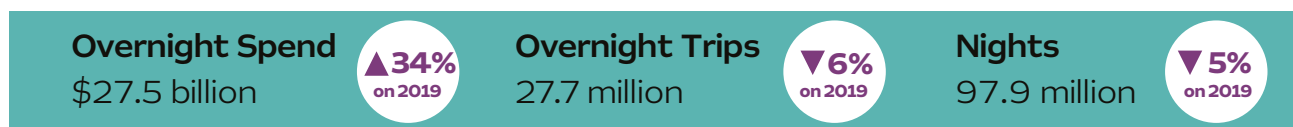




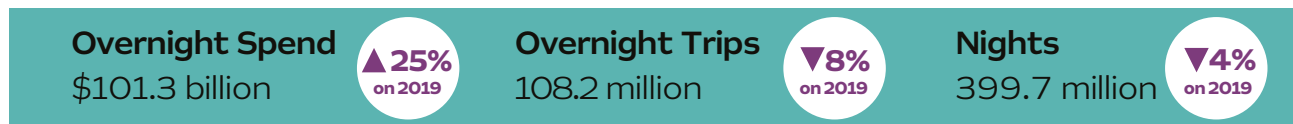
NATIONAL VISITOR SURVEY RESULTS DECEMBER QUARTER 2022

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



Year ending December 2022



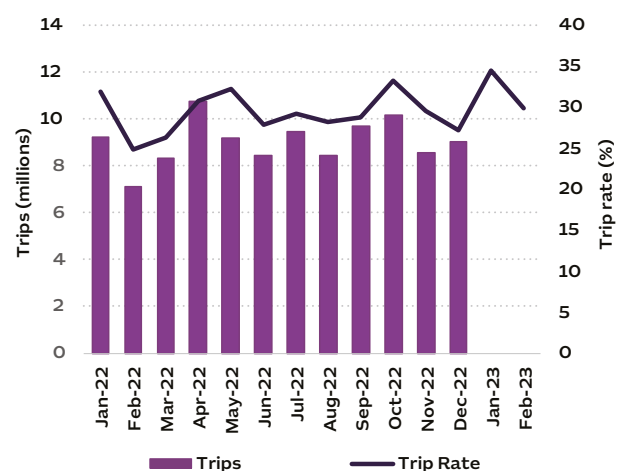
Strong spend results continue in December quarter

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



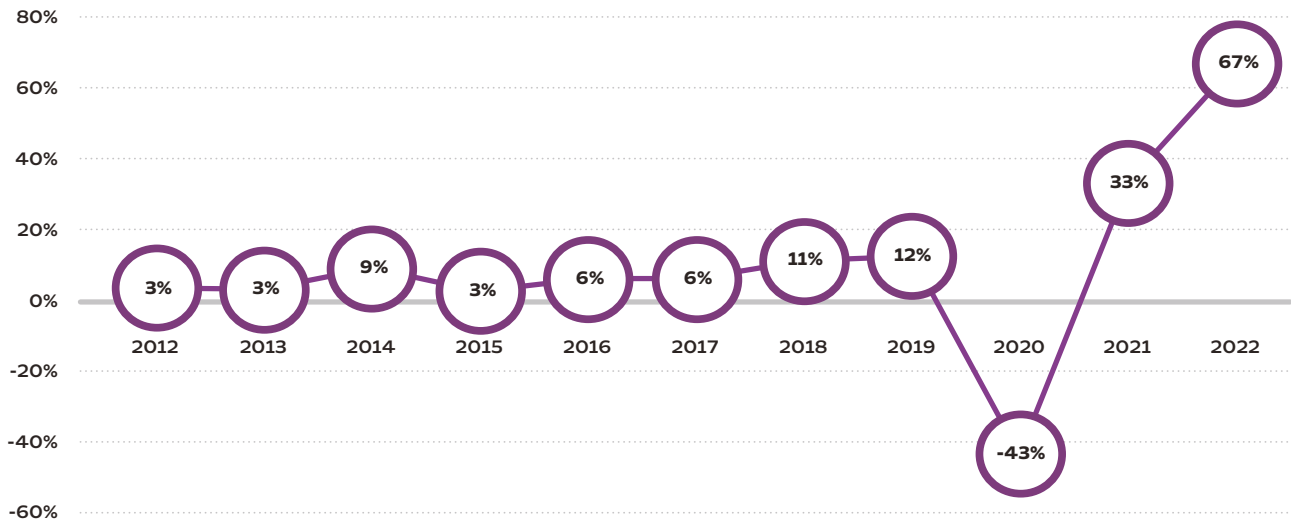
¹ The trip rate reports whether a respondent has taken a trip in the past four weeks. The trip rate of 29.82% for February 2023 indicates a high level of NVS respondents reported taking one or more overnight trips in the preceding 28 days (the reference period). The return date will have been in January 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.

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 where 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

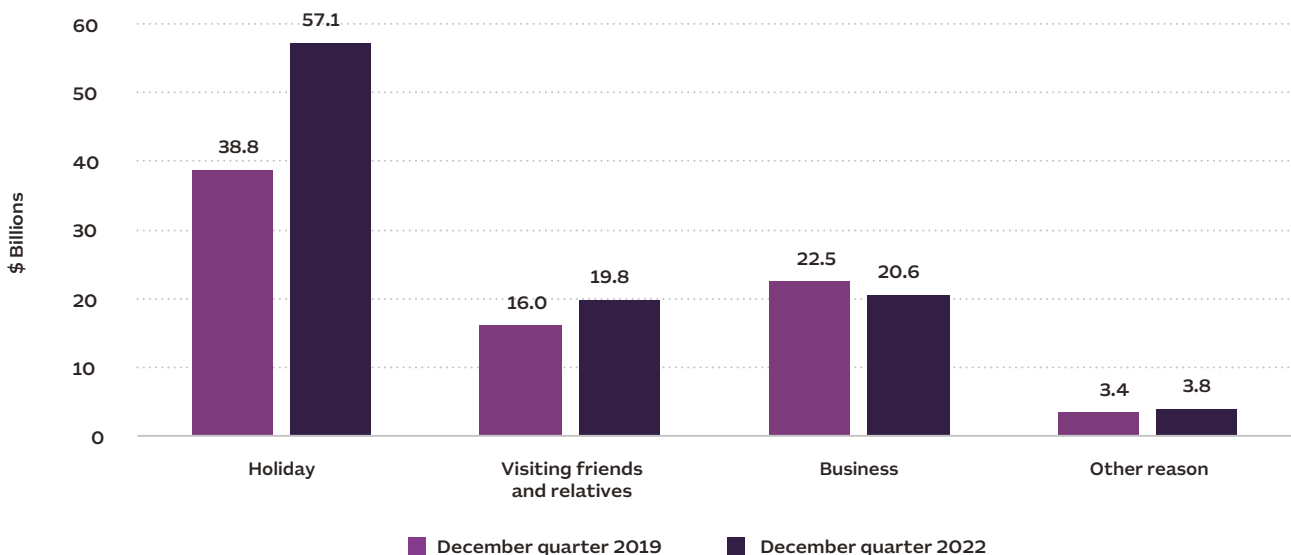


Holiday spend drives growth

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

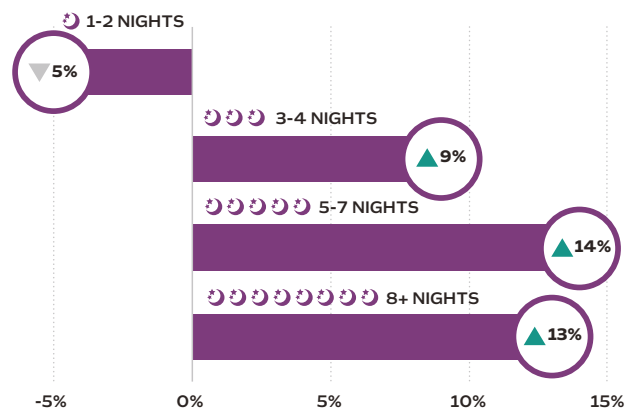


Travellers are going on longer holidays

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

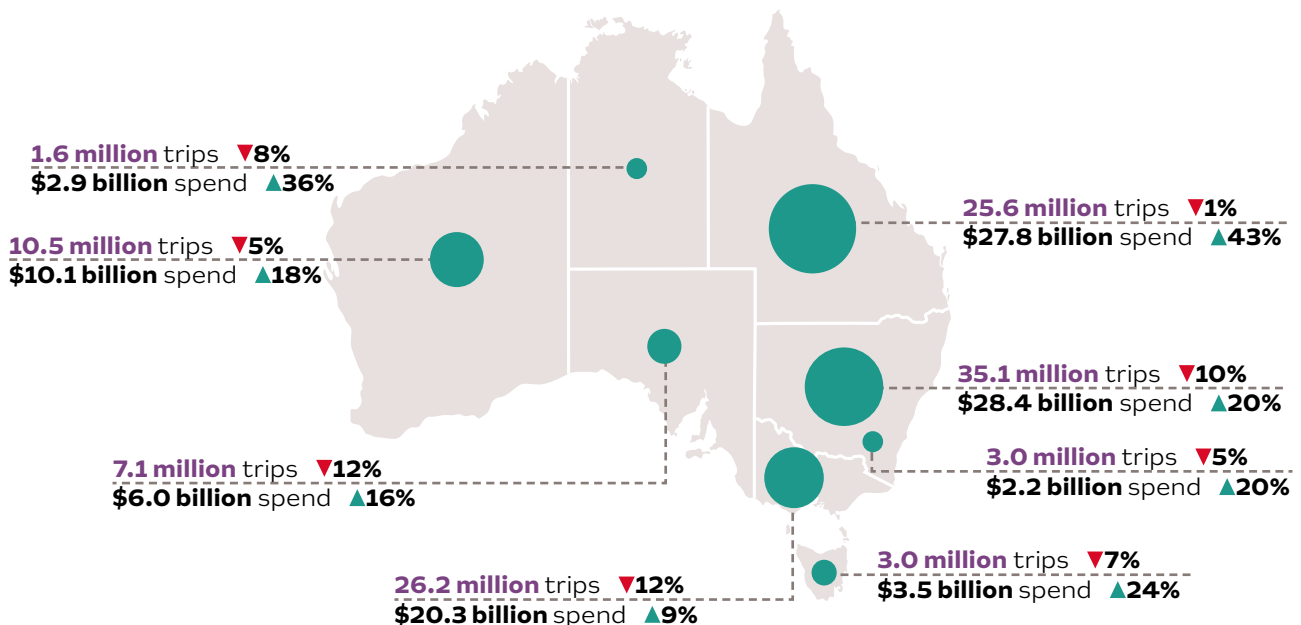


States and territories

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



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