

2 November 2018

## INTERNATIONAL TOURISM REPORT: OVERVIEW OF ACCOMMODATION PERFORMANCE

### 1. Key markets and trends

#### 1.1 Overview

International Visitors	8,362,774	↑6.15%
International Visitor Nights	269,676,096	↑1.39%
International Visitor Expenditure	\$42.485 billion	↑4.53%
Average International Visitor Expenditure	\$5,080	↓1.53%

International visitors to Australia spent a record \$42.485 billion in the year ending June 2018 – an increase of 4.53% on the previous year. International visitors increased 6.15% while there was more modest growth in visitor nights of 1.39%. Visitor nights were topped by China with 56,893,716, far surpassing the next highest in this category, the United Kingdom with 22,241,546.

Regarding capital cities (including the Gold Coast), total visitor nights in the ‘Hotels, Motels, and Resorts’ category experienced a decrease of 2.38%, though across all categories of accommodation there was an increase of 2.93%. The most significant decrease for ‘Hotels, Motels, and Resorts’ in capital cities was in Adelaide (10.35%), followed by Melbourne (8.59%). However, there were increases in visitor nights for the smaller cities of Hobart (26.43%), Darwin (13.61%), and Canberra (9.41%).

In regional locations, the most significant growth in visitor nights in ‘Hotels, Motels, and Resorts’ was seen in Victoria (23.04%), followed by NSW (9.96%), NT (7.7%), and Tasmania (7.23%). Overall however, visitor nights in this category fell 1.51%, and across all accommodation categories there was a decrease of 4.93%.

International visitor nights in unregulated accommodation has grown 65% since 2009. This is in comparison to growth over the same period for ‘Hotels, Motels, and Resorts’ of 30.6%.

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.

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### 2. International Visitor Trends

#### 2.1 Key Market Synopsis

Key Market Synopsis	Visitors	Annual Growth	Visitor Nights	Annual Growth	Average Expenditure per Night (AUD)
China	1,312,226	13.07%	56,893,716	10.55%	198
New Zealand	1,244,473	1.23%	12,827,187	-10.90%	199
USA	741,608	5.05%	13,463,956	-11.08%	273
United Kingdom	697,691	2.28%	22,241,546	-8.74%	157
Japan	408,072	4.32%	10,691,683	7.25%	165
Singapore	378,798	-1.52%	5,526,445	-15.41%	256
Malaysia	351,511	-2.17%	8,937,009	3.32%	149
India	314,045	20.50%	18,068,194	22.78%	83
Korea	277,829	3.36%	11,161,968	-5.59%	148
Hong Kong	271,829	14.27%	7,300,263	-0.40%	178

#### 2.2 International Visitor Nights by State

Rank	State	Year Ending June 2017	Year Ending June 2018	Change (%)	% of all Visitors Nights
1	NSW	92,515,764	94,419,977	2.06	35.0
2	VIC	67,380,455	68,798,006	2.10	25.5
3	QLD	53,911,980	53,837,849	-0.14	20.0
4	SA	10,934,589	10,604,483	-3.02	3.9
5	WA	28,198,415	26,969,049	-4.36	10.0
6	NT	3,949,374	5,230,980	32.45	1.9
7	ACT	3,911,860	3,605,708	-7.83	1.3
8	TAS	4,583,584	5,688,836	24.11	2.1
TOTAL	AUS	265,988,554	269,676,096	1.39	100.0

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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 June 2017	Year Ending June 2018	Change
1	Sydney	8,770,941	8,736,980	-0.39%
2	Melbourne	6,383,122	5,834,750	-8.59%
3	Gold Coast	2,263,563	2,205,105	-2.58%
4	Brisbane	2,029,368	2,113,341	4.14%
5	Perth	1,621,571	1,562,940	-3.62%
6	Adelaide	1,048,147	939,714	-10.35%
7	Hobart	381,216	481,973	26.43%
8	Darwin	333,451	378,822	13.61%
9	Canberra	287,670	314,741	9.41%
Total	Capital Cities incl. Gold Coast	23,119,048	22,568,366	-2.38%

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

Rank	Capital City	Year Ending June 2017	Year Ending June 2018	Change
1	Sydney	77,706,614	80,181,707	3.19%
2	Melbourne	59,216,439	60,940,890	2.91%
3	Brisbane	26,734,600	27,751,410	3.80%
4	Perth	22,525,999	21,884,190	-2.85%
5	Gold Coast	9,404,558	9,484,139	0.85%
6	Adelaide	8,972,241	8,700,976	-3.02%
7	Canberra	4,583,584	5,688,836	24.11%
9	Hobart	2,188,507	3,469,435	58.53%
8	Darwin	2,410,698	1,902,329	-21.09%
Total	Capital Cities incl. Gold Coast	213,743,240	220,003,912	2.93%

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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 June 2017	Year Ending June 2018	Change
1	QLD	3,413,066	3,124,012	-8.47%
2	NSW	960,712	1,056,396	9.96%
3	VIC	554,411	682,157	23.04%
4	WA	496,990	470,716	-5.29%
5	NT	467,041	502,987	7.70%
6	TAS	256,473	275,015	7.23%
7	SA	228,082	169,000	-25.90%*
Total	Regional	6,376,775	6,280,284	-1.51%

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

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

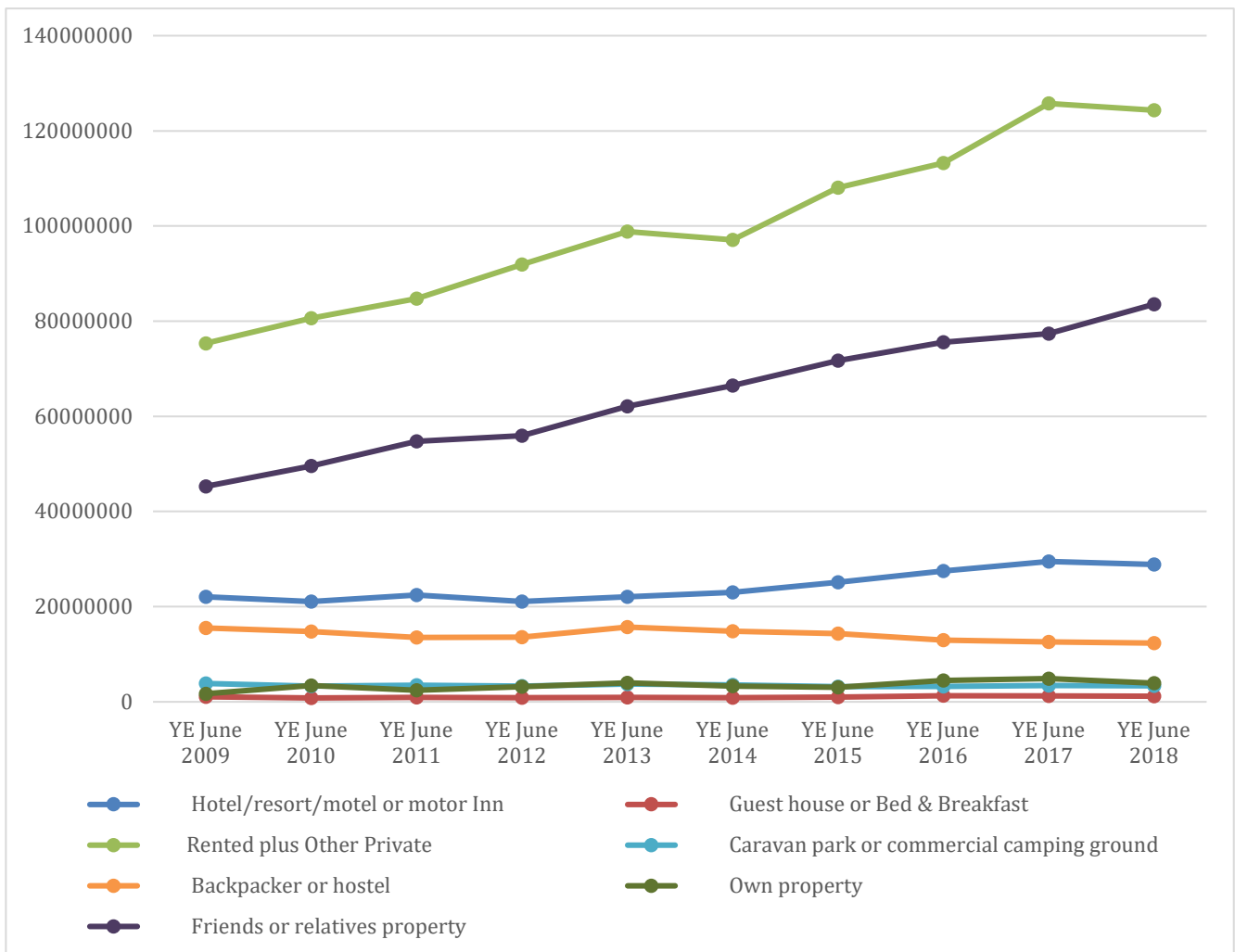
Rank	Regional	Year Ending June 2017	Year Ending June 2018	Change
1	QLD	17,772,822	16,602,300	-6.59%
2	NSW	14,809,151	14,238,270	-3.85%
3	VIC	8,164,016	7,857,116	-3.76%
4	WA	5,672,416	5,084,859	-10.36%
5	SA	1,962,348	1,903,507	-3.00%
6	TAS	1,760,867	1,761,545	0.04%
7	NT	1,501,162	1,703,379	13.47%
Total	Regional	52,245,314	49,672,184	-4.93%

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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.

These IVS results for the June 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. There are no issues with the survey collection.

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.

### 7. More Information

The data in this Member Bulletin is from Tourism Research Australia's *International Visitors In Australia: June 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).