

## INTERNATIONAL TOURISM REPORT: OVERVIEW OF ACCOMMODATION PERFORMANCE

### 1. Key markets and trends

#### 1.1 Overview

International Visitors	8,534,294	2.68%	↑
International Visitor Nights	270,672,359	0.82%	↑
International Visitor Expenditure	\$44.34 billion	5.30%	↑
Average International Visitor Expenditure	\$5,195	2.55%	↑

#### *Visitors, Visitor Nights and Expenditure takeaways*

- More than 8.5 million international visitors made the trip to Australia to the year ending March 2019, staying over 270 million nights and spending a record \$44.3 billion.
- China remained Australia's leading tourism market, with numbers increasing by 3% to 1.3 million visitors, while trip spend increased 10% to reach \$12 billion, an additional \$1.1 billion. However, the Chinese market is showing signs of maturity, and a key takeaway from the survey results is the increase in visitors to South and South East Asia.
- India shows double digit growth in both visitation and visitor spend, making it the fastest growing market. Indians' average spend is lower than other markets and they stay on average 61 nights.
- A report from Tourism Research Australia indicates that more than 40% of Indian visitors in 2016–17 were here for VFR purposes. VFR tends to record lower spend than other travel purposes, as visitors rely on their hosts for accommodation: only 4% of Indian VFR visitors stayed in commercial accommodation, compared with 41% of holiday visitors and 93% of business visitors.
- A growing market is Taiwan, which saw a 6% increase in visitors to 185,000, 10% increase in visitor nights to 10,422,000, and 13% increase in total trip expenditure to \$1 billion.
- The number of US visitors fell marginally, and the number of UK visitors fell 4%, while NZ visitors were up nearly 2%.

#### *Accommodation sector takeaways*

- For 'Hotel/resort/motel or motor inn' in capital cities, there were decreases in visitor nights across all except Melbourne, Perth and Canberra, the last of which saw an increase of 30%.
- Across all accommodation categories in capital cities there were double digit decreases for visitor nights in Perth, Adelaide, Hobart and Darwin.
- 'Hotel/resort/motel or motor inn' in regional locations saw an increase in visitor nights in all states and territories except for QLD and TAS, which had small decreases.

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### 2. International Visitor Trends

#### 2.1 Key Market Synopsis

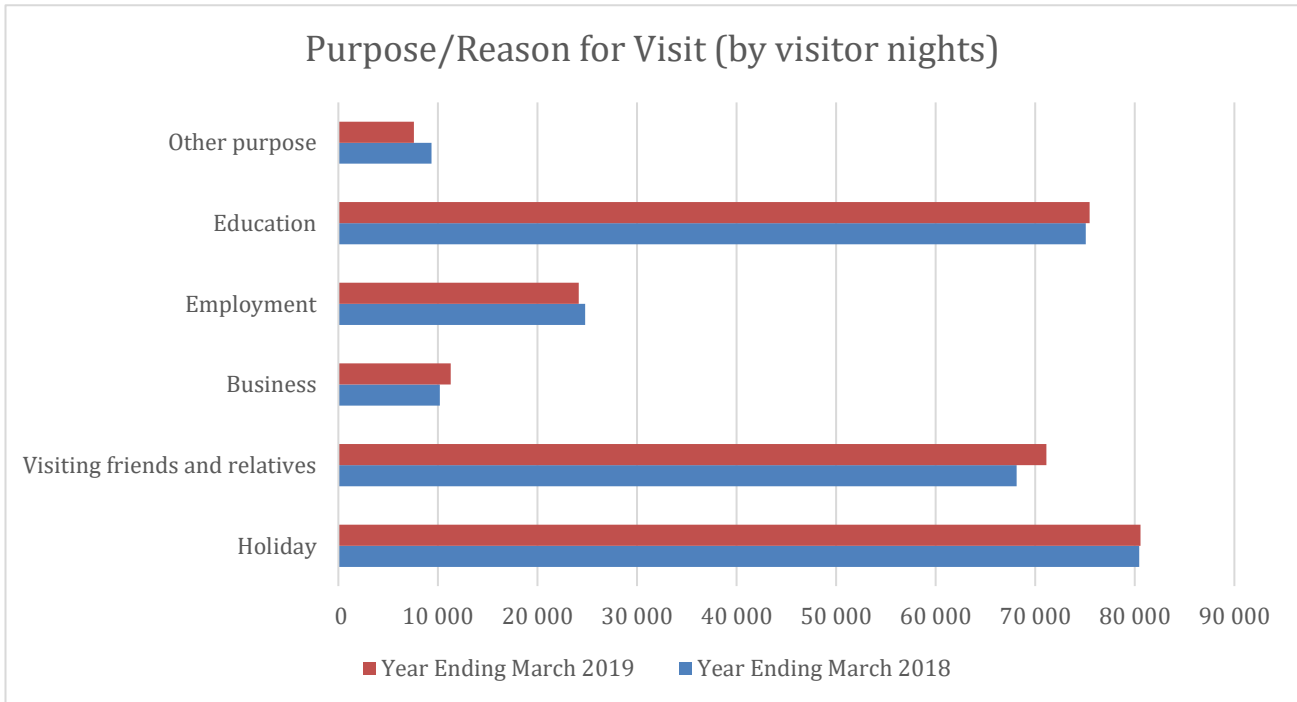
Key Market Synopsis	Visitors ('000)	Annual Growth	Visitor Nights ('000)	Annual Growth	Average Expenditure per Night (AUD)
China	1,329	2.59%	56,983	4.25%	210
New Zealand	1,262	1.73%	12,900	-0.23%	200
United States of America	750	-0.32%	13,074	-7.89%	305
United Kingdom	673	-3.91%	21,385	-6.16%	157
Japan	438	8.59%	10,667	-3.02%	185
Singapore	393	2.61%	5,826	0.32%	259
Malaysia	350	-1.42%	7,755	-10.80%	168
India	343	14.62%	20,926	20.87%	81
Hong Kong	272	-1.39%	6,282	-12.44%	201
Korea	263	-5.24%	9,670	-14.15%	154

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

Rank	State	Year Ending March 2018	Year Ending March 2019	% of all Visitor Nights	Change (%)
1	NSW	94,357	97,418	36	3.24
2	VIC	67,908	71,690	26	5.57
3	QLD	53,619	54,366	20	1.39
4	WA	26,591	23,734	9	-10.75
5	SA	11,043	9,509	4	-13.89
6	ACT	5,479	5,693	2	3.92
7	TAS	5,182	4,435	2	-14.41
8	NT	3,768	3,330	1	-11.63
	AUS	268,468	270,672	100	0.82

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



There was an increase of 3% for ‘visiting friends and relatives’ and a 9.1% increase for ‘education’, as well as an increase for ‘holiday’ of 4.6%.

### 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	17.4	5306.15	304.57
Singapore	14.8	3842.13	259.31
China	42.9	9005.48	210.04
Hong Kong	23.1	4655.60	201.21
New Zealand	10.2	2042.46	199.87
Japan	24.4	4500.37	184.61
Malaysia	22.2	3727.23	168.12
United Kingdom	31.8	4975.61	156.59
Korea	36.8	5667.57	154.18
India	61.1	4933.02	80.78
Australia total	31.7	5195.28	163.81

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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 2018	Year Ending March 2019	Change
1	Sydney	8,769,368	8,499,605	-3.08%
2	Melbourne	5,936,859	6,110,567	2.93%
3	Brisbane	2,097,848	1,964,442	-6.36%
4	Gold Coast	2,237,049	1,942,365	-13.17%
5	Perth	1,561,379	1,701,049	8.95%
6	Adelaide	1,012,076	754,643	-25.44%
7	Darwin	433,134	410,940	-5.12%
8	Hobart	473,854	393,861	-16.88%
9	Canberra	297,941	388,831	30.51%
Total	Capital Cities incl. Gold Coast	22,819,507	22,166,304	-2.86%

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

Rank	Capital City	Year Ending March 2018	Year Ending March 2019	Change
1	Sydney	79,850,679	82,315,775	3.09%
2	Melbourne	60,143,667	63,445,935	5.49%
3	Brisbane	26,868,524	27,579,304	2.65%
4	Perth	21,400,704	18,685,809	-12.69%
5	Gold Coast	9,806,348	9,743,765	-0.64%
6	Adelaide	8,973,708	7,745,936	-13.68%
7	Canberra	5,478,724	5,693,281	3.92%
8	Hobart	3,399,746	2,790,344	-17.92%
9	Darwin	2,127,097	1,726,689	-18.82%
Total	Capital Cities incl. Gold Coast	218,049,197	219,726,837	0.77%

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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 2018	Year Ending March 2019	Change
1	QLD	3,178,406	3,168,867	-0.30%
2	NSW	1,095,948	1,160,864	5.92%
3	VIC	637,559	686,473	7.67%
4	NT	449,828	562,182	24.98%
5	WA	489,454	514,748	5.17%
6	TAS	260,648	254,081	-2.52%
7	SA	171,934	253,970	47.71%
Total	Regional	6,283,778	6,601,185	5.05%

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

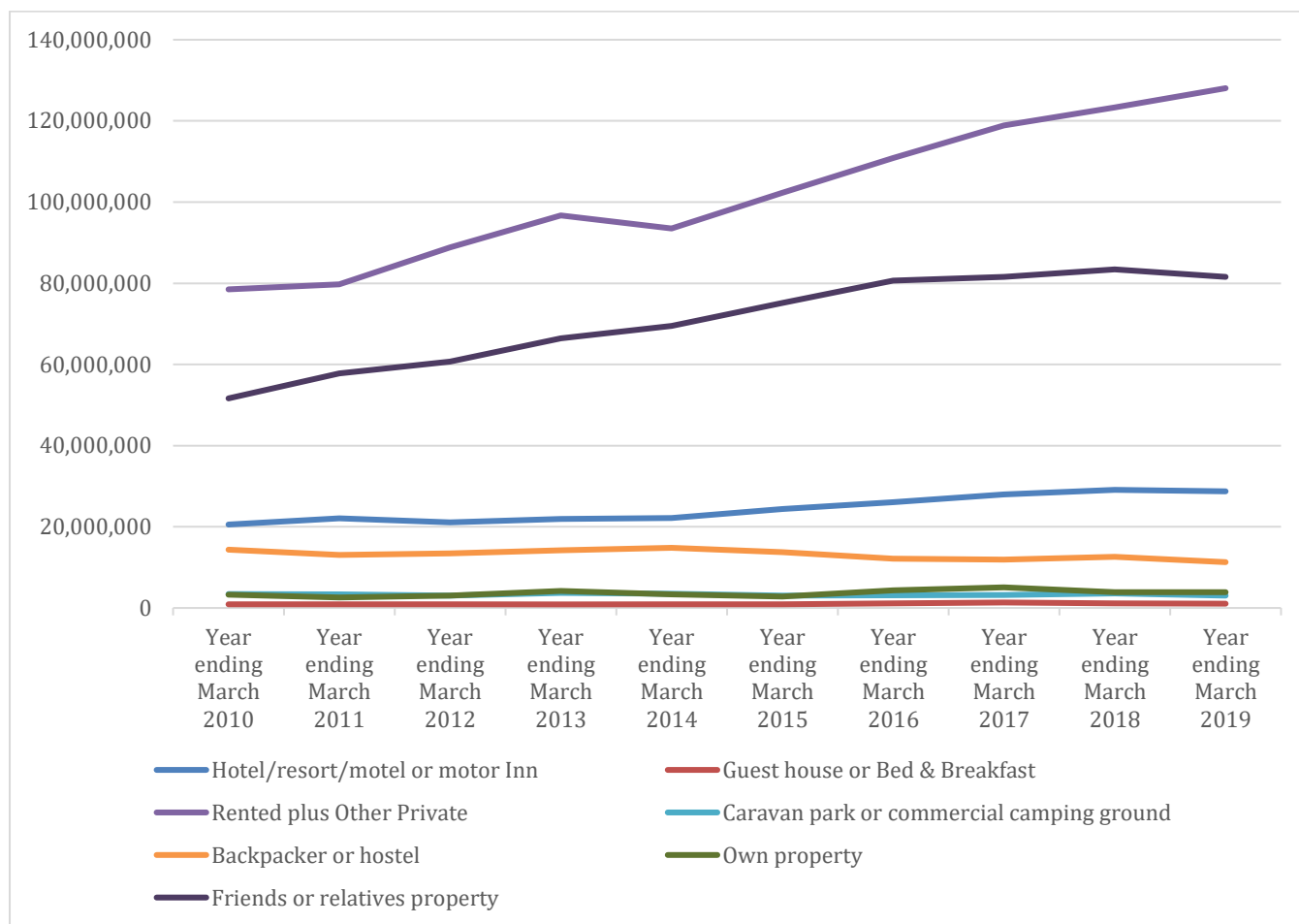
Rank	Regional	Year Ending March 2018	Year Ending March 2019	Change
1	QLD	16,944,351	17,042,453	0.58%
2	NSW	14,506,539	15,101,758	4.10%
3	VIC	7,764,363	8,244,500	6.18%
4	WA	5,190,456	5,048,110	-2.74%
5	SA	2,068,978	1,762,931	-14.79%
6	TAS	1,782,403	1,644,856	-7.72%
7	NT	1,640,727	1,602,996	-2.30%
Total	Regional	50,419,296	50,945,521	1.04%

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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



Unregulated accommodation ('Rented plus Other Private') has increased 63.1% from YE March 2018 to YE March 2019. Over the same period, 'Hotel/resort/motel or motor inn' increased 39.9%.

'Rented plus Other Private' composes just over 47% of total accommodation at present, whilst 'Hotel/resort/motel or motor inn' comprises just under 11%. Note though that the measure of what constitutes unregulated accommodation is somewhat imperfect.

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### 6. Notes

Serviced apartments are included in the 'Hotel/resort/motel or motor inn' data category.

### 7. More Information

The data in this Member Bulletin is from Tourism Research Australia's *International Visitors In Australia: March 2019 Quarterly Results Of The International Visitor Survey*. It can be accessed at <https://www.tra.gov.au/International/international-tourism-results>

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)