

NATIONAL VISITOR SURVEY RESULTS DECEMBER QUARTER 2022

**Note:** Summary results for the December quarter 2022, and the year ending December 2022, are compared to the December quarter 2019, and the year ending December 2019 unless stated otherwise.

## December quarter 2022

## Overnight spend for the December quarter 2022 was $27.5 billion. This was up 34% on 2019. Overnight trips for the December quarter 2022 was 27.7 million. This was down 6% on 2019. Nights away for the December quarter 2022 was 97.9 million. This was down 5% on 2019.

## Year ending December 2022

Overnight spend for the year ending December 2022 was $101.3 billion. This was up 25% on 2019.

Overnight trips for the year ending December 2022 was 108.2 million. This was down 8% on 2019.

Nights away for the year ending December 2022 was 399.7 million. This was down 4% on 2019.


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| Strong spend results continue in December quarter | |
| Domestic tourism spend continued to perform strongly in the December quarter 2022, exceeding pre-pandemic levels by 34%. Spend exceeded pre-pandemic levels every quarter in 2022.  Overnight trips and nights away were weaker. The December quarter 2022 saw trips and nights away down 6% and 5% respectively on pre-pandemic levels.  The forward-looking overnight domestic trip rate indicator (Figure 1) shows a strong January 2023 followed by a milder February. | **Figure 1. Domestic overnight trips and trip rates, January 2022 to February 20231**  The chart illustrates the number of domestic overnight trips taken by month from January 2022 to December 2022. The chart also illustrates the trip rate for NVS respondents from January 2022 to February 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 January and February 2023. There were 9 million domestic overnight trips in January 2022, this dropped 7 million in February before increasing in April to 11 million trips. In December 2022, there were approximately 9 million overnight trips. The trip rate followed a similar pattern, in January 2022, almost 32 per cent of NVS respondents reported taking one or more trips in the preceding 28 days. This dropped in February before improving and peaking in May 2022 with 32%. There was then a sharp improvement in trip rates in January 2023 to over 34% before coming back down to just under 30% in February. This indicates that this trend is likely to be observed in the January and February 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 29.82% for February 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 January 2023 for some of these trips reported in February 2023.  The trip estimate of 9.0 million for the month of December refers to overnight trips returned from in that month. |
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**Spend continues to go from strength to strength**

Domestic overnight spend continues to show strong growth following the COVID-19 impacted period. Spend (Figure 2):

* grew year on year until 2020 were it fell 43% due to COVID-19
* recovered from the COVID-19 pandemic, reaching $101.3 billion in 2022
* exceeded 2019 (pre-pandemic) by $20.6 billion or 25%.

**Figure 2: Year on year change in domestic overnight spend, 2012 to 2022**

The chart shows year on year change in domestic overnight spend, from 2012 to 2022. 
Domestic overnight spend increased year on year at a moderate level from 2012 to 2017. In 2018, domestic overnight spend increased by 11% from 2017 and increased again in 2019 by 12%. This is followed by a sharp drop in 2020 due to impacts from the COVID-19 pandemic. In 2020, domestic overnight spend decreased by 43% from 2019. 
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 spend drives growth**

Compared to 2019, domestic overnight spend increased for all purposes apart from business travel. In 2022 (Figure 3):

* spend on holiday travel increased from $38.8 billion to $57.1 billion, or 47%
* spend on travel for the purpose of visiting friends and family increased from $16.0 billion to $19.8 billion, or 23%
* spend on business travel decreased from $22.5 billion to $20.6 billion, or 8%
* spend on other travel increased from $3.4 billion to $3.8 billion, or 12%.

**Figure 3: Spend by travel purpose, 2019 and 2022**

This chart shows spend by travel purpose, 2019 compared to 2022. 
Spend on holiday travel in 2019 was $38.8 billion and $57.1 billion in 2022.
Spend on travel for the purpose of visiting friends and relatives was $16.0 billion in 2019 and $19.8 billion in 2022.
Spend on business travel was $22.5 billion in 2019 and $20.6 billion in 2022.
Spend on other travel was $3.4 billion in 2019 and $3.8 billion in 2022.


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| **Travellers are going on longer holidays**  Compared to 2019, travellers are taking longer holiday trips. In 2022 (Figure 4):   * 1 to 2 night holiday trips decreased by 1 million or 5% * 3 to 4 night holiday trips increased by 1 million or 9% * 5 to 7 night holiday trips increased by 887,000 or 14% * Holiday trips lasting more than 8 nights increased by 573,000 or 13%. | **Figure 4: Change in length of stay in holiday trips, 2022 compared to 2019**  This chart shows the change in length of stay in holiday trips in 2022 compared to 2019. 1 to 2 night holiday trips decreased by 5%. 3 to 4 nights holiday trips increased by 9%. 5 to 7 nights holiday trips increased by 14%. Holiday trips lasting more than 8 nights increased by 13%. |

## States and territories

Overnight spend in the year ending December 2022 exceeded pre-pandemic levels across all states and territories. However, overnight trips remained below pre-pandemic levels across all states and territories (Figure 5).

Queensland showed the strongest domestic tourism results. Overnight trips to QLD were down 1% and spend was up 43% or $8.3 billion. New South Wales and Victoria produced the next strongest spend results, up $4.8 billion (20%) and $3.3 billion (19%) respectively.

**Figure 5. Overnight trips and spend by state and territory, 2022 compared to 2019**

An image of Australia that illustrates the number of trips and spend in each state or territory from the year ending December 2019 to the year ending December 2022. The per cent change on the year ending December 2019 is also shown.

New South Wales – 35.1 million trips and $28.4 billion spend, down 10% and up 20% respectively
Victoria -  26.2 million trips and $20.3 billion spend, down 12% and up 19% respectively
Queensland – 25.6 million trips and $27.8 billion spend, down 1% and up 43% respectively
South Australia – 7.1 million trips and $6.0 billion spend, down 12% and up 16% respectively
Western Australia – 10.5 million trips and $10.1 billion spend, down 5% and up 18% respectively
Tasmania – 3.0 million trips and $3.5 billion spend, down 7% and up 24% respectively
Northern Territory - 1.6 million trips and $2.9 billion spend, down 8% and up 36% respectively
ACT – 3.0 million trips and $2.2 billion spend, down 5% and up 20% respectively.


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