

31 March 2016

## DOMESTIC TOURISM REPORT: OVERVIEW OF ACCOMMODATION PERFORMANCE

### 1. Key markets and trends

#### 1.1 Overview

Domestic Visitors	90,741,716	↑4.2%
Domestic Visitor Nights	334,764,472	↑4.0%
Domestic Trip Expenditure	\$60.967 billion	↑5.3%
Average Domestic Trip Expenditure	\$671.87	↑10.05%

The National Visitor Survey figures for the year ending December 2016 show that Australian domestic tourism continues to grow strongly. Domestic visitor numbers across all accommodation categories is up by 4.2% to 90.7 million, while visitor nights grew by 4% to exceed 334 million. Domestic visitor expenditure reached an all-time high, increasing 5.3% to nearly \$61 billion.

Domestic visitor nights spent in hotels, motels and resorts increased by 2.74%, while nights in rented plus other private accommodation fell by 4.34%. Notably, domestic caravan and camping (commercial and non-commercial) visitor nights increased 15.52%. In the five years since December 2011, domestic visitor nights in hotels, motels and resorts has grown by a total of 11.70%, while domestic visitor nights in rented plus other private accommodation has grown by a total of 24.19%.

The best performing capital cities by growth in visitor nights in hotels, motels and resorts for the year ending December 2016 were Adelaide (up 28.47%), Darwin (up 27.95%) and Canberra (up 16.66%). Melbourne is the largest market for domestic visitor nights in hotels, motels and resorts, while Sydney is the largest market for domestic visitor nights across all accommodation categories.

The states with the largest growth in regional domestic visitor nights in hotels, motels and resorts for the year ending December 2016 were South Australia (up 18.09%), Western Australia (up 16.06%) and New South Wales (up 10.02%).

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

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### 2. Domestic Visitor Trends

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

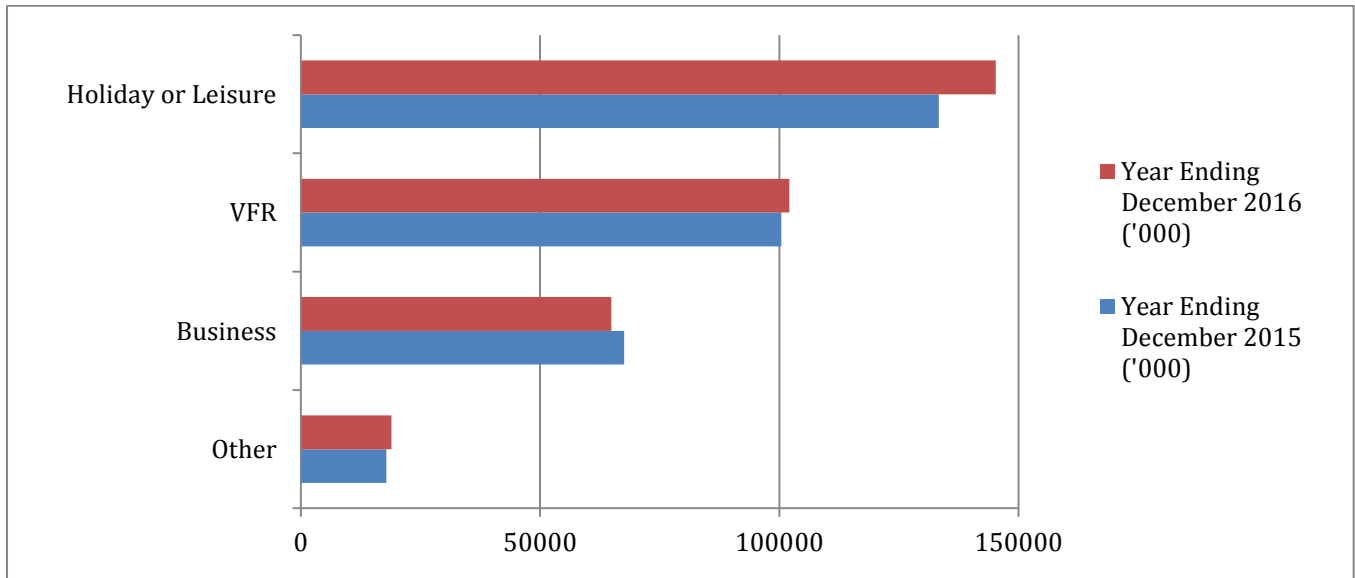
State	Visitors			
	YE December 2015	YE December 2016	Change (%)	% of all Visitors
NSW	28,098	29,297	4.27	30.60
VIC	21,615	21,899	1.31	22.87
QLD	20,120	20,798	3.37	21.72
WA	8,467	9,680	14.33	10.11
SA	5,850	6,204	6.05	6.48
ACT	2,207	2,490	12.82	2.60
TAS	2,607	2,422	-7.10	2.53
NT	1,291	1,531	18.59	1.60
AUS	87,054	95,742	9.98	100

#### 2.2 Domestic Overnight Trips – Visitor Nights ('000)

State	Visitor Nights			
	YE December 2015	YE December 2016	Change (%)	% of all Visitor Nights
NSW	91,072	95,718	5.10	28.59
QLD	79,358	83,064	4.67	24.81
VIC	63,410	64,446	1.63	19.25
WA	41,600	43,675	4.99	13.05
SA	21,020	22,352	6.34	6.68
TAS	10,902	10,379	-4.80	3.10
NT	8,346	8,816	5.63	2.63
ACT	6,260	6,308	0.77	1.88
AUS	321,968	334,764	3.97	100

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



\*Holiday/Leisure up 8.96%

\*VFR up 1.62%

\*Business down 3.97%

\*Other up 6.19%

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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 December 2015 ('000)	YE December 2016 ('000)	Change (%)
1	Melbourne	9,679	9,616	-0.65
2	Sydney	9,556	8,582	-10.19
3	Gold Coast	5,637	5,330	-5.45
4	Brisbane	4,384	4,344	-0.91
5	Adelaide	2,483	3,190	28.47
6	Perth	3,157	3,122	-1.11
7	Canberra	2,287	2,668	16.66
8	Hobart	1,834	1,700	-7.31
9	Darwin	1,263	1,616	27.95
Total	Capital Cities incl. Gold Coast	40,281	40,168	-0.28

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

Rank	Location	YE December 2015 ('000)	YE December 2016 ('000)	Change (%)
1	Sydney	24,785	24,856	0.29
2	Melbourne	23,279	24,524	5.35
3	Brisbane	17,560	18,434	4.98
4	Perth	13,395	13,639	1.82
5	Gold Coast	13,457	13,473	0.12
6	Adelaide	7,692	8,559	11.27
7	Canberra	6,260	6,308	0.77
8	Hobart	5,019	4,693	-6.50
9	Darwin	3,851	3,974	3.19
Total	Capital Cities incl. Gold Coast	115,297	118,460	2.74

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### 4. Accommodation Performance - Regional

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

Rank	Location	YE December 2015 ('000)	YE December 2016 ('000)	Change (%)
1	NSW	13,070	14,379	10.02
2	QLD	12,450	12,918	3.76
3	VIC	6,728	6,310	-6.21
4	WA	3,905	4,532	16.06
5	SA	1,763	2,082	18.09
6	TAS	1,535	1,460	-4.89
7	NT	1,120	1,220	8.93
Total	Regional	40,572	42,901	5.74

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

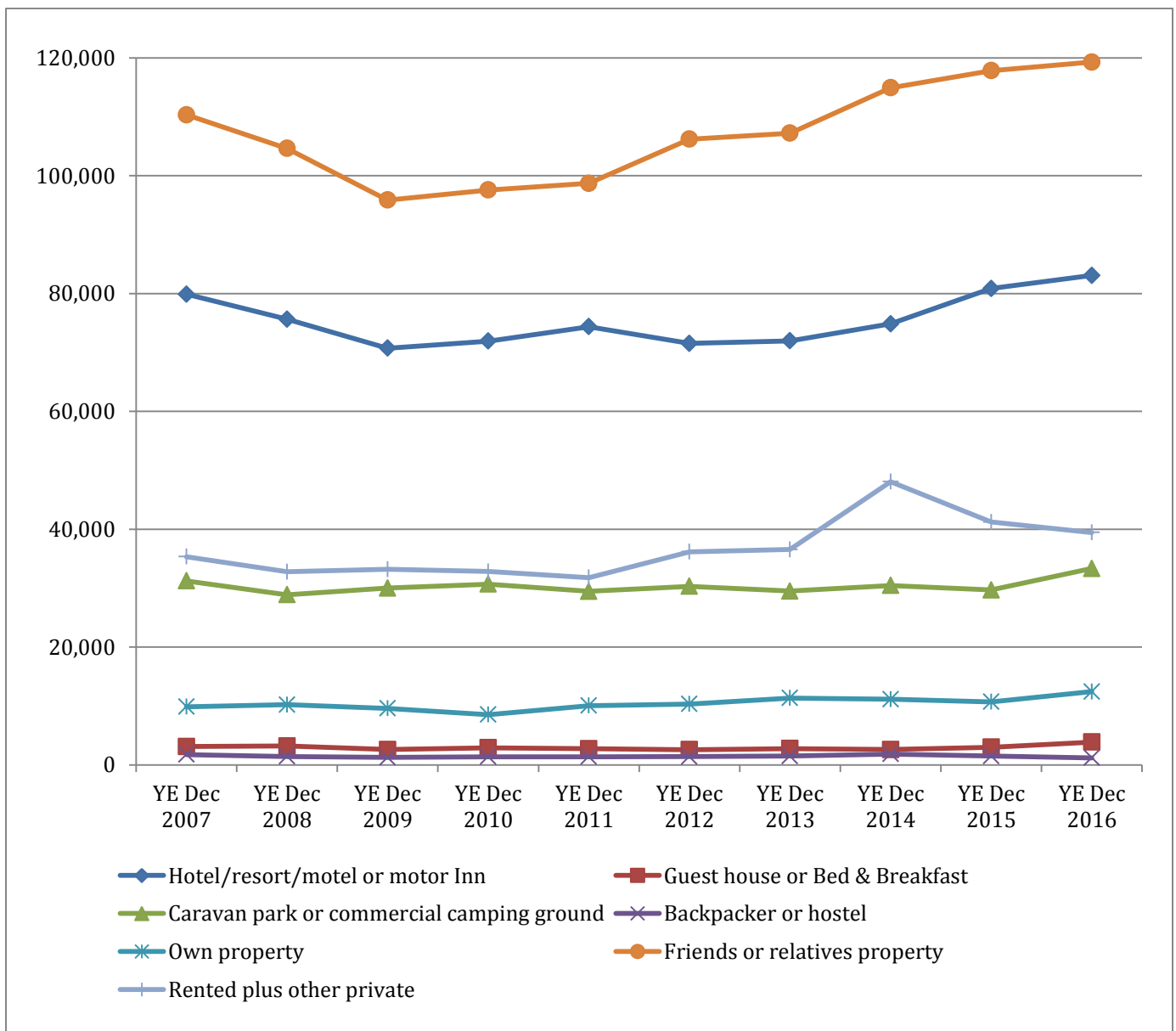
Rank	Location	YE December 2015 ('000)	YE December 2016 ('000)	Change (%)
1	QLD	48,431	51,157	5.63
2	NSW	66,288	70,862	6.90
3	VIC	40,131	39,922	-0.52
4	WA	28,205	30,037	6.50
5	SA	13,328	13,793	3.49
6	TAS	5,883	5,686	-3.35
7	NT	4,496	4,842	7.70
Total	Regional	206,671	216,305	4.66

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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.

Due to changes in survey methodology, in recent quarters some unexpectedly high growth rates have appeared in some National Visitor Survey (NVS) sub-estimates. The issue is more pronounced in some specific purpose groups, and has a relatively higher impact in some of the smaller states and territories. TRA suggests that users of the NVS data interpret recent year on year growth rates with caution until further notice.

### 7. More Information

The data in this Member Bulletin is from Tourism Research Australia's *Travel By Australians: December 2016 Quarterly Results of the National Visitor Survey*. It can be accessed at <https://www.tra.gov.au/research/latest-nvs-report.html>.

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)