

8 December 2016

INTERNATIONAL TOURISM REPORT: OVERVIEW OF ACCOMMODATION PERFORMANCE

1. Key markets and trends

1.1 Overview

International Visitors	7,444,738	↑11.5%
International Visitor Nights	250,997,394	↑3.8%
International Visitor Expenditure	\$38.793 billion	↑11.4%
Average International Visitor Expenditure	\$5,211	↓0.1%

International visitors to Australia spent a record \$38.8 billion in the year ending September 2016 – an increase of \$3.97 billion (11.4%) on the previous year. International visitor nights increased 3.8%.

In terms of reasons for travel, the holiday and education segments recorded growth of 25.3% and 16.7%, respectively.

The number of international visitor nights in unregulated accommodation has nearly doubled since 2007, growing from 61 million to 114.9 million. Over the same period international visitor nights in hotels, motels and serviced apartments has grown from 25.5 million to 28.7 million. As such, unregulated accommodation accounts for four times the number of international visitor nights as regulated hotel, motel and serviced apartment accommodation.

In the year to September 2016, backpacker visitor nights declined 4.5% and backpacker expenditure declined 0.7%. Backpacker visitor nights fell most dramatically in Queensland, South Australia, Northern Territory and the ACT. Tasmania recorded significant growth in backpacker visitor nights and backpacker expenditure of 54.4% and 81%, respectively.

Key Market Synopsis	Visitors	Visitor Nights	Average Expenditure per Night (AUD)
New Zealand	1,214,752	15,313,336	176
China	1,093,625	43,214,129	210
United Kingdom	667,037	24,026,443	156
USA	648,097	14,572,420	257
Singapore	382,799	6,205,229	235
Korea	255,294	13,777,076	117
India	234,674	14,322,500	80

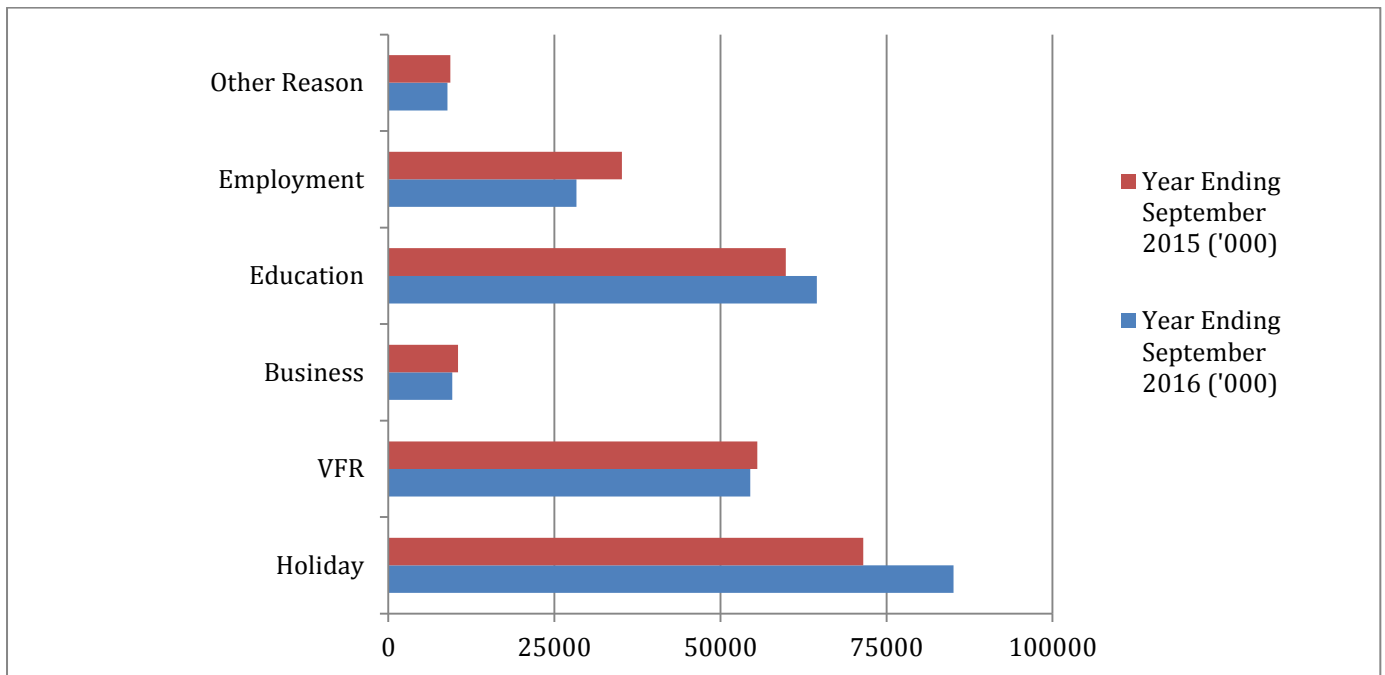
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2. International Visitor Trends

2.1 International Visitor Nights by State ('000)

Rank	State	Year Ending September 2015	Year Ending September 2016	Change (%)
1	NSW	82,421,083	87,071,077	5.6
2	VIC	57,701,513	59,927,301	3.9
3	QLD	50,554,701	53,087,032	5.0
4	WA	28,644,527	28,804,217	0.6
5	SA	9,214,753	9,863,804	7.0
6	ACT	5,088,269	4,418,966	-13.2
7	NT	4,400,068	3,846,874	-12.6
8	TAS	3,285,672	3,382,893	3.0

2.2 Purpose/Reason for Visit (by visitor nights)



*Holiday up 25.3%

*Employment down 16.5%

*Education up 16.7

*Business down 3.9%

*VFR down 0.1%

*Other down 10.5%

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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 September 2015	Year Ending September 2016	Change (%)
1	Sydney	7,421,797	8,561,951	15.36
2	Melbourne	4,971,760	5,585,710	12.35
3	Gold Coast	1,854,027	2,393,159	29.08
4	Brisbane	1,740,090	1,859,719	6.87
5	Perth	1,654,716	1,620,026	-2.10
6	Adelaide	789,492	1,011,385	28.11
7	Darwin	453,326	416,271	-8.17
8	Hobart	354,602	385,598	8.74
9	Canberra	252,168	284,212	12.71

3.2 Capital Cities, International Visitor Nights Across All Accommodation Categories

Rank	Capital City	Year Ending September 2015	Year Ending September 2016	Change (%)
1	Sydney	69,077,665	74,181,616	7.39
2	Melbourne	50,965,304	52,945,668	3.89
3	Brisbane	23,737,815	24,735,391	4.20
4	Perth	22,496,031	22,468,041	-0.12
5	Gold Coast	8,462,220	10,722,322	26.71
6	Adelaide	7,470,547	8,256,982	10.53
7	Canberra	5,088,269	4,418,966	-13.15
8	Darwin	2,836,756	2,326,216	-18.00
9	Hobart	1,855,051	1,884,987	1.61

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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 September 2015	Year Ending September 2016	Change (%)
1	QLD	2,841,286	3,414,157	20.16
2	NSW	903,661	956,571	5.86
3	VIC	493,305	593,051	20.22
4	WA	597,201	551,321	-7.68
5	NT	460,658	466,077	1.18
6	SA	189,219	300,141	58.62
7	TAS	188,660	274,659	45.58

4.2 Regional Locations, International Visitor Nights Across All Accommodation Categories

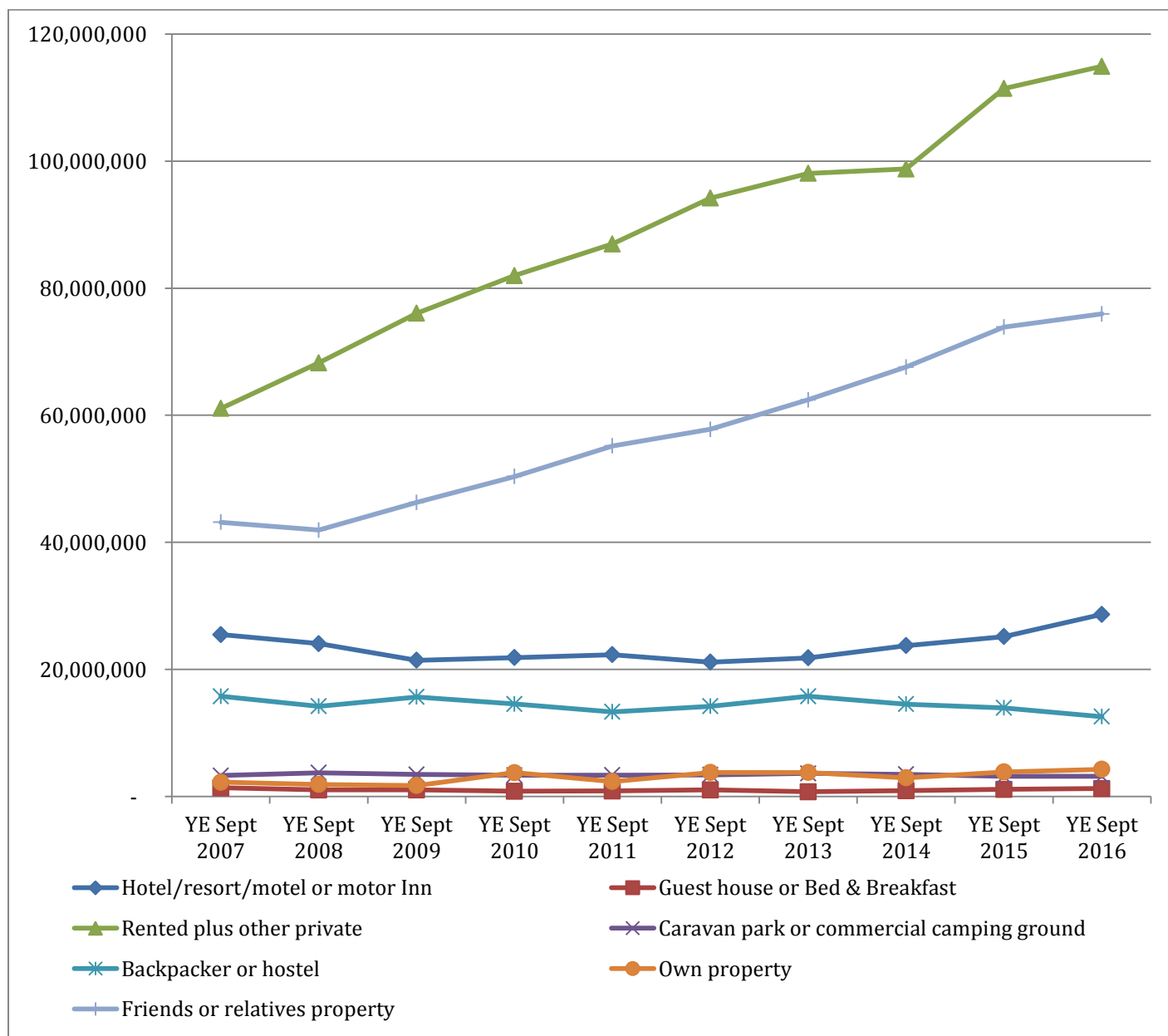
Rank	Regional	Year Ending September 2015	Year Ending September 2016	Change (%)
1	QLD	18,354,667	17,629,319	-3.95
2	NSW	13,343,418	12,889,461	-3.40
3	VIC	6,736,209	6,981,633	3.64
4	WA	6,148,496	6,336,176	3.05
5	SA	1,744,206	1,606,823	-7.88
7	NT	1,563,312	1,520,657	-2.73
6	TAS	1,430,622	1,497,906	4.70

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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. Backpackers

STATE	VISITOR NIGHTS ('000)			REGIONAL EXPENDTURE (\$M)		
	YE June 2015	YE June 2016	Change	YE June 2015	YE June 2016	Change
New South Wales	14 199	14 084	-0.8	1 027	1 063	3.5
Victoria	8 594	8 824	2.7	626	653	4.3
Queensland	13 624	12 351	-9.3	960	887	-7.6
South Australia	1 657	1 246	-24.8	103	91	-11.6
Western Australia	4 949	4 809	-2.8	286	271	-5.0
Tasmania	643	993	54.4	48	87	81.0
Northern Territory	1 400	1 129	-19.4	108	112	-3.2
ACT	827	386	-53.3	51	21	-59.2
Total	46 140	44 065	-4.5	3 208	3 185	-0.7

7. Notes

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

8. More Information

The data in this Member Bulletin is from Tourism Research Australia's *International Visitors In Australia: September 2016 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.