



Australian Government

Australian Trade and Investment Commission  
Tourism Research Australia



# DOMESTIC TOURISM FORECASTS

2021–22 to 2025–26



## Acknowledgements

As part of the forecasting process, Tourism Research Australia (TRA) established the Tourism Forecasting Reference Panel (the Panel) comprising experts from industry and government. TRA acknowledges the contribution of the Panel members.

**Cover image:** Litchfield National Park,  
Northern Territory  
Courtesy of Tourism Australia

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# Overview

The COVID-19 pandemic has had a devastating effect on Australia's visitor economy. Overall, tourism losses since the start of the pandemic (March 2020 to June 2021) have totalled \$101.7 billion.<sup>1</sup>

International travel has remained at record lows since March 2020. Any recovery in international tourism remains dependent on the further opening up of Australia's international border and changes to restrictions on international travel in source markets.

Domestic tourism, which accounts for a large majority of the total visitor economy, has also been severely affected by the pandemic.<sup>2</sup> However, the recovery is already underway in the domestic sector and is expected to continue in 2022.

This report documents how the domestic tourism industry is expected to recover from the pandemic-induced downturn. Forecasts are made over a five-year future timeframe and are provided for individual states and territories as well as nationally.



Image courtesy of Tourism Australia

## Comments on methodology

The forecasts in this report combine evidence-based models with market intelligence, relevant research, and the best available data.

This was also the case in previous years. However, this year's approach for short-term forecasts incorporates additional judgments, given the importance of factors such as policies on state border controls. These judgments are based on public policy announcements, likely behavioural responses to travel, and factors such as aviation capacity and the accommodation outlook.

Insights from TRA's Tourism Forecasting Reference Panel are also very important. This panel has supported TRA over many years and is made up of industry and government experts. Steps in the forecasting process and the adjustments made to our approach this year are detailed in the Forecast Methodology section of this report.

There are no forecasts for international tourism in this report as the outlook for international tourism remains highly uncertain and is reliant on government decisions both in Australia and abroad regarding international border policies. TRA intends to resume production of annual international tourism forecasts (and its detailed components) next year.

Reporting is on a financial year basis unless otherwise specified.<sup>3</sup> To assist users, forecast data are available to download on both a financial year and calendar year basis. Data can be found in the spreadsheets that accompany this report on the [TRA website](#).

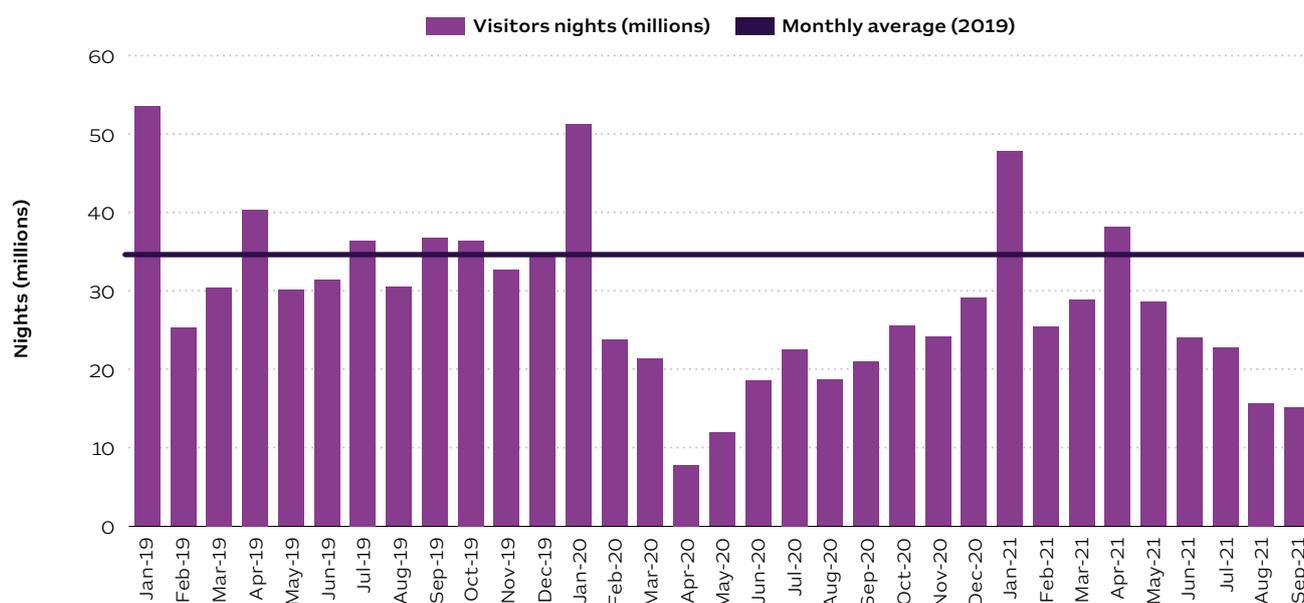
1. Tourism Research Australia (September 2021), 'National Visitor Survey (NVS) Year Ending June 2021', available [online](#).
2. Domestic tourism accounted for 77 per cent of total tourism expenditure in Australia in 2019. This measure of the visitor economy excludes international students who stay for longer than 12 months without returning home. Including expenditure in Australia by international students irrespective of the length of stay increases the size of the total visitor economy, and reduces the domestic share to 64 per cent (in 2019).
3. This report uses fiscal years as the comparison unit, whereas other documents like the THRIVE 2030 strategy use calendar years: marginal differences are to be expected.

## Summary of findings

Domestic visitor nights declined sharply in early 2020 as a result of the nationwide pandemic-induced lockdown (Figure 1). As those restrictions eased, domestic tourism demand started returning to 2019 levels (pre-pandemic level). Domestic visitor nights in January to April of 2021 were only 6 per cent down on the first four months of 2019, and 35 per cent above the same period in 2020.

Domestic visitor nights declined again in mid-2021 as several states experienced widespread lockdowns in response to Delta variant outbreaks. Domestic tourism is forecast to rebound at a similarly rapid pace from these lockdowns. Domestic visitation is forecast to return to around its pre-pandemic level in 2022-23, then surpass that previous peak in 2023-24.

**Figure 1: Recent performance of domestic tourism**



Source: Tourism Research Australia

Factors supporting domestic growth over this period include:

- the reopening of state borders
- declining risk of lockdowns
- pent-up demand for travel
- accrued leave and disposable income during lockdowns
- incentivisation from government travel subsidies and support payments
- marketing by the tourism industry
- increasing traveller confidence about domestic travel, and
- ongoing barriers to international travel (cost, complexity and hesitancy).

Together with this projected national recovery, the domestic visitor economy of each of the states and territories is forecast to return to its pre-pandemic level by the end of 2023-24.

The three key risks to the forecasts presented in this report are:

1. greater-than-expected substitution from domestic to outbound travel,
2. a departure from the current government guidelines (i.e. the [National Plan to Transition Australia's National COVID-19 Response](#)), and
3. future major, uncontained outbreaks that drastically reduce the desire or ability to travel.

# National forecasts

## The national outlook

TRA data show that the lockdowns and travel restrictions in place at various times over the past two years have been detrimental to tourism activity. Fortunately, lockdowns in Australia are likely to be much more isolated and infrequent in the future according to the [National Plan to transition Australia's National COVID-19 Response](#). This is very positive for the domestic visitor economy.

The forecasts indicate that domestic tourism has resumed its recovery from October 2021, following the easing of restrictions in parts of Australia. Growth in visitation is expected for the rest of 2021-22 and is forecast to continue through 2022-23. Domestic tourism is forecast to return to an average pre-pandemic level in 2022-23, and to surpass its 2018-19 peak the following year. A more moderate growth trajectory is forecast for the period between 2023-24 and 2025-26.

There are a number of temporary factors driving growth in the near-term. These are discussed in the Economic factors affecting the national forecasts section of this report. The main downside risks to the forecasts, including future virus outbreaks, are discussed in the Risks section of this report.

## Visitor nights

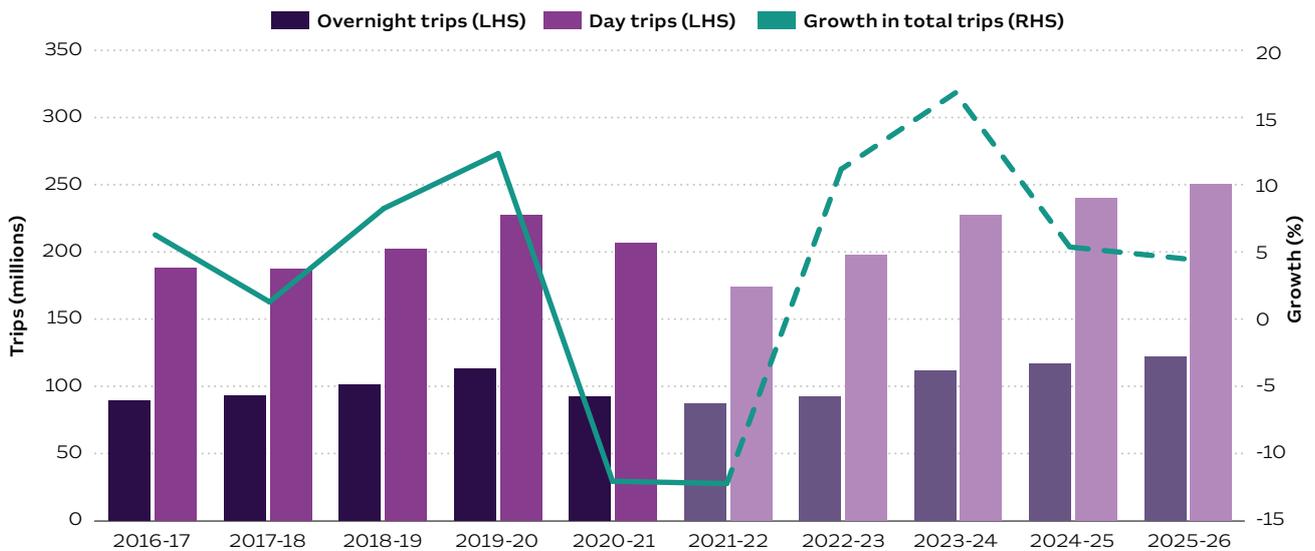
As a result of extended lockdowns in various states and territories between July and October 2021, domestic visitor nights in 2021-22 are expected to remain around 17 per cent lower than the 2018-19 peak. The number of visitor nights is then forecast to increase by 20 per cent in 2022-23 to return to around pre-pandemic levels. Growth moderates over subsequent years as temporary and one-off factors, such as pent-up demand and reconnecting with family, subside. In this more normal environment, domestic tourism is forecast to increase roughly in line with population growth.

## Trips

The number of domestic trips is estimated to have already troughed in 2020-21 and is forecast to rise strongly in both 2021-22 and 2022-23 (Figure 2). The number of trips includes both overnight trips and day trips.

- The number of **day trips** is forecast to increase by 14 per cent in 2021-22 and by 15 per cent in 2022-23. The recovery in domestic day trips is stronger than overnight trips in the current year (2021-22). The risk of lockdowns and state border closures during part of this period imposes a larger negative impact on overnight trips than on day trips. Day trips generally require less pre-planning than overnight trips and can be undertaken closer to home. Day trips are expected to see continued growth in 2022-23, returning to pre-pandemic levels, as Australians take advantage of opportunities to reconnect with family and friends, attend events, and explore their surroundings.
- The number of domestic **overnight trips** is expected to increase by 4 per cent in 2021-22 and by 21 per cent in 2022-23 to reach over 111 million overnight trips. The forecast visitation in 2022-23 represents an average of 5 overnight trips per year for each person aged 15 years or older. This is a similar rate of travel per person as in pre-pandemic years.
- Over the two years from 2023-24 to 2025-26, domestic overnight trips are forecast to increase at an annual average growth rate of 2.7 per cent to reach over 123 million. A similar rate of growth is expected for domestic day trips (3.3 per cent average annual growth) to reach 255 million in 2025-26.

**Figure 2. Domestic overnight and day trips taken**



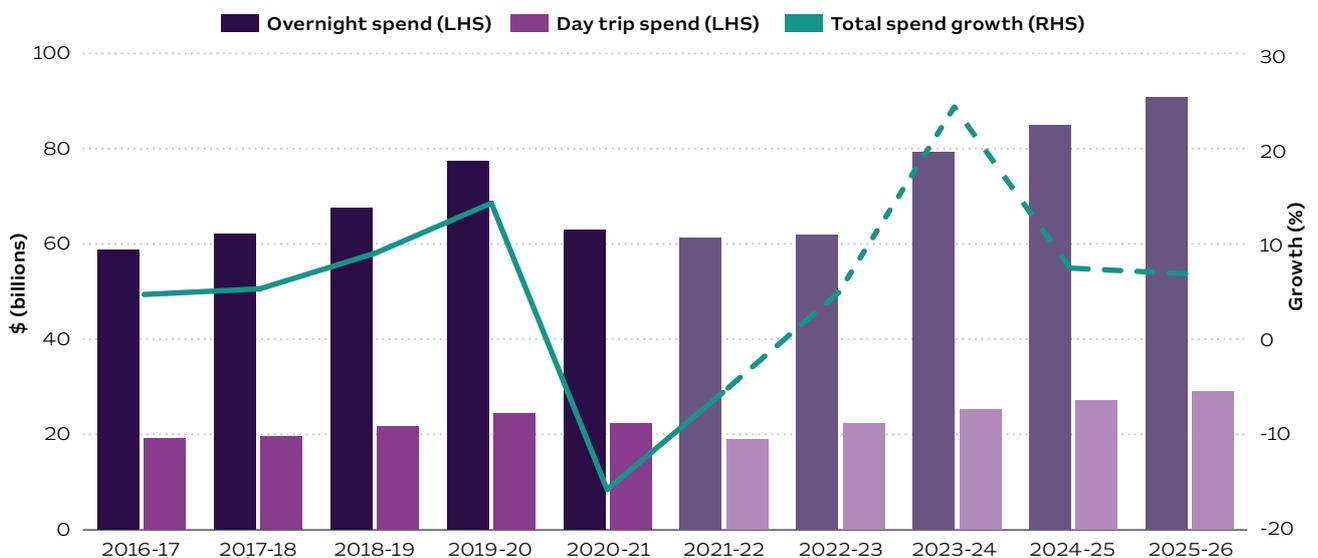
Source: Tourism Research Australia

### Expenditure

Modelling suggests that in 2022-23, overnight visitor expenditure will reach \$80.2 billion, and day trip expenditure \$25.5 billion in nominal terms (Figure 3). These figures are in line with the pre-pandemic level in 2018-19, indicating that tourism expenditure is forecast to recover sooner than the number of trips or visitor nights.

Total domestic visitor expenditure is expected to grow by 5.9 per cent on average in each of the two years from 2023-24, to reach \$127.7 billion in 2025-26 in nominal terms. Despite the higher number of day trips taken each year, overnight visitor trips account for three-quarters of total annual domestic tourism expenditure. This reflects the higher average spend of overnight trips compared with day trips (for example, in 2019, the average spend was \$687 per overnight trip and \$106 per day trip).

**Figure 3. Domestic visitor expenditure on overnight and day trips**



Source: Tourism Research Australia

## Forecasts by purpose of travel

All three major travel segments, holiday, visiting friends and relatives (VFR), and business travel, are forecast to rebound. By travel purpose, leisure travel (holiday and VFR) is expected to recover faster in coming years than business travel (Figure 4).

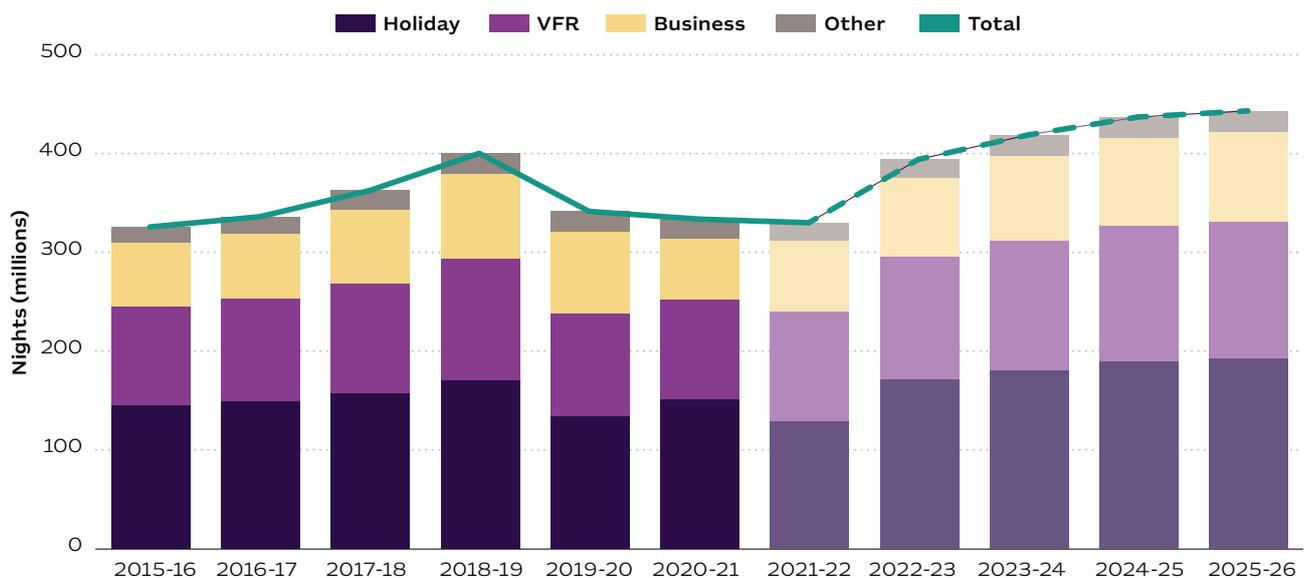
The forecasts suggest that:

- Travel for VFR is the first segment to fully recover, as Australians seek to reconnect with family and friends after an extended period of separation during the pandemic.
- Travel for holiday purposes, the largest category, contributes most to growth over the next two years. Holiday travel declined by more than the other categories relative to the 2018-19 level, reflecting its discretionary nature and restrictions in place for this type of travel.
- Travel for business purposes is slower to recover than leisure travel. Nevertheless, business travel is forecast to eventually return to pre-pandemic levels. This reflects a growing desire for organisations to reunite, the enduring value of face-to-face meetings for decision-making and the role of the events sector in building business relationships.
- Travel for ‘other reasons’, the smallest category (around 5 per cent of total domestic visitation), has been more stable than the three main categories over the pandemic period. This category encompasses mainly education-related, employment and health-related travel. These reasons for travel were often subject to exemptions from travel bans.



Image courtesy of Tourism Australia

**Figure 4. Domestic visitor nights by purpose of travel**



Source: Tourism Research Australia

Businesses may be more constrained than individuals when reinstating travel plans, and slower growth in business travel in the near-term reflects the following three factors:

1. The availability of efficient alternative communication methods allows business meetings to be conducted both online and in-person. Businesses are expected to permanently adopt some changes to business communication methods that were implemented during the pandemic, such as virtual meetings instead of face-to-face meetings for more routine matters.
2. There is less pent-up demand in this sector because essential business travel was permitted during travel restrictions, whereas leisure travel was severely restricted.
3. Business travellers tend to have shorter stays and undertake date-dependent travel. The risk of changes to travel schedules may deter business travellers more than travellers planning longer visits that are not tied to a particular date. This is not expected to present a significant constraint to business travel beyond the near-term, as the risk of lockdowns/quarantine requirements and border closures diminishes.

Critical to the recovery in business travel will be overcoming community concerns regarding travel safety.

## Economic factors affecting the national forecasts

The strength of the projected recovery in domestic tourism, particularly in the near-term, is underpinned by a number of factors. These factors are discussed below and include:

- reopening of state borders
- declining risk of lockdowns
- pent-up demand for travel
- accrued leave and disposable income during lockdowns
- incentivisation from government travel subsidies and support payments
- marketing by the tourism industry
- increasing traveller confidence to travel domestically, and
- barriers to international travel (cost, complexity and hesitancy).

4. The overnight trip rate reports the share of survey respondents in the month that report having returned from an overnight trip in the preceding four weeks.

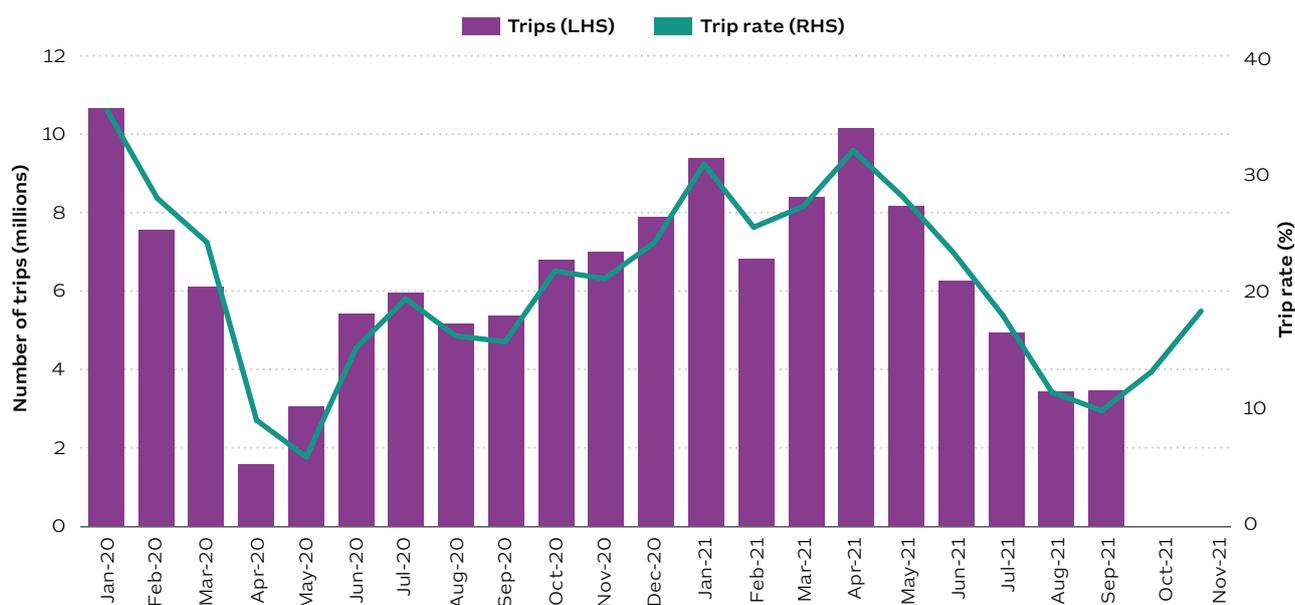


Image courtesy of Tourism Australia

Forecasts are conditioned on the [National Plan](#) suggesting that lockdowns are now less likely as a result of high double-dose vaccination rates. As travel restrictions ease, Australians are expected to return to their previous travel habits, seek opportunities to reconnect with family and friends, and participate in events that support the visitor economy.

- Sentiment indicators suggest that Australians are keen to travel once internal borders reopen, and many are actively planning their next getaway.
- Data available for October 2021 suggest that some activity resumed immediately after lockdown measures were eased.
- TRA's Trip Rate<sup>4</sup> measure increased in both October and November 2021, following the easing of travel restrictions in parts of Australia (Figure 5). The trip rate had earlier declined from around the time of the mid-2021 Delta variant outbreaks and consequent lockdowns.
- TRA data similarly show that domestic tourism rebounded rapidly from lockdowns in 2020. A similar trajectory is envisaged in the near-term forecasts.

**Figure 5. Domestic overnight trips and trip rate**



Source: Tourism Research Australia

The household saving rate increased substantially over the pandemic period, and household disposable income has been high. Households are now expected to spend some of those accumulated savings as opportunities for spending open up. Leave balances may have also accumulated over the pandemic period and may enable Australians to undertake additional travel.

In the near term, it is also expected that domestic tourism will continue to benefit from a slower rebound in outbound travel than in domestic travel. Any recovery in outbound travel is likely to be rapid, as it rises from an extremely low base. Some of the factors supporting a rebound in outbound travel are similar to those affecting demand for domestic travel such as increasing airline capacity, pent-up demand, and desire to reconnect with family. However, the recovery in outbound travel is forecast to lag the recovery in domestic travel due to additional hurdles and risks overseas travellers face. Examples of additional risks and hurdles that outbound travellers from Australia may encounter include:

- International travel may be subject to disruptions associated with quarantine requirements at the destination as well as other measures such as virus testing.

- The prolonged pandemic and ongoing focus on health and safety may make Australians hesitant to visit certain countries.
- Australians concerned about acquiring or passing on the virus to vulnerable individuals may also hold off travelling internationally initially.
- International travel is often a larger expense, requires additional time (leave balances), and is more complex to organise than a domestic trip.

In contrast, domestic travel is expected to benefit from a continuation of recent travel habits, marketing and incentives schemes directed at domestic travel, and lower perceived and actual barriers to travel. However, a greater-than-expected substitution from domestic to outbound travel is a risk to these forecasts and is discussed in the Risks section of this report.

When assessing the likely path of recovery, TRA has considered the expected impact of changes to travel habits resulting from the recent pandemic experience. These include the consequences of increased remote working, barriers to travel for unvaccinated and vulnerable individuals, various ongoing public health measures and supply side adjustments in the tourism industry.



# State and Territory forecasts

## The outlook for domestic tourism

The domestic visitor economy of each of the states and territories is forecast to return to its pre-pandemic level by the end of 2023-24. While states and territories have had different experiences so far in the pandemic, visitation in every state and territory is expected to return to 2018-19 levels within a couple of years (Figure 6). Growth is then expected to continue in the following years for all states and territories.

The main point of difference in the recovery paths of the various states and territories is that domestic tourism in Victoria is forecast to take longer than other states to return to pre-pandemic levels. This reflects prolonged lockdowns over the past two years.

New South Wales and the territories also follow a slightly slower path in the near-term because of recent lockdowns. The other states largely recover their pre-pandemic level in 2022-23 (around one year earlier than Victoria and New South Wales). Other factors affecting the rate of recovery across the states are discussed in the next section of this report.

In line with the [National Plan](#), the risk of lockdowns eases once all jurisdictions have achieved the 70 per cent double dose vaccination rate – likely by the end of December 2021. As double-dose vaccination rates increase further, internal state borders are generally expected to remain open. The forecasts are subject to change if, for example, there are prolonged unexpected state border closures – see Risks section.

**Figure 6. Forecast return to previous peak by state/territory: Domestic visitor nights**



Source: Tourism Research Australia

## Factors driving variations in the pace of recovery

Differences in the speed of recovery across the states and territories reflect variations in the decline in domestic tourism to date, policy changes and the composition of domestic travel in the region. The forecasts account for some of these variations in the following ways:

- States/territories that experienced additional lockdowns are more likely to have seen larger declines in domestic tourism. After lockdowns end, these states/territories are more likely to experience the sharp rebound in domestic tourism associated with removing barriers to travel and pent-up demand. Longer lockdowns are forecast to be more likely to result in new travel habits rather than quick reversions to pre-crisis behaviours.
- States with ongoing internal border controls are expected to have less growth in interstate travel. The share of interstate travel relative to intrastate travel in a region varies. Therefore, the impact of prolonged border closures varies across the states and territories.

- The forecasts also account for differences in the composition of domestic travel nights in each tourism region. As mentioned previously, travel for leisure purposes is expected to recover more quickly than travel for business purposes. Moreover, across the states and territories there are differences in the composition and reason for travel within these groups that may affect the expected growth rate. For example, while virtual meetings are expected to remain a practical alternative for consulting and finance projects, they are less able to replace site visits in the construction and mining industry. Therefore, the industry composition in a region may affect the forecast rate of growth of business travel.
- The share of regional versus city-based travel is accounted for in the forecasts. Travel to regional areas, particularly those within a few hours of capital cities, experienced smaller reductions than travel to capital cities over the pandemic period.
- Other state-specific factors considered include region-specific travel incentives and upcoming major events.

Appendix A contains graphs showing the forecast growth in domestic travel by purpose for each state and territory.



Image courtesy of Tourism Australia

# Risks

Forecasts presented in this report are based on the latest available data and information. They use data available to October 2021 and input from the expert panel collected in September 2021. In the current, rapidly evolving environment, there continue to be changes to health advice, border policies and economic forecasts that could impact the forecasts for domestic tourism presented here.

The three main risks to the forecasts are:

- 1. Forecasts are conditioned on the National Plan** suggesting that lockdowns will be less frequent after double dose vaccination rates pass 70 per cent.<sup>5</sup> Forecasts have been prepared at a time when restrictions are easing, and many state and territory borders are expected to open before the end of 2021.

Major deviations from this plan and messaging from state governments, such as prolonged, complete state border closures are a risk to the outlook. This type of travel restriction has been shown to have a significant impact on the visitor economy. In contrast, the imposition of targeted, temporary lockdowns is unlikely to have a major effect on the forecasts. TRA data show that short, localised lockdowns generally have a temporary and narrow impact.

- 2. The ramp-up of outbound travel options is uncertain.** As discussed above, the recovery in outbound travel is initially expected to lag domestic travel. A greater-than-anticipated rate of growth in outbound travel would likely lower the projected growth rate of domestic tourism. This is because outbound travel is an obvious substitute for domestic travel, and individuals are likely to choose one or the other when they are limited by financial and time constraints.

The recovery in outbound travel may also be uneven across the states and territories as changes in international travel policies, such as quarantine requirements, may vary at the state level.



Image courtesy of Tourism Australia

- 3. Major, uncontrollable outbreaks of the virus** or other health crises could drastically reduce traveller confidence and the desire/ability to travel. The path of the global pandemic has surprised in the past. Globally, there are signs of increasing case numbers and there remains a risk of future outbreaks, including of new strains of the virus, in Australia.

The forecasts presented in this report are a central scenario, based on the best available information. There are many factors that could support a stronger recovery than outlined in the forecasts presented here. There are also plausible reasons why the recovery could be slower. Forecasts at the state level are subject to greater imprecision given the variety of influences on these estimates.

5. See [daily COVID-19 vaccine roll-out update](#) on the Department of Health website for up-to-date progress on vaccination rates of Australian states and territories.

# Forecast methodology

TRA forecasts are produced using a hybrid, evidence-based approach which combines quantitative modelling and expert judgement. This method utilises market intelligence, the best available data and relevant research. Due to the current extraordinary pandemic situation involving significant travel restrictions and greater uncertainty, TRA's approach has been adapted. Specifically, additional judgment has been applied to modelled short- and medium-term results, while longer term forecasts rely more on structural parameters than on cyclical factors.

Other factors such as changes in public policy including travel restrictions, behavioural considerations related to pent-up demand and ability to travel versus the perceived risk of travel, are incorporated into the forecasts using

a judgement-based approach. Factors such as aviation capacity, national disposable income growth and the accommodation outlook are also accounted for using this approach.

Input from an expert panel provides valuable further refinement to the short- and medium-term forecasts. As in previous years, input from the Tourism Forecasting Reference Panel (the expert panel), which is made up of industry and government experts, is incorporated before the results are finalised.

This year, the method of engagement with the expert panel and the survey of panel members were adapted. Instead of traditional discussions with the expert panel, a structured survey approach was adopted.<sup>6</sup> A panel of 17 tourism



Image courtesy of Tourism Australia

6. Examples in the literature of the use of expert judgment in forecasting include Athanasopoulos et al (2021) and Zhang et al (2021). A panel of multiple experts is recommended to reduce the impact of individual biases and viewpoints.

experts was asked to predict the timing of the domestic tourism recovery and the most likely scenario for domestic tourism progression over the next five years. The steps to incorporate expert judgement into TRA's forecasts are as follows:

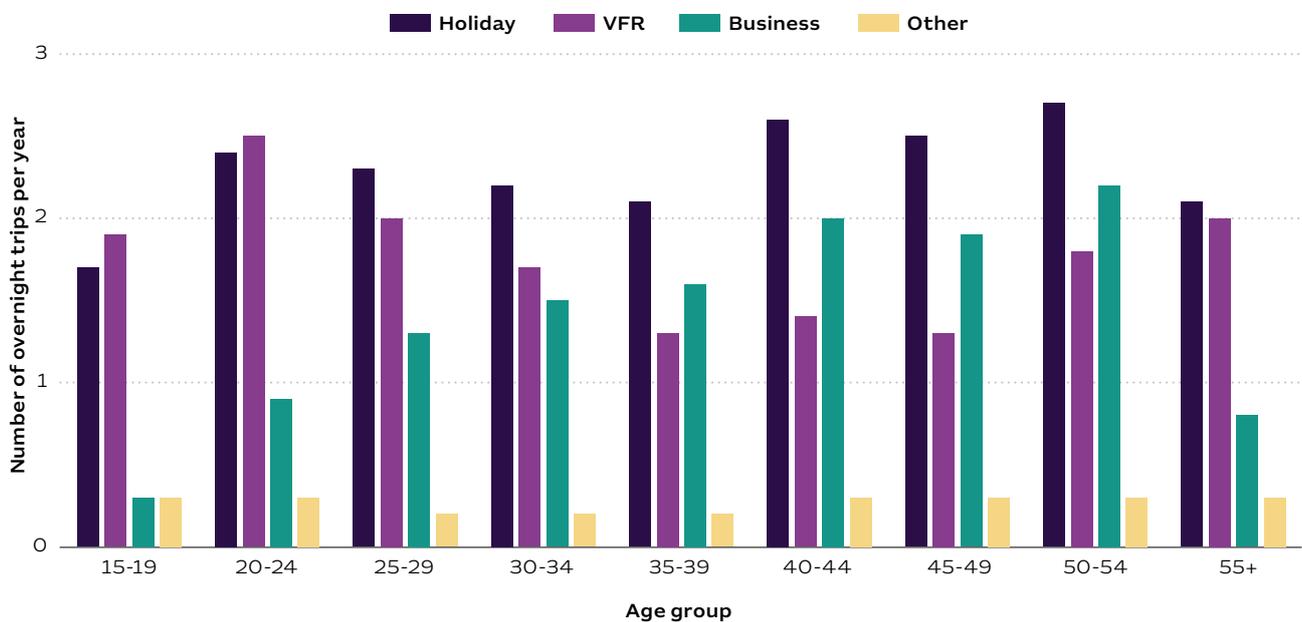
1. Modelling by TRA to produce initial forecasts
2. Surveying panel members to collect views and forecasts
3. Statistical analysis of the survey results to encompass all views and determine the most probable scenarios for domestic visitation in the short and medium term.
4. Adjusting the model-based forecasts to incorporate survey results.

From 2023-24, domestic tourism is expected to have recovered from the pandemic-related downturn. Future growth then reflects more normal, conventional factors. Forecasts for domestic tourism at the national level over these years are modelled from two parameters:

Australian population growth and travel propensities of age cohorts. Travel propensities are calculated from recent, pre-pandemic TRA data (Figure 7) and population growth projections are sourced from the [Economic Intelligence Unit](#) (Figure 8).

Forecasts rely more on structural parameters this year than cyclical factors because, in the current atypical situation, historical data does not generate a reliable prediction of domestic travellers' future behaviour. Temporary barriers to travel and the impact of various policy measures generate structural breaks in the series. Cyclical factors that have been used in previous years, such as relative prices (substitute prices/travel costs), are not currently informative because Australian residents cannot currently choose between domestic and overseas travel. Moreover, sampling changes to the NVS data means that recent data are not directly comparable with data prior to 2019.<sup>7</sup> Consequently, the historical data series typically used in TRA's forecasting models are too short.

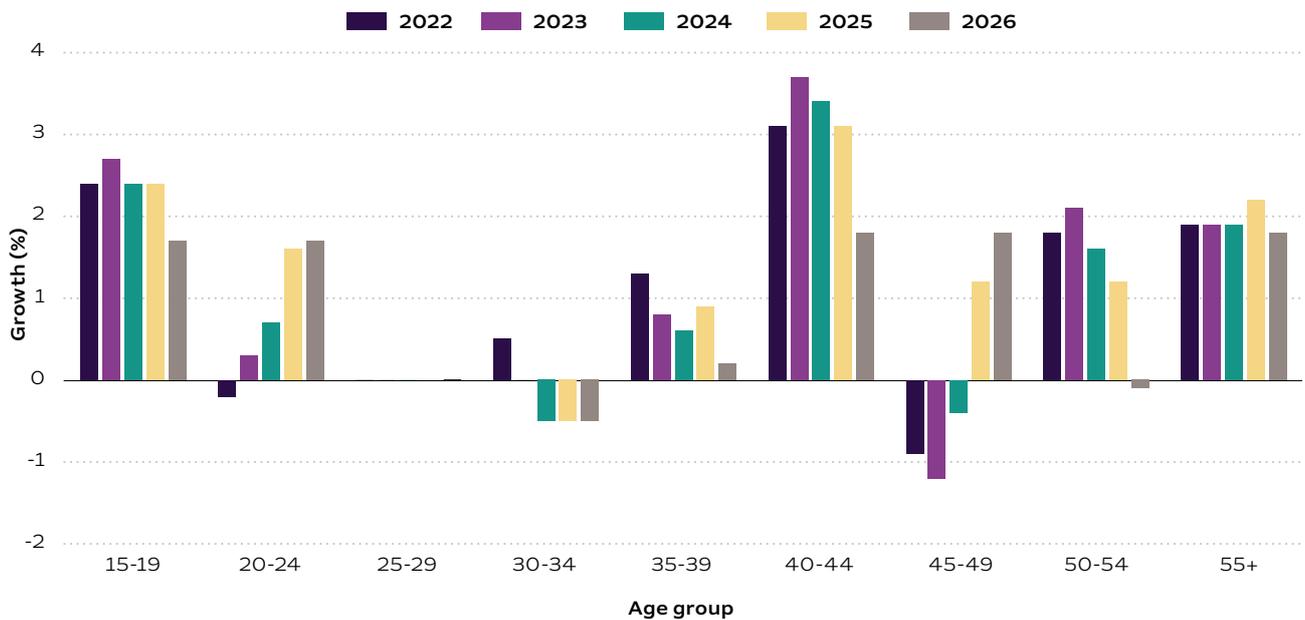
**Figure 7. Propensity to travel by age group and purpose of travel: pre-pandemic level**



Source: Tourism Research Australia

7. With 97% of the Australian population aged 15 years or over owning a mobile phone, TRA has transitioned NVS sampling to 100% mobile phone interviewing and discontinued landline sampling. This new sampling method has improved the accuracy of national, state and territory estimates.

**Figure 8. Projected population growth rate by age group**



Source: Economic Intelligence Unit

The state forecasts are produced using the following steps:

1. Australia is divided into thirteen metropolitan and regional locations.<sup>8</sup>
2. Historical visitor nights data for each location are adjusted for extreme peaks and troughs, and for structural breaks in the series. The most recent visitor nights data are used to produce forward trend estimates. Seasonal projections are then produced for each location based on long-term growth patterns and these seasonal projections are combined with the forward trend estimates to produce forecasts for each location. These are then converted to state and territory forecasts.
3. Adjustments are made where projected series do not adequately incorporate policy changes and the list of judgement-based factors. Final checks are made to ensure that the state and territory forecasts aggregate to the national forecasts.



Image courtesy of Tourism Australia

8. These locations comprise Sydney, regional New South Wales, Melbourne, regional Victoria, Brisbane/Gold Coast, regional Queensland, Perth, regional Western Australia, Adelaide, regional South Australia, Northern Territory, Tasmania, and the Australian Capital Territory.

# Data sources and references

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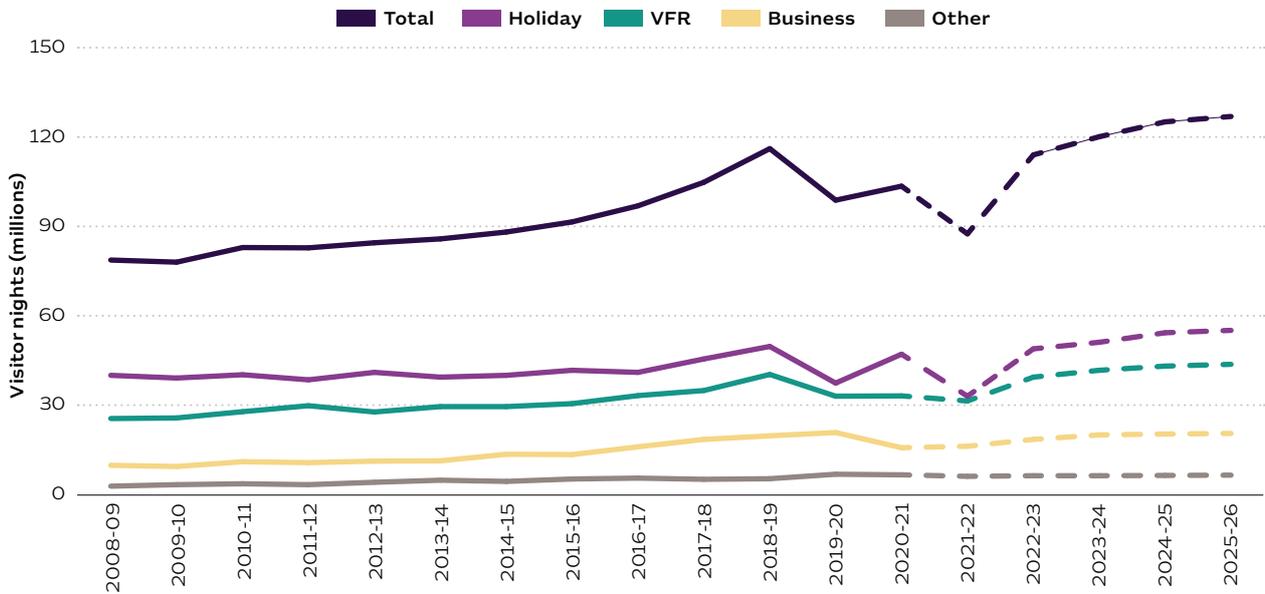
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# Appendix A – State and Territory graphs

## New South Wales

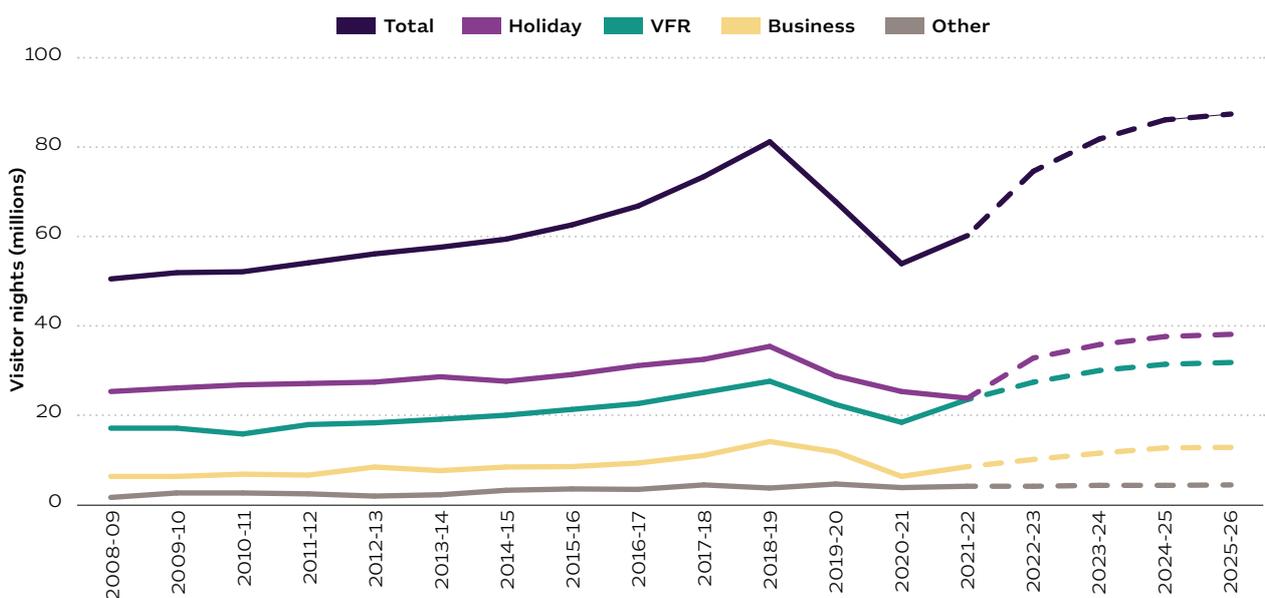
Figure 9. Forecast for domestic visitor nights in New South Wales by purpose of travel



Source: Tourism Research Australia

## Victoria

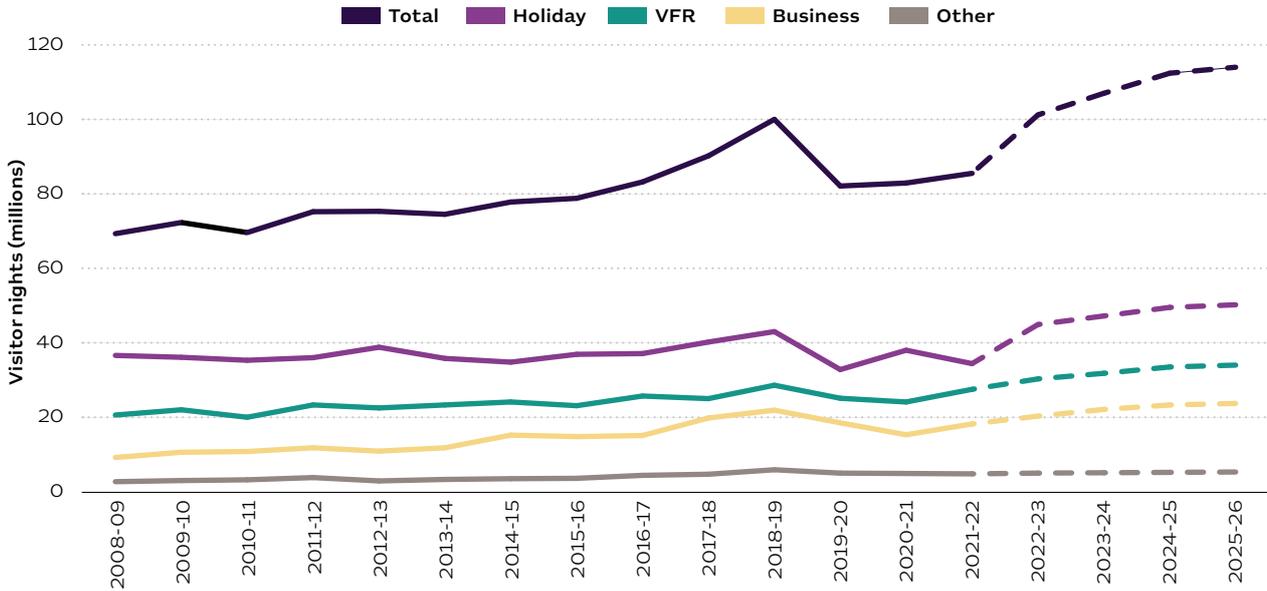
Figure 10. Forecast for domestic visitor nights in Victoria by purpose of travel



Source: Tourism Research Australia

## Queensland

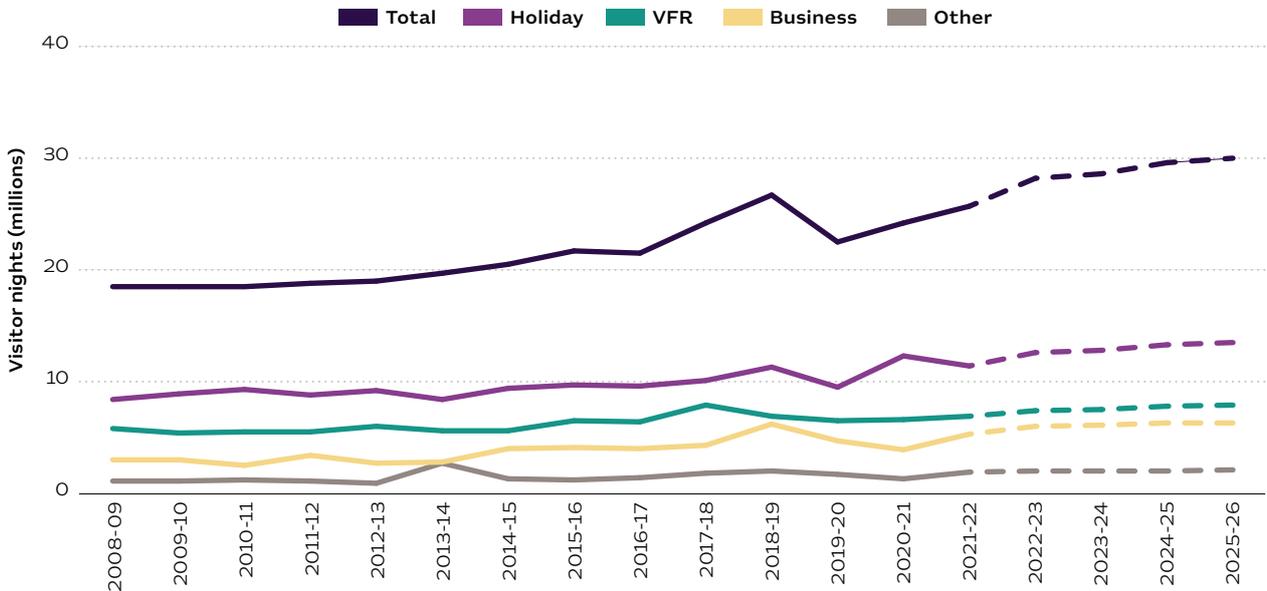
**Figure 11.** Forecast for domestic visitor nights in Queensland by purpose of travel



Source: Tourism Research Australia

## South Australia

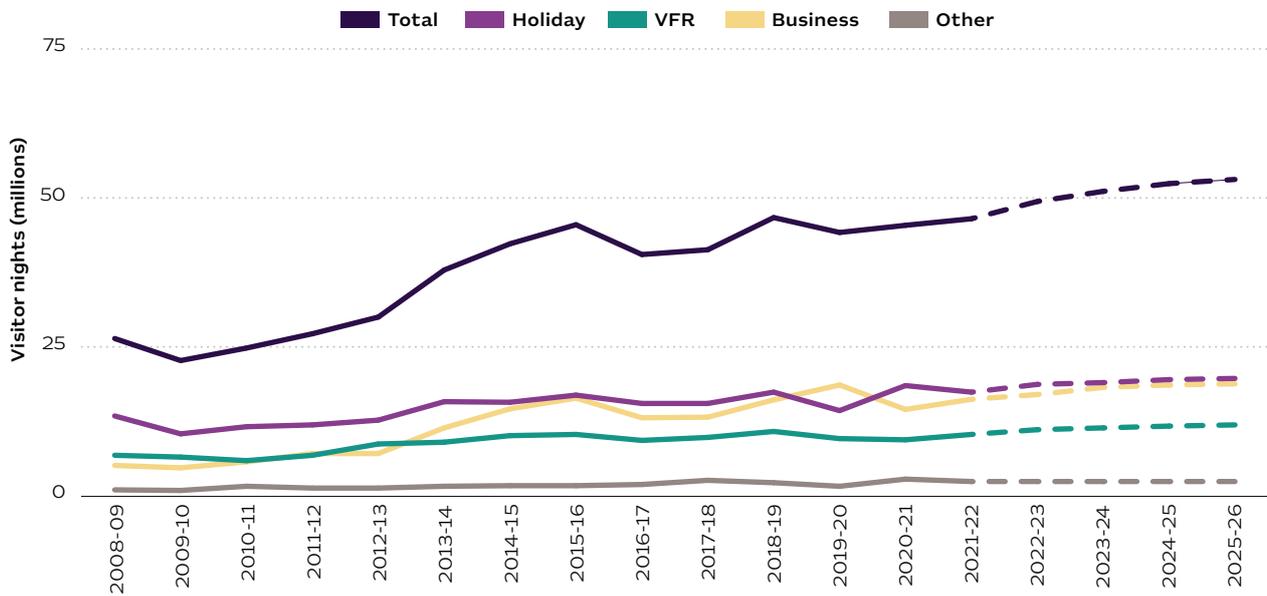
**Figure 12.** Forecast for domestic visitor nights in South Australia by purpose of travel



Source: Tourism Research Australia

## Western Australia

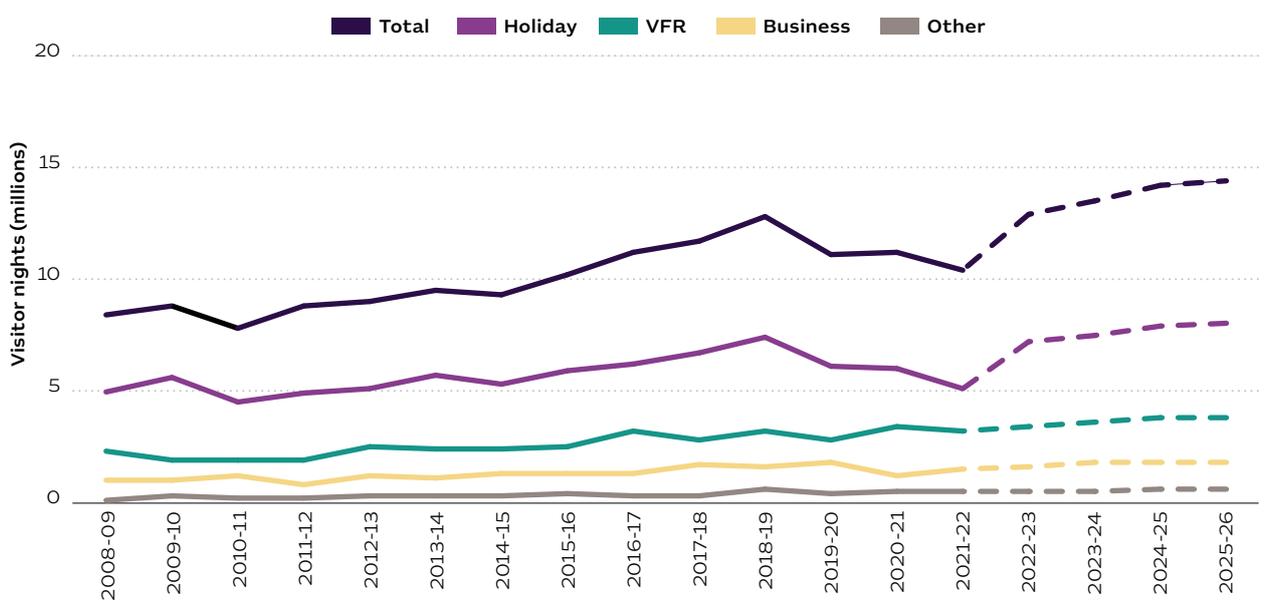
Figure 13. Forecast for domestic visitor nights in Western Australia by purpose of travel



Source: Tourism Research Australia

## Tasmania

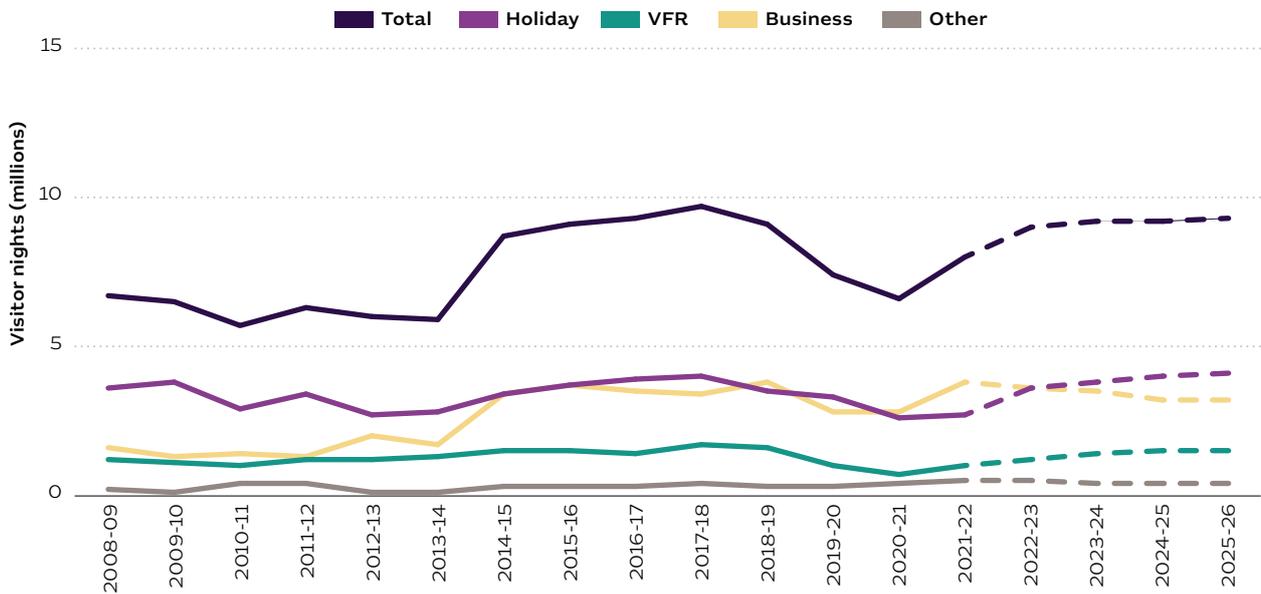
Figure 14. Forecast for domestic visitor nights in Tasmania by purpose of travel



Source: Tourism Research Australia

## Northern Territory

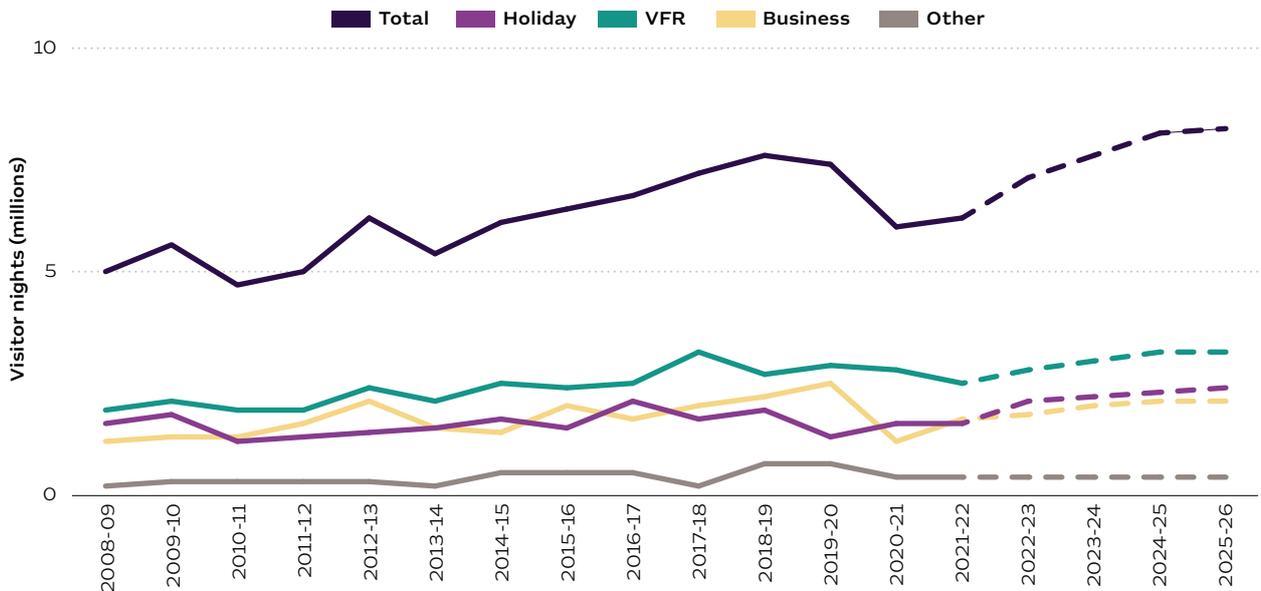
Figure 15. Forecast for domestic visitor nights in the Northern Territory by purpose of travel



Source: Tourism Research Australia

## Australian Capital Territory

Figure 16. Forecast for domestic visitor nights in the Australian Capital Territory by purpose of travel



Source: Tourism Research Australia



**Australian Government**

**Australian Trade and Investment Commission**  
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