



TRAVEL BY AUSTRALIANS

YEAR ENDING DECEMBER 2018

OVERNIGHT SPEND ▲13%
\$72.7 BILLION

OVERNIGHT TRIPS ▲9%
105.6 MILLION

NIGHTS ▲7%
376.1 MILLION

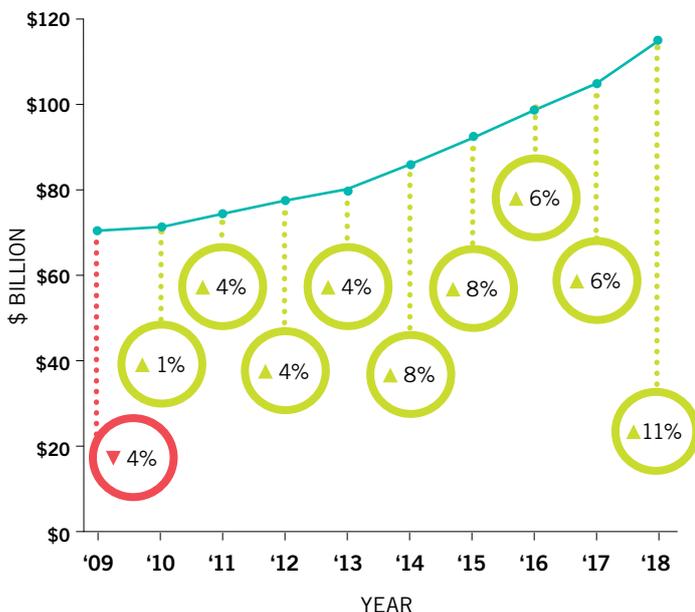
Domestic overnight tourism continued to perform strongly during the year ending December 2018. Spend increased by 13% to reach \$72.7 billion, while the number of overnight trips were up 9% to 105.6 million and visitor nights grew 7% to 376 million.

Growth in domestic overnight travel was shared across all purposes of visit.

- Holiday visits were up 8% to 42.4 million and spend by 9% to \$35.3 billion
- Visits to friends and relatives (VFR) increased 8% to 35.5 million and spend jumped 15% to \$14.9 billion
- Business trips grew 14% to 23.9 million and spend surged 23% to \$19.6 billion.

With domestic overnight and international tourism both performing well, total overnight spend (domestic and international) reached \$116.6 billion across the year. This represented an increase of 11% or \$11.2 billion, the largest annual growth recorded over the past 10 calendar years (Figure 1).

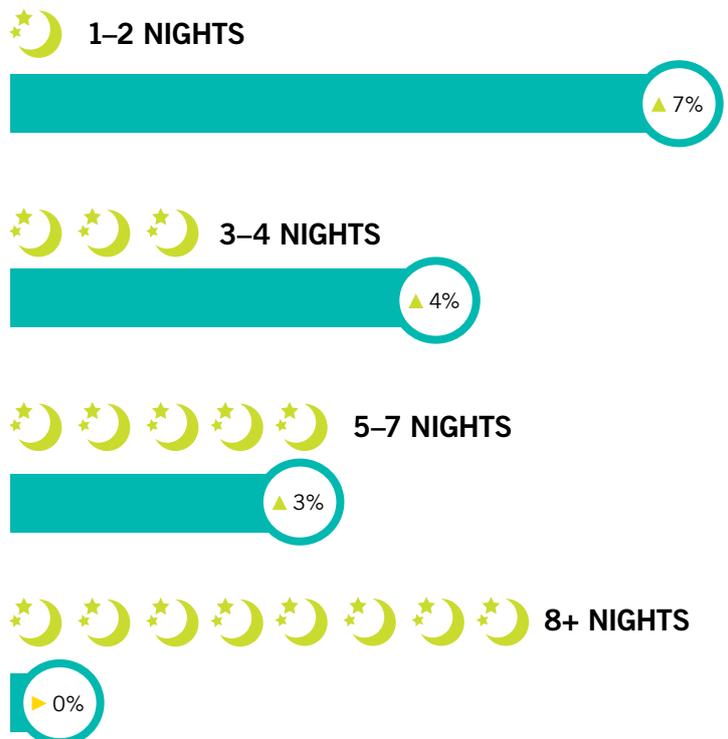
FIGURE 1: TOTAL OVERNIGHT SPEND, 2009 TO 2018



DOMESTIC OVERNIGHT HOLIDAY TRAVEL

Continuing the trend of recent years (Figure 2), growth in domestic overnight holiday travel was strongest for short (and thus lower cost) trips in 2018. There was an increase of 11% in one and two night holiday trips compared with 7% for three and four night trips and 5% for five through seven night trips. Holiday trips longer than one week fell 3% for the year. One and two night stays now account for 51% of all trips with a main purpose of holiday compared with 48% in 2014.

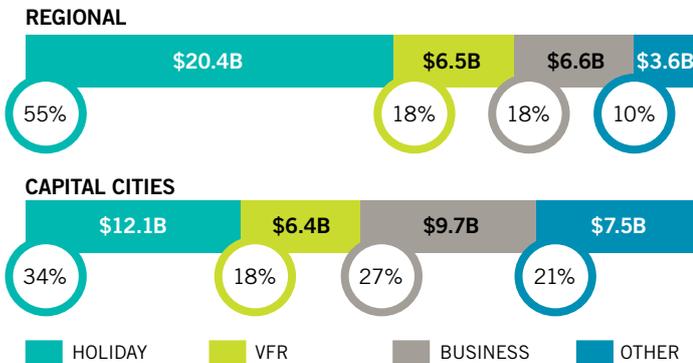
FIGURE 2: AVERAGE ANNUAL GROWTH IN HOLIDAY TRIPS BY LENGTH OF STAY, 2014 TO 2018



Holiday travel to capital cities grew by 11% in 2018. This was almost twice the rate of increase for holidays taken in regional Australia. However, since 2014 the average annual increase in holiday visits has been 5% for both capital cities and regional Australia. Furthermore, holiday travel contributed more than half (55%) of all domestic overnight spend in regional Australia compared with just over one-third (34%) of total spend for capital cities in 2018 (Figure 3).



FIGURE 3: SPEND IN REGIONAL AUSTRALIA AND CAPITAL CITIES BY STOPOVER PURPOSE, 2018



ACTIVITIES

There is a continuing shift towards active outdoor activities that can be done at low or no cost and improve health and well-being. This includes domestic overnight trips involving visits to botanical or other public gardens (up 13% annually since 2014 to 5.4 million visitors in 2018) and bushwalking (up 9% to 12.8 million). These activities have been among those with the strongest average rates of increase since 2014.

ACCOMMODATION

Domestic visitors' accommodation choices provide another indicator that Australians are seeking out more cost-effective travel options in growing numbers. While there has been impressive average annual growth of 5% in total visitor nights since 2014, the equivalent rates of increase have been higher for nights spent in rented houses/apartments/flats or units (up 8% annually to 33.5 million in 2018) and at non-commercial caravan or camping sites (up 8% to 20.7 million).

LIFE CYCLE GROUPS AND TRAVEL PARTIES

While growth in overnight travel has been wide spread across all life cycle groups, the increase in trips has been more pronounced for singles (15%) than those who have a partner (6%) in 2018. The increase for singles has been evenly shared between young and midlife singles (16%), older working singles (15%) and older non-working singles (15%).

Consistent with the stronger growth in travel by those from single life cycle groups, the number of overnight trips taken by those travelling alone increased 13% in 2018. While there was also strong growth of 8% for those travelling as an adult couple, the increase in trips taken by family groups was a more modest 2%.

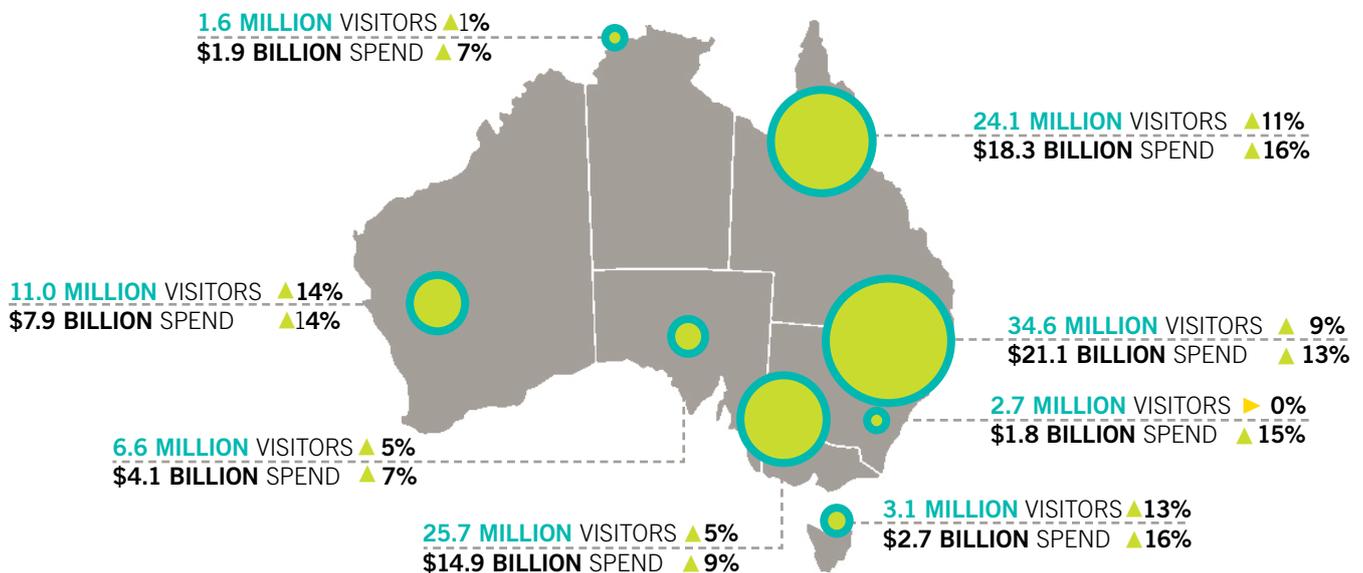
OUTBOUND TRAVEL

The lower value of the Australian dollar is making overseas travel less appealing and increasing the relative attractiveness of travel on home shores. Australians aged 15 years or more took 10.1 million outbound trips in 2018¹. While this represented solid growth of 4%, it was the second year in a row where growth in domestic overnight travel has outstripped the rate of increase for travel abroad.

STATES AND TERRITORIES

Led by Queensland and Tasmania, all states and territories had impressive growth in domestic overnight spend in 2018. Similarly, there was predominantly strong increases in the number of overnight trips taken to most states and territories across the year.

FIGURE 4: OVERNIGHT TRIPS AND SPEND BY STATE, YE DEC 2018



1. Short-term resident departures from the Australian Bureau of Statistics (ABS) Overseas Arrivals and Departures (OAD) dataset.