

NATIONAL VISITOR SURVEY RESULTS SEPTEMBER QUARTER 2022

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

## Year ending September 2022

Overnight spend for the year ending September 2022 was $87.5 billion. This was up 11% on 2019.

Overnight trips for the year ending September 2022 was 101.6 million. This was down 12% on 2019.

Nights away for the year ending September 2022 was 376.9 million. This was down 8% on 2019.

## September quarter 2022

Overnight spend for the September quarter 2022 was $27.8 billion. This was up 33% on 2019.

Overnight trips for the September quarter 2022 was 27.6 million. This was down 2% on 2019.

Nights away for the September quarter 2022 was 103.2 million. This was on par with 2019.

## Domestic recovery continues in September quarter

|  |  |
| --- | --- |
| The September quarter 2022 saw domestic tourism continue to recover from the pandemic, nearing levels seen in the September quarter 2019.  Spend exceeded pre-pandemic levels by 33% and nights were flat. However, overnight trips were slightly down when compared to pre-pandemic levels (down 2%).  The forward-looking overnight domestic trip rate indicator (Figure 1) continued to show positive signs for the visitor economy in October and November 2022. | **Figure 1. Domestic overnight trips and trip rates, March 2020 to November 20221**  **The chart illustrates the number of domestic overnight trips taken by month from March 2020 to September 2022. The chart also illustrates the trip rate for NVS respondents from March 2020 to November 2022.  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 October and November 2022. There were 6 million domestic overnight trips in March 2020, this dropped significantly to under 2 million in April 2020. This then increased gradually until May 2021 where it peaked at approximately 10 million overnight trips. Trips then declined due to the lockdowns in mid-2021, reaching just under 4 million trips in August and September 2021. Following that, overnight trips rebounded and gradually increased to peak at 10.7 million in April 2022. In September 2022, there were approximately 9.7 million overnight trips. The trip rate followed a similar pattern, in March 2020, almost 25 per cent of NVS respondents reported taking one or more trips in the preceding 28 days. This dropped significantly in April and May of 2020 before gradually increasing until peaking in April 2021 with just over 30 per cent of respondents taking at least one overnight trip. This then gradually declined until reaching 10 per cent in September 2021. There was then a sharp improvement in trip rates. In November 2022, 30% of respondents reported taking at least one overnight trip. This indicates that this trend is likely to be observed in the October and November 2022 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 29.53% for November 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 October 2022 for some of these trips reported in November.  The trip estimate of 9.7 million for the month of September refers to overnight trips returned from in that month. |
|  |  |

## Domestic travel spend by purpose

For the first time since the start of the pandemic, all spend by travel purpose categories exceeded pre-pandemic levels. Holiday travel remained the strongest performer with domestic travellers going on more and longer trips.

When compared to pre-pandemic spend, in the September quarter 2022 Australians spent (Figure 2):

* more on holiday travel (up 57% on pre-pandemic levels)
* more on travel for the purpose of visiting friends and relatives (up 23% on pre-pandemic levels)
* more on business travel (up 3% on pre-pandemic levels). This was the first quarter that business travel spend exceeded pre-pandemic levels.

**Figure 2: Spend by trip purpose, September quarter 2019 and 2022**

The chart shows the spend by trip purpose for the September quarter 2022 compared to the September quarter 2019.
For holiday trips, travellers spent $10.3 billion in the September quarter 2019 and $16.2 billion in the September quarter 2022.
For trips for the purpose of visiting family and friends, travellers spent $3.7 billion in the September quarter 2019 and $4.6 billion in the September quarter 2022.
For business trips, travellers spent $5.9 billion in the September quarter 2019 and $6.0 billion in the September quarter 2022.
For other travel, travellers spent $0.9 billion in the September quarter 2019 and $1.0 billion in the September quarter 2022.


## Strong interstate travel spend

In the September quarter 2022, interstate spend exceeded pre-pandemic levels by 29%. However, interstate trips remain down by 8% (Figure 3).

The increase in interstate spend was driven by travel for holiday purposes (up 47%). The average spend per trip for interstate travellers was up $505 or 40% from the September quarter 2019. The average spend per trip for intrastate travellers increased by $177 or 39%.

**Figure 3. Interstate spend on travel & trips change compared to 2019**

The chart shows interstate spend on travel and interstate trips from the March quarter 2020 to the September quarter 2022 as a percentage of interstate spend on travel and interstate trips for the same quarter in 2019.
Both interstate trips and interstate spend on travel dropped sharply in the June quarter 2020 when compared to the June quarter 2019. Interstate trips and interstate spend on travel showed gradual recovery until the June quarter 2021, before sharply declining in the September quarter 2021.
Interstate spend on travel recovered to pre-pandemic levels in the March quarter 2022 before exceeding it in the June and September quarters 2022. Interstate trips have recovered to close to pre-pandemic levels in the June quarter 2022 before declining slightly in the September quarter 2022.


Note: Each quarter is compared to the same quarter in 2019.

## States and territories

Overnight spend in the year ending September 2022 exceeded pre-pandemic levels across all states and territories except for the Australia Capital Territory. However, overnight trips remained below pre-pandemic levels across all states and territories due to the widespread lockdowns from July 2021 onwards being included in this period (Figure 4).

The recovery in spend from the pandemic in 2021 saw Queensland (QLD) and New South Wales (NSW) perform strongly when compared to the year ending September 2019. The year ending September 2022 saw:

* QLD: up $5.4 billion or 29% in spend but down 5% in trips
* NSW: up $1.1 billion or 5% in spend but down 16% in trips

The other states and territories also experienced an increase in spend in the year ending September 2022. Victoria was up $617 million or 4%, Western Australia up $538 million or 6%, the Northern territory up $375 million or 18%, South Australia up $259 million or 5% and Tasmania up $202 million or 7%.

**Figure 4. Overnight trips and spend by state and territory, year ending September 2022 compared to year ending September 2019**

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

New South Wales – 32.3 million trips and $24.3 billion spend, down 16% and up 5% respectively
Victoria -  24.2 million trips and $17.1 billion spend, down 18% and up 4% respectively
Queensland – 24.5 million trips and $24.5 billion spend, down 5% and up 29% respectively
South Australia – 6.7 million trips and $5.3 billion spend, down 15% and up 5% respectively
Western Australia – 10.3 million trips and $9.1 billion spend, down 5% and up 6% respectively
Tasmania - 2.9 million trips and $2.9 billion spend, down 8% and up 7% respectively
Northern Territory - 1.4 million trips and $2.5 billion spend, down 14% and up 18% respectively
ACT – 2.6 million trips and $1.8 billion spend, both down 15% and 8% respectively.


## Top 10 tourism regions

Top 10 tourism regions by change in overnight trips in the year ending September 2022 compared to the year ending September 2019:

### Top 10 tourism regions by change in overnight trips in the year ending September 2022 compared to the year ending September 2019: 1. Whitsundays (QLD): 923,000 trips, up 276,000 or 43% 2. Clare Valley (SA): 215,000 trips, up 44,000 or 26% 3. Katherine Daly (NT): 327,000 trips, up 65,000 or 25% 4. Snowy Mountains (NSW): 1.2 million trips, up 191,000 or 20% 5. Central Highlands (VIC): 529,000 trips, up 88,000 or 20% 6. Australia’s Coral Coast (WA): 1.2 million trips, up 147,000 or 15% 7. Yorke Peninsula (SA): 590,000 trips, up 73,000 or 14% 8. Mackay (QLD): 1.2 million trips, up 138,000 or 13% 9. Tropical North Queensland (QLD): 2.4 million trips, up 210,000 or 10% 10. Gippsland (VIC): 1.5 million trips, up 119,000 or 8%

This report has been prepared by the Commonwealth of Australia represented by the Australian Trade and Investment Commission (Austrade). The report is a general overview and is not intended to provide exhaustive coverage of the topic. The information is made available on the understanding that the Commonwealth of Australia is not providing professional advice.

While care has been taken to ensure the information in this report is accurate, the Commonwealth does not accept any liability for any loss arising from reliance on the information, or from any error or omission, in the report.