Regional Dispersal of International Holiday Visitors

ACCOMMODATION AUSTRALIA
A DIVISION OF AHA

Year to June 2026 and change over ten years

This paper analyses accommodation-specific International Visitor Survey (IVS) data supplied to AA by Tourism Research Australia. It examines the regional distribution of international holiday visitor nights and hotels' share of that market in the year to June 2026. Business, visiting friends and relatives (VFR), education, employment and other travel are excluded, as holiday travel by international visitors is the principal market for regional hotels. Nights across all purposes of travel are summarised at the end for context.

IVS estimates become detailed for smaller states, and several categories for Western Australia and South Australia are not published (np), generally because sample sizes are too small. Apologies to members in the Northern Territory, Tasmania, and the ACT for not presenting a similar analysis due to the shortcomings in the data.

Regional Australia (i.e., outside Capital Cities & the Gold Coast) – all states and territories

International holiday visitor nights in Regional Australia – Year to June, '000s (Source: TRA IVS)								
	2016	%	2019	%	2025	%	2026	%
Hotel/resort/motel	4,715	20.7	5,140	19.6	4,875	22.3	4,708	17.3
Guest house or BnB	441	1.9	293	1.1	207	0.9	129	0.5
Rented house/ unit	5,316	23.3	7,237	27.6	7,721	35.3	11,594	42.5
Caravan Park or commercial camping ground	2,323	10.2	2,389	9.1	1,582	7.2	1,725	6.3
Backpacker or hostel	3,899	17.1	4,180	15.9	2,742	12.5	3,279	12.0
Other commercial accommodation	227	1.0	437	1.7	884	4.0	1,060	3.9
Total Commercial	16,921	74.2	19,676	75.0	18,010	82.4	22,495	82.5
Friends or relatives' property	1,826	8.0	1,359	5.2	1,234	5.6	1,308	4.8
Caravan or camping - non commercial	1,162	5.1	1,183	4.5	848	3.9	737	2.7
Other Private Accommodation	2,746	12.0	3,678	14.0	1,575	7.2	2,334	8.6
Total Private	5,831	25.6	6,363	24.3	3,747	17.1	4,465	16.4
Total	22,793	100	26,238	100	21,857	100	27,259	100
% regional share of international holiday visitor nights	30.7	-	31.1	-	26.5	-	28.8	-
Total international holiday visitor nights	74,241	-	84,278	-	82,365	-	94,650	-
Holiday nights as % total international nights	30.0	-	30.9	-	27.4	-	30.1	-

- International holiday visitor nights in regional Australia increased 3.9% between the years to June 2019 and June 2026, reaching 27.3 million. Over the same period, total international holiday nights rose 12.3% and international nights across all travel purposes rose 15.3%, indicating that regional Australia captured a disproportionately small share of growth.
- The most recent year was stronger: regional holiday nights rose 24.7%, from 21.9 million, compared with 14.9% growth nationally. The regional share consequently increased from 26.5% in 2025 to 28.8% in 2026, though it remained below 31.1% in 2019 and 30.7% in 2016.

- Hotels and motels did not share in this growth. Their share of regional holiday nights fell from 22.3% in 2025 to 17.3% in 2026, below 19.6% in 2019 and 20.7% in 2016. Nights in hotels declined 3.4% over the 12 months to 4.7 million – essentially the 2016 level – while the regional market grew by almost a quarter.
- Demand continued to shift towards commercial rented houses and units, including Airbnb. Their share rose from 23.3% in 2016 to 42.5% in 2026, up from 35.3% in 2025. Nights in rented accommodation increased 50.2% over the year to 11.6 million, making this the largest regional accommodation category by a wide margin. The shift is less pronounced when capital cities are included (see table on page 8).
- Other segments also lost share over the decade. Backpacker and hostel accommodation declined from 17.1% in 2016 to 12.0% in 2026, despite a 19.6% increase in nights over the past year. Private accommodation fell from 25.6% to 16.4%, leaving commercial accommodation with 82.5% of regional holiday nights in 2026.
- Australia recorded 94.7 million international holiday visitor nights in the year to June 2026, 14.9% more than a year earlier and 12.3% above 2019. Holiday travel accounted for 30.1% of all international visitor nights, still below 30.9% in 2019.

New South Wales

International holiday visitor nights in Regional NSW – Year to June, '000s (Source: TRA IVS)								
	2016	%	2019	%	2025	%	2026	%
Hotel/resort/motel	540	12.0	594	10.1	774	14.1	772	13.3
Guest house or BnB	51	1.1	52	0.9	np	-	np	-
Rented house/ unit	1,081	24.0	1,946	33.1	2,276	41.4	2,803	48.3
Caravan Park or commercial camping	427	9.5	446	7.6	317	5.8	286	4.9
Backpacker or hostel	726	16.1	743	12.6	449	8.2	626	10.8
Other commercial accommodation	np	-	np	-	156	2.8	np	-
Total Commercial	2,846	63.2	3,862	65.7	3,999	72.7	4,628	79.8
Friends or relatives' property	640	14.2	532	9.0	509	9.3	418	7.2
Caravan or camping - non commercial	184	4.1	239	4.1	225	4.1	155	2.7
Other Private Accommodation	789	17.5	1,130	19.2	758	13.8	np	-
Total Private	1,643	36.5	1,942	33.0	1,493	27.1	1,148	19.8
Total	4,499	100	5,879	100	5,503	100	5,803	100
% regional share of total NSW international holiday visitor nights	18.2	-	19.9	-	20.9	-	19.5	-
Total NSW international holiday visitor nights	24,770	-	29,497	-	26,388	-	29,820	-

- Regional NSW's share of international holiday nights edged up from 18.2% in 2016 to 19.5% in 2026, but remained below 19.9% in 2019 and 20.9% in 2025.
- NSW recorded 29.8 million international holiday nights in 2026, 1.1% above 2019 and 13.0% above 2025. Regional nights rose 5.5% over the year to 5.8 million but remained 1.3% below 2019, indicating that most recent growth accrued outside regional areas.
- Hotels and motels accounted for 13.3% of regional nights, up from 12.0% in 2016 but little changed from 14.1% in 2025. Nights were effectively flat at 772,000, even as the regional market grew 5.5%. Although hotel nights were 30.0% above 2019, the sector's share remained below the national regional average of 17.3%.
- Commercial rented houses and units, including Airbnb, are now the dominant category. Their share more than doubled from 24.0% in 2016 to 48.3% in 2026, while nights rose 23.2% over the past year to 2.8 million – more than three and a half times hotel and motel nights. The share also exceeded the national regional average of 42.5%.
- Backpacker and hostel nights increased 39.4% over the year, lifting their share from 8.2% to 10.8%, but it remained well below the 16.1% in 2016. Private accommodation fell from 36.5% of nights in 2016 to 19.8% in 2026, while commercial accommodation rose to 79.8%.

Victoria

International holiday visitor nights in Regional Victoria – Year to June, '000s (Source: TRA IVS)								
	2016	%	2019	%	2025	%	2026	%
Hotel/resort/motel	390	14.9	403	12.5	585	20.5	289	7.3
Guest house or BnB	117	4.5	60	1.9	np	-	np	-
Rented house/unit	688	26.2	944	29.2	1,309	45.9	2,437	61.5
Caravan Park or commercial camping	231	8.8	291	9.0	180	6.3	65	1.6
Backpacker or hostel	347	13.2	356	11.0	np	-	np	-
Other commercial accommodation	7	0.3	35	1.1	205	7.2	343	8.7
Total Commercial	1,779	67.8	2,088	64.6	2,279	80.0	3,134	79.1
Friends or relatives' property	270	10.3	271	8.4	294	10.3	310	7.8
Caravan or camping - non commercial	161	6.1	151	4.7	130	4.5	np	-
Other Private Accommodation	398	15.2	655	20.3	np	-	np	-
Total Private	843	32.1	1,087	33.7	559	19.6	716	18.1
Total	2,623	100	3,231	100	2,849	100	3,962	100
% regional share of total Victorian international holiday visitor nights	18.9	-	19.0	-	16.0	-	19.8	-
Total VIC international holiday visitor nights	13,902	-	17,032	-	17,798	-	19,979	-

- Regional Victoria's share of international holiday nights rose from 18.9% in 2016 to 19.8% in 2026, recovering from 16.0% in 2025 and exceeding 19.0% in 2019. Regional nights grew 39.1% over the year to 4.0 million, compared with 12.3% growth statewide.
- Hotels and motels' share halved from 14.9% in 2016 to 7.3% in 2026, with most of the decline occurring over the past year from 20.5%. Nights fell 50.6% to 289,000 and were 25.9% below 2016, despite total regional nights being 51.0% higher. Regional Victoria had the lowest hotel share of any state.
- Commercial rented houses and units, including Airbnb, rose from 26.2% of nights in 2016 to 61.5% in 2026, up from 45.9% in 2025. Nights increased 86.2% over the year to 2.4 million—more than eight times hotel and motel nights. This was the highest rented share of any state, compared with 48.3% in NSW and 37.9% in Queensland.

Regional Victoria's recovery has therefore been accompanied by a pronounced structural shift towards rented accommodation. Traditional providers have not shared in the growth, and the contraction in hotel nights over the past year is especially significant.

Queensland

International holiday visitor nights in Regional Queensland – Year to June, '000s (Source: TRA IVS)								
	2016	**%**	**2019**	**%**	**2025**	**%**	**2026**	**%**
Hotel/resort/motel	2,747	26.9	2,830	25.0	2,460	28.6	2,541	22.9
Guest house or BnB	126	1.2	79	0.7	np	-	np	-
Rented house/ unit	2,254	22.1	3,001	26.5	2,537	29.4	4,197	37.9
Caravan Park or commercial camping	783	7.7	824	7.3	385	4.5	690	6.2
Backpacker or hostel	2,231	21.8	2,604	23.0	2,011	23.3	2,115	19.1
Other commercial accommodation	169	1.7	223	2.0	288	3.3	243	2.2
Total Commercial	8,309	81.4	9,560	84.5	7,734	89.8	9,830	88.7
Friends or relatives' property	542	5.3	329	2.9	204	2.4	346	3.1
Caravan or camping - non commercial	361	3.5	258	2.3	226	2.6	271	2.4
Other Private Accommodation	928	9.1	1,051	9.3	387	4.5	558	5.0
Total Private	1,876	18.4	1,713	15.1	829	9.6	1,235	11.1
Total	10,213	100	11,315	100	8,616	100	11,085	100
% regional share of total QLD international holiday visitor nights	48.9	-	49.6	-	42.2	-	43.9	-
Gold Coast	4,395	-	4,588	-	4,247	-	4,155	-
% regional (incl. Gold Coast) of total QLD int'l holiday nights	69.9	-	69.7	-	63.0	-	60.4	-
Total QLD international holiday visitor nights	20,891	-	22,802	-	20,401	-	25,242	-

- Regional Queensland's share of international holiday nights declined from 48.9% in 2016 to 43.9% in 2026, below 49.6% in 2019 but above 42.2% in 2025. Including the Gold Coast, the share fell from 69.9% in 2016 to 60.4% in 2026 and from 63.0% in 2025, as Gold Coast nights declined 2.2% while regional nights grew 28.7%. Queensland nevertheless retained the highest regional dispersal among the major states.
- Hotels and motels' share fell from 26.9% in 2016 to 22.9% in 2026, down from 28.6% in 2025. Nights increased 3.3% over the year to 2.5 million but remained 10.2% below 2019, well behind the 28.7% growth in total regional nights.
- Commercial rented houses and units, including Airbnb, rose from 22.1% of nights in 2016 to 37.9% in 2026, up from 29.4% in 2025. Nights increased 65.4% over the year to 4.2 million and now exceed hotel and motel nights by 65%, although the rented share remains below Victoria and NSW.
- Queensland retained a substantially larger backpacker and outdoor accommodation market than other states. Backpacker and hostel accommodation together with caravan parks and commercial camping accounted for 25.3% of regional holiday nights in 2026, compared with 15.7% in regional NSW, underscoring the importance of working holiday makers and backpackers to regional Queensland.

Queensland along with Tasmania remains the most regionally dispersed of Australia's major international holiday markets. Its accommodation mix is more balanced than Victoria's or NSW's, although the shift from hotels to rented accommodation is increasingly evident.

South Australia

International holiday visitor nights in Regional SA – Year to June, '000s (Source: TRA IVS)								
	2016	**%**	**2019**	**%**	**2025**	**%**	**2026**	**%**
Hotel/resort/motel	135	18.5	176	22.3	153	18.3	68	9.6
Rented house/ unit	151	20.6	185	23.4	303	36.4	219	30.8
Caravan Park or commercial camping	122	16.6	113	14.3	80	9.6	74	10.5
Backpacker or hostel	76	10.3	84	10.6	np	-	np	-
Other commercial accommodation	np	-	np	-	np	-	np	-
Total Commercial	527	72.0	585	74.1	578	69.4	418	58.9
Caravan or camping - non commercial	37	5.0	41	5.2	np	-	np	-
Other Private Accommodation	np	-	116	14.7	np	-	np	-
Total Private	205	28.0	203	25.8	254	30.5	292	41.1
Total	732	100	789	100	833	100	710	100
% regional share of total SA international holiday visitor nights	33.2	-	36.2	-	33.9	-	26.5	-
Total SA international holiday visitor nights	2,203	-	2,178	-	2,455	-	2,677	-

- Regional South Australia's share of international holiday nights fell from 33.2% in 2016 to 26.5% in 2026, below 36.2% in 2019. The sharpest decline was from 33.9% in 2025. Regional SA now sits below Western Australia (29.9%) and Queensland (43.9%) but above NSW (19.5%) and Victoria (19.8%).
- Regional holiday nights fell 14.8% over the year to 710,000, 10.0% below 2019. By contrast, total South Australian holiday nights rose 9.0% to 2.7 million, 22.9% above 2019, indicating that recent growth was concentrated in Adelaide.
- Hotels and motels' share halved from 18.5% in 2016 to 9.6% in 2026, down from 18.3% in 2025. Nights fell 55.6% over the year to 68,000. Only Victoria had a lower regional hotel share.
- Commercial rented houses and units, including Airbnb, fell from 36.4% of nights in 2025 to 30.8% in 2026, with nights down 27.7% to 219,000, although the share remained above 20.6% in 2016. Commercial accommodation's share fell from 69.4% to 58.9%, while private accommodation rose to 41.1%. Because many categories were not published (np), these movements should be interpreted cautiously.

South Australia's recovery has been uneven. Statewide international holiday nights are above pre-pandemic levels, but regional South Australia has captured little of that growth as visitation has become more concentrated in Adelaide.

Western Australia

International holiday visitor nights in Regional WA – Year to June, '000s (Source: TRA IVS)								
	2016	%	2019	%	2025	%	2026	%
Hotel/resort/motel	336	11.3	418	14.2	377	14.8	472	12.7
Guest house or BnB	40	1.3	58	2.0	np	-	np	-
Rented house/ unit	906	30.4	790	26.8	978	38.4	1369	36.8
Caravan Park or commercial camping	461	15.5	490	16.6	434	17.0	445	12.0
Backpacker or hostel	291	9.8	229	7.8	np	-	223	6.0
Other commercial accommodation	np	-	np	-	357	14.0	339	9.1
Total Commercial	2049	68.7	2051	69.7	2235	87.7	2888	77.7
Friends or relatives' property	191	6.4	152	5.2	np	-	np	-
Caravan or camping - non commercial	240	8.0	259	8.8	115	4.5	np	-
Other Private Accommodation	497	16.7	454	15.4	np	-	435	11.7
Total Private	930	31.2	870	29.6	302	11.9	714	19.2
Total	2981	100	2945	100	2549	100	3716	100
% regional share of total WA international holiday visitor nights	35.2	-	36.9	-	23.0	-	29.9	-
Total WA international holiday visitor nights	8,468	-	7,984	-	11,067	-	12,423	-

- Regional Western Australia's share of international holiday visitor nights increased from 23.0% in 2025 to 29.9% in 2026. However, this remains well below pre-pandemic levels (36.9% in 2019 and 35.2% in 2016), indicating that regional WA has not recovered at the same pace as the state's broader international tourism market.
- Regional holiday nights rose 45.8% over the year to 3.7 million, compared with 12.3% growth in total WA holiday nights. Regional nights were 26.2% above 2019 levels, but total WA holiday nights were 55.6% higher, suggesting that much of the recovery has been concentrated in Perth.
- Hotels and motels accounted for 12.7% of regional holiday nights in 2026, above 11.3% in 2016 but below 14.8% in 2025. Nights in regional WA increased 25.2% to 472,000, although the sector's share remained below NSW (13.3%), Queensland (22.9%) and the national regional average (17.3%), while exceeding Victoria (7.3%) and South Australia (9.6%).
- Commercial rented houses and units, including Airbnb, recorded strong growth, with nights increasing 40.0% to 1.4 million. However, their share fell from 38.4% in 2025 to 36.8% in 2026. Given the number of unpublished (np) categories, this trend should be interpreted with caution.
- Caravan parks and commercial camping remained an important accommodation segment, accounting for 12.0% of regional holiday nights in 2026. This compares with 4.9% in NSW and 1.6% in Victoria and highlights the continuing importance of self-drive and outdoor tourism markets in regional WA.

Western Australia has experienced a strong rebound in regional international holiday visitation, with growth comfortably exceeding the state as a whole. Nevertheless, regional dispersal remains well below pre-pandemic levels because international visitor growth has been concentrated disproportionately in Perth.

For Context – international regional visitor nights: all reasons of visit

International visitor nights in Regional Australia – Year to June, '000s (Source: TRA IVS)								
	2016	%	2019	%	2025	%	2026	%
Hotel/resort/motel	6,116	12.3	6,439	12.2	6,711	11.9	6,055	10.3
Guest house or BnB	500	1.0	357	0.7	337	0.6	313	0.5
Rented house/ unit	12,286	24.6	14,120	26.6	18,475	32.8	23,150	39.4
Caravan Park or commercial camping	2,559	5.1	2,602	4.9	1,917	3.4	2,049	3.5
Backpacker or hostel	4,526	9.1	4,665	8.8	3,421	6.1	3,650	6.2
Other commercial accommodation	493	1.0	706	1.3	2,131	3.8	1,918	3.3
Total Commercial	26,480	53.1	28,888	54.5	32,992	58.6	37,134	63.1
Friends or relatives' property	13,786	27.7	13,561	25.6	16,618	29.5	14,030	23.8
Caravan or camping - non commercial	1,432	2.9	1,240	2.3	1,024	1.8	876	1.5
Other Private Accommodation	6,187	12.4	6,555	12.4	3,487	6.2	4,570	7.8
Total Private	21,694	43.5	22,031	41.6	21,461	38.1	20,031	34.1
Total	49,851	100	52,990	100	56,307	100	58,827	100
% regional share of total international visitor nights	20.2	-	19.4	-	18.7	-	18.7	-
Total international visitor nights	247,157	-	273,023		301,100	-	314,855	-

- Regional international visitor nights across all travel purposes reached 58.8 million in the year to June 2026, up 4.5% on 2025 and 11.0% on 2019. Total international visitor nights increased 4.6% and 15.3% over the same periods, leaving the regional share unchanged at 18.7% from 2025, but below 19.4% in 2019 and 20.2% in 2016.
- Across all reasons of visit, the hotel and motel share of regional nights fell from 11.9% in 2025 to 10.3% in 2026 (12.3% in 2016), with nights down 9.8%.
- Commercial rented houses and units, including Airbnb, continued to gain share. Their proportion of regional visitor nights increased from 24.6% in 2016 to 39.4% in 2026, while nights rose 25.3% over the year to 23.2 million. This reinforces the longer-term shift away from traditional accommodation towards rented dwellings across regional Australia.

The broader international visitor market therefore shows a similar pattern to the holiday segment. Regional visitation continued to grow in 2026, but not sufficiently to increase regional dispersal, while accommodation demand continued to shift towards commercial rented properties at the expense of hotels and motels.

State/Territory comparison

State/Territory comparison of regional international holiday nights – Year to June 2026, '000s (Source: TRA IVS)								
	NSW	VIC	QLD	WA	SA	TAS	NT	Regional Total
Hotel/resort/motel or motor Inn	772	289	2,541	472	68	250	315	4,708
% hotel share of total state regional nights	13.3	7.3	22.9	12.7	9.6	25.5	31.4	17.3
Rented house/apartment/unit	2,803	2,437	4,197	1,369	219	417	np	11,594
Caravan Park or commercial camping	286	65	690	445	74	np	141	1,725
Backpacker or hostel	626	np	2,115	223	np	np	np	3,279
Total Commercial	4,628	3,134	9,830	2,888	418	803	793	22,495
Friends or relatives' property	418	310	346	np	np	np	np	1,308
Caravan or camping - non commercial	155	np	271	np	np	np	80	737
Total Private	1,148	716	1,235	714	np	np	198	4,465
Total	5,803	3,962	11,085	3,716	710	981	1,001	27,259
% Regional share of state international holiday visitor nights	19.5	19.8	43.9	29.9	26.5	45.9	51.6	28.8
% share of regional Australian holiday nights	21.3	14.5	40.7	13.6	2.6	3.6	3.7	100

State/Territory comparison of international holiday visitor nights – Year to June 2026 (Source: TRA IVS)									
	NSW	VIC	QLD	WA	SA	TAS	NT	ACT	Total
Hotel/resort/motel or motor Inn, '000s	8,065	4,374	5,833	2,174	537	796	620	146	22,546
Share of Australian hotel nights for int'l holiday visitor nights	35.8	19.4	25.9	9.6	2.4	3.5	2.7	0.6	100
Hotel/resort/motel or motor Inn in regions, '000s	772	289	2,541	472	68	250	315	np	4,708
Share of regional Australian Hotel nights	16.4	6.1	54.0	10.0	1.4	5.3	6.7	-	100
Total Holiday visitor nights	29,820	19,979	25,242	12,423	2,677	2,136	1,941	434	94,650
Share of total Australian holiday visitor nights	31.5	21.1	26.7	13.1	2.8	2.3	2.1	0.5	100

Summary of all International Visitor nights (not just regional):

- The most recent overall international holiday nights (capital cities, Gold Coast and regions) show a concerning picture for hotel market share. Hotel and motel nights fell 1.7% between 2025 and 2026 to 22.5 million, while total holiday nights grew 14.9%. As a result, the hotel share fell 4.0 p ercentage points, from 27.8% to 23.8%. It is above the 22.2% share in 2019, and hotel nights are 20.5% higher than in 2019, but the gain over 2019 has largely been given back over the past year.

International Visitor Survey, Visitor Nights, Year to June, '000s (Source: TRA IVS)												
	Holiday Travellers						All Travellers					
	2019	%	2025	%	2026	%	2019	%	2025	%	2026	%
Hotel/resort/motel or motor Inn	18,708	22.2	22,926	27.8	22,546	23.8	28,841	10.6	37,759	12.5	34,371	10.9
Guest house or Bed & Breakfast	746	0.9	316	0.4	303	0.3	1,076	0.4	872	0.3	575	0.2
Rented house /apartment/unit	29,550	35.1	32,865	39.9	43,651	46.1	107,758	39.5	117,699	39.1	144,044	45.7
Caravan Park or commercial camping	2,830	3.4	2,117	2.6	2,219	2.3	3,123	1.1	2,823	0.9	2,685	0.9
Backpacker or hostel	10,469	12.4	8,284	10.1	9,144	9.7	11,782	4.3	10,109	3.4	10,183	3.2
Friends or relatives' property	8,953	10.6	6,714	8.2	7,514	7.9	83,519	30.6	100,129	33.3	91,534	29.1
Caravan or camping - non commercial	1,412	1.7	1,173	1.4	943	1.0	1,492	0.5	1,517	0.5	1,134	0.4
Other Private Accommodation	9,758	11.6	3,942	4.8	4,863	5.1	20,770	7.6	10,042	3.3	11,362	3.6
Other Accommodation	1,853	2.2	4,028	4.9	3,468	3.7	14,663	5.4	20,150	6.7	18,967	6.0
Total	84,278	100	82,365	100	94,650	100	273,023	100	301,100	100	314,855	100

- Rented houses and apartments are now the dominant accommodation type for holiday travellers, with their share increasing from 35.1% in 2019 and 39.9% in 2025 to 46.1% in 2026. Nights in this category rose 32.8% over the year to 43.7 million, accounting for about 88% of all growth in holiday nights over the year and are almost double the number of hotel and motel nights. Since 2019, rented nights have increased 47.7%.
- Hotels account for a smaller share of holiday nights in the regions (17.3%) than nationally (23.8%), and only 20.9% of hotel and motel holiday nights are spent in regional areas, compared with 28.8% of all holiday nights.
- For holiday travellers, friends and relatives' accommodation has declined in relative importance compared with pre-pandemic levels (10.6% in 2019 to 7.9% in 2026), although nights increased 11.9% over the past year and it remains a significant component of non-commercial stays.
- Backpacker and hostel accommodation continues its long-term decline in share, falling from 12.4% in 2019 to 9.7% in 2026, although nights increased 10.4% over the past year. Nights remain 12.7% below 2019, indicating a sustained structural shift away from budget dorm-style accommodation.
- Caravan and camping accommodation (commercial and non-commercial combined) has also declined, from 5.0% of holiday nights in 2019 to 3.3% in 2026, and other private accommodation has fallen from 11.6% to 5.1%.
- Overall holiday visitor nights have increased significantly since 2019, rising from 84.3 million to 94.7 million in 2026 (up 12.3%), indicating that total demand has recovered and exceeded pre-pandemic levels despite shifts in accommodation mix.
- For total reasons of visit, hotel and motel share fell from 12.5% in 2025 to 10.9% in 2026, with nights down 9.0% to 34.4 million, while total nights grew 4.6%. Rented accommodation grew to 45.7% of nights (up from 39.1%), with nights up 22.4%. Hotels have grown 19.2% since 2019, compared with 15.3% for total nights, so the hotel share is slightly above 2019 (10.6%).

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