

20 December 2017

DOMESTIC TOURISM REPORT: OVERVIEW OF ACCOMMODATION PERFORMANCE

1. Key markets and trends

1.1 Overview

Domestic Overnight Visitors	95,975,834	↑7.20%
Domestic Visitor Nights	347,274,031	↑5.93%
Domestic Trip Expenditure	\$63.702 billion	↑6.93%
Average Domestic Trip Expenditure	\$663.73	↓0.25%

The National Visitor Survey figures for the year ending September 2017 show that Australian domestic tourism continues to grow strongly. Domestic overnight visitor numbers across all accommodation categories is up by 7.2% to nearly 96 million, while visitor nights grew by 5.93% to over 347 million. Domestic visitor expenditure reached an all-time high, increasing 6.93% to \$63.7 billion.

Nationwide, for the year ending September 2017 visitor nights in 'Hotels, motels and resorts' increased 6.8% (consisting of 10.64% in capital cities and 3.24% in regional areas). By comparison, domestic visitor nights in friends or relatives' property grew 6.5%, and domestic visitor nights in rented plus other private accommodation grew 4.61%.

The best performing capital cities by growth in visitor nights in hotels, motels and resorts for the year ending September 2017 were Brisbane (up 28.97%), Canberra (up 17.02%), Sydney (up 14.11%) and Perth (up 13.54%).

Victoria (up 21.01%) and New South Wales (up 7.57%) reported strong growth in regional domestic visitor nights in hotels, motels and resorts for the year ending September 2017, while all other states apart from Tasmania (up 1.84%) recorded declines.

Domestic trip expenditure in regional Australia grew 4.98% to \$32.8 billion, while domestic trip expenditure in capital cities grew 9.09% to \$30.8 billion. The largest expenditure growth was in Tasmania, which increase 24.5% on the previous year to \$2.36 billion.

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

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2. Domestic Visitor Trends

2.1 Domestic Overnight Visitors ('000)

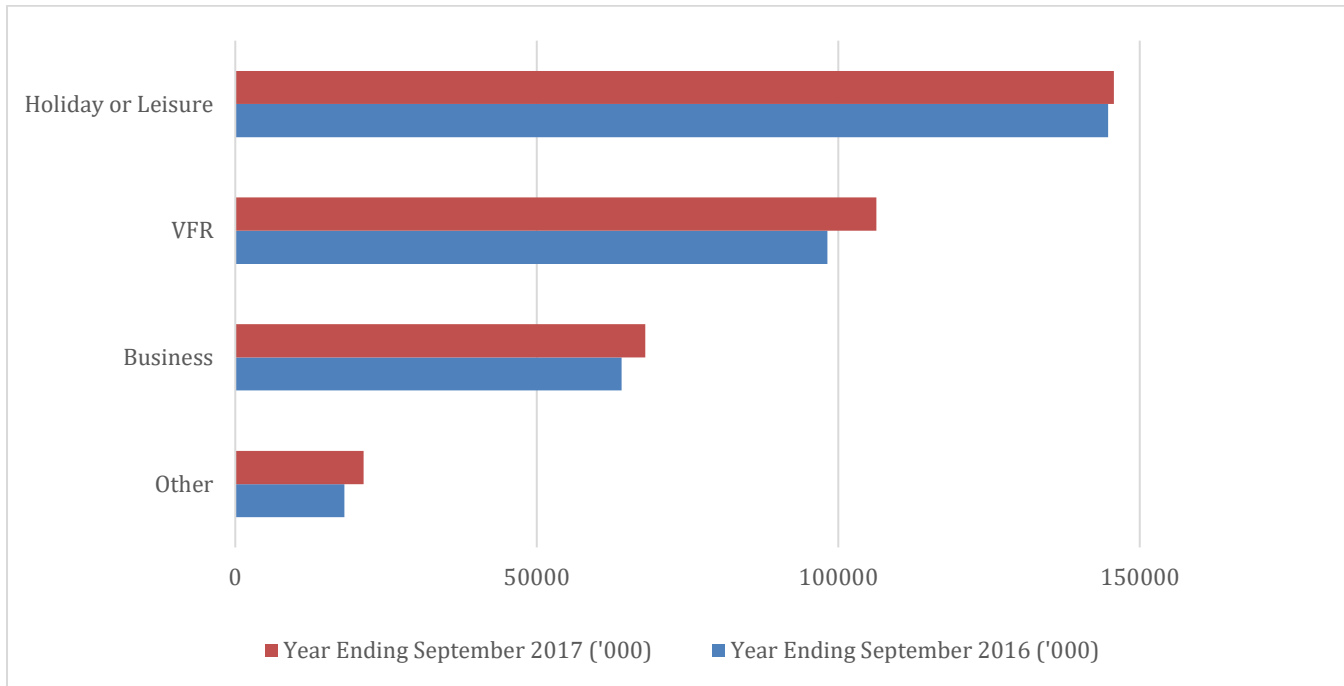
State	Visitors			
	YE September 2016	YE September 2017	Change 2016-2017	% of all Visitors
NSW	28,832	31,030	7.62%	32.33%
VIC	21,466	23,750	10.64%	24.75%
QLD	20,155	22,110	9.70%	23.04%
WA	9,827	9,629	-2.01%	10.03%
SA	6,278	6,105	-2.76%	6.36%
TAS	2,430	2,729	12.30%	2.84%
ACT	2,404	2,707	12.60%	2.82%
NT	1,580	1,552	-1.77%	1.62%
AUS	89,532	95,976	7.20%	100%

2.2 Domestic Visitor Nights ('000)

State	Visitor Nights			
	YE September 2016	YE September 2017	Change 2016-2017	% of all Visitors
NSW	92,984	99,591	7.11%	28.68%
QLD	79,361	85,982	8.34%	24.76%
VIC	62,904	68,407	8.75%	19.70%
WA	44,505	42,841	-3.74%	12.34%
SA	22,635	22,084	-2.43%	6.36%
TAS	10,205	11,608	13.75%	3.34%
NT	9,182	9,677	5.39%	2.79%
ACT	6,065	7,084	16.80%	2.04%
AUS	327,840	347,274	5.93%	100%

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2.2 Purpose/Reason for Visit (by visitor nights)



*Holiday/Leisure up 0.67%

*Business up 6.14%

*VFR up 8.25%

*Other up 17.48%

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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 September 2016 ('000)	YE September 2017 ('000)	Change 2016-2017
1	Melbourne	9,082	9,738	7.22%
2	Sydney	8,422	9,610	14.11%
3	Gold Coast	5,571	5,727	2.80%
4	Brisbane	4,035	5,204	28.97%
5	Perth	3,064	3,479	13.54%
6	Adelaide	3,206	3,242	1.12%
7	Canberra	2,432	2,846	17.02%
8	Hobart	1,663	1,766	6.19%
9	Darwin	1,534	1,549	0.98%
Total	Capital Cities incl. Gold Coast	39,009	43,160	10.64%

3.2 Capital Cities, Domestic Visitor Nights Across All Accommodation Categories

Rank	Location	YE September 2016 ('000)	YE September 2017 ('000)	Change 2016-2017
1	Sydney	23,495	27,031	15.05%
2	Melbourne	23,914	24,403	2.04%
3	Brisbane	17,282	19,812	14.64%
4	Gold Coast	13,448	14,761	9.76%
5	Perth	14,202	12,653	-10.91%
6	Adelaide	8,634	8,903	3.12%
7	Canberra	6,065	7,084	16.80%
8	Hobart	4,455	5,257	18.00%
9	Darwin	3,910	4,560	16.62%
Total	Capital Cities incl. Gold Coast	115,404	124,463	7.85%

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4. Accommodation Performance - Regional

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

Rank	Location	YE September 2016 ('000)	YE September 2017 ('000)	Change 2016-2017
1	NSW	14,146	15,217	7.57%
2	QLD	12,545	12,475	-0.56%
3	VIC	6,106	7,389	21.01%
4	WA	4,405	3,994	-9.33%
5	SA	2,040	1,634	-19.90%
6	TAS	1,522	1,550	1.84%
7	NT	1,383	1,253	-9.40%
Total	Regional	42,147	43,513	3.24%

4.2 Regional Locations, Domestic Visitor Nights Across All Accommodation Categories

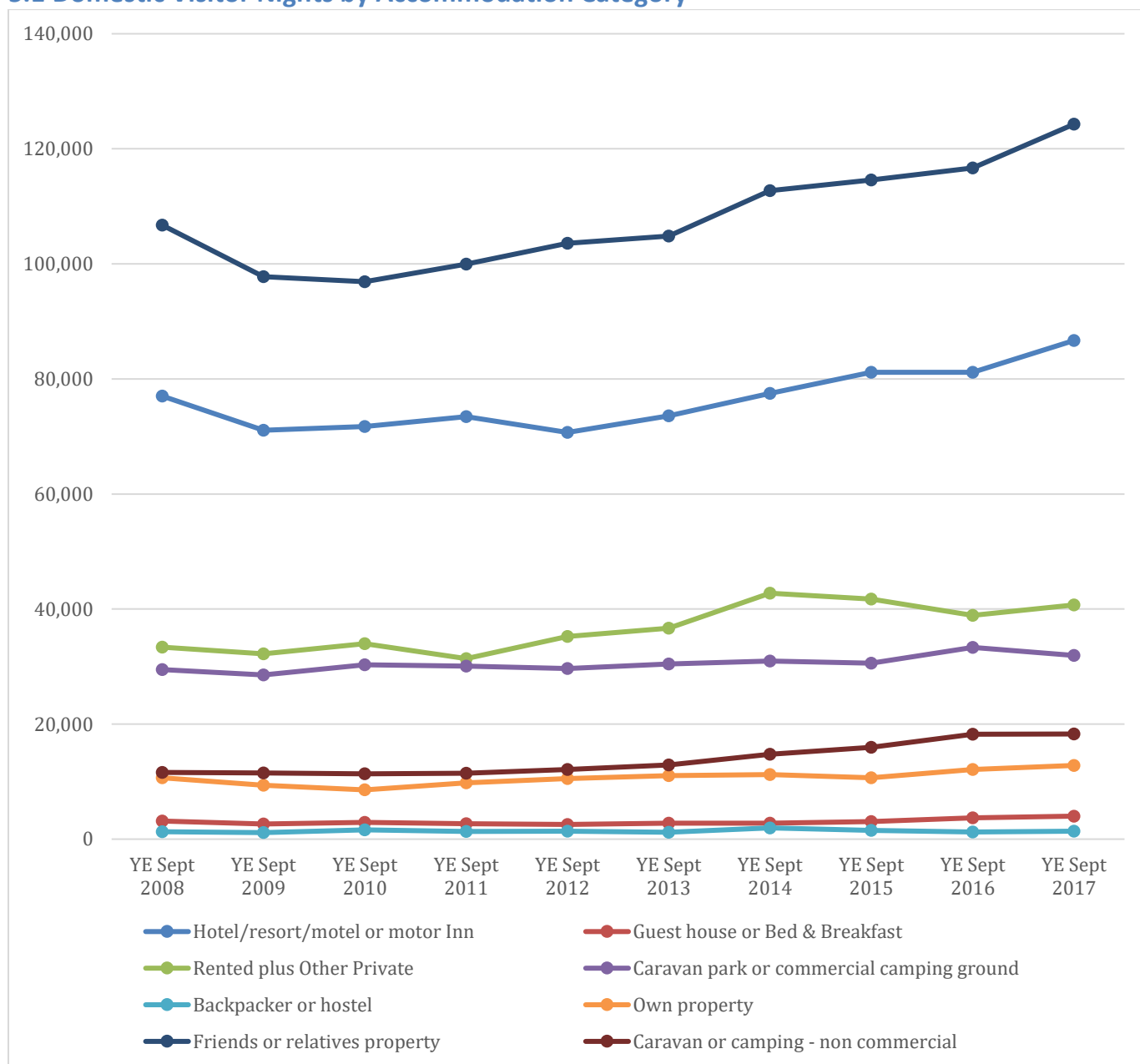
Rank	Location	YE September 2016 ('000)	YE September 2017 ('000)	Change 2016-2017
1	NSW	69,489	72,560	4.42%
2	QLD	48,632	51,410	5.71%
3	VIC	38,990	44,005	12.86%
4	WA	30,303	30,189	-0.38%
5	SA	14,001	13,181	-5.86%
6	TAS	5,750	6,350	10.43%
7	NT	5,272	5,117	-2.94%
Total	Regional	212,437	222,811	4.88%

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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: September 2017 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/national-visitor-survey-results-september-2017>.

If you have questions about the information provided in this overview, or would like further information, please email: taa@tourismaccommodation.com.au