

**DOMESTIC TOURISM REPORT:  
OVERVIEW OF ACCOMMODATION PERFORMANCE**

**1. Key markets and trends**

**1.1 Overview**

Domestic Overnight Visitors	100,269,374	↑7.00%
Domestic Visitor Nights	361,969,742	↑7.12%
Domestic Trip Expenditure	\$67.512 billion	↑7.93%
Average Domestic Trip Expenditure	\$673.31	↑0.87%

The National Visitor Survey figures for the year ending June 2018 demonstrate continued robust growth for Australian domestic tourism. Domestic overnight visitors across all accommodation categories is up by 7% to 100.3 million, while visitor nights grew 7.1% to just over 360 million. Domestic visitor expenditure continues to break records in 2018 and increased 7.9% to \$67.5 billion.

Visitor nights in hotels, motels and resorts across the nation increased, by 8% in capital cities and 6.4% in regional locations. In comparison, domestic visitor nights in 'Guest house or Bed & Breakfast' accommodation grew 20.7%, while 'Rented house/apartment/flat or unit' grew 8.3%.

The best performing capital cities in hotels, motels and resorts were Perth (up 23.9%) and Brisbane (up 18.9%), with substantial increases also reported for Melbourne (15.7%) and Sydney (12.6%). Declines were reported for the Gold Coast and Adelaide, with more significant declines reported for Canberra, Hobart, and Darwin.

Regional domestic visitor nights in hotels, motels and resorts for the year recorded growth in New South Wales (up 11.5%), Queensland (up 13%), and Tasmania (up 8.2%). A significant decline was recorded for the Northern Territory (down 17.5%).

Regional Australia attracted domestic trip expenditure of \$35.1 billion (up 8.7%), while capital cities attracted expenditure of \$32.4 billion (up 7.1%). New South Wales was a strong performer overall, with the largest expenditure growth both regionally (up 14%) and for capital cities (Sydney up 17.1%). Queensland came in second both regionally (up 12.1%) and for capital cities (Brisbane up 11.4%).

Continuing the March 2018 Quarter trend 'Business' continues to be the fastest growing category for capital cities with visitor nights increasing 14.1% to 29.6 million.

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This report is based on data sourced from Tourism Research Australia.

### 2. Domestic Visitor Trends

#### 2.1 Domestic Overnight Visitors ('000)

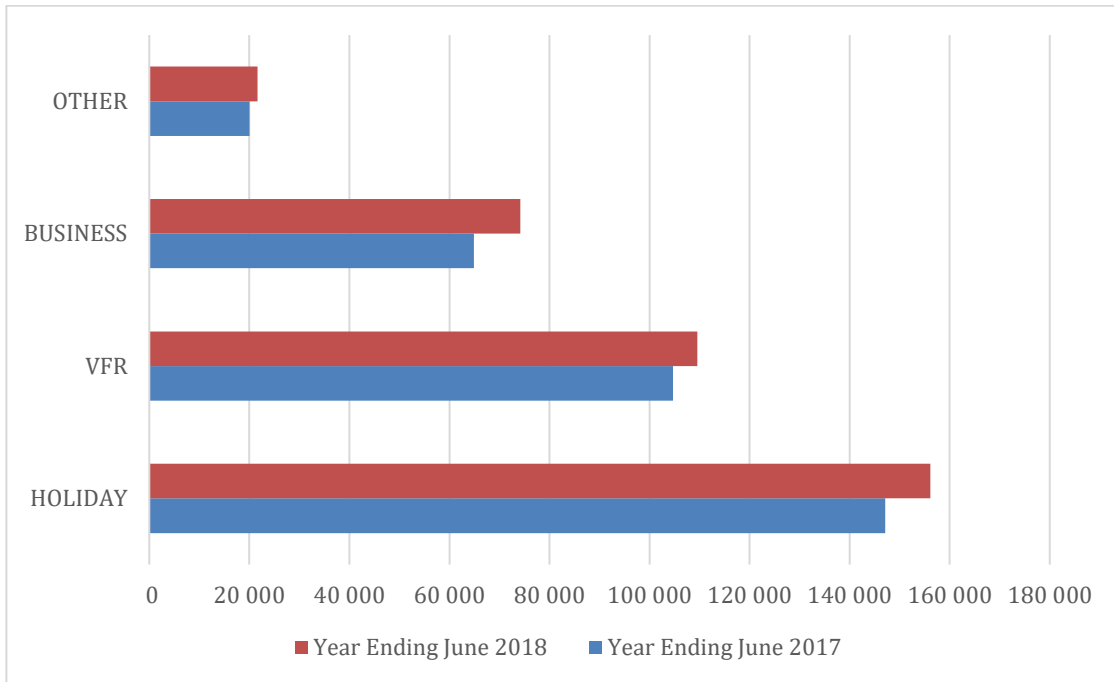
State	Visitors			
	YE June 2017	YE June 2018	Change 2017-18	% of all Visitors
NSW	30 122	32 924	9.30%	32.8%
VIC	23 180	24 661	6.39%	24.6%
QLD	21 453	22 457	4.68%	22.4%
SA	6 158	6 495	5.46%	6.5%
WA	9 456	10 222	8.11%	10.2%
TAS	2 701	2 810	4.05%	2.8%
NT	1 612	1 428	-11.39%	1.4%
ACT	2 649	2 701	1.96%	2.7%
AUST	93 708	100 269	7.00%	100.0%

#### 2.2 Domestic Visitor Nights ('000)

State	Visitor Nights ('000)			
	YE June 2017	YE June 2018	Change 2017-18	% of all Visitors
NSW	96 876	103 337	6.67%	28.5%
QLD	66 472	71 611	7.73%	19.8%
VIC	83 699	90 334	7.93%	25.0%
WA	21 586	23 941	10.91%	6.6%
SA	41 903	44 347	5.83%	12.3%
TAS	11 244	11 608	3.24%	3.2%
NT	9 430	9 644	2.27%	2.7%
ACT	6 704	7 148	6.63%	2.0%
AUS	337 914	361 970	7.12%	100.0%

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## 2.2 Purpose/Reason for Visit (by visitor nights)



\*Holiday/Leisure up 6.2%

\*Business up 14.3%

\*VFR up 4.6%

\*Other up 7.9%

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### 3. Accommodation Performance - Capital Cities (plus GC)

#### 3.1 Capital Cities, Domestic Visitor Nights Spent in Hotels, Motels and Resorts

Rank	Location	YE June 2017 ('000)	YE June 2018 ('000)	Change
1	Melbourne	9,572	11,073	15.68%
2	Sydney	9,073	10,212	12.55%
3	Brisbane	4,927	5,857	18.88%
4	Gold Coast	5,635	5,517	-2.09%
5	Perth	3,047	3,776	23.93%
6	Adelaide	3,132	3,076	-1.79%
7	Canberra	2,995	2,605	-13.02%
8	Hobart	1,832	1,642	-10.37%
9	Darwin	1,655	1,485	-10.27%
Total	Capital Cities incl. Gold Coast	41,868	45,244	8.06%

#### 3.2 Capital Cities, Domestic Visitor Nights Across All Accommodation Categories

Rank	Location	YE June 2017 ('000)	YE June 2018 ('000)	Change
1	Sydney	26,215	27,654	5.49%
2	Melbourne	23,803	27,124	13.95%
3	Brisbane	19,999	21,274	6.38%
4	Perth	12,630	14,454	14.44%
5	Gold Coast	13,612	13,261	-2.58%
6	Adelaide	8,302	9,563	15.19%
7	Canberra	6,704	7,148	6.62%
8	Hobart	5,309	4,811	-9.38%
9	Darwin	4,323	4,069	-5.88%
Total	Capital Cities incl. Gold Coast	120,897	129,360	7.00%

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### 4. Accommodation Performance - Regional

#### 4.1 Regional Locations, Domestic Visitor Nights Spent in Hotels, Motels and Resorts

Rank	Location	YE June 2017 ('000)	YE June 2018 ('000)	Change
1	NSW	14,838	16,537	11.45%
2	QLD	12,695	14,348	13.02%
3	VIC	6,957	6,997	0.57%
4	WA	4,452	4,050	-9.03%
5	SA	1,747	1,671	-4.35%
6	TAS	1,428	1,545	8.19%
7	NT	1,428	1,178	-17.51%
Total	Regional	43,546	46,325	6.38%

#### 4.2 Regional Locations, Domestic Visitor Nights Across All Accommodation Categories

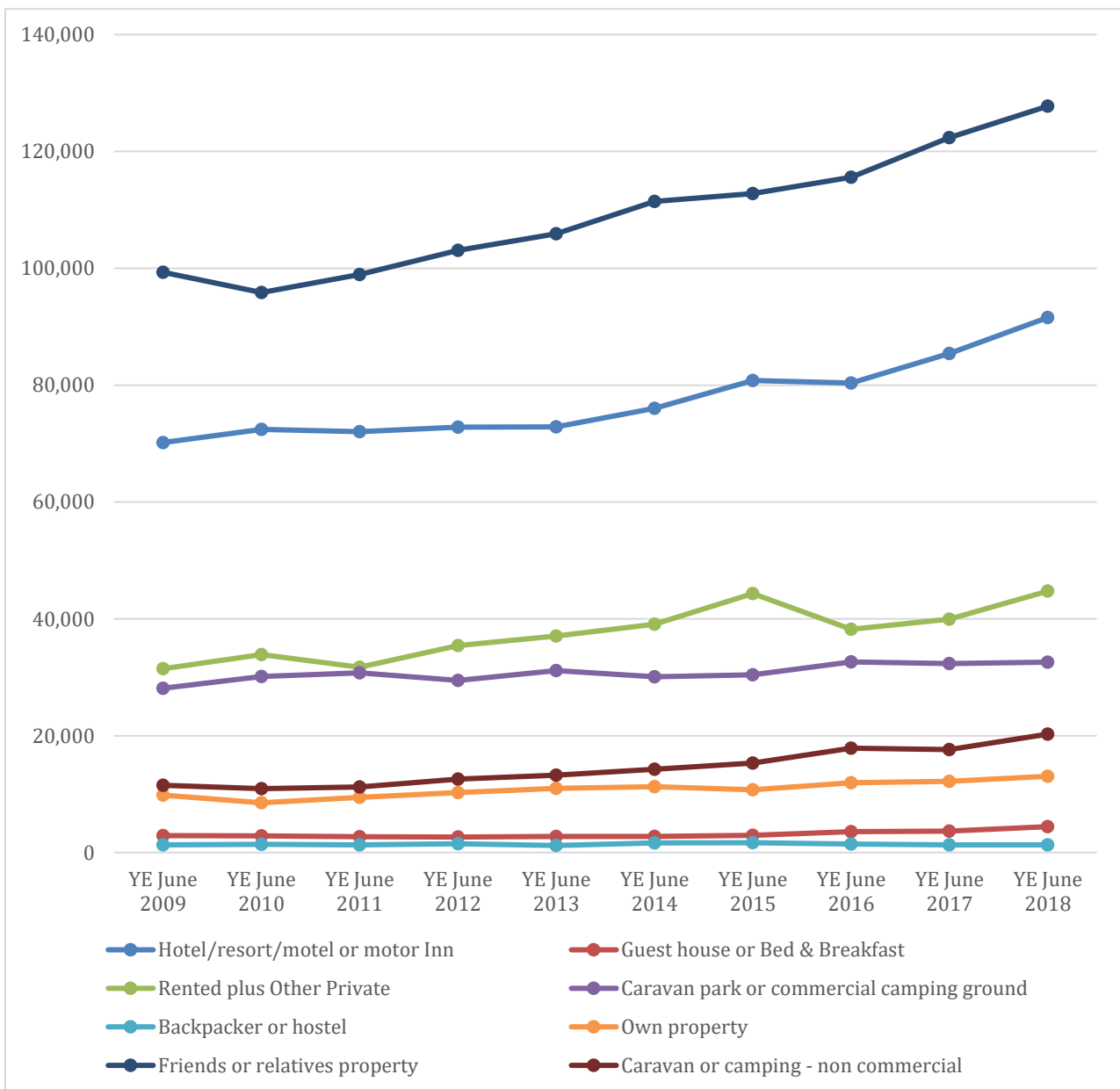
Rank	Location	YE June 2017 ('000)	YE June 2018 ('000)	Change
1	NSW	70,661	75,683	7.11%
2	QLD	50,087	55,799	11.40%
3	VIC	42,669	44,486	4.26%
4	WA	29,273	29,893	2.12%
5	SA	13,284	14,377	8.23%
6	TAS	5,936	6,797	14.50%
7	NT	5,107	5,575	9.16%
Total	Regional	217,017	232,610	7.19%

## MEMBER BULLETIN

### 5. Unregulated Accommodation Performance

Tourism Research Australia has advised TAA that unregulated accommodation (i.e. Airbnb type rentals) is presently recorded in two categories: 'Rented house/apartment/flat or unit' and 'Other Private Accommodation.' Accordingly, these two categories have been combined below and labelled 'Rented plus Other Private'.

#### 5.1 Domestic Visitor Nights by Accommodation Category



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### 6. Notes

Serviced apartments are included in the Hotels/Motels/Resorts data category.

Tourism Research Australia has enhanced its procedures for coding purpose of visit for domestic overnight trips. As a result, historical estimates for some purpose categories may be slightly higher than previously published.

### 7. More Information

The data in this Member Bulletin is from Tourism Research Australia's *Travel By Australians: June 2018 Quarterly Results of the National Visitor Survey*. It can be accessed at <https://www.tra.gov.au/Research/Domestic-tourism-by-Australians/National-Visitor-Survey-results>.

If you have questions about the information provided in this overview, or would like further information, please email: [taa@tourismaccommodation.com.au](mailto:taa@tourismaccommodation.com.au)