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INTERNATIONAL VISITOR SURVEY RESULTS

MARCH QUARTER 2024

## March quarter 2024

In the March quarter 2024:

Spend in Australia was $10.2 billion, 99% of March quarter 2019 levels.

Number of trips were 2.1 million, 89% of March quarter 2019 levels.

Nights spent in Australia were 87.5 million, 105% of March quarter 2019 levels.

Total trip spend was $15.1 billion, 104% of March quarter 2019 levels.

## Year ending March 2024



**International tourism closes in on full recovery**

The March quarter 2024 international tourism results saw an uptick in trips to Australia relative to pre-pandemic. Trips reached 89% of pre-COVID levels (up from 81% in December quarter 2023) driven by an influx of travellers from China here for holiday and education purposes. Nights away exceeded pre-COVID levels at 105% (up from 101% in December quarter 2023) while spend in Australia was 99% of pre-COVID levels (up from 97% in December quarter 2023). The flatter spend recovery is likely driven by uncertain global economic conditions and heightened inflation impacting discretionary spending (Figure 1).

The year ending March 2024 results saw international tourism to Australia edge closer to 2019 levels (pre-COVID). Spend, trips and nights away all saw improvements as a percentage of pre-COVID levels, compared with last quarter’s data, with all exceeding 84% of pre-COVID levels. The average spend in Australia per trip increased by 25% when compared to pre-COVID due to travellers staying longer, with an average stay of 37 nights (up from 32 nights in 2019).

**Figure 1: Percentage of spend, nights and trips in Australia compared to 2019 levels, March quarter 2023 to March quarter 2024**

Figure 1 shows the quarterly percentage levels for number of trips, nights spent in Australia and spend in Australia compared the same period in 2019, for March quarter 2023 to March quarter March 2024.
Compared to the same period in 2019, number of trips in:
• March quarter 2023 was 66%
• June quarter 2023 was 79%
• September quarter 2023 was 80%
• December quarter 2023 was 81%
• March quarter 2024 was 89%
Compared to the same period in 2019, nights spent in Australia in:
• March quarter 2023 was 77%
• June quarter 2023 was 90%
• September quarter 2023 was 90%
• December quarter 2023 was 101%
• March quarter 2024 was 105%
Compared to the same period in 2019, spend in Australia in:
• March quarter 2023 was 72%
• June quarter 2023 was 100%
• September quarter 2023 was 98%
• December quarter 2023 was 97%
• March quarter 2024 was 99%.


**Uptick in holiday and education travel from China**

The March quarter 2024 saw an influx of travellers from China for holiday and education purposes when compared with the March quarter 2023. Travel from China continues to recover following Chinese outbound travel re-opening in early 2023, later than other markets.

The China visitor market saw:

* holiday trips and spend reach 48% and 52% of pre-COVID levels, respectively (up from both being only at 3% in the March quarter 2023).
* Education trips and spend reach 66% and 71% of pre-COVID levels, respectively (up from 36% and 46%, respectively in the March quarter 2023).

While there was an uptick for holiday and education travellers from China in the March quarter 2024, the average spend per trip has moderated for the past 4 quarters when compared to pre-COVID. This is driven by an average spend per trip for travellers here for education purposes returning to pre-COVID levels. This may reflect a return to more normal spending behaviour following a period where visitors were able to draw on savings built up during COVID-19 period and the current global economic uncertainty weighing on spending decisions (Figure 2).

**Figure 2: Average spend in Australia per trip (percentage of 2019 levels) of travellers from China, March quarter 2023 to March quarter 2024**

Figure 2 shows the average spend per trip as a percentage of 2019 levels of travellers from China, March quarter 2023 to March quarter 2024.
Compared to the same period in 2019, average spend per trip in:
• March quarter 2023 was 190%
• June quarter 2023 was 173%
• September quarter 2023 was 150%
• December quarter 2023 was 116%
• March quarter 2024 was 116%.

## Top 5 Visitor Markets

In the year ending March 2024, 4 of the top 5 visitor markets (New Zealand, India, United Kingdom and United States of America) exceeded their 2019 spend levels. Trips to Australia continued to improve across the top 5 markets, with India exceeding 2019 levels (114%). China saw the largest improvement as a percentage of pre-COVID levels on a year-ending basis, compared with last quarter’s data, with spend and trips at 73% (up from 56%) and 51% (up from 38%) respectively. China has become the second largest international visitor market, up from being the fourth largest in the year ending December 2023.

Australia’s top 5 international visitor markets in the year ending March 2024 were (2019 comparison in brackets):

1. New Zealand with:

* 1.2 million trips (96%)
* $2.1 billion spent (128%)
* 14.4 million nights (111%)

2. China

* 681 thousand trips (51%)
* $7.2 billion spent (73%)
* 39.0 million nights (68%)

3. United States of America with:

* 663 thousand trips (88%)
* $2.1 billion spent (106%)
* 11.3 million nights (86%)

4. United Kingdom with:

* 578 thousand trips (86%)
* $2.0 billion spent (108%)
* 20.0 million nights (94%)

5. India with:

* 390 thousand trips (114%)
* $1.5 billion spent (121%)
* 23.8 million nights (114%)

**Figure 3. Top 5 markets by spend in Australia (percentage of 2019 levels), year ending March 2021 to year ending March 2024**

Figure 3 shows a timeseries of the top 5 international visitor markets by spend in Australia as a percentage of 2019 levels from year ending March 2021 to year ending March 2024.

In the year ending March 2024:
• New Zealand was 128% of year ending March 2019 levels.
• China was 73% of year ending March 2019 levels (up from 56% in the year ending December 2023 results).
• United States of America was 106% of year ending March 2019 levels.
• United Kingdom was 108% of year ending March 2019 levels.
• India was 121% of year ending March 2019 levels.


## States and Territories

In the year ending March 2024, results were stronger across all states and territories for spend and trips to Australia as a percentage of pre-COVID levels, compared with last quarters data (excluding spend in the Northern Territory).

Half of the states and territories exceeded 2019 spend levels with South Australia the strongest at 120%, followed by Western Australia (111%), New South Wales (105%) and Queensland (102%).

New South Wales and Victoria drove the stronger relative spend and trip results, compared with last quarter’s data, due to an influx of travellers from China at the start of 2024, here for holiday and education purposes.

**Figure 4. Number of trips and spend in Australia by state and territory, year ending March 2024 & year ending December 2023 (as percentages of 2019 levels)**

Figure 4 shows a map of Australia with differing sizes of circles based on number of trips for each state and territory. 
The figures show the number of trips and spend in Australia by state and territory, year ending March 2024 comparing with year ending December 2023 (as percentages of 2019 equivalent period levels).

New South Wales:
• Trips was 84% of 2019 levels (up from 78%)
• Spend was 105% of 2019 levels (up from 97%)

Victoria:
• Trips was 78% of 2019 levels (up from 65%)
• Spend was 91% of 2019 levels (up from 73%)

Queensland:
• Trips was 77% of 2019 levels (up from 71%)
• Spend was 102% of 2019 levels (up from 95%)

South Australia:
• Trips was 102% of 2019 levels (up from 93%)
• Spend was 120% of 2019 levels (up from 111%)

Western Australia:
• Trips was 85% of 2019 levels (up from 79%)
• Spend was 111% of 2019 levels (up from 97%)

Tasmania:
• Trips was 79% of 2019 levels (up from 72%)
• Spend was 85% of 2019 levels (up from 64%)

Northern Territory:
• Trips was 67% of 2019 levels (up from 63%)
• Spend was 83% of 2019 levels (down from 98%)

Australian Capital Territory:
• Trips was 73% of 2019 levels (up from 66%)
• Spend was 96% of 2019 levels (up from 85%).


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