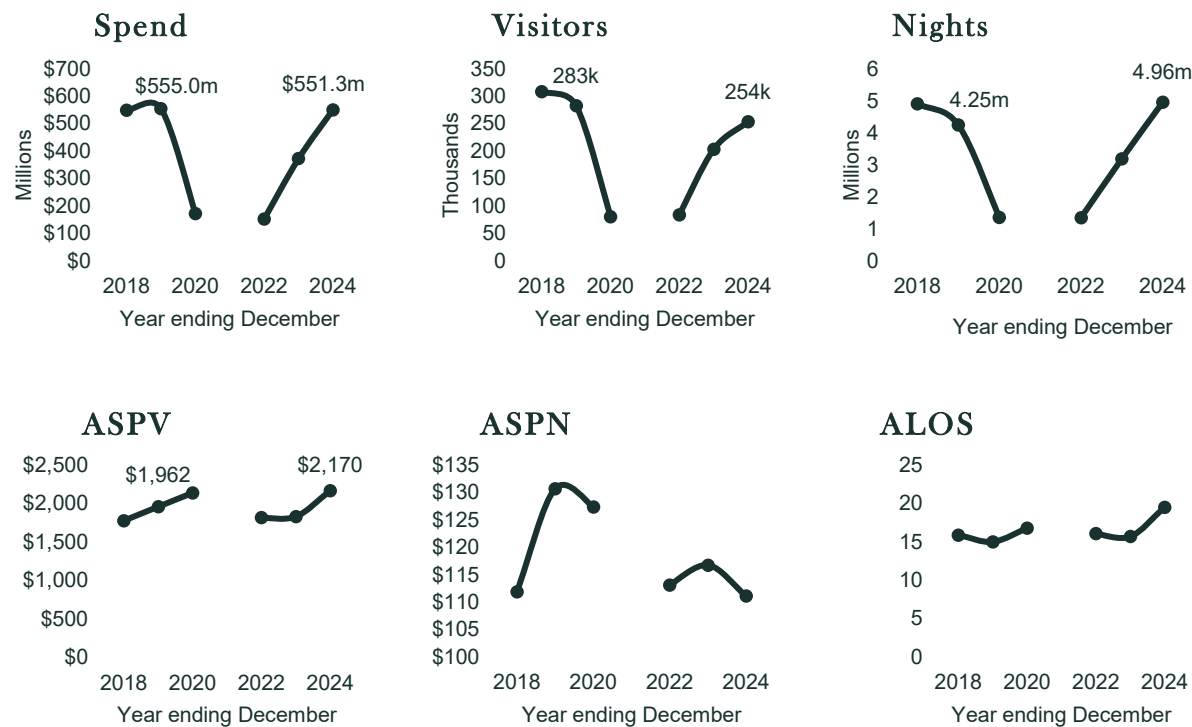
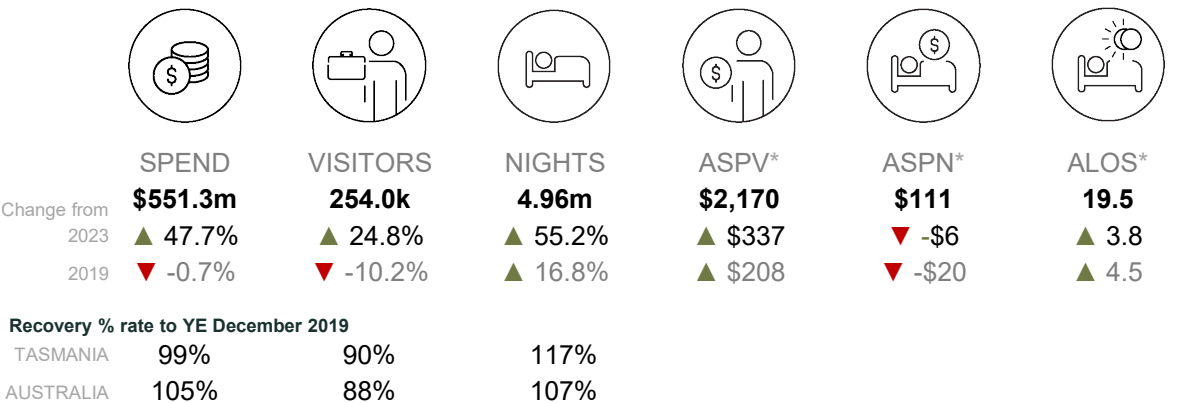
International Visitors

International Visitor Survey, YE December 2024
Tourism Research Australia

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

- Tasmania welcomed more international visitors in 2024, who spent more each and stayed for longer, compared to 2023.
- International visitors spent \$551m in the state, up significantly on last year (+48%, or \$178m more) driven by each visitor on average spending an additional \$337 and staying almost four nights longer.
- Post-pandemic international travel into Australia continued to improve throughout 2024, with Tasmania maintaining its share of all international visitors to Australia at 3.33% (3.25% in 2019), and 5.07% of holiday visitors (4.81% in 2019).
- Tasmania's international visitor recovery leads the national average for nights (TAS 117%, national average 107%) and visitation (TAS 90%, national average 88%, of 2019).
- International spend in Tasmania has recovered to pre-COVID levels (99% of 2019), while nationally spend has slightly exceeded it (105%).
- Tasmania attracts a higher proportion of international holiday visitors compared to other states, and while visitation remains down on 2019 (189.8k in 2024, -16%), they spent \$311 more each, leading to a total spend of \$322.1m (+3% on 2019).

INTERNATIONAL VISITORS

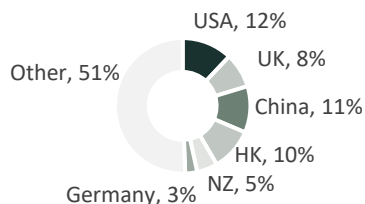


* ASPV – average spend per visitor. ASPN – average spend per night. ALOS – average length of stay (nights)

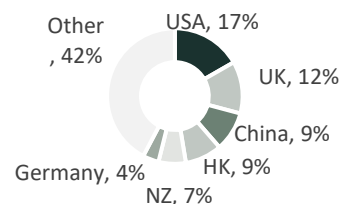
International Visitors

International Visitor Survey, YE December 2024
Tourism Research Australia

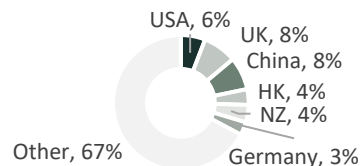
Spend market share



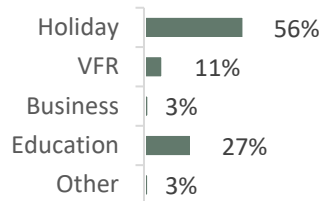
Visitors market share



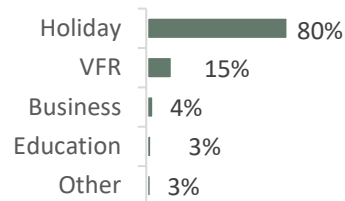
Nights market share



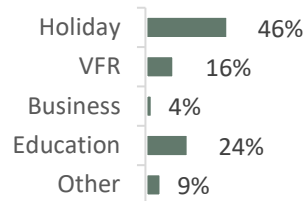
Spend by purpose⁺



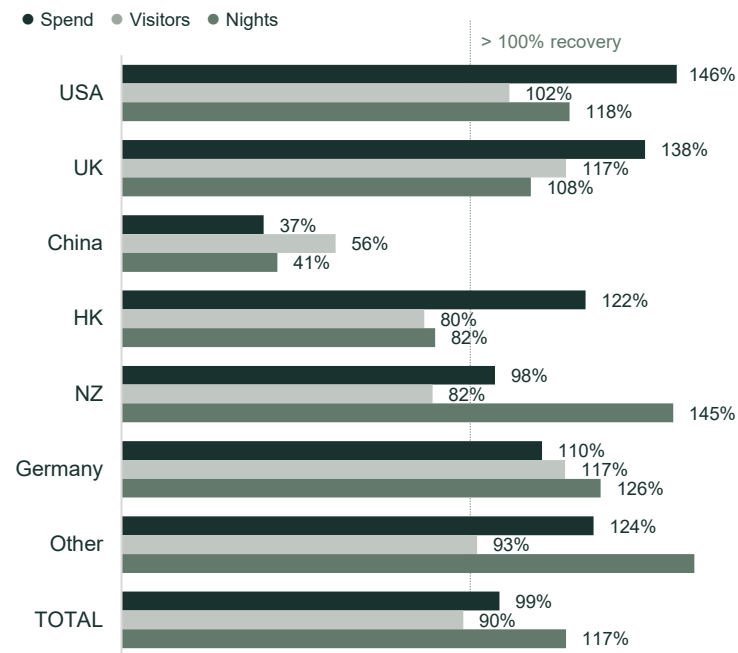
Visitors by purpose



Nights by purpose



Market recovery rate compared to 2019



	SPEND (m)	Change from 2023	VISITORS (000)	Change from 2023	NIGHTS (000)	Change from 2023	ASP ^V	Change from 2023	ASP ^N	Change from 2023	ALOS (nights)	Change from 2023
USA	\$66.3	15.3%	42.4	5.7%	289.0	-31.1%	\$1,562	\$130	\$229	\$92	6.8	-3.6
UK	\$45.8	49.6%	31.6	39.2%	399.9	13.9%	\$1,449	\$102	\$114	\$27	12.7	-2.8
China	\$61.0	124.5%	24.0	55.8%	389.3	203.5%	\$2,541	\$777	\$157	-\$55	16.2	7.9
HK	\$56.3	33.6%	22.3	33.5%	186.9	-5.7%	\$2,520	\$1	\$301	\$89	8.4	-3.5
NZ	\$27.2	-37.8%	16.5	0.3%	205.8	29.3%	\$1,645	-\$1,009	\$132	-\$143	12.4	2.8
Germany	\$15.8	51.5%	9.7	57.3%	154.8	39.2%	\$1,623	-\$61	\$102	\$8	15.9	-2.1
Other	\$278.9	72.6%	107.4	25.0%	3,333.8	82.3%	\$2,597	\$716	\$84	-\$5	31.0	9.8
TOTAL	\$551.3	47.7%	254.0	24.8%	4,959.4	55.2%	\$2,170	\$337	\$111	-\$6	19.5	3.8

* ASPV – average spend per visitor. ASPN – average spend per night. ALOS – average length of stay (nights)

+ The IVS allows different purposes by stopover (overnight stays in a place), and therefore values may add to more than 100%. This list reflects all markets where there is sufficient survey sample that meets TRA's publishable data threshold

Intrastate trips by Tasmanians

National Visitor Survey, YE December 2024
Tourism Research Australia

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

- Tasmanians spent over \$1.8b (-4.5% on 2023) on trips within the state in the year ending December 2024, spread across overnight trips (\$970m, -14.0%) and day trips (\$841m, +9.5%).

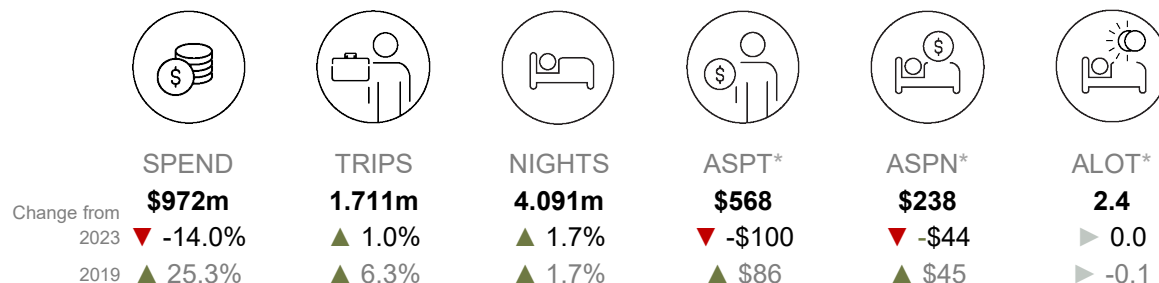
OVERNIGHT TRIPS

- Tasmanians took a similar number of overnight trips within the state compared to the previous year (+1.0%), and for similar duration (2.4 nights).
- There was however a drop in average spend per trip, (\$568, down \$100, or \$44 less per night, from 2023), resulting in an overall decline in overnight trip spend.
- Spend by Tasmanians taking overnight trips for a holiday (\$363m) was up 15% on 2019 (\$316m), as the number of trips taken (+9%) and nights (+15%) also increased.

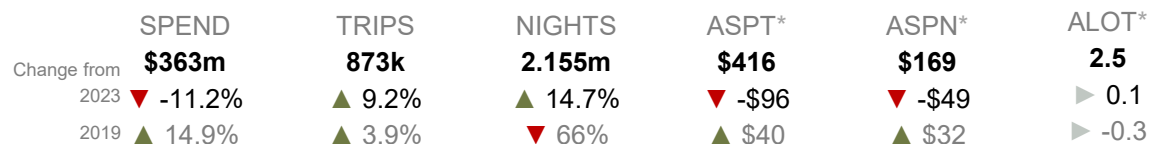
Definition of an overnight trip

- Overnight trips must include at least one night away and be a minimum of 40 kilometres from the respondent's usual place of residence.

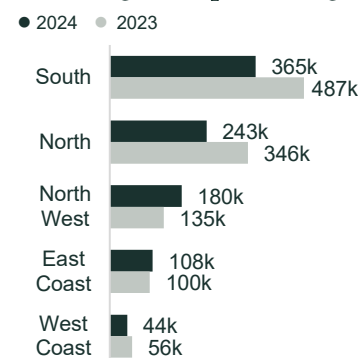
INTRASTATE OVERNIGHT TRIPS



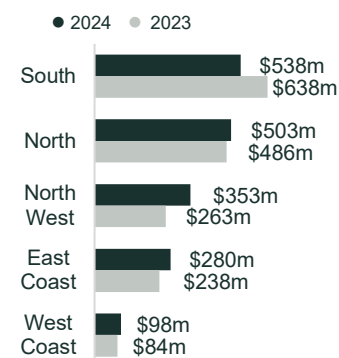
HOLIDAY OVERNIGHT TRIPS



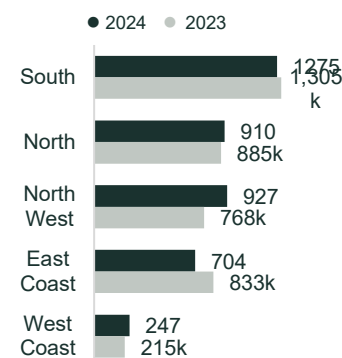
Overnight trips to regions



Spend in regions



Nights in regions



* ASPT – average spend per trip. ASPN – average spend per night. ALOT – average length of trip (nights)

Intrastate trips by Tasmanians

National Visitor Survey, YE December 2024
Tourism Research Australia

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

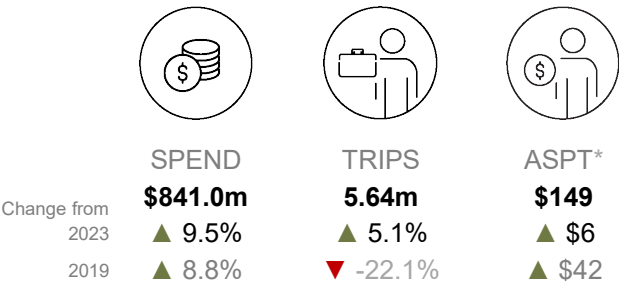
DAY TRIPS

- Tasmanians are avid explorers of their 'backyard', and in 2024 took more day trips within the state and spent more each compared to the previous year.
- Over half of day trips are for 'holiday' purposes, with Tasmanians taking an additional 241k of these day trips, spending \$31m more than in the previous year.

Definition of a day trip for this data

- A day trip is a trip that involves a round-trip distance of at least 50 kilometres from the respondent's usual place of residence, lasting a minimum of four hours and does not involve an overnight stay.

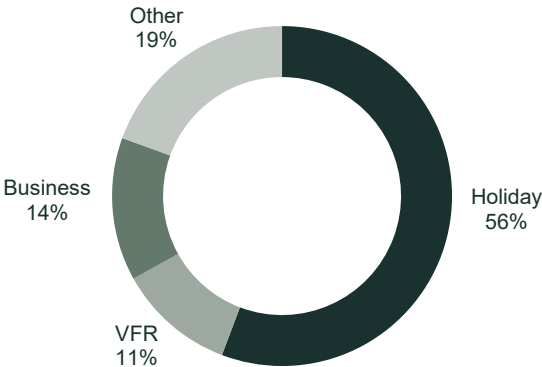
INTRASTATE DAY TRIPS



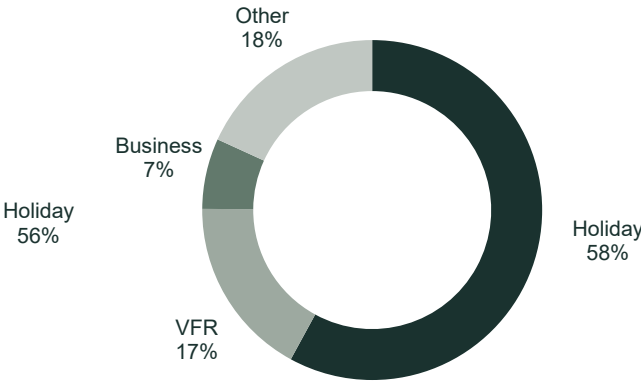
HOLIDAY DAY TRIPS



Day trip spend



Day trip purpose



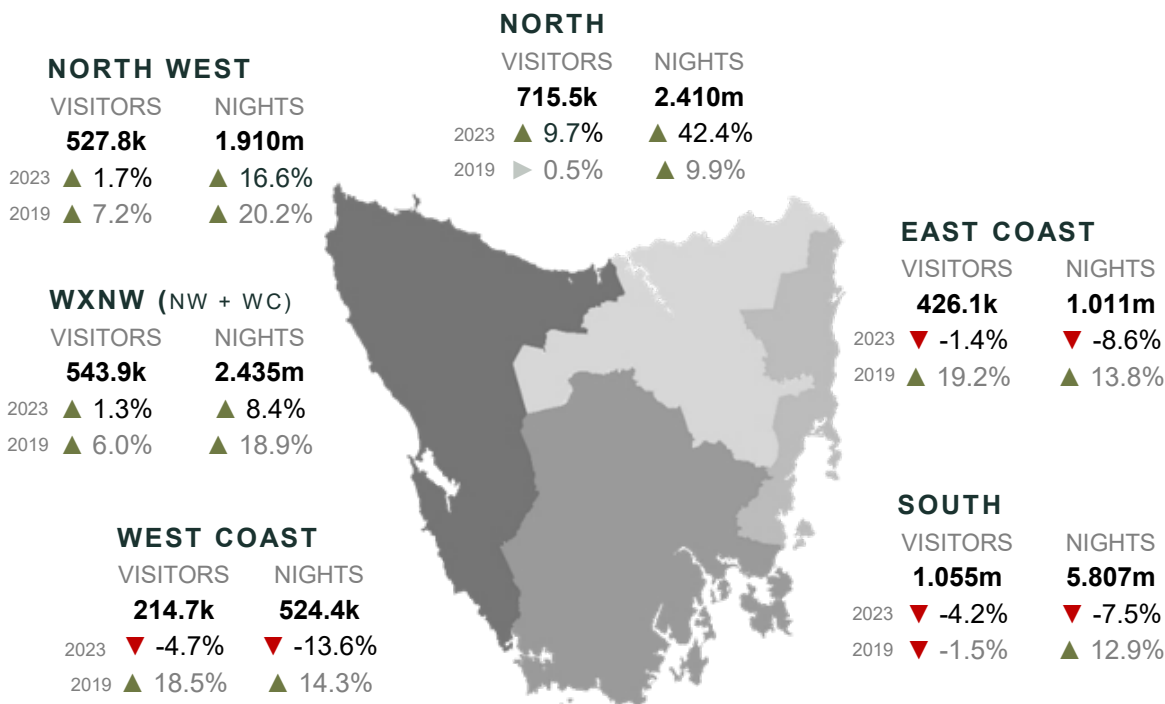
Year ending December 2024

Tasmanian Visitor Survey
Roy Morgan

Total visitation (interstate + international) to the state increased by 4.2% from last year, and nights up 2.7%, though there were mixed results across the regions.

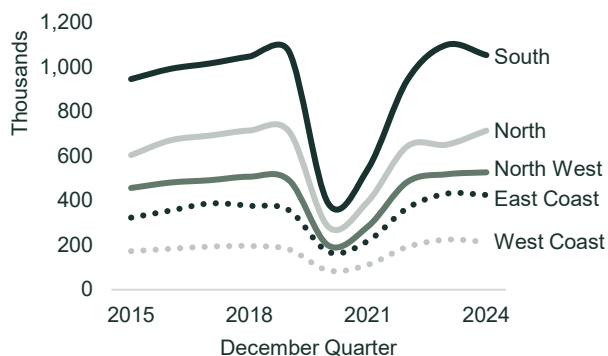
- The **South** saw a softening in visitation this year compared to 2023, settling to pre-pandemic levels just over 1 million annual visitors. Holiday* visitation (57% of visitors to the region) was 9% above 2019.
- The **North** experienced record-equalling visitation in 2024, matching 2018's 715k visitors, in part driven by a record number of VFR visitors to the state who included the North in their stay, and holiday visitation increasing 6.5% on 2019.
- The **East Coast** saw slightly fewer visitors this year, however both holiday (+1.3%) and VFR (+6.4%) saw increases. The overall decline was due to a peak last year from visitors in the state for 'other'^ purposes.
- The **North West** region welcomed more visitors than 2023 or 2019, mainly due to increases in holiday (+8.2%) and VFR (+16.9%).
- While **West Coast** visitation declined from last year, it remains over 18% above 2019, and has maintained over 200k annual visitors since YE January 2023 – visitation had not reached that level prior to then. The West has the highest rate of holiday visitation (84% in 2024) and this market is keeping visitation elevated.

REGIONAL VISITATION



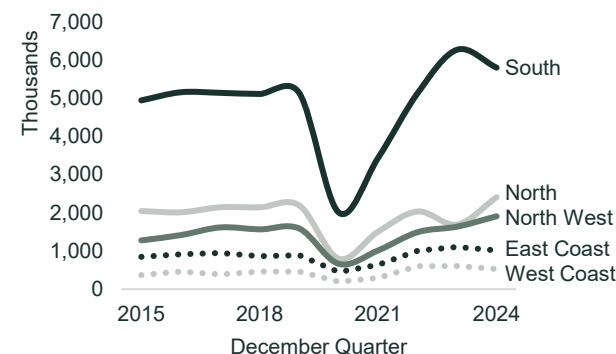
Visitors

10 years – YE December



Nights

10 years – YE December

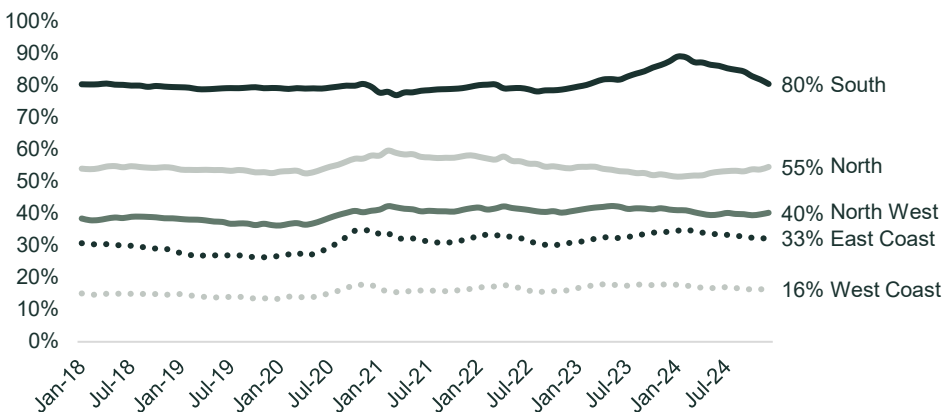


Regional visitation - year ending December 2024

Tasmanian Visitor Survey
Roy Morgan

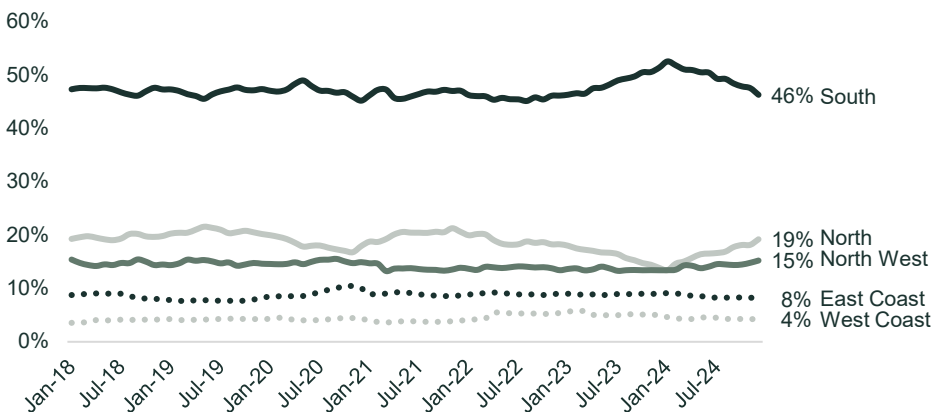
Regional share of visitors

10 years – Rolling year ending monthly



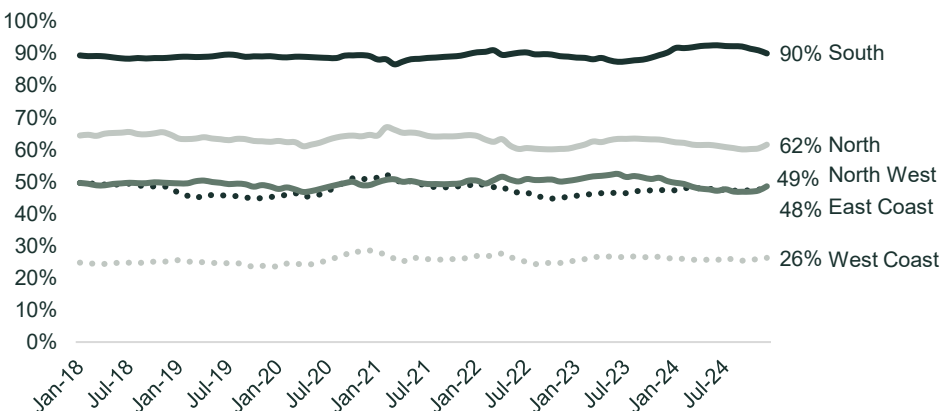
Regional share of nights

10 years – Rolling year ending monthly



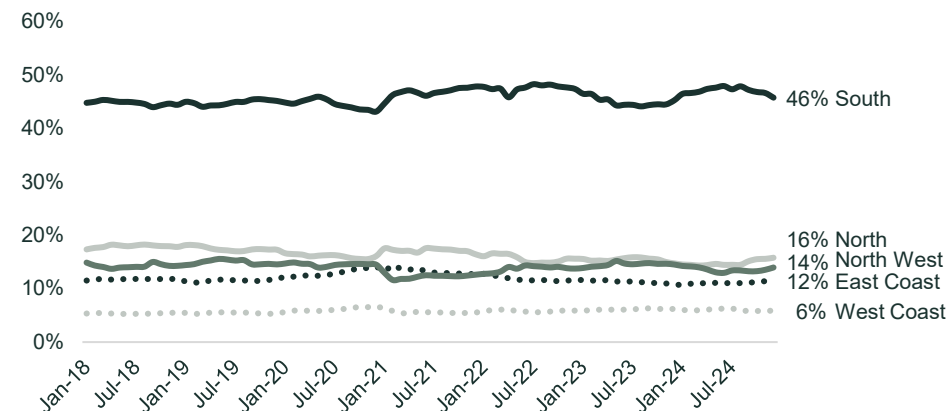
Regional share of holiday* visitors

10 years – Rolling year ending monthly



Regional share of holiday nights

10 years – Rolling year ending monthly



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 can be found in Tourism Tasmania's [monthly accommodation reports](#).
- 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

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 60,000 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

A NOTE OF CAUTION

- You are advised to exercise care when interpreting figures contained in this report and 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 5,000 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.