

INTERSTATE VISITOR PROFILE

YEAR ENDING DECEMBER 2024



The Nut, Stanley
Jason Charles Hill

TASMANIA

COME DOWN FOR AIR



Tourism
Tasmania

Interstate Visitors

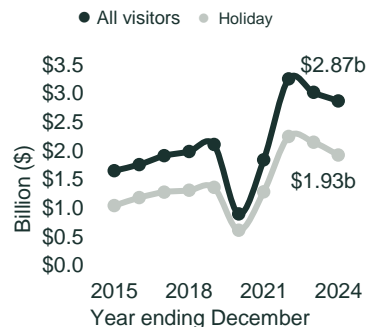
Tasmanian Visitor Survey, YE December 2024
Roy Morgan

INTERSTATE VISITORS

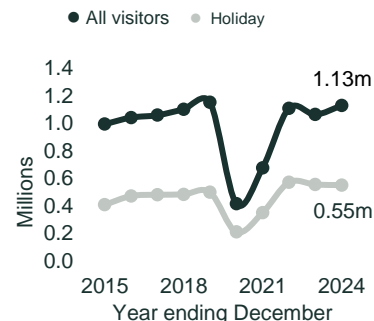
- Visitors from mainland Australia spent \$2.87b in Tasmania in 2024, down 4.9% (-\$147m) from 2023 (\$3.018b), and \$762m (+36.1%) more than in 2019.
- Tasmania welcomed 1.13m interstate visitors in 2024, up 6.1% on last year. Interstate visitation has been steadily increasing over the past year, with 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

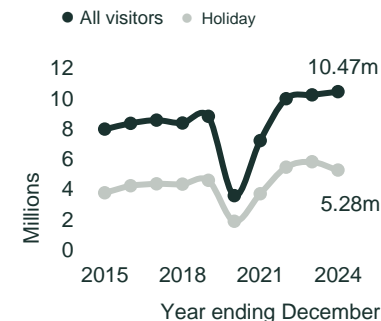
Spend



Visitors



Nights



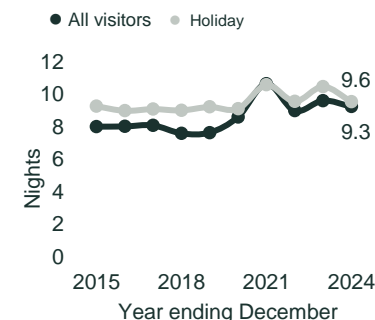
ASPV



ASPN



ALOS



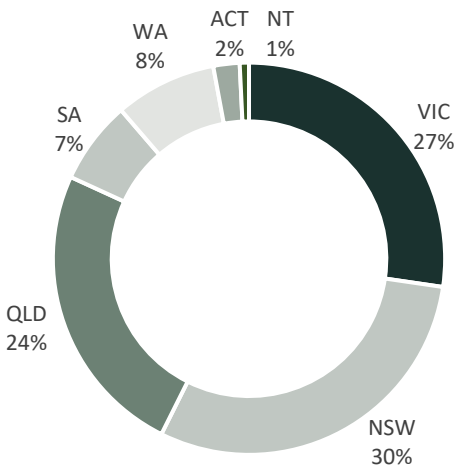
	SPEND	VISITORS	NIGHTS	ASPV	ASPN	ALOS
Interstate	\$2.871b	1.131m	10.47m	\$2,539	\$274	9.3
Change from 2023	▼ -4.9%	▲ 6.1%	▲ 2.0%	▼ -\$292	▼ -\$20	▼ -0.4
Change from 2019	▲ 36.1%	▼ -2.2%	▲ 18.4%	▲ \$714	▲ \$36	▲ 1.6
Interstate holiday	\$1.927b	552k	5.28m	\$3,488	\$365	9.6
Change from 2023	▼ -10.4%	▼ -0.6%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

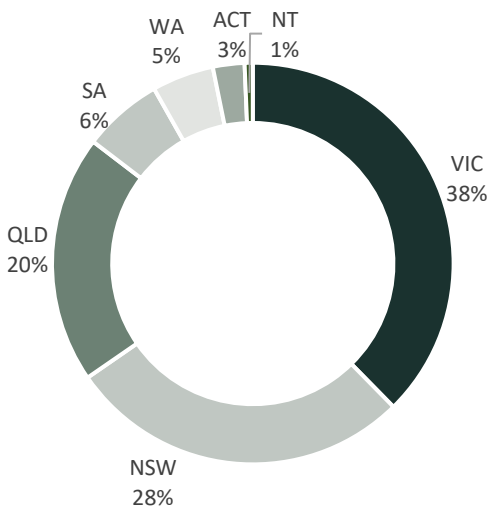
Interstate Visitors

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Spend share



Visitor share



Purpose of visit share by state of origin

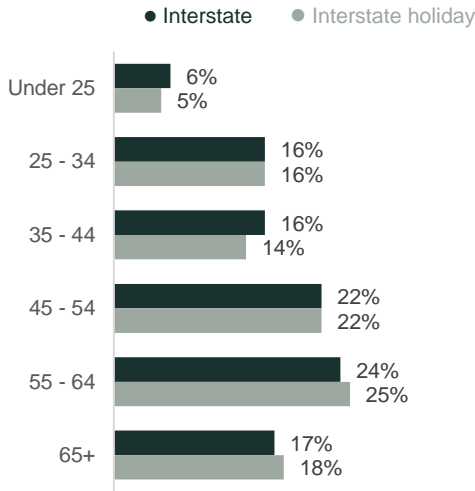
	HOLIDAY	VFR	BUSINESS /CONF.	OTHER	LEISURE HOL+VFR
VIC	43%	27%	25%	5%	70%
NSW	53%	28%	15%	4%	81%
QLD	52%	31%	14%	4%	82%
SA	53%	24%	19%	4%	77%
WA	58%	27%	9%	6%	85%
ACT	38%	36%	20%	6%	74%
NT^	47%	35%	13%	5%	82%
AUS	49%	28%	19%	4%	77%

	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

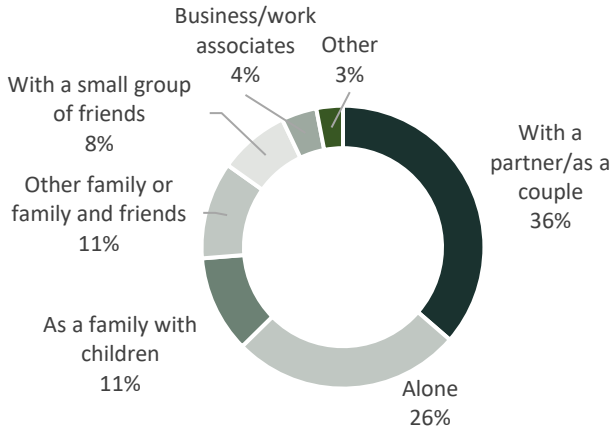
Interstate Visitors

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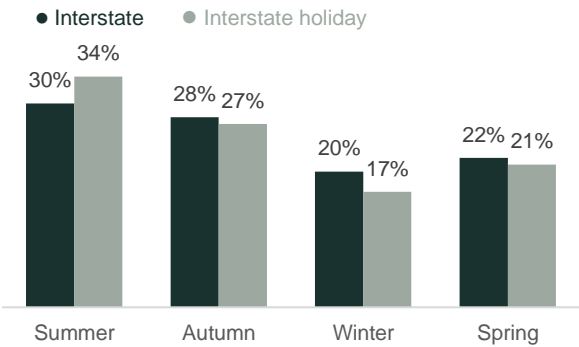
Age group



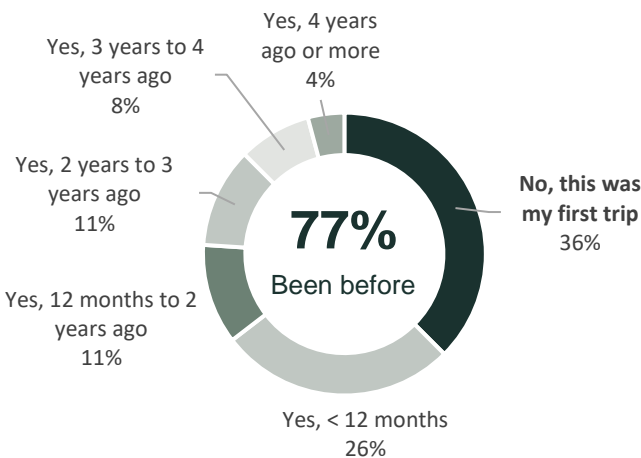
Travel party



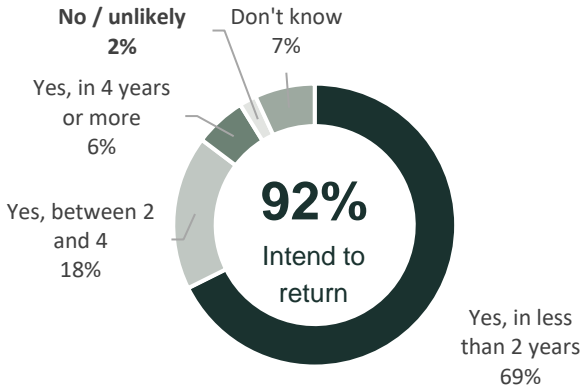
Season of visit



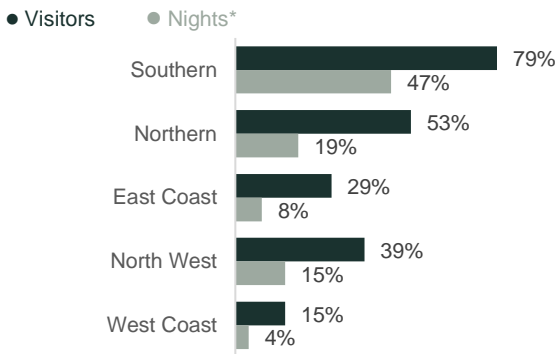
Previously visited Tasmania



Intention to return



Regional share of visitors and nights



70%

Visit Hobart during their trip

69%

Of nights are spent outside Hobart

Interstate Visitors

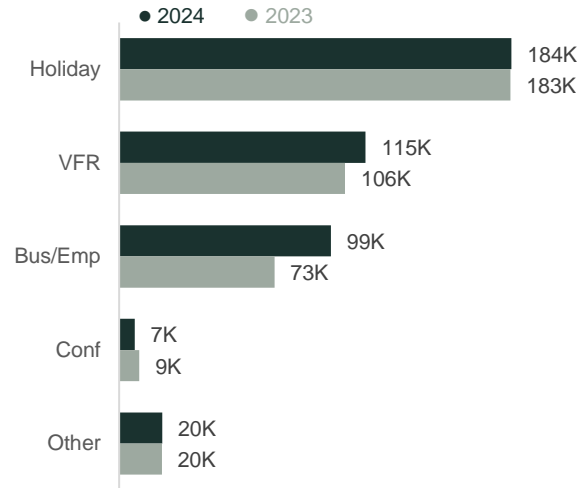
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VICTORIA

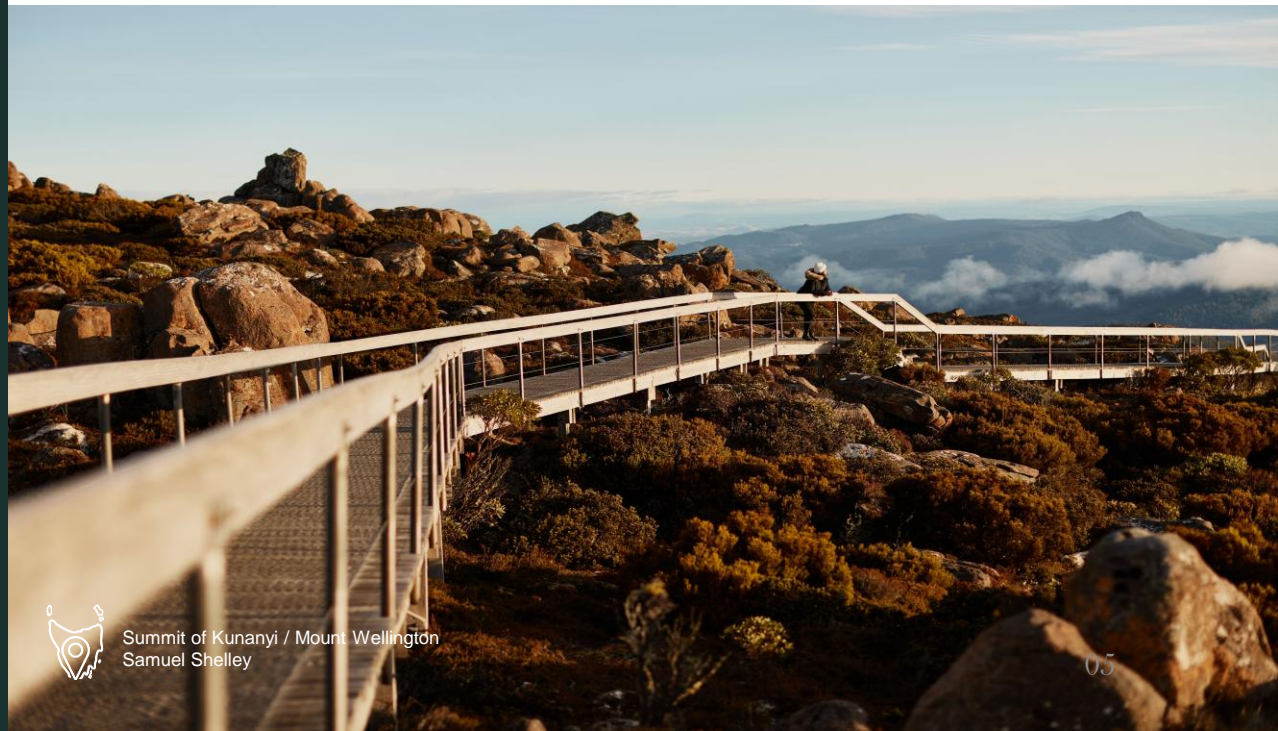
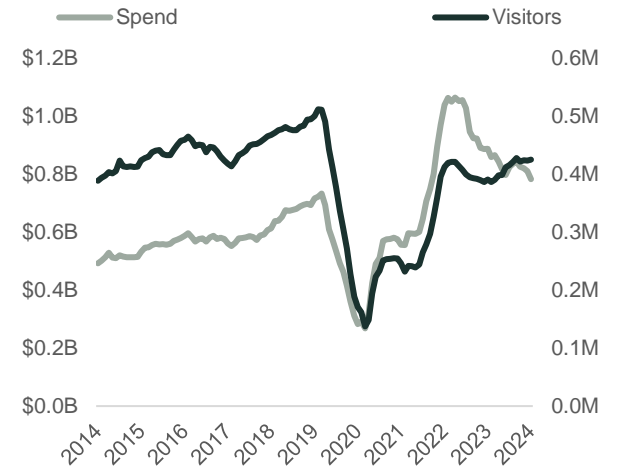
- Total spend (\$784m) was down 11.8% on 2023, as Victorians spent around \$430 less each per trip.
- The recovery pattern in spending has not aligned with trends observed in visitation from other states, with Victorian visitor spend on a downward trajectory since August 2024. This appears to be led 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



Interstate Visitors

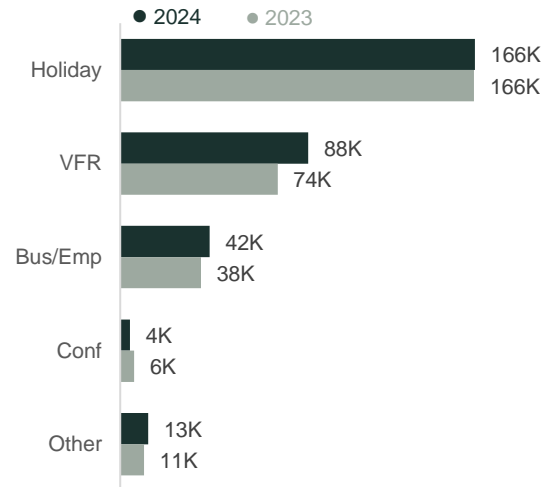
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NEW SOUTH WALES

- 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

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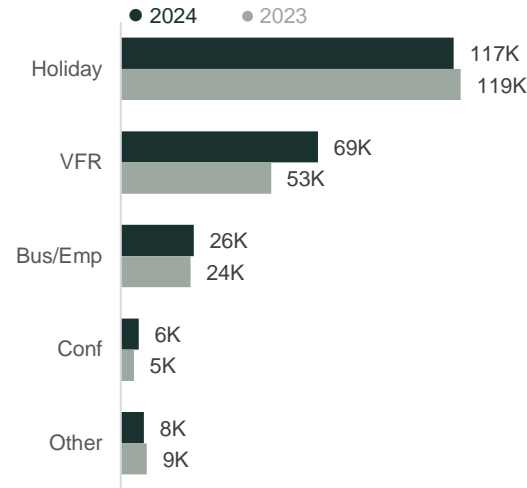
QUEENSLAND

- 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

