

TASMANIAN TOURISM SNAPSHOT

SEPTEMBER 2024



Lake Oberon, Western Arthur Range
Southwest National Park
© Mark Reid

TASMANIA

COME DOWN FOR AIR



Tourism
Tasmania

TASMANIAN TOURISM SNAPSHOT

OVERVIEW AT QUARTER AND YEAR ENDING SEPTEMBER 2024

KEY INSIGHTS

- Overall, the state welcomed more visitors in the year ending September (+3.5%) and the September quarter (+1.9%) of 2024 compared to 2023, led by interstate visitors coming to see friends or relatives (VFR), or for business or employment purposes, while more international visitors came for a holiday.
- Visitor spend continues to track below 2023, year ending (-6.9%) and quarter (-3.3%), although still above 2019.
- There were more visitors this summer (+4.0%), autumn (+11.0%) and winter (+7.3%) than in their respective seasons in 2023.
- Interstate holiday visitation in winter 2024 was on par with the record (94k) for these visitors set in 2022.
- Tasmania's primary tourism market is interstate holiday visitors, and the state continues to welcome more of these visitors than in 2019 (+13%). However as with all states and territories, there is a softening in travel from this market (-3% on YE September 2023), although visitation picked up in the September quarter (+9.2%).
- Interstate visitors stayed 9.6 nights, on par with 2023, almost two nights longer than in 2019.
- Visitors from Queensland set a record for visitor nights, led by strong growth in visiting friends and relatives living in Tasmania, and by visitors on business trips.
- Visitors are still spending far more each compared to before the pandemic (+\$739), however they continue to spend less each compared to in 2022 and 2023.
- International holiday visitors spent on average an extra \$400 each compared to 2019, leading to a new record spend of \$337.5m (+5% on YE September 2019) from these visitors.
- International visitors accounted for 14.6% of all visitors, on par with pre-COVID share (14.0% in 2019).
- Tasmanians took more overnight trips within the state (+9%), for more nights (+8%), although because they spent less each per night, overall spend decreased by 11% compared to 2023.

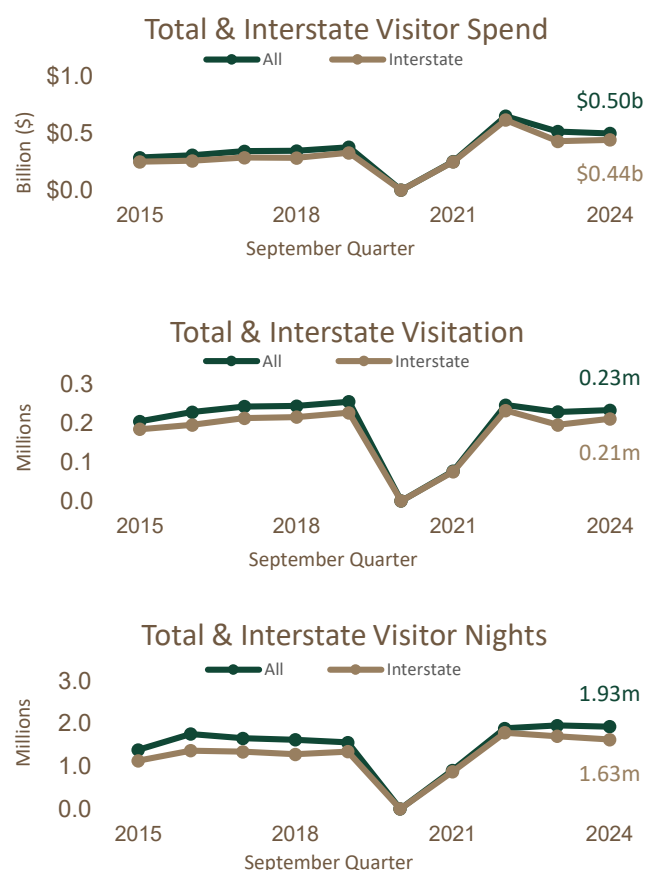
EXPLORE THE DATA

Latest visitation results can be explored using the free TVS Analyser dashboard www.tvsanalyser.com.au

SEPTEMBER 2024 QUARTER

Spend in the September quarter of 2024 totalled \$496.2m, falling 3% from the same quarter in 2023 (\$513.2m), as visitors spent around 5% less each on their stay in Tasmania. Compared to 2019 however, visitors spent an additional \$586 each on average in this quarter, leading to total expenditure increasing 39% (or \$204m) over the last five years.

Average length of stay (7.7 nights) for interstate holiday visitors was down 1.5 nights on last year, although up half a night on pre-COVID. Meanwhile, the average length of stay across all interstate visitors has remained at a higher level (8.3 nights, down less than half a night on 2023 and up two nights on 2019) since 2021 due to longer stays by trips to visit friends or relatives (VFR) in Tasmania.



SEPTEMBER QUARTER	All Visitors				Interstate Visitors			
	2023	2024	Quarter Change	Change on 2019 ³	2023	2024	Quarter Change	Change on 2019
SPEND	\$513.2m	\$496.2m	-3.3%	+32.2%	\$427.6m	\$440.2m	+2.9%	+34.8%
VISITORS	228.3k	232.7k	+1.9%	-8.6%	195.0k	210.6k	+8.0%	-6.9%
NIGHTS	1.96m	1.93m	-1.3%	+24%	1.71m	1.63m	-4.7%	+21.1%
ASPV	\$2,248	\$2,133	-\$115	+\$658	\$2,192	\$2,090	-\$102	+\$647
ASPN	\$262	\$257	-\$5	+\$16	\$250	\$270	+\$20	+\$28
ALOS (NIGHTS)	8.6	8.3	-0.3	+2.2	8.8	7.7	-1.0	+1.8

REGIONAL VISITATION

Although total visitation to the state increased 1.9% this quarter compared to last year, there were mixed results across the regions. The Northern and North West regions saw lifts in visitation compared to last year, and while the East and West Coasts did not increase from

last year, they both continue to see elevated visitation compared to the same quarter in 2019 (+51% and +35% respectively). Nights stayed, and average length of stay, in each region remains above this quarter in 2019, for both total visitation and the interstate holiday market.

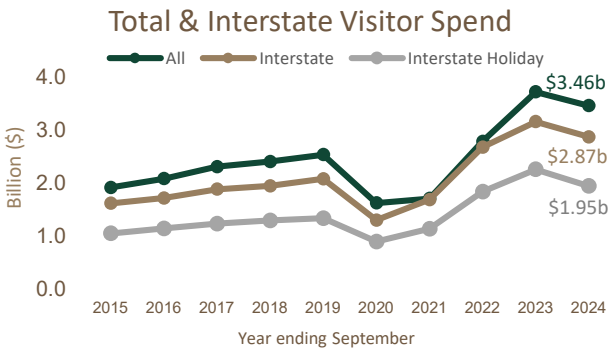
ALL VISITORS SEPTEMBER QUARTER	Visitors ('000)				Nights ('000)			
	2023	2024	Quarter Change	Change on 2019	2023	2024	Quarter Change	Change on 2019
SOUTHERN	208.8	189.6	-9.2%	-2.3%	1,170.1	896.2	-23.4%	+8.7%
NORTHERN	104.9	109.0	+4.0%	-7.5%	251.4	404.8	+61.0%	+25.3%
EAST COAST	64.0	56.7	-11.5%	+50.7%	136.2	123.9	-9.0%	+80.3%
W X NW	79.4	83.0	+4.5%	+4.5%	305.3	312.2	+2.3%	+30.0%
NORTH WEST	77.8	80.3	+3.3%	+4.1%	210.2	245.2	+16.6%	+22.9%
WEST COAST	28.4	25.4	-10.5%	+35.2%	95.1	67.0	-29.5%	+65.1%

YEAR ENDING SEPTEMBER 2024



VISITOR SPEND

In the year ending (YE) September 2024, total spend across all interstate & international visitors was \$3.461b, down 6.9% on 2023, though up \$926m (36.5%) from 2019. Average spend per visitor has fallen by 10% (\$296) from YE September 2023, but was \$739 more per visitor than in 2019.

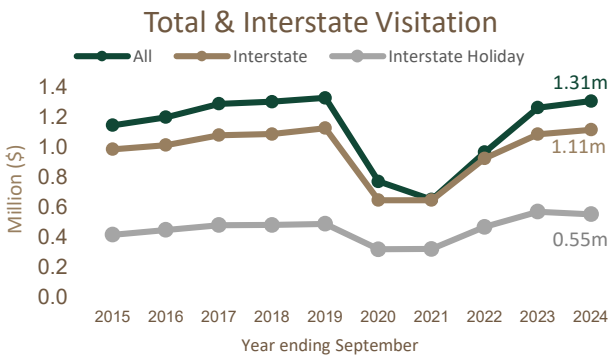


VISITOR SPEND	YE Sep 23	YE Sep 24	Annual Change ¹	Change vs YE Sep 2019
ALL ²	\$3.719b	\$3.461b	-6.9%	+36.5%
INTERSTATE	\$3.159b	\$2.871b	-9.1%	+37.9%
INTERSTATE HOL.	\$2.258b	\$1.946b	-13.8%	+45.3%



TOTAL VISITORS

Tasmania welcomed 1.306m visitors in the year ending September 2024, up 3.5% on 2023, and down only 1.6% from the 1.327m visitors in YE September 2019. The increased visitation on last year was led by interstate visitors coming to visit friends or relatives (VFR) living in Tasmania, or for business or employment purposes.

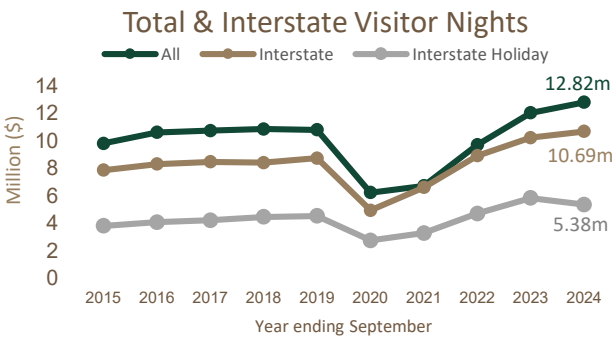


TOTAL VISITORS	YE Sep 23	YE Sep 24	Annual Change	Change vs YE Sep 2019
ALL	1.262m	1.306m	+3.5%	-1.6%
INTERSTATE	1.086m	1.115m	+2.7%	-1.0%
INTERSTATE HOL.	0.570m	0.554m	-2.9%	+13.1%



VISITOR NIGHTS

Visitors stayed a total of 12.82m nights in the state, up on last year (+6.4%) and the same time in 2019 (+18.5%), primarily due to interstate visitors spending an extra two nights, on average, in the state than they did in 2019. In particular, the business or employment visitors spent longer in the state, driving up the total nights.



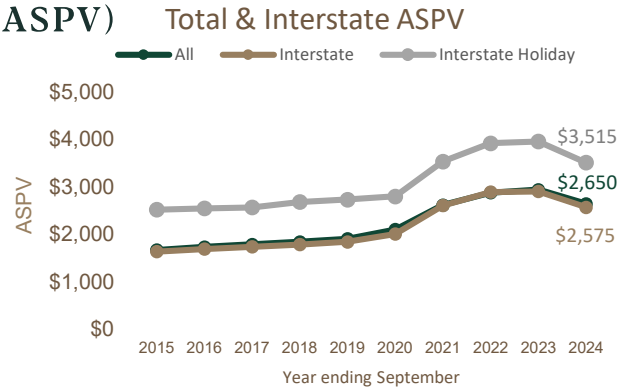
VISITOR NIGHTS	YE Sep 23	YE Sep 24	Annual Change	Change vs YE Sep 2019
ALL	12.05m	12.82m	+6.4%	+18.5%
INTERSTATE	10.24m	10.69m	+4.4%	+22.1%
INTERSTATE HOL.	5.86m	5.38m	-8.1%	+18.4%

KEY METRICS



AVERAGE SPEND PER VISITOR (ASPV)

Average spend per visitor (ASPV) was \$2,650 in year ending September 2024, down 10% (-\$296) from 2023, and 39% (+\$739) more than the same period in 2019. Interstate holiday visitors spent an average \$3,515 each (\$446 less than in 2023). Rising costs of living and doing business may mean the extra spend may not flow through to operators – while all spend was down.

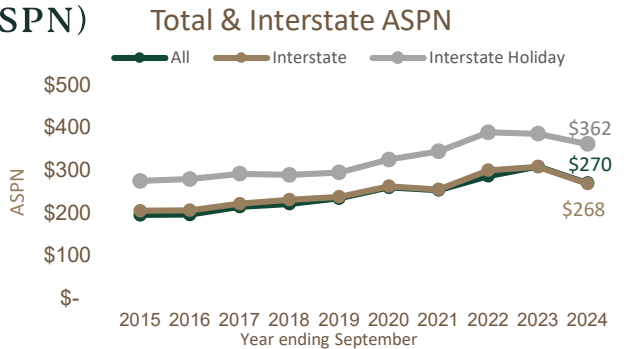


VISITOR SPEND	YE Sep 23	YE Sep 24	Annual Change	Change vs YE Sep 2019
ALL	\$2,946	\$2,650	-\$296/visit	+\$739/visit
INTERSTATE	\$2,910	\$2,575	-\$335/visit	+\$727/visit
INTERSTATE HOL.	\$3,961	\$3,515	-\$446/visit	+\$779/visit



AVERAGE SPEND PER NIGHT (ASPN)

As visitors spend less overall on their trips but continue to stay longer in the state, this will put downward pressure on ASPN. Visitors spent 13% (-\$39) less per night compared to YE September 2023, though 15% more (+\$36) on 2019. Interstate holiday visitors spent \$24 less than 2023, and an extra \$67 per night compared to 2019.

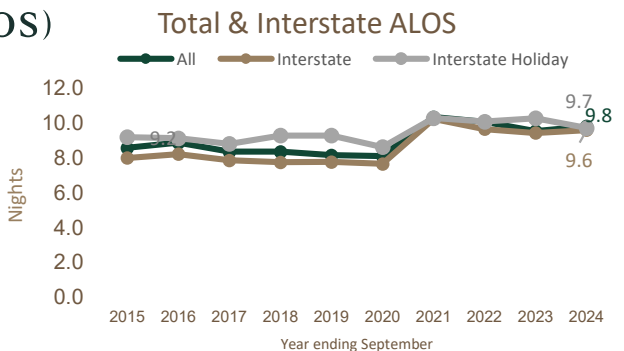


TOTAL VISITORS	YE Sep 23	YE Sep 24	Annual Change	Change vs YE Sep 2019
ALL	\$309	\$270	-\$39/night	+\$36/night
INTERSTATE	\$308	\$268	-\$40/night	+\$31/night
INTERSTATE HOL.	\$386	\$362	-\$24/night	+\$67/night



AVERAGE LENGTH OF STAY (ALOS)

While average length of stay was up 0.3 nights on 2023, and 1.7 nights on 2019, there has been a loss of around 1 night since the peaks in ALOS seen in 2021 and 2022. The increase in ALOS is primarily driven by interstate visitors; of these, holiday-makers stayed 9.7 nights (down half a night on 2023, up around the same on 2019) and VFR stayed 8.9 nights (on par with 2023, 9.0, up 2 nights on 2019).



VISITOR NIGHTS	YE Sep 23	YE Sep 24	Annual Change	Change vs YE Sep 2019
ALL	9.5	9.8	+0.3 nights	+1.7 nights
INTERSTATE	9.4	9.6	+0.2 nights	+1.8 nights
INTERSTATE HOL.	10.3	9.7	-0.6 nights	+0.4 nights

KEY MARKETS

INTERSTATE MARKETS

The vast majority of Tasmania's visitors are from interstate (85%), with VIC, NSW and QLD accounting for 72% of all visitors to the state (or 85% of interstate visitors).

VICTORIA

Traditionally the largest single market, VIC is the only market of the top three markets (VIC, NSW, QLD) to not recover to 2019 levels of visitation, across any purpose of visit. A significant rebound in visitors coming for business or employment in YE September 2024 (+37% on 2023) lifted overall visitation from VIC by 7.5% from the previous year. Victorians stayed 3.11m nights in the state, up 6.9% on 2023, with a 53% increase in business or employment nights more than offsetting a 12.9% decline in nights stayed by holiday visitors. Total spend, at \$827m was down 10.5% on 2023, as Victorians spent around \$396 less each.

NEW SOUTH WALES

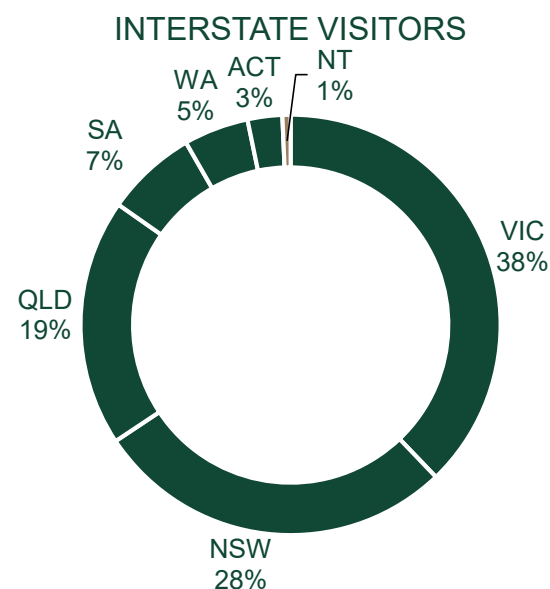
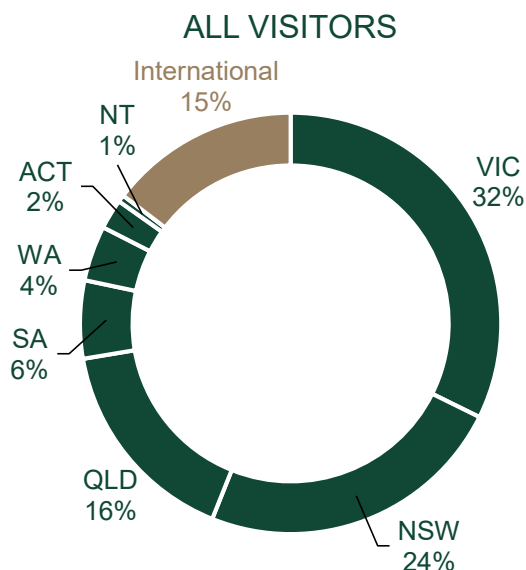
Total visitation from NSW exceeded 2019 levels in early 2023, and has remained elevated since, with YE September 2024 on par with 2023 (310k, +0.8% on 2023). Despite a 7.4% drop in spend from last year, at \$840m NSW maintained its post-COVID position as the market with the highest visitor spend contribution, led by VFR and business or employment visitors spending more each this year than last, in contrast to the general visitor trend.

QUEENSLAND

QLD visitors set a record for nights in the state (2.605m, up 4.7% on 2023, up 33.8% on 2019). QLD holiday visitors also exceeded pre-COVID visitation (+41%) and expenditure (+75%) in the YE September 2024, however both saw drops from 2023.

SOUTH AUSTRALIA

Visitation (78.3k) from SA grew by 15% in YE September 2024, boosted by more holiday, VFR and business or employment visitors. Although, visitation remains below peak visitation in YE March 2024 (80.6k), which was bolstered by a particularly strong visitation in summer 2023-24. Total spend was \$208m, up 15.6% on 2023.



INTERNATIONAL MARKETS

Tasmania's international visitor recovery leads the national average for nights (TAS 117%, national average 104%) and visitation (TAS 89%, national average 86%, of YE September 2019). International visitors spent more (\$546.7m, + 2%, peak spend was \$560.4m in YE March 2018) in the state than they did in YE September 2019, while nationally spend was up 7%.

Tasmania attracts a higher proportion of holiday visitors compared to other states, and while visitation remains down on YE September 2019 (193.5k in 2024, -19%), they spent \$400 more each, leading to a new record for holiday spend of \$337.5m (+5% on YE September 2019).

TOTAL VISITORS TO TASMANIA

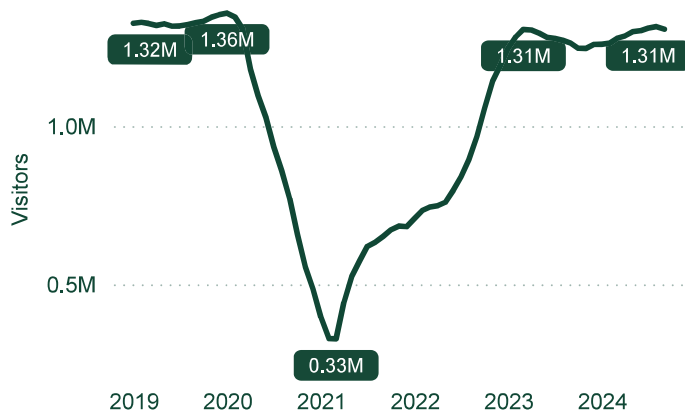
ALL VISITORS*

1.31M Visitors ▲ 3.5% 98.4% of 2019	12.82M Visitor Nights ▲ 6.4% 118.5% of 2019	\$3.46bn Visitor Spend ▼ -6.9% 136.5% of 2019	9.8 ALOS (Nights) ▲ 2.9% 120.4% of 2019	\$2.650K ASPV ▼ -10% 138.7% of 2019	\$270 ASPN ▼ -12.6% 115.2% of 2019
---	---	---	---	---	--

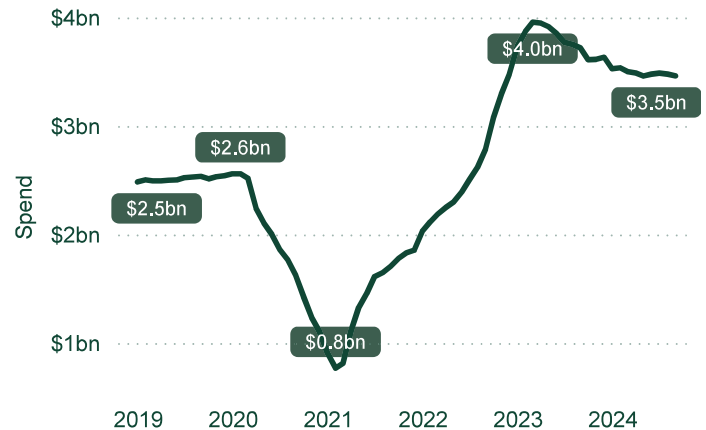
ALL HOLIDAY VISITORS

694.08K Visitors ▼ -0.1% 110.7% of 2019	6.65M Visitor Nights ▼ -4.2% 117.5% of 2019	\$2.43bn Visitor Spend ▼ -9.2% 145.6% of 2019	9.6 ALOS (Nights) ▼ -4.1% 106.1% of 2019	\$3.503K ASPV ▼ -9.2% 131.5% of 2019	\$365 ASPN ▼ -5.3% 123.9% of 2019
---	---	---	--	--	---

ROLLING ANNUAL VISITATION TO TASMANIA



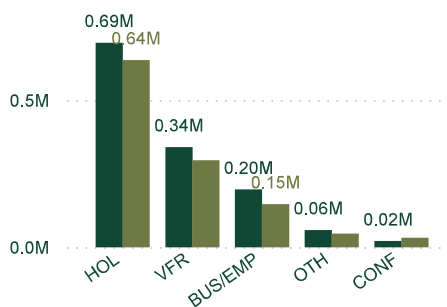
ROLLING ANNUAL SPEND IN TASMANIA



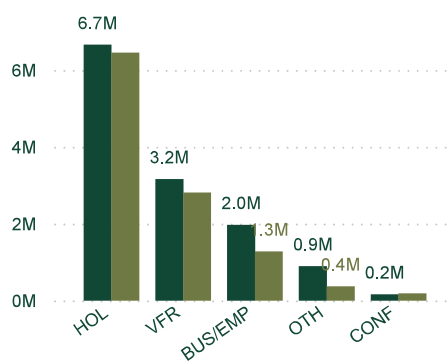
PURPOSE OF VISIT TO TASMANIA

VISITORS

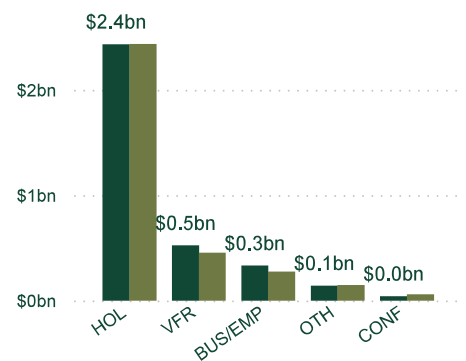
● YE Sep 24 ● YE Sep 23



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.

INTERSTATE VISITORS TO TASMANIA

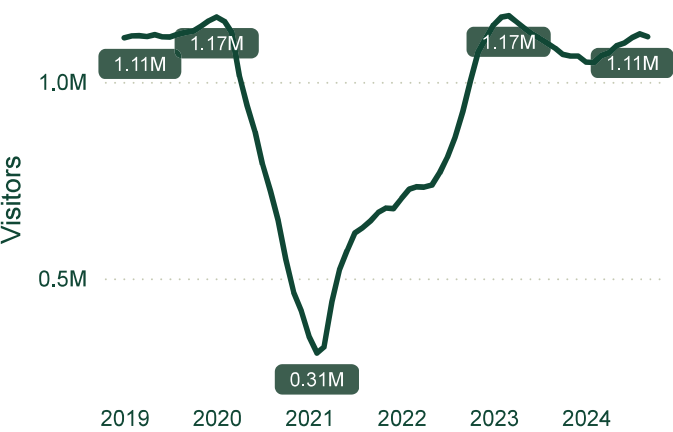
ALL INTERSTATE VISITORS*

1.11M Visitors ▲ 2.7% 99% of 2019	10.69M Visitor Nights ▲ 4.4% 122.1% of 2019	\$2.87bn Visitor Spend ▼ -9.1% 137.9% of 2019	9.6 ALOS (Nights) ▲ 1.7% 123.4% of 2019	\$2,575K ASPV ▼ -11.5% 139.3% of 2019	\$268 ASPN ▼ -13% 112.9% of 2019
---	---	---	---	---	--

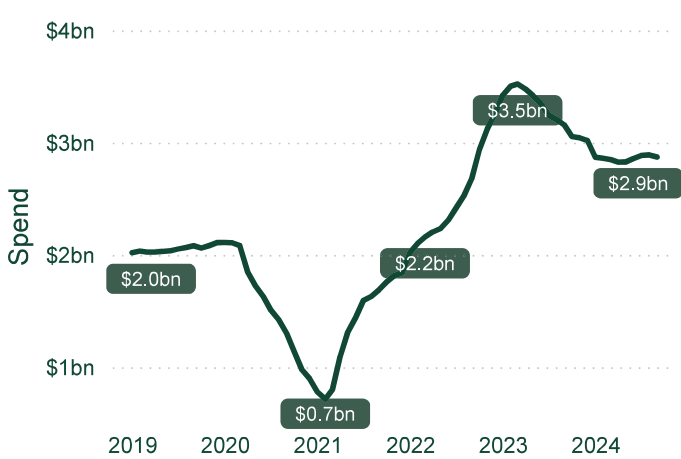
INTERSTATE HOLIDAY VISITORS

553.54K Visitors ▼ -2.9% 113.1% of 2019	5.38M Visitor Nights ▼ -8.1% 118.4% of 2019	\$1.95bn Visitor Spend ▼ -13.8% 145.3% of 2019	9.7 ALOS (Nights) ▼ -5.4% 104.7% of 2019	\$3,515K ASPV ▼ -11.3% 128.5% of 2019	\$362 ASPN ▼ -6.2% 122.7% 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	422,100	3,114	\$827	7.4	\$1,959	\$266	44%	26%	23%	6%
NSW	310,200	3,088	\$864	10.0	\$2,787	\$280	55%	27%	13%	4%
QLD	211,900	2,606	\$668	12.3	\$3,154	\$256	53%	30%	12%	3%
SA	78,300	713	\$209	9.1	\$2,663	\$292	51%	27%	16%	5%
WA	55,500	807	\$211	14.5	\$3,808	\$262	56%	27%	7%	7%
ACT	30,000	276	\$71	9.2	\$2,354	\$256	40%	32%	18%	8%
NT	6,900	90	\$20	13.0	\$2,964	\$227	54%	22%	16%	9%

▲ 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

Interstate holidaymakers are the main market across the regions, and all except the South saw a decline from the previous year; however all maintained elevated interstate holiday visitation compared to YE September 2019.

SOUTHERN

The return of international visitors, and an increase in interstate visitors, continued the positive trend for the South. The South has maintained over 1m visitors annually since YE January 2024, with visitors from Victoria and South Australia leading the increase.

NORTHERN

Visitation steadily improved through autumn and winter 2024, following a softening across late 2023, resulting in total interstate and international visitation increasing on YE September 2023. Australians visiting for business or employment, or VFR, led the recovery, and offset the drop in interstate holiday visitors from the previous year.

EAST COAST

The East Coast had a modest increase from last year (+1.2%), however it has had the strongest return of visitation of the regions in terms of volume, up 21.3% on YE September 2019. A decline (-6.7%) in interstate holiday visitation was offset by increased international visitation (+18.2%).

NORTH WEST

The NW saw similar visitation compared to the previous year, with more VFR and business or employment visitors nearly completely offsetting a drop in holiday visitors to the region. Total (+6.3%) and holiday (+5.5%) visitation remains up on 2019.

WEST COAST

Visitation has been steadily coming down from a record high at YE March 2023 (which was +28% on YE September 19, +35% for interstate holiday). While YE September 2024 was down 4.5% from the previous year, it remained significantly above 2019.

ALL VISITORS	Visitors ('000)				Nights (m)			
	YE Sep 23	YE Sep 24	Annual Change	Change on YE Sep 19	YE Sep 23	YE Sep 24	Annual Change	Change on YE Sep 19
SOUTHERN	1,065.9	1,102.0	+3.4%	+4.7%	5.986	6.202	+3.6%	+20.4%
NORTHERN	664.8	694.9	+4.5%	-1.9%	1.840	2.276	+23.7%	+2.5%
EAST COAST	424.0	428.9	+1.2%	+21.3%	1.080	1.052	-2.6%	+26.8%
WXNW	544.9	535.9	-1.6%	+5.1%	2.236	2.399	+7.3%	+19.5%
NORTH WEST	524.9	520.2	-0.9%	+6.3%	1.620	1.844	+13.8%	+19.6%
WEST COAST	224.7	214.6	-4.5%	+18.0%	0.616	0.555	-9.9%	+19.2%

INTERSTATE VISITORS	Visitors ('000)				Nights (m)			
	YE Sep 23	YE Sep 24	Annual Change	Change on YE Sep 19 ^a	YE Sep 23	YE Sep 24	Annual Change	Change on YE Sep 19
SOUTHERN	905.7	923.3	+1.9%	+5.9%	5.070	5.212	+2.8%	+23.6%
NORTHERN	556.7	571.8	+2.7%	-2.5%	1.576	1.920	+21.8%	+7.0%
EAST	339.4	328.9	-3.1%	+24.2%	0.880	0.834	-5.2%	+31.4%
WXNW	458.2	442.3	-3.5%	+6.3%	1.951	2.008	+2.9%	+22.2%
NORTH WEST	440.9	429.2	-2.6%	+6.8%	1.400	1.538	+9.9%	+24.6%
WEST COAST	185.9	171.7	-7.6%	+18.8%	0.551	0.471	-14.7%	+15.0%

VISITATION TO TOURISM REGION

INTERSTATE AND INTERNATIONAL

VISITORS TO REGIONS

1.10M ▲ 3.4% Southern 104.7% of 2019	694.93K ▲ 4.5% Northern 98.1% of 2019	535.91K ▼ -1.6% West x North West 105.1% of 2019	428.93K ▲ 1.2% East Coast 121.3% of 2019
---	--	---	---

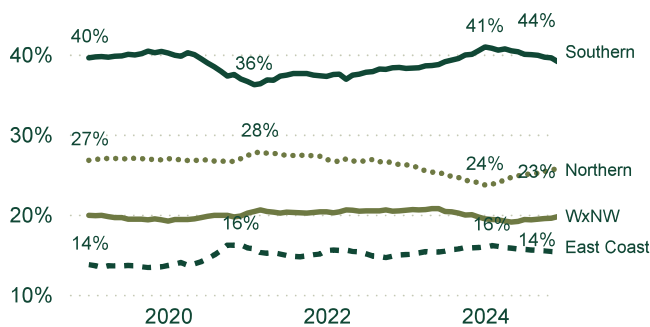
OVERNIGHT VISITORS[^]

1.03M ▲ 3.6% Southern 104.8% of 2019	518.67K ▲ 3.4% Northern 96.1% of 2019	404.52K ▼ -5.7% West x North West 104% of 2019	327.89K ▼ -2.6% East Coast 112.9% of 2019
---	--	---	--

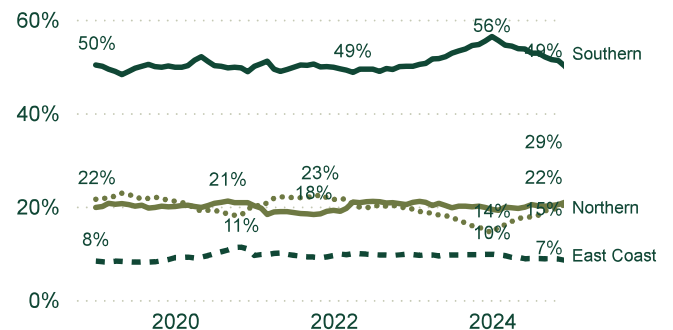
NIGHTS IN REGIONS

6.20M ▲ 3.6% Southern 5.6 ALOS	2.28M ▲ 23.7% Northern 3.3 ALOS	2.40M ▲ 7.3% West x North West 4.5 ALOS	1.05M ▼ -2.6% East Coast 2.5 ALOS
--	---	---	---

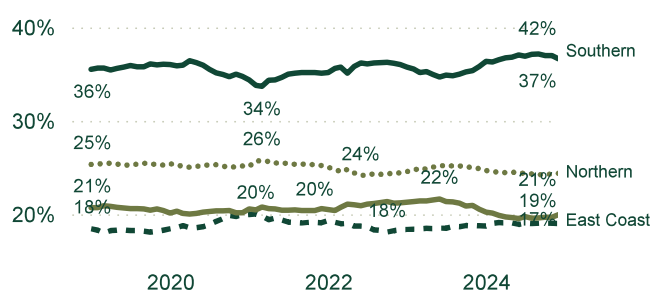
ROLLING ANNUAL SHARE* OF VISITORS BY REGION



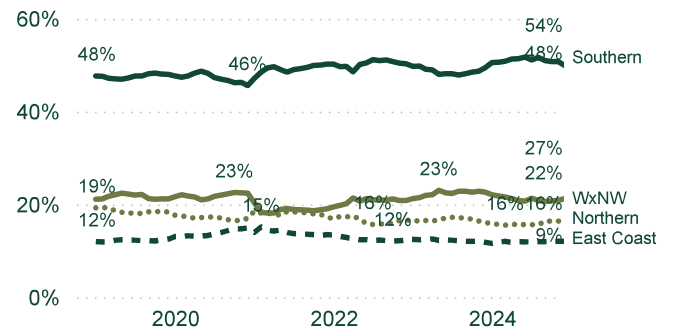
ROLLING ANNUAL SHARE OF NIGHTS BY REGION



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.

INTERNATIONAL VISITATION

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

International visitation to Tasmania was at 89% of YE June 2019, spend 102% and nights 117%.

Post-pandemic international travel into Australia and Tasmania continued to increase throughout 2023-24, with Tasmania's share of all international visitors to Australia at 3.51% (3.38% in 2019), and 5.39% of holiday visitors (5.22% in 2019).



SPEND

VISITATION TO AUSTRALIA

\$48.411B
+7.1% on 2019

VISITATION TO TASMANIA

\$546.8M
+2.0% on 2019



VISITORS

7.476M

-13.7% on 2019

262,090

-10.5% on 2019



NIGHTS

286.99M

+4.1% on 2019

4.97M

+17.2% on 2019

TOP 5 VISITOR COUNTRY OF ORIGIN		YE Sep 2019	YE Sep 2024	Change on 2019
50% Int'l Visitors	United States of America	45,800	41,900	-9%
	United Kingdom	27,200	25,100	-8%
	Hong Kong	29,600	22,600	-24%
	China	40,900	22,000	-46%
	New Zealand	21,300	20,300	-5%
	Other Countries	128,200	130,200	+2%
	TOTAL INTERNATIONAL VISITORS TO TASMANIA	293,000	262,100	-11%

INTRASTATE VISITATION

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

Tasmanians spent over \$1.8b on trips within the state in the year ending September 2024, across overnight trips (\$0.97b) and day trips (\$849m).

Tasmanians took 9% more overnight trips within the state compared to the previous year, with trips lasting an

average of 2.4 nights away (same as in 2019).

Although Tasmanians took more trips, they spent less per night (\$238, down 18%, or \$57 per night from 2023), leading to softer growth in total spend.

Spend by Tasmanians taking overnight trips for a holiday (\$389.9m) was up slightly (+1%) on 2019 (\$386m), with the number of trips up 25%, and nights up 29% on year ending September 2023.

	YE Sep 23	YE Sep 24	Annual Change	Change vs YE Sep 2019
SPEND	\$1.10b	\$0.97b	-11%	+33%
OVERNIGHT TRIPS	1.60m	1.74m	+9%	+12%
NIGHTS	3.77m	4.09m	+8%	+1%

DAY TRIPS	5.70m	5.54m	-3%	-22%
SPEND	\$723m	\$849m	+17%	+13%

INTERNATIONAL VISITORS TO TASMANIA

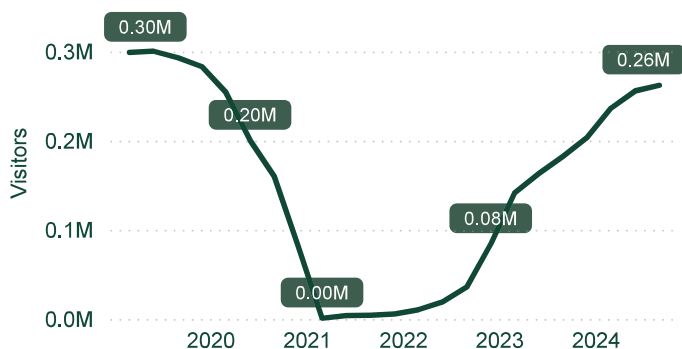
ALL VISITORS

262.09K Visitors ▲ 43.6% 89% of 2019	4.97M Nights ▲ 73.9% 117% of 2019	\$547M Spend** ▲ 78.4% 102% of 2019	18.97 ALOS (Nights) ▲ 21.1% 2019: 14.5	\$2,086 ASPV ▲ 24.2% 2019: \$1830	\$110 ASPN ▲ 2.6% 2019: \$126
--	---	---	--	---	---

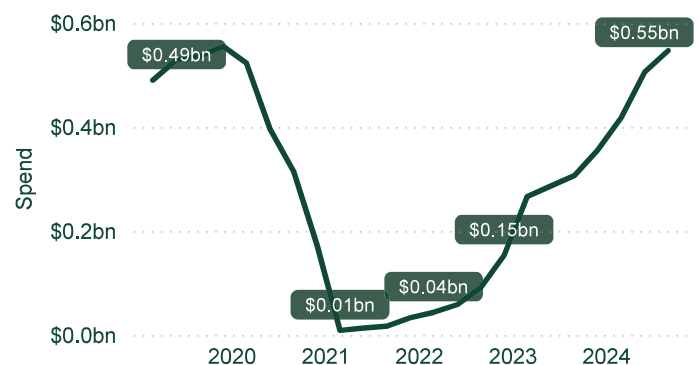
HOLIDAY VISITORS

193.54K Visitors 81% of 2019	2.28M Nights 115% of 2019	\$337M Spend** 105% of 2019	11.79 ALOS (Nights) 2019: 8.3	\$1,744 ASPV 2019: \$1343	\$148 ASPN 2019: \$161
---	--	--	--	--	-------------------------------------

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	41,900	257	52	6.1	\$1,247	78%	20%	5%		1%
UK	25,100	321	37	12.8	\$1,479	66%	20%	11%	3%	6%
Hong Kong	22,600	203	63	9.0	\$2,791	94%	4%		2%	11%
China	22,000	376	57	17.1	\$2,599	81%	14%	3%	3%	
New Zealand	20,300	221	38	10.9	\$1,865	61%	27%	12%		7%
Singapore	11,900	91	29	7.6	\$2,439	88%	11%		1%	

▲ Increase
▼ Decrease

+ % Change is from previous year.

++ IVS data up to December 2022 is based on imputations from pre-COVID visitor behaviours. Interviews resumed in January 2023.

* 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.

The IVS is conducted by Tourism Research Australia

INTRASTATE TRIPS WITHIN TASMANIA

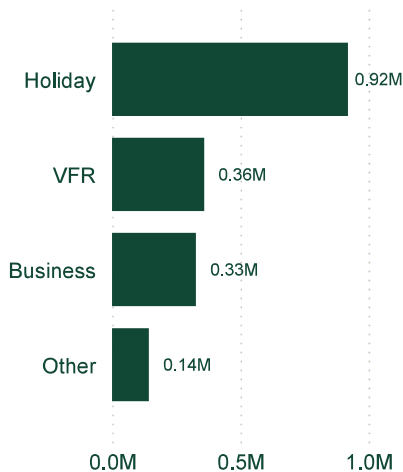
OVERNIGHT TRIPS

1.74M Trips ▲ 8.9%	4.09M Visitor Nights ▲ 8.5%	\$972.41M Visitor Spend ▼ -11.2%	2.4 ALOS (Nights) ▼ -0.4%	\$238 ASPT ▼ -18.1%	\$560 ASPN ▼ -18.4%
---------------------------------	--	---	--	----------------------------------	----------------------------------

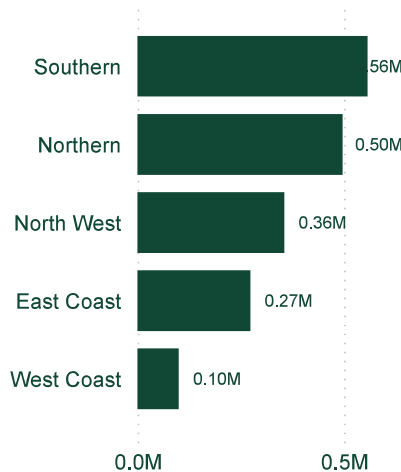
HOLIDAY OVERNIGHT TRIPS*

919.57K Trips ▲ 24.8%	2.26M Visitor Nights ▲ 29%	\$390M Visitor Spend ▲ 1%	2.5 ALOS (Nights) ▲ 3.3%	\$173 ASPT ▼ -21.7%	\$424 ASPN ▼ -19.1%
------------------------------------	---	--	---------------------------------------	----------------------------------	----------------------------------

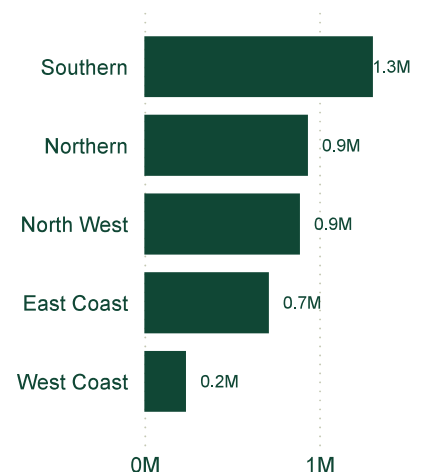
PURPOSE OF OVERNIGHT TRIP



OVERNIGHT TRIPS IN REGIONS



NIGHTS IN REGIONS



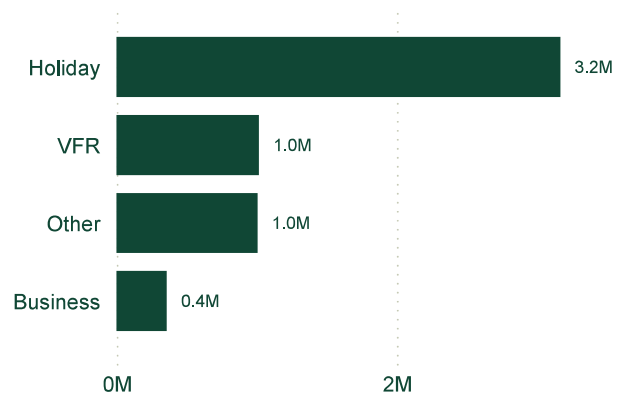
DAY TRIPS

5.54M Trips ▼ -2.9%	\$849M Spend ▲ 17.3%	\$153 ASPT ▲ 20.8%
----------------------------------	-----------------------------------	---------------------------------

HOLIDAY DAY TRIPS^

3.17M Trips ▲ 0.3%	\$489M Spend ▲ 14.7%	\$154 ASPT ▲ 14.4%
---------------------------------	-----------------------------------	---------------------------------

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 60,000 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. Accommodation data provides insight into the demand from travellers in the state.

Tourism Tasmania has engaged two providers to deliver meaningful data that broadly represents the range of Tasmanian accommodation operators.

STR - COMMERCIAL ACCOMMODATION

STR provides accommodation operators an opt-in system to add their data to an anonymous aggregated 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.

The STR occupancy data provides insight 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 providers of hotel, motel, lodge or similar accommodation 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 report.

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, listed on on Airbnb or VRBO.

Data is provided across multiple regions, offering a view of urban and regional performance. Data in this snapshot refers only to 'entire properties', where guests have the entire home, hotel room or apartment to themselves; approximately 89% of listings in Tasmania. This can be a standalone building or self-contained apartment.

TASMANIAN HOSPITALITY ASSOCIATION (THA)

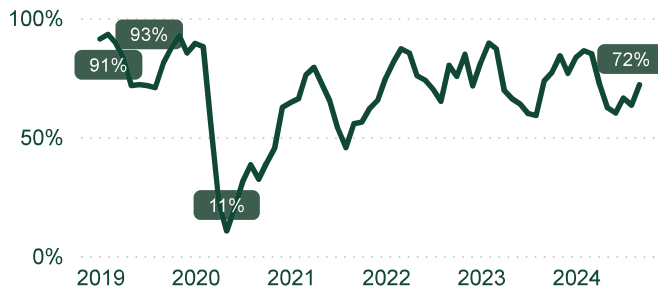
The THA collects accommodation demand insights from a cross-section of its members, and is published separately to this Snapshot. While there may be some duplication of sample with STR, the sample size of rooms is smaller for THA than the STR coverage.

AIRDNA REPORTING 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, Branhholm, Ringarooma, Pioneer
EASTERN SHORE (HOBART)	Geilston Bay to Tranmere, 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
DELORAINIE - EVANDALE	Deloraine, Mole Creek, Westbury, Evandale

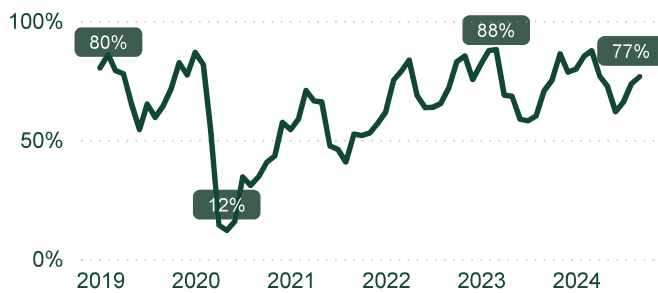
COMMERCIAL ACCOMMODATION IN TASMANIA

OCCUPANCY BY MONTH

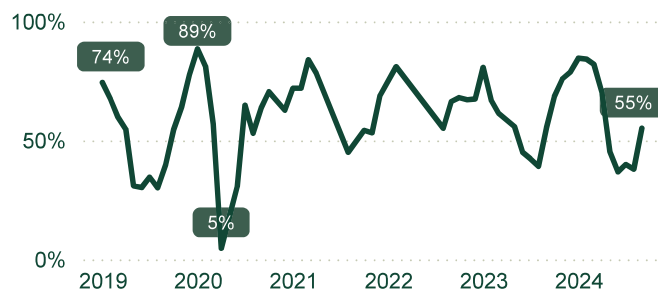
Hobart & the South



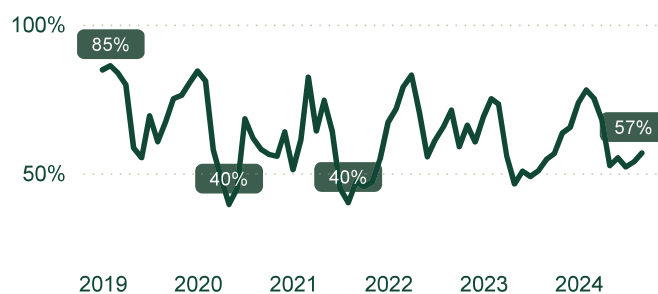
Launceston & the North



East Coast

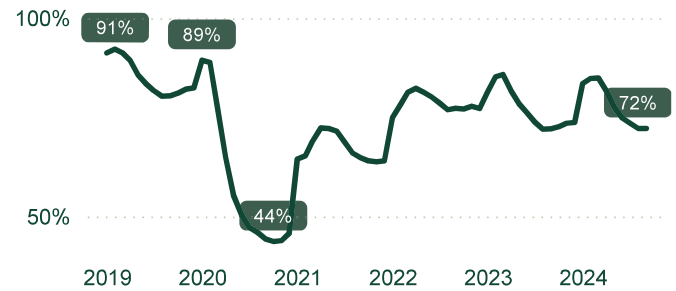


North West

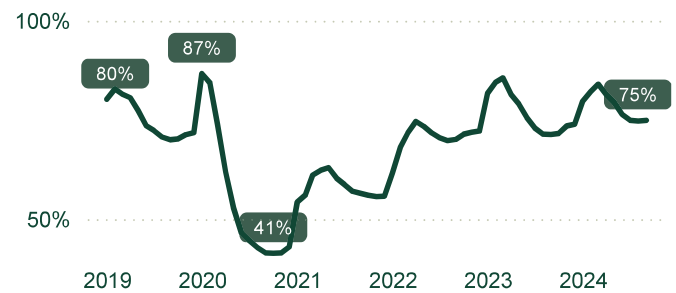


OCCUPANCY BY ROLLING YEAR ENDING

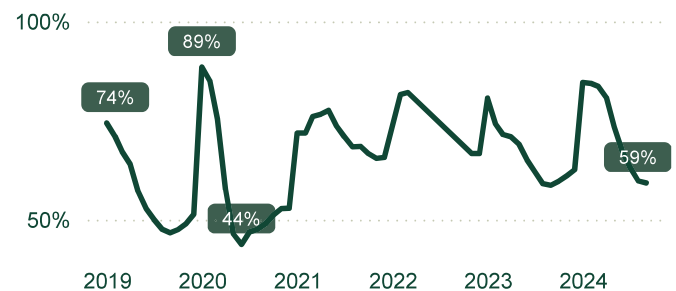
Hobart & the South



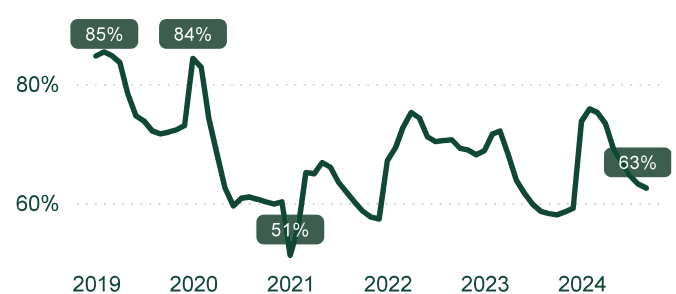
Launceston & the North



East Coast



North West



Source: STR

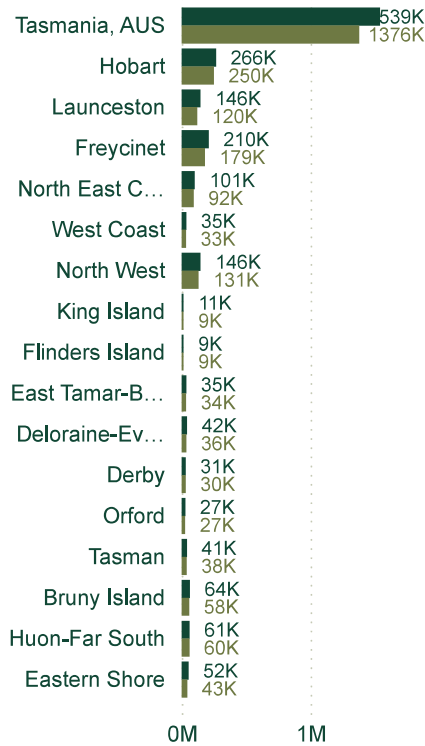
Some months are omitted due to insufficient sample.

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

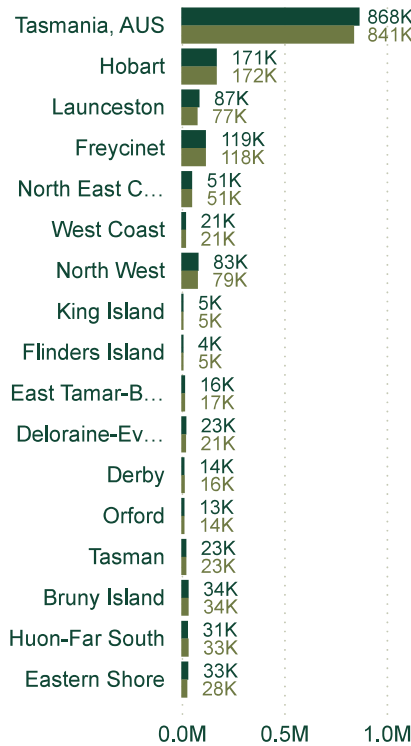
SHORT-STAY ACCOMMODATION IN TASMANIA

● Year Ending September 24 ● Year Ending September 23

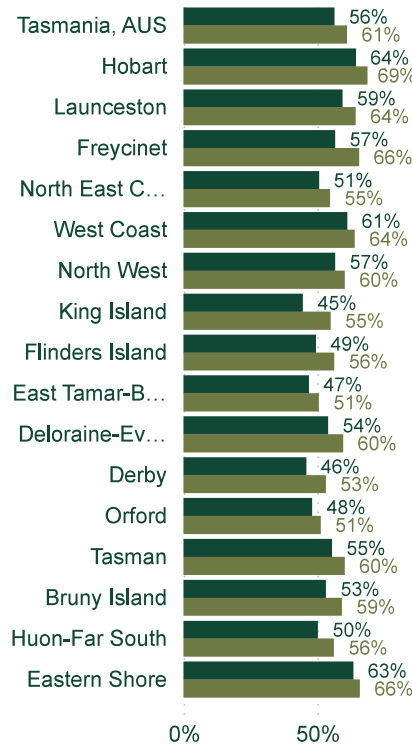
Supply (Nights Available)



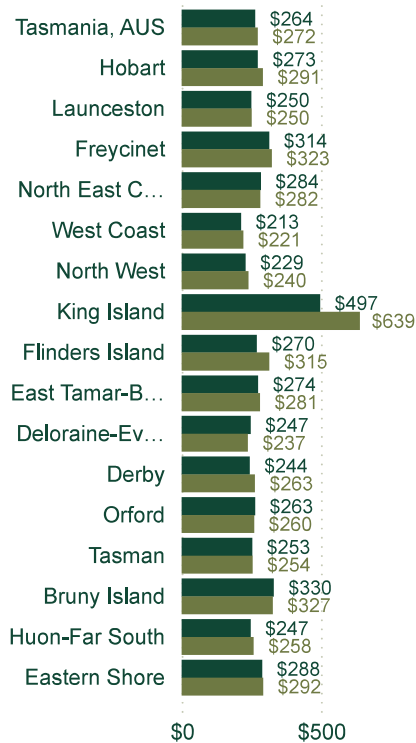
Demand (Nights Booked)



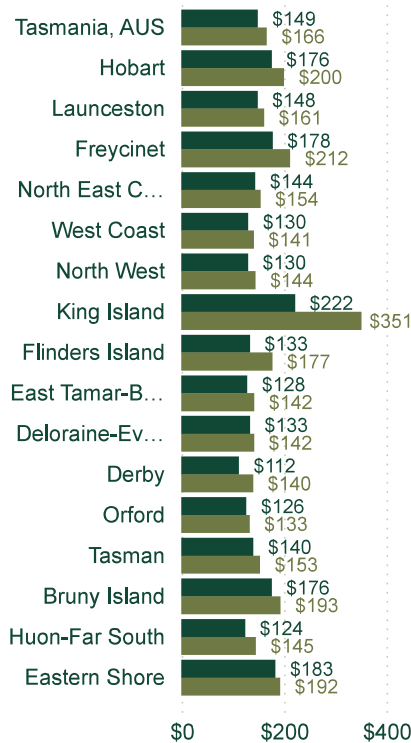
Occupancy (%)



ADR (\$)



RevPAR (\$)



Revenue Estimated (\$m)



Source: AirDNA
Data shown is for 'entire properties' only.
% change is compared to the previous year.

Revenue, ADR and RevPAR are converted from USD at exchange rate of 1.50 as at 19 June 2024 for YE March 2024 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

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.

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).
3. Change on 2019 refers to the percentage change between the year covered by this snapshot compared to the same period in 2019, unless otherwise stated.