



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
 \$87.5 billion

▲ **11%**
 on 2019

Overnight Trips
 101.6 million

▼ **12%**
 on 2019

Nights
 376.9 million

▼ **8%**
 on 2019

September quarter 2022

Overnight Spend
 \$27.8 billion

▲ **33%**
 on 2019

Overnight Trips
 27.6 million

▼ **2%**
 on 2019

Nights
 103.2 million

0%
 on 2019

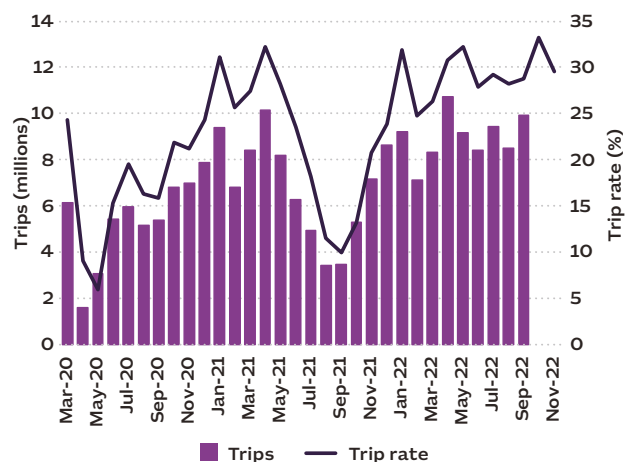
Domestic recovery continues in September quarter

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



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.

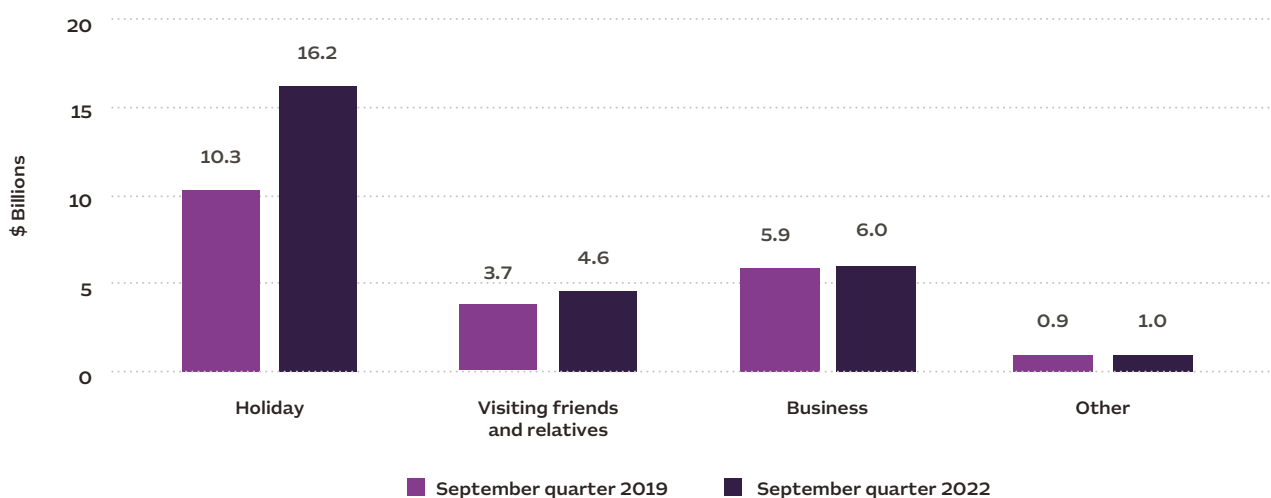
Domestic travel spend by purpose

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

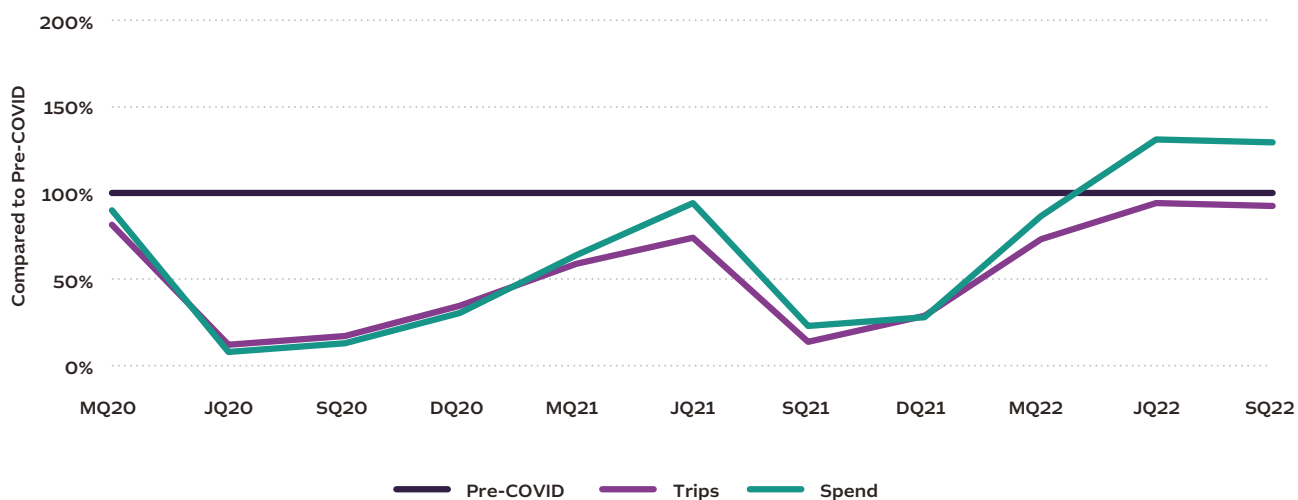


Strong interstate travel spend

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



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).

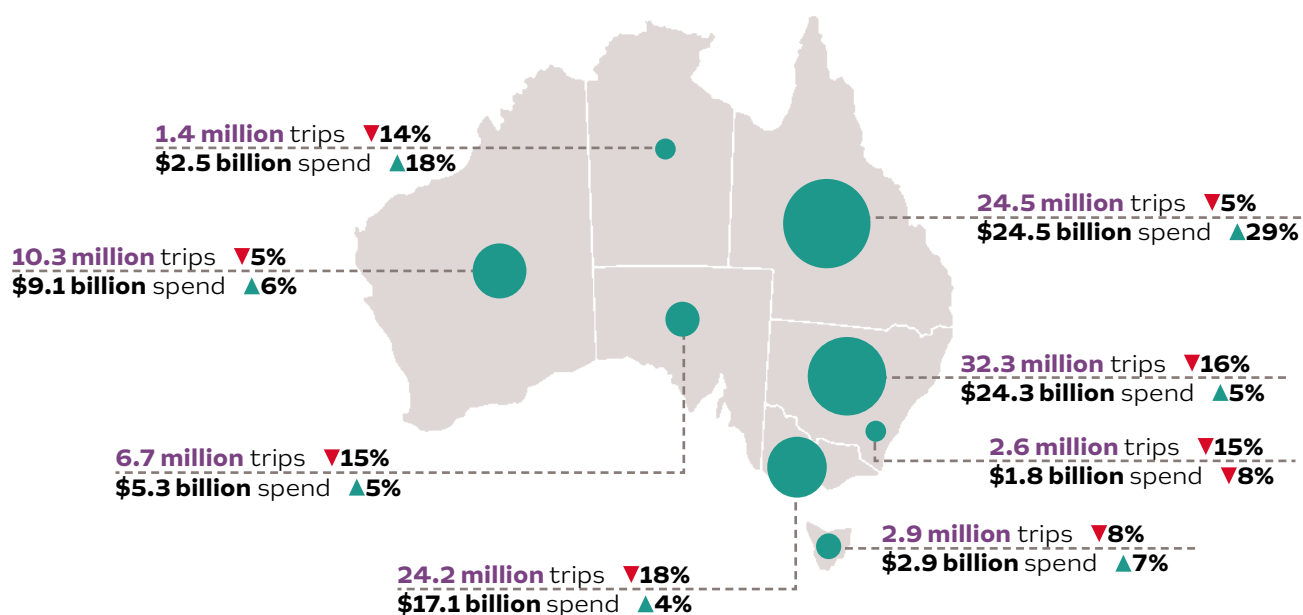
The recovery in spend from the pandemic in 2021 saw Queensland (QLD) and New South Wales (NSW) perform strongly when compared to the year ending September 2019. The year ending September 2022 saw:

- 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

Overnight trips to Western Australia were least impacted (down 8%). While state borders were shut until the March quarter 2022, travel within the state remained relatively unrestricted.

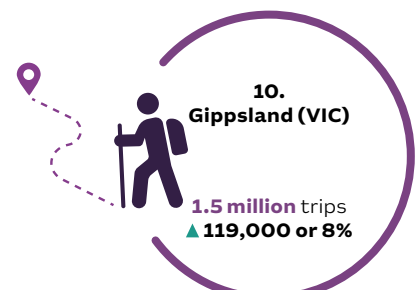
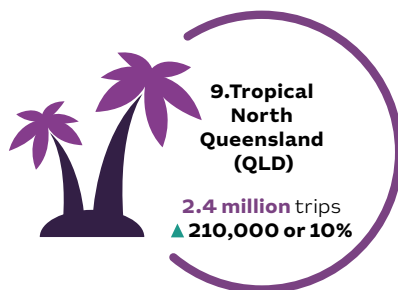
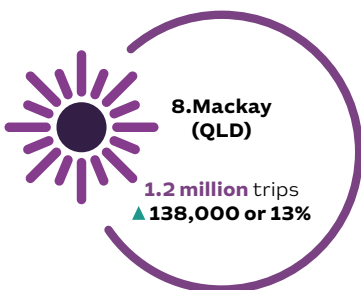
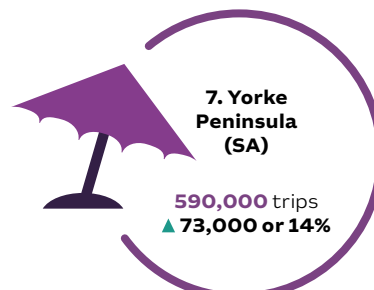
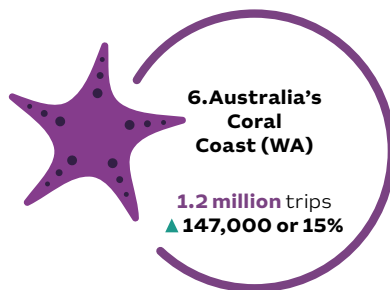
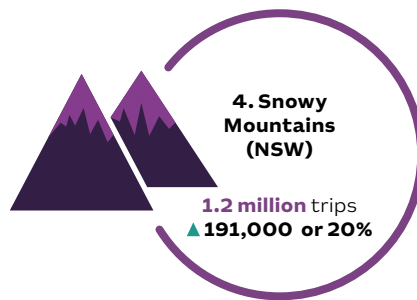
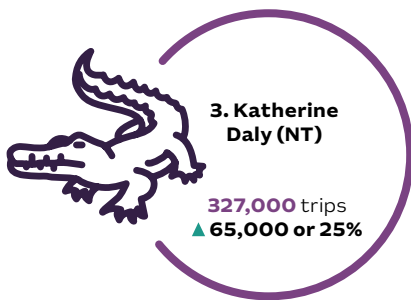
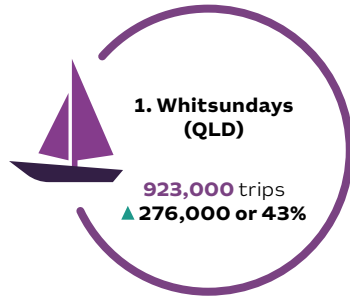
The other states and territories also experienced an increase in spend in the year ending September 2022. Victoria was up \$617 million or 4%, Western Australia up \$538 million or 6%, the Northern Territory up \$375 million or 18%, South Australia up \$259 million or 5% and Tasmania up \$202 million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

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



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:



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