

20 July 2018

## INTERNATIONAL TOURISM REPORT: OVERVIEW OF ACCOMMODATION PERFORMANCE

### 1. Key markets and trends

#### 1.1 Overview

International Visitors	8,305,891	↑7.53%
International Visitor Nights	269,166,469	↑2.81%
International Visitor Expenditure	\$42.259 billion	↑6.06%
Average International Visitor Expenditure	\$5,088	↓1.37%

The 8.3 million international visitors to Australia spent a record \$42.259 billion in the year ending March 2018 – an increase of \$2.4 billion (6.06%) on the previous year. International visitor nights increased 2.81%.

In capital cities (including Gold Coast), total visitor nights in the ‘Hotels, Motels, and Resorts’ category grew 1.9% to 22.9 million. The strongest growth was in the smaller capital cities: Darwin (39%), Hobart (29%) and Canberra (6%). In regional locations, total visitor nights in the same category grew 0.68%, with the strongest growth in New South Wales (34%) and Victoria (12%).

The number of international visitor nights in unregulated accommodation has grown 69% since 2009, growing from 73.8 million to 124.8 million. Over the same period international visitor nights in ‘Hotels, Motels and Resorts’ has grown 28.6% from 22.8 million to 29.3 million. As such, unregulated accommodation accounts for four times the number of international visitor nights as regulated hotel, resort, motel and serviced apartment accommodation.

For the reasons explained on page 6, data relating to ‘purpose of visit’ has been excluded from this IVS release. The quality of the survey data has not been affected.

#### **Note: Purpose of Visit**

These IVS results for the March quarter 2018 are preliminary and do not include any data relating to purpose of visit. This is because the quality of the main purpose of visit component of the passenger data supplied to TRA by the Department of Home Affairs has been identified as a concern.

To produce a purpose of visitor measure for the IVS, TRA uses data collected from the incoming passenger cards of international visitors to Australia. Work is currently in progress to resolve these issues and it is likely that a back cast of TRA data will be required. TRA will release revised estimates once a solution has been implemented.

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### 2. International Visitor Trends

#### 2.1 Key Market Synopsis

Key Market Synopsis	Visitors	Visitor Nights	Average Expenditure per Night (AUD)
China	1,291,962	54,801,858	199
New Zealand	1,239,510	12,806,916	199
USA	751,403	14,200,587	266
United Kingdom	698,832	22,973,660	154
Japan	401,242	10,937,636	161
Singapore	385,472	5,714,374	251
Malaysia	354,870	8,652,859	150
India	298,188	17,257,690	89
Korea	277,737	11,248,298	144
Hong Kong	277,227	7,325,803	183

#### 2.2 International Visitor Nights by State ('000)

Rank	State	Year Ending March 2017	Year Ending March 2018	Change (%)	% of all Visitors Nights
1	NSW	89,932,354	94,520,165	5.10	35.12
2	VIC	66,630,753	68,279,417	2.47	25.37
3	QLD	53,469,437	53,495,871	0.05	19.88
4	WA	28,540,127	26,786,954	-6.14	9.95
5	SA	10,608,125	11,064,084	4.30	4.11
6	ACT	4,546,505	5,498,884	20.95	2.04
7	TAS	3,618,698	5,203,794	43.80	1.93
8	NT	3,859,286	3,784,337	-1.94	1.41
TOTAL	AUS	261,814,132	269,166,469	2.81	100

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### 3. Accommodation Performance - Capital Cities (plus GC)

#### 3.1 Capital Cities, International Visitor Nights Spent in Hotels, Motels and Resorts

Rank	Capital City	Year Ending March 2017	Year Ending March 2018	Change
1	Sydney	8,703,385	8,865,586	1.86%
2	Melbourne	6,049,891	6,011,764	-0.63%
3	Gold Coast	2,268,251	2,248,645	-0.86%
4	Brisbane	1,989,265	2,090,988	5.11%
5	Perth	1,612,188	1,582,413	-1.85%
6	Adelaide	978,600	991,225	1.29%
7	Hobart	372,248	480,125	28.98%
8	Darwin	303,362	420,238	38.53%
9	Canberra	283,002	300,553	6.20%
Total	Capital Cities incl. Gold Coast	22,560,193	22,991,538	1.91%

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

Rank	Capital City	Year Ending March 2017	Year Ending March 2018	Change (%)
1	Sydney	75,722,397	79,968,426	5.61%
2	Melbourne	58,675,886	60,451,822	3.03%
3	Brisbane	26,627,422	26,808,044	0.68%
4	Perth	22,724,584	21,573,874	-5.06%
5	Gold Coast	9,296,101	9,732,330	4.69%
6	Adelaide	8,709,616	8,985,200	3.16%
7	Canberra	4,546,505	5,498,884	20.95%
9	Hobart	2,143,535	3,364,979	56.98%
8	Darwin	2,370,955	2,110,390	-10.99%
Total	Capital Cities incl. Gold Coast	210,817,001	218,493,950	3.64%

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### 4. Accommodation Performance - Regional

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

Rank	Regional	Year Ending March 2017	Year Ending March 2018	Change
1	QLD	3,406,094	3,180,066	-6.64%
2	NSW	831,811	1,111,683	33.65%
3	VIC	571,636	642,489	12.39%
4	WA	500,892	497,034	-0.77%
5	NT	443,443	458,792	3.46%
6	TAS	282,155	264,609	-6.22%
7	SA	249,199	173,051	-30.56%*
Total	Regional	6,285,230	6,327,724	0.68%

Over the past ten years, annual growth in HMSA visitor nights in regional SA has routinely fluctuated in a range of -30% to +30%.

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

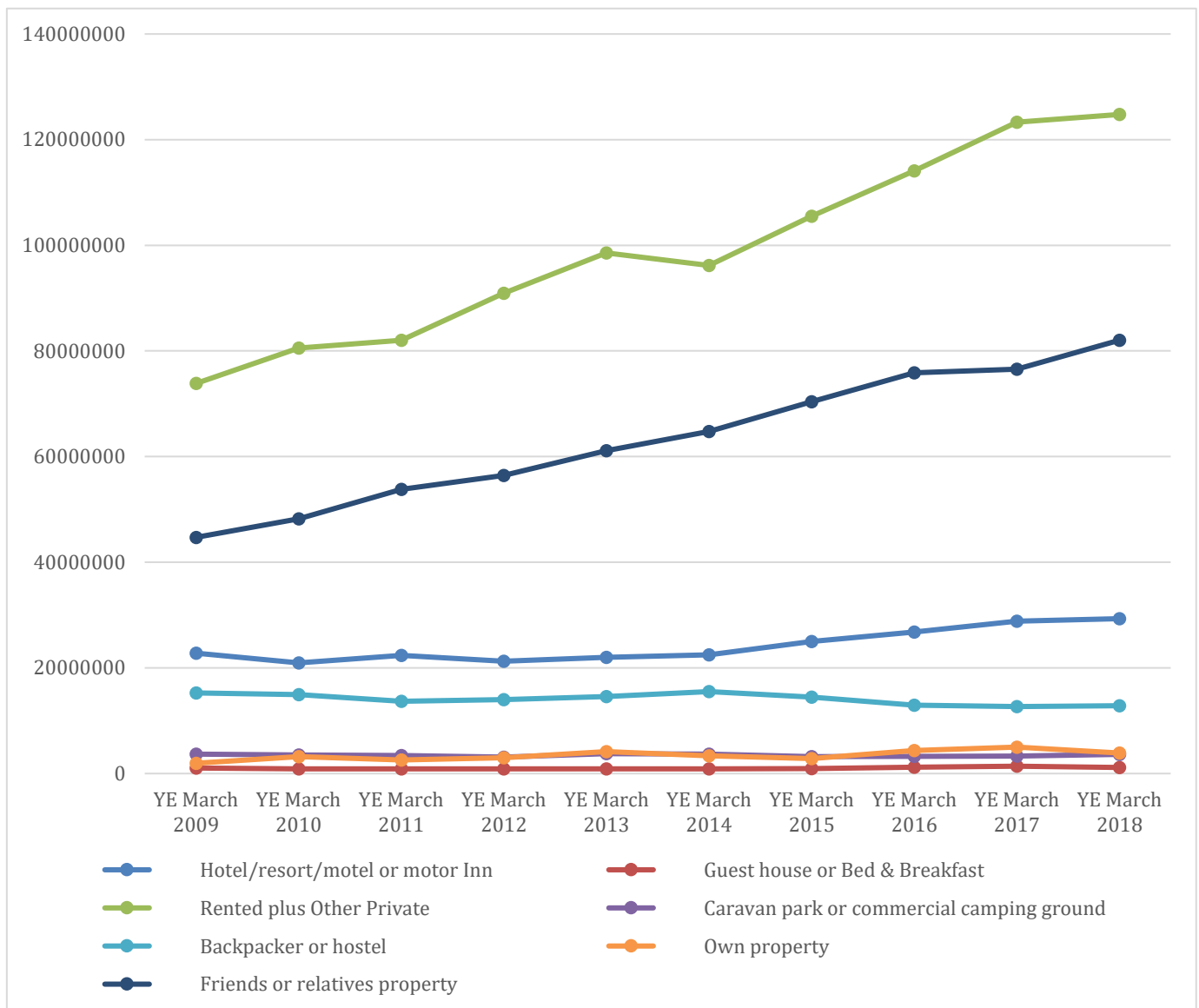
Rank	Regional	Year Ending March 2017	Year Ending March 2018	Change
1	QLD	17,545,914	16,955,497	-3.36%
2	NSW	14,209,957	14,551,739	2.41%
3	VIC	7,954,868	7,827,594	-1.60%
4	WA	5,815,543	5,213,080	-10.36%
5	SA	1,898,509	2,078,884	9.50%
7	NT	1,488,331	1,673,947	12.47%
6	TAS	1,475,163	1,838,815	24.65%
Total	Regional	50,997,130	50,672,519	-0.64%

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### 5. Unregulated Accommodation

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 International Visitor Nights by Accommodation Category



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### 6. Notes

Serviced apartments are included in the Hotels/Motels/Resorts data category.

### 7. More Information

The data in this Member Bulletin is from Tourism Research Australia's *International Visitors In Australia: March 2018 Quarterly Results Of The International Visitor Survey*. It can be accessed at <https://www.tra.gov.au/research/latest-ivs-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).