

NATIONAL VISITOR SURVEY RESULTS MARCH QUARTER 2023

**Note:** Summary results for the March quarter 2023, and the year ending March 2023, are compared to the March quarter 2020, and the year ending March 2020 unless stated otherwise.

## March quarter 2023

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## Year ending March 2023



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| March quarter summary | |
| The March quarter 2023 spend continued to perform strongly, exceeding the March quarter 2020 by 53%. Overnight trips and nights away rose by 16% and 13% respectively when compared to the same period.  The forward-looking overnight domestic trip rate indicator (Figure 1) showed an increase in April 2023 (Easter and school holidays) followed by a slightly milder May. | **Figure 1. Domestic overnight trips and trip rates, April 2022 to May 20231**  The chart illustrates the number of domestic overnight trips taken by month from April 2022 to May 2023. The chart also illustrates the trip rate for NVS respondents from April 2022 to May 2023.  The chart shows that the trip rate follows a similar pattern to the number of domestic overnight trips. As the trip rate data is available two months in advance of the overnight trips data it can provide insight for where overnight trips are likely to head in April and May 2023. There were 11 million domestic overnight trips in April 2022, this dropped to 9 million in May and to 8 million in June. In March 2023, there were approximately 10 million overnight trips. The trip rate followed a similar pattern, in April 2022, almost 31 per cent of NVS respondents reported taking one or more trips in the preceding 28 days. This increased in May but dropped to 28 per cent in June 2022. There was then a sharp improvement in trip rates in April 2023 to 33 per cent before coming back down to 30 per cent in May. This indicates that this trend is likely to be observed in the April and May 2023 overnight trips data once this becomes available.  1 The trip rate reports whether a respondent has taken a trip in the past four weeks. The trip rate of 30.10% for May 2023 indicates a high level of NVS respondents reported taking one or more overnight trips in the preceding 28 days (the reference period). The return date will have been in April 2023 for some of these trips reported in May 2023.  The trip estimate of 9.5 million for the month of March refers to overnight trips returned from in that month. |
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**Travellers return to capital cities**

Domestic overnight travellers continued to return to capital cities in the year ending March 2023, nearing levels seen in the year ending March 2020 (Figure 2).

**Capital cities**

In the year ending March 2023, Australians took 44.2 million trips to capital cities and spent $49.1 billion. This was a:

* 63% increase in overnight trips and a 113% increase in spend when compared to the year ending March 2022
* 6% decrease in overnight trips but a 29% increase in spend when compared to the year ending March 2020.

**Regional areas**

Travel to regional areas also performed well. Overnight trips exceeded the year ending March 2020 levels for the first time since the onset of the pandemic.

In the year ending March 2023, Australians took 72.9 million trips to regional areas and spent $59.0 billion. This was a:

* 25% increase in overnight trips and a 46% increase in spend when compared to the year ending March 2022
* 4% increase in overnight trips and a 45% increase in spend when compared to the year ending March 2020.

**Figure 2. Overnight trips to capital cities & regional areas, Year ending March 2015 to 2023**

The chart shows overnight trips to capital cities and regional areas, from the year ending March 2015 to 2023. 
Overnight trips to capital cities increased year on year at a moderate level from year ending March 2015 with 35 million overnight trips to 2020 with 47 million overnight trips. This is followed by a sharp drop in year ending March 2021 due to impacts from the COVID-19 pandemic. In year ending March 2023, overnight trips to capital cities almost recovered to levels seen in 2020 at 44 million overnight trips. 
Overnight trips to regional areas had a similar pattern with overnight trips to capital cities. However, in year ending March 2023 overnight trips to regional areas exceeded levels seen in 2020 at 73 million overnights trips. This is a 4 per cent increase.
Domestic overnight spend have since shown strong recovery. In 2021, domestic overnight spend increased by 33% from 2020. In 2022, domestic overnight spend increased by 67% from 2021.


**Holiday travel drives the return to capital cities**

The March quarter 2023 saw holiday trips drive the return to capital cities. This was followed by business trips, with both exceeding the March quarter 2022 levels.

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| **Capital cities**  When compared to the March quarter 2022:   * Holiday travel rose by 41% or 1.2 million trips * Business travel rose by 35% or 523,000 trips * Travel for visiting friends and relatives rose by 15% or 473,000 trips.   When compared to the March quarter 2020:   * Holiday travel rose by 40% or 1.2 million trips * Travel for visiting friends and relatives rose by 6% or 205,000 trips * Business travel fell by 12% or 283,000 trips. | **Figure 3. Overnight trips to capital cities, March quarter 2020 to 2023**  The chart shows overnight trips to capital cities by travel purpose, from the March quarter 2020 to 2023. In the March quarter 2020, overnight trips to capital cities had 3,463 thousand trips visiting friends and relatives, holiday travel had 3,026 thousand trips, 2,297 thousand business trips and 873 thousand travel for other purposes. This is followed by a drop in all travel purposes due to the impacts from the COVID-19 pandemic. In the March quarter 2022, overnight trips to capital cities for holiday travel and visiting friends and relatives recovered from March quarter 2020 to 4,250 (40 per cent higher) and 3,667 (6 per cent higher) thousand trips. Business travel and travel for other purposes remained lower at 2,014 (12 per cent lower) and 770 (12 per cent lower) thousand trips. |
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| **Figure 4. Overnight trips to regional areas, March quarter 2020 to 2023**  The chart shows overnight trips to regional areas by travel purpose, from the March quarter 2020 to 2023. In the March quarter 2020, regional areas had 7.6 million holiday trips, 5 million trips visiting friends and relatives, 3 million business trips and 0.9 million trips for other purposes. This is followed by a drop in business trips in the March quarter 2021 due to the impacts from the COVID-19 pandemic. Visiting friends and relatives, holiday trips and travel for other purposes were all higher when compared to the March quarter 2020. In the March quarter 2022, overnight trips to regional areas had all travel by purpose increase above levels seen in March quarter 2020 except for travel for other purposes (8 per cent lower). Holiday travel had 10 million trips (29 per cent higher), visiting friends and relatives travel had 6 million thousand trips (17 per cent higher) and business travel had 3 million trips (2 per cent higher). | **Regional areas**  When compared to the March quarter 2022:   * Travel for visiting friends and relatives rose by 13% or 693,000 trips * Business travel rose by 27% or 607,000 trips * Holiday travel rose by 3% or 254,000 trips.   When compared to the March quarter 2020:   * Holiday travel rose by 29% or 2.2 million trips * Travel for visiting friends and relatives rose by 17% or 841,000 trips * Business travel rose by 2% or 54,000 trips. |

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| **Travellers spending more per trip**  Travellers were spending more per trip when compared to the previous March quarters. Compared to the March quarter 2020, the average spend per trip was (Figure 5):   * $964 in the March quarter 2023, up 31% * $832 in the March quarter 2022, up 13% * $727 in the March quarter 2021, down 1%. | **Figure 5. Average spend per trip, March quarter 2020 to 2023**  The chart shows average spend per trip, from the March quarter 2020 to 2023. March quarter 2020, travellers spent on average $735.58 per trip.  March quarter 2021 travellers spent on average $727.22. This is 1 per cent lower compared to March quarter 2020.  March quarter 2022 travellers spent on average $831.57. This is 13 per cent higher compared to March quarter 2020.  March quarter 2023 travellers spent on average $964.39. This is 31 per cent higher compared to March quarter 2020. |

## States and territories

Overnight spend in the year ending March 2023 exceeded the year ending March 2020 levels across all states and territories (Figure 6).

Queensland showed the strongest domestic tourism in the year ending March 2023 results. Overnight trips to Queensland were up 5% and spend was up 55% or $10.4 billion. Western Australia and the Australian Capital Territory also experienced growth in overnight trip numbers. All Australian states and territories saw growth in visitor spend of 31% or more.

**Figure 6. Overnight trips and spend by state and territory, year ending March 2023 compared to the year ending March 2020**

An image of Australia that illustrates the number of trips and spend in each state or territory from the year ending March 2020 to the year ending March 2023. The per cent change on the year ending March 2020 is also shown.

New South Wales – 36.1 million trips and $29.9 billion spend, down 3% and up 31% respectively
Victoria – 27.5 million trips and $22.3 billion spend, down 3% and up 33% respectively
Queensland – 26.0 million trips and $29.3 billion spend, both up 5% and 55% respectively
South Australia – 7.5 million trips and $6.5 billion spend, down 4% and up 31% respectively
Western Australia – 11.1 million trips and $11.1 billion spend, both up 4% and up 32% respectively
Tasmania – 3.0 million trips and $3.8 billion spend, down 3% and up 31% respectively
Northern Territory - 1.6 million trips and $2.8 billion spend, down 6% and up 32% respectively
ACT – 3.2 million trips and $2.4 billion spend, both up 5% and up 32% respectively.


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