



# MEMBER BULLETIN

6 May 2019

## DOMESTIC TOURISM REPORT: OVERVIEW OF ACCOMMODATION PERFORMANCE

### 1. Key markets and trends

#### 1.1 Overview

Domestic Overnight Visitors	105,599,743	↑8.64%
Domestic Visitor Nights	376,087,407	↑7.17%
Domestic Trip Expenditure	\$72.705 billion	↑12.69%
Average Domestic Trip Expenditure	\$688.50	↑3.73%

With the weak Australian dollar and low inflation, Australians are increasingly choosing to holiday domestically, resulting in increases for overnight visitors, visitor nights and trip expenditure. According to the latest Tourism Satellite Account (2017-18), of the \$143.4 billion total tourism consumption in Australia, almost three quarters came from domestic tourists.

Almost every state and territory experienced an increase between the year ending December 2017 and December 2018 for domestic overnight visitors and domestic visitor nights, with only ACT experiencing a decrease. NSW topped both these categories, and WA had the largest increases.

Regarding the purpose of visit, every category (Business, VFR, Holiday and Other) was up, but Business was especially so, with an increase of 19.8%.

In terms of accommodation performance, the Gold Coast experienced a 22.15% increase in visitor nights spent in hotels, motels and resorts, while Melbourne, Sydney and Hobart also saw strong increases. In this category though, Adelaide, Canberra and Darwin all saw decreases.

Regionally, Queensland saw the largest increase in visitor nights spent in hotels, motels and resorts, growing 27.13%. Regional visitor nights spent in hotels, motels and resorts across Australia as a whole increased from 43,484 to 47,914 (10.19%), compared to regional nights across all accommodation categories, which increased from 226,396 to 238,619 (5.4%).

Across all visitor nights in hotel, motel and resorts there was growth of 10.75%, however the growth in unregulated accommodation (“Rented plus Other Private” in the data) was 16.68%.

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

## MEMBER BULLETIN

### 2. Domestic Visitor Trends

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

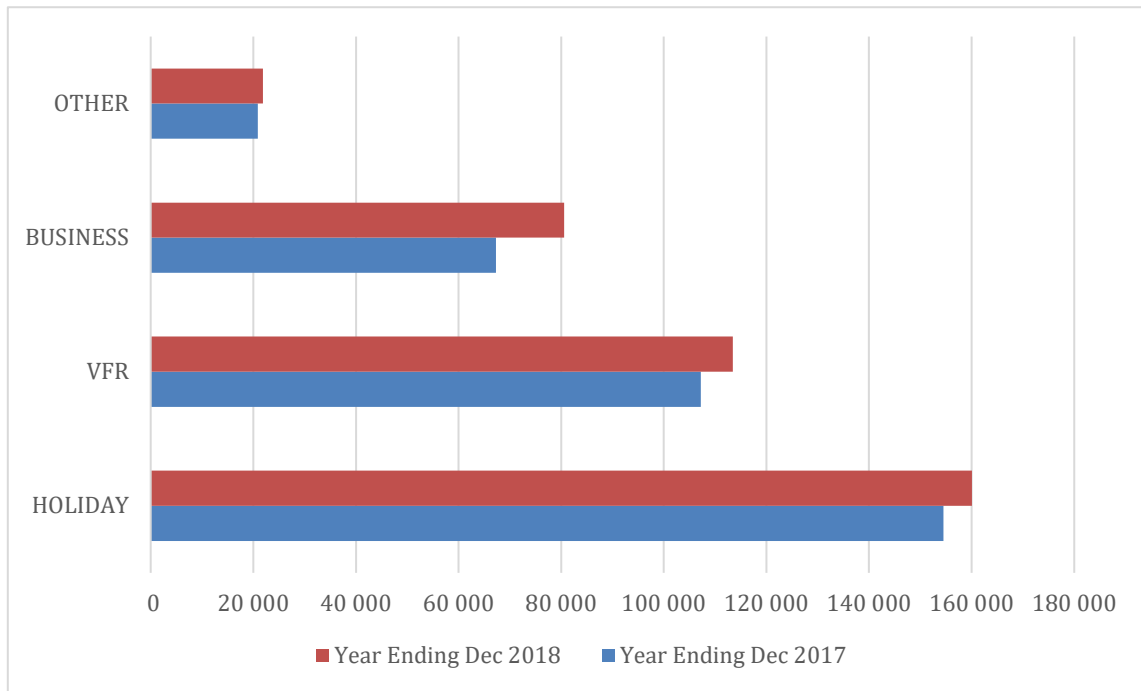
State	Visitors ('000)			
	YE December 2017	YE December 2018	% change 17 to 18	% of all Visitors
NSW	31 575	34 554	9.4	32.7
VIC	24 458	25 687	5.0	24.3
QLD	21 781	24 086	10.6	22.8
WA	9 604	10 963	14.2	10.4
SA	6 337	6 632	4.7	6.3
TAS	2 708	3 055	12.8	2.9
ACT	2 754	2 745	-0.3	2.6
NT	1 568	1 579	0.7	1.5
AUST	97 203	105 600	8.6	100.0

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

State	Visitor Nights ('000)			
	YE December 2017	YE December 2018	% change 17 to 18	% of all Visitors
NSW	100 104	107 413	7.3	28.6
QLD	86 528	94 732	9.5	25.2
VIC	70 423	73 873	4.9	19.6
WA	42 232	46 904	11.1	12.5
SA	23 101	24 131	4.5	6.4
TAS	11 457	12 420	8.4	3.3
NT	10 017	9 270	-7.5	2.5
ACT	7 050	7 331	4.0	1.9
AUST	350 911	376 087	7.2	100.0

## MEMBER BULLETIN

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



\*Holiday/Leisure up 3.6%

\*Business up 19.8%

\*VFR up 5.8%

\*Other up 5%

## MEMBER BULLETIN

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

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

Rank	Location	YE Dec 2017 ('000)	YE Dec 2018 ('000)	Change
1	Melbourne	10,024	11,801	17.73%
2	Sydney	9,713	11,302	16.36%
3	Gold Coast	5,441	6,646	22.15%
4	Brisbane	5,450	5,590	2.57%
5	Perth	3,504	3,955	12.87%
6	Adelaide	3,266	2,956	-9.49%
7	Canberra	2,890	2,733	-5.43%
8	Hobart	1,713	1,963	14.59%
9	Darwin	1,429	1,397	-2.24%
Total	Capital Cities incl. Gold Coast	43,432	48,342	11.31%

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

Rank	Location	YE Dec 2017 ('000)	YE Dec 2018 ('000)	Change
1	Sydney	26,778	29,649	10.72%
2	Melbourne	25,436	27,856	9.51%
3	Brisbane	20,688	21,883	5.78%
4	Perth	12,626	16,917	33.99%
5	Gold Coast	13,451	14,664	9.02%
6	Adelaide	9,007	9,612	6.72%
7	Canberra	7,050	7,331	3.99%
9	Hobart	5,127	5,576	8.76%
8	Darwin	4,353	3,981	-8.55%
Total	Capital Cities incl. Gold Coast	124,515	137,469	10.40%

## MEMBER BULLETIN

### 4. Accommodation Performance - Regional

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

Rank	Location	YE Dec 2017 ('000)	YE Dec 2018 ('000)	Change
1	NSW	15,465	16,380	5.92%
2	QLD	12,344	15,693	27.13%
3	VIC	7,209	7,133	-1.05%
4	WA	4,020	4,403	9.53%
5	SA	1,611	1,770	9.87%
6	TAS	1,516	1,420	-6.33%
7	NT	1,320	1,115	-15.53%
Total	Regional	43,484	47,914	10.19%

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

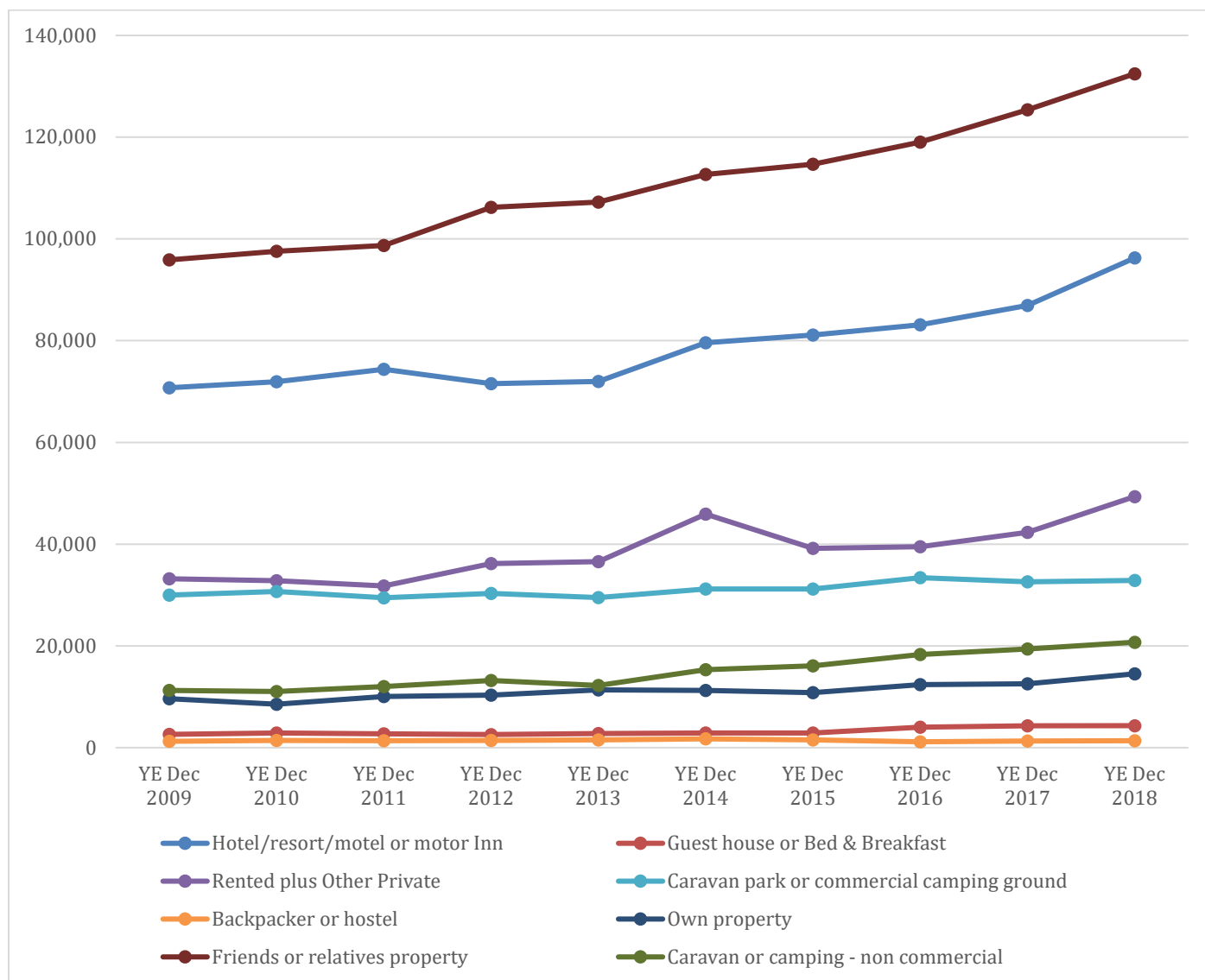
Rank	Location	YE Dec 2017 ('000)	YE Dec 2018 ('000)	Change
1	NSW	73,326	77,764	6.05%
2	QLD	52,389	58,185	11.06%
3	VIC	44,987	46,017	2.29%
4	WA	29,606	29,987	1.29%
5	SA	14,094	14,519	3.02%
6	TAS	6,330	6,845	8.14%
7	NT	5,664	5,289	-6.62%
Total	Regional	226,396	238,619	5.40%

## 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



## MEMBER BULLETIN

### 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: December 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)