

MEMBER BULLETIN

20 January 2020

DOMESTIC TOURISM REPORT: OVERVIEW OF ACCOMMODATION PERFORMANCE

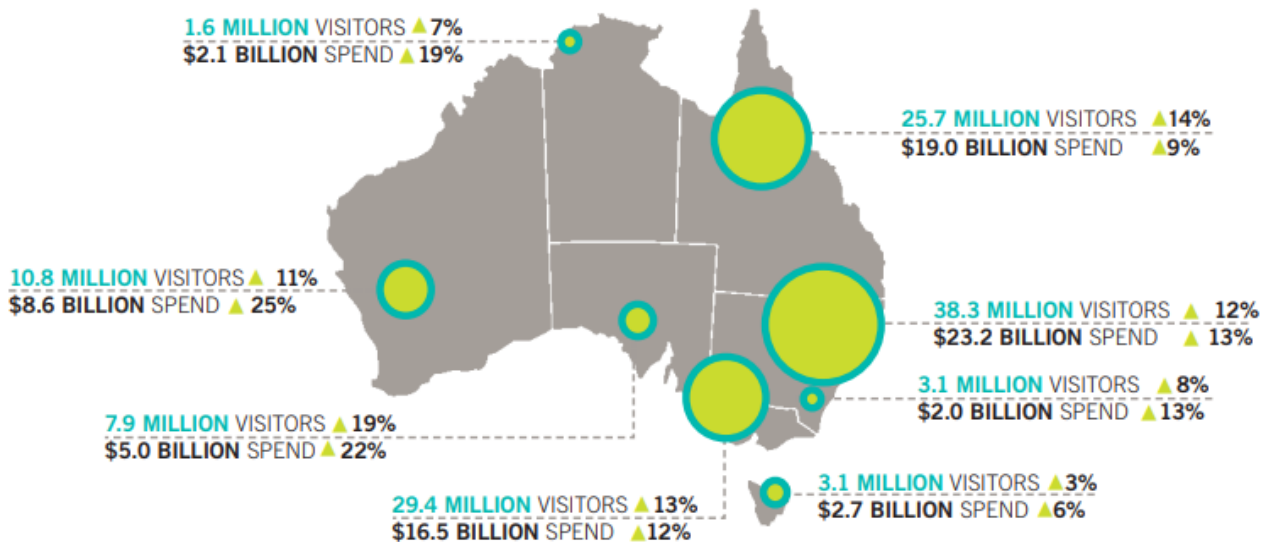
1. Key markets and trends

1.1 Overview

Domestic Overnight Visitors	115,688,860	↑12.33%
Domestic Visitor Nights	410,076,303	↑11.96%
Domestic Trip Expenditure	\$79.12 billion	↑13.28%
Average Domestic Trip Expenditure	\$683.86	↑0.84%

Domestic visitors spent up big, hitting a record \$79.1 billion. The number of overnight trips grew 12.3% to nearly 116million and there were over 410million nights spent away from home. All states and territories continued to gain significant economic benefit from Australian domestic overnight traveller spend during the year ending September 2019 (see below figure).

OVERNIGHT TRIPS AND SPEND BY STATE, YE SEPT 2019



Regarding accommodation, nights spent in ‘Hotels, Motels, and Resorts’ grew in all capital cities except the Gold Coast (down 2.51%) and Hobart (down 3.44%). Regional locations in the same category all saw increases, with considerable growth in WA (up 18.68%) and SA (up 20.51%).

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2. Domestic Visitor Trends

2.1 Domestic Overnight Visitors ('000)

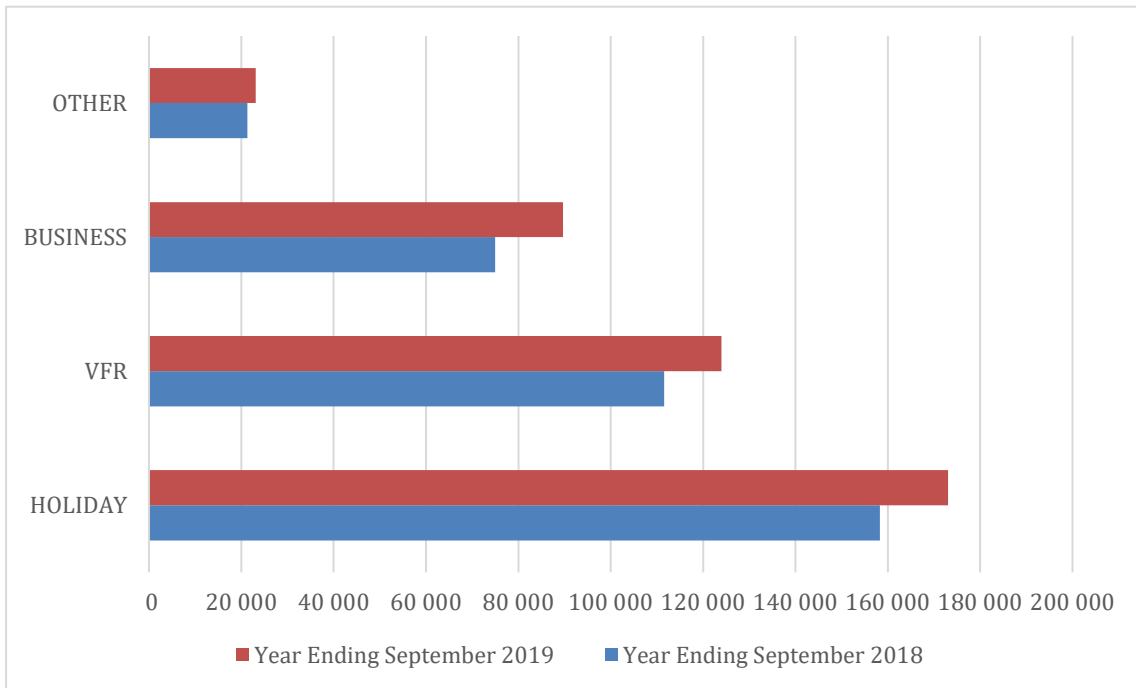
State	Visitors ('000)			
	YE Sept 2018	YE Sept 2019	% of all Visitors	% change 18 to 19
NSW	34 106	38 333	33.1	12.4
VIC	26 081	29 428	25.4	12.8
QLD	22 599	25 704	22.2	13.7
WA	9 720	10 833	9.4	11.4
SA	6 610	7 883	6.8	19.3
TAS	3 036	3 142	2.7	3.5
ACT	2 837	3 067	2.7	8.1
NT	1 542	1 643	1.4	6.6
AUST	102 990	115 689	100.0	12.3

2.2 Domestic Visitor Nights ('000)

State	Visitor Nights ('000)			
	YE Sept 2018	YE Sept 2019	% of all visitors	% change 18 to 19
NSW	106 054	119 177	29.1	12.4
QLD	91 202	101 682	24.8	11.5
VIC	74 881	82 131	20.0	9.7
WA	41 520	49 642	12.1	19.6
SA	23 337	28 293	6.9	21.2
TAS	12 175	12 622	3.1	3.7
NT	9 559	9 017	2.2	-5.7
ACT	7 525	7 503	1.8	-0.3
AUST	366 265	410 076	100.0	12.0

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2.2 Purpose/Reason for Visit (by visitor nights)



*Holiday/Leisure up 9.3%

*Business up 19.6%

*VFR up 11.2%

*Other up 8.6%

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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 Sept 2018 ('000)	YE Sept 2019 ('000)	Change
1	Melbourne	11,528	12,240	6.18%
2	Sydney	10,704	11,938	11.53%
3	Gold Coast	6,266	6,109	-2.51%
4	Brisbane	5,787	5,982	3.37%
5	Perth	3,657	3,894	6.48%
6	Adelaide	2,932	3,426	16.85%
7	Canberra	2,729	3,363	23.23%
8	Hobart	1,859	1,795	-3.44%
9	Darwin	1,346	1,454	8.02%
Total	Capital Cities incl. Gold Coast	46,807	50,200	7.25%

3.2 Capital Cities, Domestic Visitor Nights Across All Accommodation Categories

Rank	Location	YE Sept 2018 ('000)	YE Sept 2019 ('000)	Change
1	Sydney	28,767	33,572	16.70%
2	Melbourne	27,702	30,905	11.56%
3	Brisbane	21,188	23,096	9.01%
4	Gold Coast	14,338	16,355	14.07%
5	Perth	15,055	16,125	7.11%
6	Adelaide	9,231	10,606	14.90%
7	Canberra	7,525	7,503	-0.29%
8	Hobart	5,229	6,135	17.33%
9	Darwin	3,859	3,986	3.29%
Total	Capital Cities incl. Gold Coast	132,895	148,284	11.58%

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4. Accommodation Performance - Regional

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

Rank	Location	YE Sept 2018 ('000)	YE Sept 2019 ('000)	Change
1	NSW	16,440	17,069	3.83%
2	QLD	14,813	14,873	0.41%
3	VIC	7,289	7,866	7.92%
4	WA	4,037	4,791	18.68%
5	SA	1,755	2,115	20.51%
6	TAS	1,431	1,532	7.06%
7	NT	1,175	1,229	4.60%
Total	Regional	46,939	49,475	5.40%

4.2 Regional Locations, Domestic Visitor Nights Across All Accommodation Categories

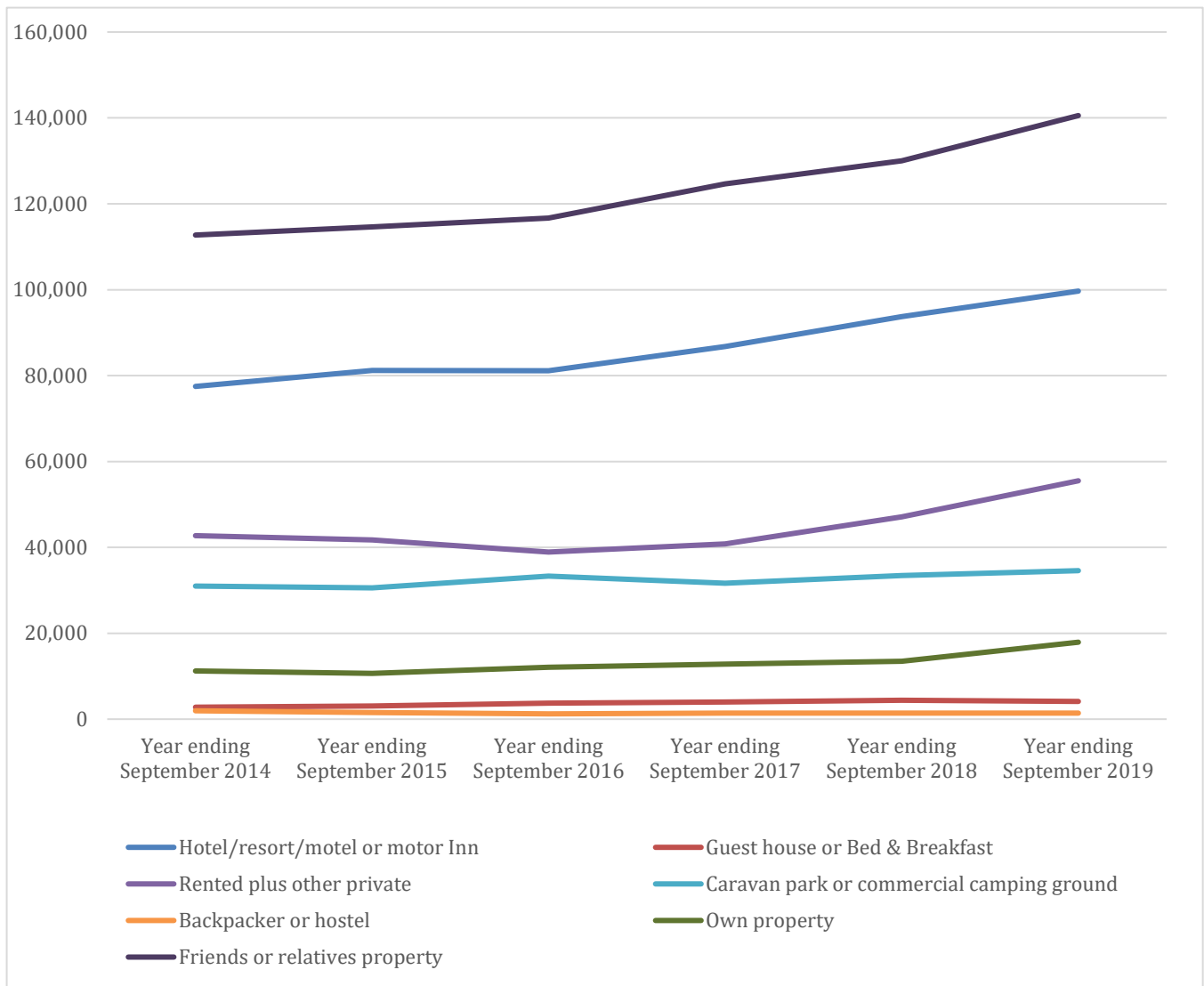
Rank	Location	YE Sept 2018 ('000)	YE Sept 2019 ('000)	Change
1	NSW	77,287	85,605	10.76%
2	QLD	55,676	62,231	11.77%
3	VIC	47,180	51,225	8.57%
4	WA	26,465	33,517	26.65%
5	SA	14,107	17,686	25.37%
6	TAS	6,945	6,487	-6.59%
7	NT	5,699	5,032	-11.70%
Total	Regional	233,370	261,793	12.18%

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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.

*(1) NVS methodology, 2014

Domestic/NVS data from March 2014 to December 2018 comes from a dual frame methodology. Previously only landlines were used to interview, but mobiles were introduced in 2014. 2014 data and onwards should not be compared to previous years for domestic data due to the inconsistent collection methods

(2) New NVS methodology, 2019

Tourism Research Australia has transitioned NVS sampling to 100% mobile phone interviews (from 50% mobile phone/50% landline) to reflect current phone usage trends. The change in methodology has seen a break in series, so please use caution when comparing 2019 results with previous time periods.

Note also that 2017 and 2018 estimates have been revised to align with the latest release of ABS population projections and will differ slightly from previously published estimates.

For further information, see

<https://www.tra.gov.au/Domestic/national-visitor-survey-methodology>

7. More Information

The data in this Member Bulletin is from Tourism Research Australia's *Travel By Australians: September 2019 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.