

6 September 2017

INTERNATIONAL TOURISM REPORT: OVERVIEW OF ACCOMMODATION PERFORMANCE

1. Key markets and trends

1.1 Overview

International Visitors	7,878,024	↑8.72%
International Visitor Nights	265,988,554	↑7.29%
International Visitor Expenditure	\$40.643 billion	↑6.54%
Average International Visitor Expenditure	\$5,159	↓2.00%

International visitors to Australia spent a record \$40.6 billion in the year ending June 2017 – an increase of \$2.5 billion (6.54%) on the previous year. International visitor nights increased 7.29%.

In terms of reasons for travel, the holiday and education segments recorded expenditure growth of 5% and 18%, respectively. Holiday visitor nights grew 5%, while education visitor nights grew 17%.

In capital cities (including Gold Coast), total visitor nights in the ‘Hotels, Motels, and Resorts’ category grew 9.4% to 23.1 million. The strongest growth was in Melbourne (22%) and Brisbane (13%). In regional locations, total visitor nights in the same category grew 0.64%, with the strongest growth in the Northern Territory (8%).

The number of international visitor nights in unregulated accommodation has grown 93% since 2008, growing from 64.8 million to 125.7 million. Over the same period international visitor nights in ‘Hotels, Motels and Resorts’ has grown 19.8% from 24.6 million to 29.4 million. As such, unregulated accommodation accounts for four times the number of international visitor nights as regulated hotel, resort, motel and serviced apartment accommodation.

Key Market Synopsis	Visitors	Annual Growth	Visitor Nights	Annual Growth	Average Expenditure per Night (AUD)
New Zealand	1,229,364	2.23%	14,396,412	-5.62%	185
China	1,160,588	9.52%	51,463,307	23.6%	190
USA	705,969	14.05%	15,141,835	7.09%	249
United Kingdom	682,116	2.65%	24,371,863	-2.64%	145
Japan	391,163	12.67%	9,969,156	10.06%	176
Singapore	384,636	3.07%	6,532,834	3.91%	224
Malaysia	359,302	12.02%	8,650,200	13.84%	154
Korea	268,803	12.36%	11,823,058	-7.47%	128
India	260,614	14.79%	14,715,663	4.41%	97

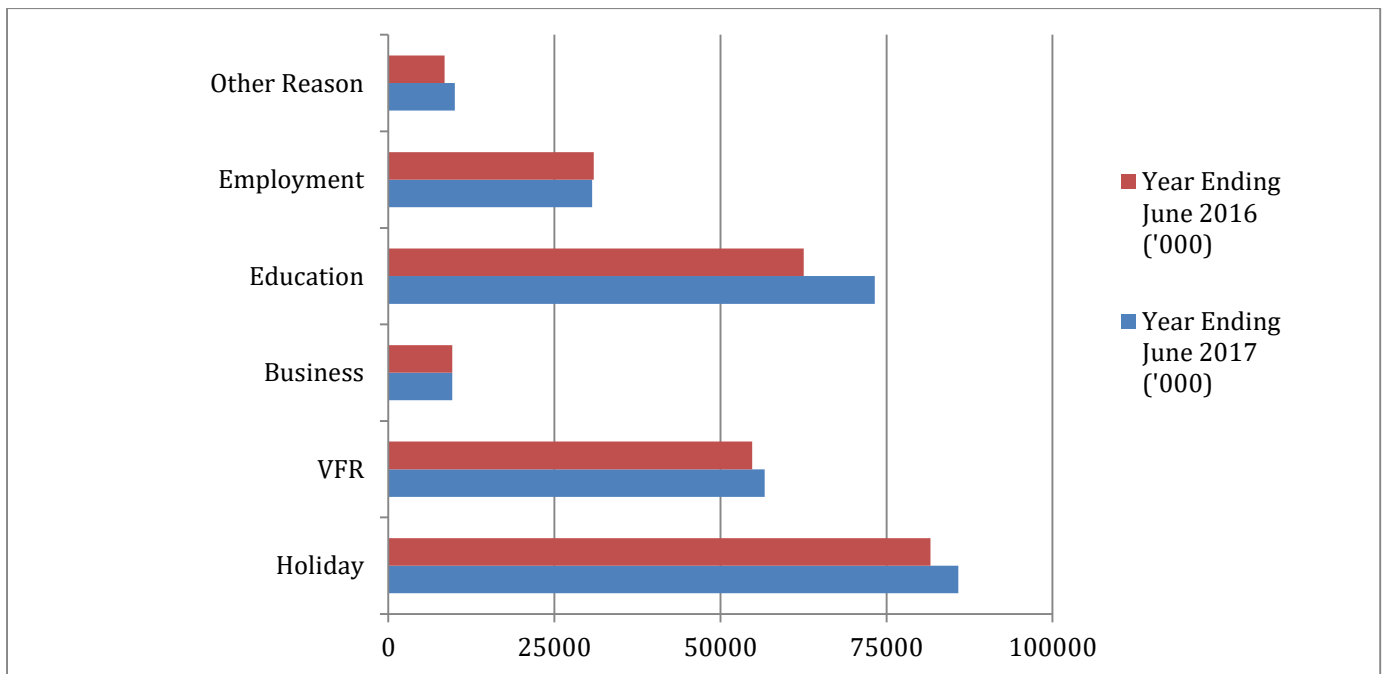
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2. International Visitor Trends

2.1 International Visitor Nights by State ('000)

Rank	State	Year Ending June 2016	Year Ending June 2017	Change (%) in Visitor Nights	% of all Visitor Nights
1	NSW	86,858,920	92,515,764	6.5	34.8
2	VIC	58,792,588	67,380,455	14.6	25.3
3	QLD	51,967,850	53,911,980	3.7	20.3
4	WA	27,901,210	28,198,415	1.1	10.6
5	SA	9,627,229	10,934,589	13.6	4.1
6	ACT	4,981,632	4,583,584	-8.0	1.7
7	NT	3,799,849	3,911,860	2.9	1.5
8	TAS	3,411,604	3,949,374	15.8	1.5
Total	AUS	247,911,508	265,988,554	7.3	100

2.2 Purpose/Reason for Visit (by visitor nights)



*Holiday up 5.1%

*Employment down 0.7%

*Education up 17.1%

*Business up 0.1%

*VFR up 3.4%

*Other up 18.25%

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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 2016	Year Ending June 2017	Change
1	Sydney	8,160,042	8,770,941	7.49%
2	Melbourne	5,214,177	6,383,122	22.42%
3	Gold Coast	2,270,393	2,285,807	0.68%
4	Brisbane	1,772,863	2,007,124	13.21%
5	Perth	1,671,507	1,621,571	-2.99%
6	Adelaide	930,884	1,048,147	12.60%
7	Hobart	371,918	381,216	2.50%
8	Darwin	453,125	333,451	-26.41%
9	Canberra	283,482	287,670	1.48%
Total	Capital Cities incl. Gold Coast	21,128,392	23,119,048	9.42%

3.2 Capital Cities, International Visitor Nights Across All Accommodation Categories

Rank	Capital City	Year Ending June 2016	Year Ending June 2017	Change (%)
1	Sydney	73,130,371	77,706,614	6.26%
2	Melbourne	51,883,411	59,216,439	14.13%
3	Brisbane	24,013,202	26,159,997	8.94%
4	Perth	21,633,000	22,525,999	4.13%
5	Gold Coast	10,166,849	9,979,161	-1.85%
6	Adelaide	7,972,916	8,972,241	12.53%
7	Canberra	4,981,632	4,583,584	-7.99%
8	Darwin	2,327,811	2,410,698	3.56%
9	Hobart	1,932,651	2,188,507	13.24%
Total	Capital Cities incl. Gold Coast	198,041,842	213,743,240	7.93%

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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 2016	Year Ending June 2017	Change
1	QLD	3,294,031	3,413,066	3.61%
2	NSW	918,249	960,712	4.62%
3	VIC	565,977	554,411	-2.04%
4	WA	569,446	496,990	-12.72%
5	NT	430,881	467,041	8.39%
6	TAS	257,030	256,473	-0.22%
7	SA	300,725	228,082	-24.16%
Total	Regional	6,336,338	6,376,775	0.64%

4.2 Regional Locations, International Visitor Nights Across All Accommodation Categories

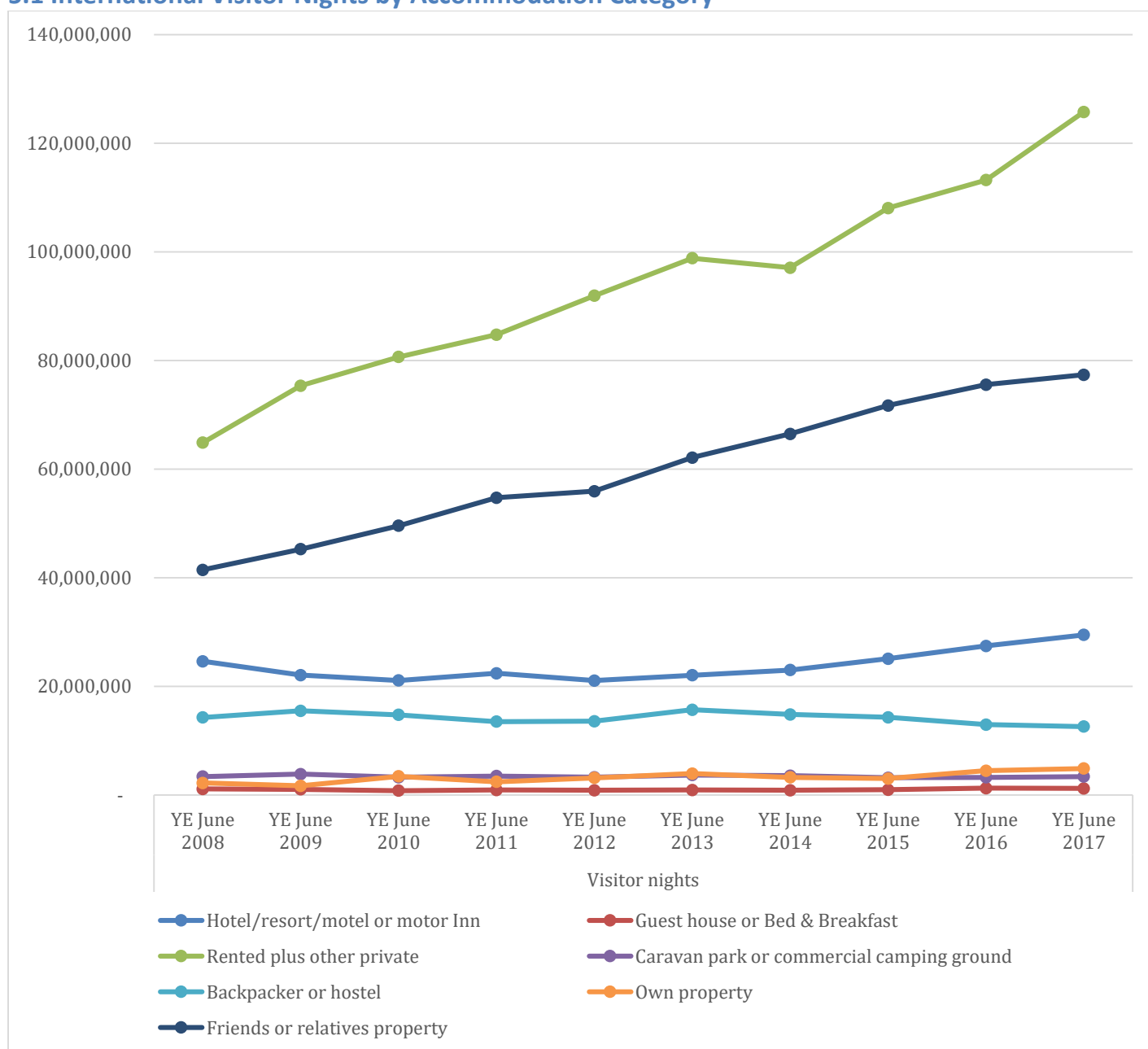
Rank	Regional	Year Ending June 2016	Year Ending June 2017	Change
1	QLD	17,787,799	17,772,822	-0.08%
2	NSW	13,728,549	14,809,151	7.87%
3	VIC	6,909,177	8,164,016	18.16%
4	WA	6,268,210	5,672,416	-9.51%
5	SA	1,654,313	1,962,348	18.62%
6	TAS	1,478,953	1,760,867	19.06%
7	NT	1,472,039	1,501,162	1.98%
Total	Regional	49,869,666	52,245,314	4.76%

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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: June 2017 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.