

INTERNATIONAL TOURISM REPORT: OVERVIEW OF ACCOMMODATION PERFORMANCE

1. Key markets and trends

1.1 Overview

International Visitors	8,523,540	↑ 4.77%
International Visitor Nights	273,793,318	↑ 3.79%
International Visitor Expenditure	\$43.918 billion	↑ 7.37%
Average International Visitor Expenditure	\$5,153	↑ 2.48%

Visitors, Visitor Nights and Expenditure takeaways

- The International Visitor Survey Year Ending December 2018 shows that Australia continues to break records with 8.5 million international visitors choosing to holiday Down Under, a 5% increase on December 2017 figures. For context, Tourism Minister Simon Birmingham has described this as “an extra 1000 jumbos” arriving in our airports in the last year.
- Key Asian markets remain important, and China continues to dominate with 1.3 million visitors. India recorded the greatest increase in visitors (17.95%) and visitor nights (30.33%), though their expenditure per night remains low at \$81.40.
- There were decreases in the visitor nights for the US (5.99%) and the UK (7.44%), but the US topped average expenditure per night at \$285.68.

Accommodation sector takeaways

HMSA top 3 increases for capital cities	HMSA top 3 increases for regional areas
Canberra, 14.53%	SA, 37.01%
Perth, 11%	VIC, 32.49%
Hobart, 9.72%	NT, 24.13%

- For HMSA (hotels, motels, serviced apartments) in the capital cities, Adelaide had a 19.97% decrease and the Gold Coast had a 5.64% decrease.
- HMSA in regional QLD experienced a 6.73% decrease, and regional TAS fell 0.29%, however all other regional areas experienced an increase in HMSA visitor nights.

MEMBER BULLETIN

2. International Visitor Trends

2.1 Key Market Synopsis

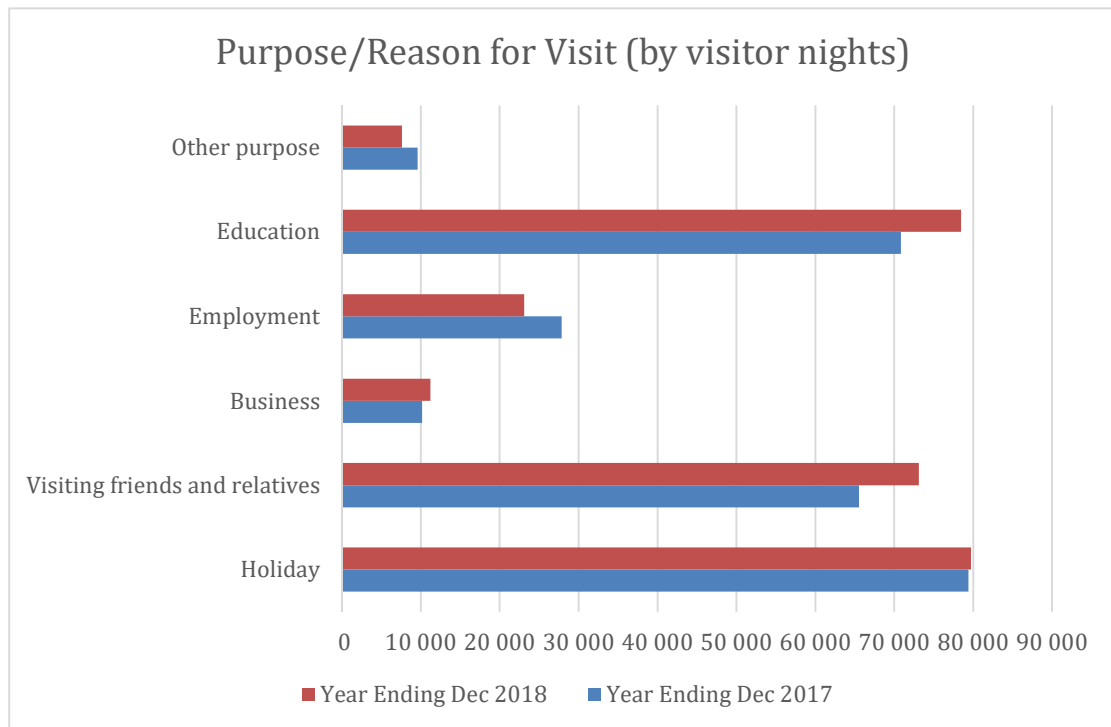
Key Market Synopsis	Visitors ('000)	Annual Growth	Visitor Nights ('000)	Annual Growth	Average Expenditure per Night (AUD)
China	1,322	5.16%	58,781	12.69%	200
New Zealand	1,259	2.11%	13,108	0.47%	197
United States of America	744	1.34%	13,380	-5.99%	286
United Kingdom	688	-0.27%	21,694	-7.44%	158
Japan	434	8.43%	10,894	-2.72%	179
Singapore	392	3.35%	5,829	-2.26%	261
Malaysia	357	0.96%	8,387	-3.37%	161
India	336	17.95%	20,458	30.33%	81
Hong Kong	280	9.12%	6,716	-5.66%	199
Korea	264	-4.40%	10,294	-2.49%	149

2.2 International Visitor Nights by State ('000)

Rank	State	Year Ending Dec 2017	Year Ending Dec 2018	% of all Visitor Nights	Change (%)
1	NSW	93,984	96,204	35	2.4
2	VIC	65,557	72,872	27	11.2
3	QLD	53,075	55,052	20	3.7
4	WA	26,241	24,928	9	-5.0
5	SA	10,855	9,874	4	-9.0
6	ACT	5,221	5,838	2	11.8
7	TAS	4,625	4,911	2	6.2
8	NT	3,706	3,589	1	-3.2
	AUS	263,797	273,793	100	3.8

MEMBER BULLETIN

2.3 Purpose/Reason for Visit (by visitor nights)



The IVS December 2018 re-included purpose/reason of visit which was absent in previous versions due to concerns around quality of data. There was an increase of 11.6% for 'visiting friends and relatives' and a 10.8% increase for 'education', with a marginal increase for 'holiday' of 0.4%.

2.4 Averages for International Visitors by Key Markets (AUD)

Country	Average Nights Stayed	Average Trip Expenditure	Average Expenditure Per Night
United States of America	17.98	5137.02	285.68
Singapore	14.89	3884.61	260.96
China	44.46	8872.64	199.56
Hong Kong	24.03	4776.15	198.79
New Zealand	10.41	2046.18	196.52
Japan	25.12	4502.57	179.23
Malaysia	23.50	3780.83	160.87
United Kingdom	31.51	4964.23	157.53
Korea	38.98	5795.74	148.68
India	60.92	4959.08	81.40
Total	32.12	5152.59	160.41

MEMBER BULLETIN

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 Dec 2017	Year Ending Dec 2018	Change
1	Sydney	8,575,039	8,611,275	0.42%
2	Melbourne	6,027,824	6,062,676	0.58%
3	Gold Coast	2,204,861	2,080,565	-5.64%
4	Brisbane	1,988,685	2,067,519	3.96%
5	Perth	1,508,624	1,674,641	11.00%
6	Adelaide	1,069,939	856,290	-19.97%
7	Hobart	412,649	452,761	9.72%
8	Darwin	395,903	400,951	1.28%
9	Canberra	314,110	359,765	14.53%
Total	Capital Cities incl. Gold Coast	22,497,633	22,566,443	0.31%

3.2 Capital Cities, International Visitor Nights Across All Accommodation Categories

Rank	Capital City	Year Ending Dec 2017	Year Ending Dec 2018	Change
1	Sydney	79,273,749	81,284,386	2.54%
2	Melbourne	57,597,138	64,745,361	12.41%
3	Brisbane	26,179,311	28,718,305	9.70%
4	Perth	21,118,353	19,758,568	-6.44%
5	Gold Coast	9,295,435	10,021,287	7.81%
6	Adelaide	8,924,048	8,032,972	-9.99%
7	Canberra	5,220,704	5,837,988	11.82%
9	Hobart	2,833,381	3,315,813	17.03%
8	Darwin	2,168,648	1,811,943	-16.45%
Total	Capital Cities incl. Gold Coast	212,610,767	223,526,623	5.13%

MEMBER BULLETIN

4. Accommodation Performance - Regional

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

Rank	Regional	Year Ending Dec 2017	Year Ending Dec 2018	Change
1	QLD	3,390,180	3,161,931	-6.73%
2	NSW	985,734	1,178,639	19.57%
3	VIC	563,578	746,666	32.49%
4	NT	461,173	572,431	24.13%
5	WA	465,696	496,691	6.66%
6	TAS	257,376	256,640	-0.29%
7	SA	184,008	252,101	37.01%
Total	Regional	6,307,746	6,665,099	5.67%

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

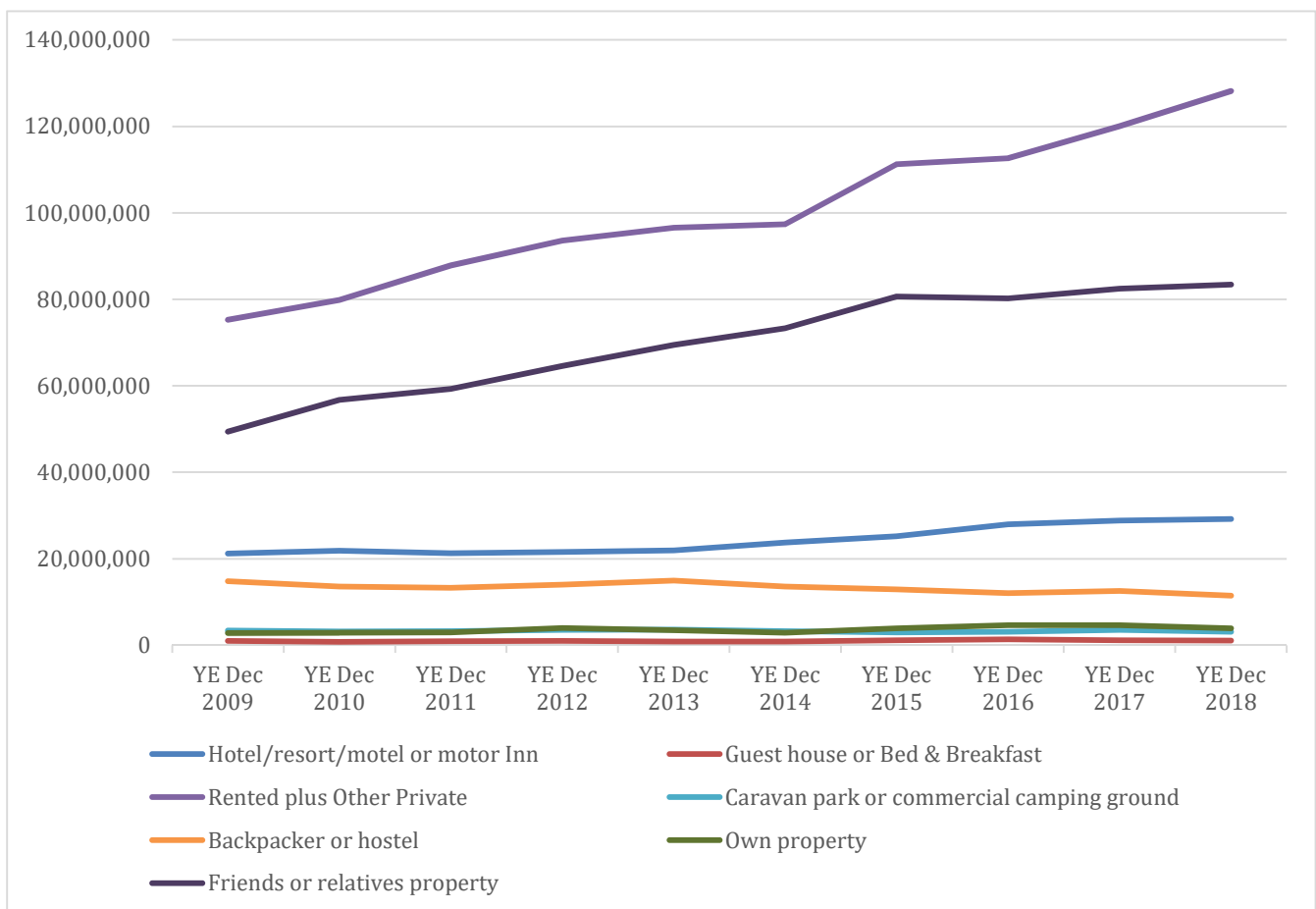
Rank	Regional	Year Ending Dec 2017	Year Ending Dec 2018	Change
1	QLD	17,600,668	16,312,668	-7.32%
2	NSW	14,710,058	14,919,982	1.43%
3	VIC	7,959,398	8,126,469	2.10%
4	WA	5,122,388	5,169,806	0.93%
5	SA	1,931,095	1,841,099	-4.66%
6	NT	1,537,726	1,776,790	15.55%
7	TAS	1,791,992	1,595,131	-10.99%
Total	Regional	51,186,125	50,266,695	-1.80%

MEMBER BULLETIN

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



Unregulated accommodation ('Rented plus Other Private') has increased 70.3% from YE December 2009 to YE December 2018. Over the same period, 'Hotel/resort/motel or motor Inn' has increased 38%.

MEMBER BULLETIN

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: Year Ending December 2018*. 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.