

INTERNATIONAL TOURISM REPORT: OVERVIEW OF ACCOMMODATION PERFORMANCE

1. Key markets and trends

1.1 Overview

International Visitors	8,662,019	2.51%	↑
International Visitor Nights	275,789,666	2.09%	↑
International Visitor Expenditure	\$45.2 billion	4.68%	↑
Average International Visitor Expenditure	\$5,219	2.11%	↑

Visitors, Visitor Nights and Expenditure summary

- Data for the year ending September 2019 shows that international visitation rose 2.51% to nearly 8.7million visitors, staying 275.7million nights, and spending \$45.2 billion.
- There were mixed results for Australia's top 5 markets over the year. Growth was impressive for Japan with visitors up 9% to 455,000 and spend up 15% to \$2.1 billion. The US also saw solid gains, with visitors up 5% to 771,000, and spend increasing a strong 10% to \$4.0 billion.
- There was growth in visitation and visitor nights for the Indian market, however this is fostered primarily by growth in visiting friends and relatives.
- The average length of holiday trips to Australia has fallen from 26 to 21 nights over the last five years. This has occurred across all top markets except China (up from 10 to 14 nights). The increase for China is due to more free and independent travellers, who stay for longer – on average – than group tour travellers (20 nights compared to 6 nights).
- The wider Asian market now accounts for 55% of all holiday travel to Australia, and has had the largest impact on the decline in overall trip length. Their average trip length has dropped from 21 to 17 nights.
- There has been no adverse financial impact from shorter holiday trips. The average spend per holiday visitor remained relatively constant at \$4,300 per visitor (down only 1%). This is due to spend per night increasing from \$166 to \$208 over the last five years.

Accommodation sector takeaways

- For 'Hotel/resort/motel or motor inn' in capital cities, both Perth (up 10.17%) and Canberra (up 25.78%) had impressive growth. Hobart, Darwin, Adelaide and the Gold Coast all saw declines (see Table 3.1).
- Regionally, QLD, VIC and TAS all saw declines in nights spent in the 'Hotel/resort/motel or motor inn' category, whilst NSW, NT and WA saw healthy growth (see Table 4.1).

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	1,331	1.18%	58,395	1.68%	211
New Zealand	1,276	1.48%	12,977	0.64%	200
United States of America	771	4.70%	13,168	0.89%	306
United Kingdom	670	-4.25%	20,788	-7.38%	160
Japan	455	8.76%	10,892	4.02%	193
Singapore	417	9.39%	5,663	-0.81%	270
Malaysia	344	-3.69%	7,292	-17.47%	175
India	364	12.15%	22,253	18.69%	80
Hong Kong	284	2.79%	5,983	-12.15%	229
Korea	250	-10.04%	10,230	-7.34%	146

2.2 International Visitor Nights by State ('000)

Rank	State	Year Ending September 2018	Year Ending September 2019	% of all Visitor Nights	Change (%)
1	NSW	95 459	97 784	35.5	2.4
2	VIC	70 178	74 329	27.0	5.9
3	QLD	54 534	55 216	20.0	1.3
4	SA	10 108	9 780	3.5	-3.2
5	WA	25 557	24 493	8.9	-4.2
6	TAS	5 050	4 241	1.5	-16.0
7	NT	3 573	3 331	1.2	-6.8
8	ACT	5 168	6 117	2.2	18.4
	TOTAL	270 133	275 790	100.0	2.1

MEMBER BULLETIN

2.3 Purpose/Reason for Visit (by visitor nights)



There was an increase of 10.7% increase for 'education', and an increase of 3.7% for 'holiday.'

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	17.1	5219.18	305.74
Singapore	13.6	3665.06	269.79
China	43.9	9235.01	210.56
Hong Kong	21.1	4834.49	229.50
New Zealand	10.2	2031.93	199.76
Japan	23.9	4613.57	192.90
Malaysia	21.2	3698.68	174.58
United Kingdom	31.0	4955.81	159.62
Korea	40.9	5958.52	145.78
India	61.1	4907.75	80.28
Total	31.8	5218.94	163.92

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 September 2018	Year Ending September 2019	Change
1	Sydney	8,638,458	8,798,011	1.85%
2	Melbourne	6,031,059	6,065,640	0.57%
3	Brisbane	2,121,284	2,087,960	-1.57%
4	Gold Coast	2,165,865	1,959,329	-9.54%
5	Perth	1,582,265	1,743,199	10.17%
6	Adelaide	881,373	777,700	-11.76%
7	Canberra	306,333	385,318	25.78%
8	Hobart	478,281	383,350	-19.85%
9	Darwin	403,134	360,361	-10.61%
Total	Capital Cities incl. Gold Coast	22,608,049	22,560,869	-0.21%

3.2 Capital Cities, International Visitor Nights Across All Accommodation Categories

Rank	Capital City	Year Ending September 2018	Year Ending September 2019	Change
1	Sydney	80,925,609	83,060,774	2.64%
2	Melbourne	62,289,990	64,891,502	4.18%
3	Brisbane	28,291,516	28,231,857	-0.21%
4	Perth	20,488,237	19,089,670	-6.83%
5	Gold Coast	9,603,846	10,046,294	4.61%
6	Adelaide	8,322,012	8,029,783	-3.51%
7	Canberra	5,167,668	6,116,962	18.37%
8	Hobart	3,453,699	2,416,211	-30.04%
9	Darwin	1,977,337	1,622,764	-17.93%
Total	Capital Cities incl. Gold Coast	220,519,914	223,505,817	1.35%

MEMBER BULLETIN

4. Accommodation Performance - Regional

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

Rank	Regional	Year Ending September 2018	Year Ending September 2019	Change
1	QLD	3,259,915	2,954,974	-9.35%
2	NSW	1,059,890	1,136,486	7.23%
3	VIC	682,203	592,403	-13.16%
4	NT	490,809	517,866	5.51%
5	WA	472,319	509,677	7.91%
6	SA	188,011	263,117	39.95%
7	TAS	282,895	242,994	-14.10%
Total	Regional	6,436,042	6,217,518	-3.40%

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

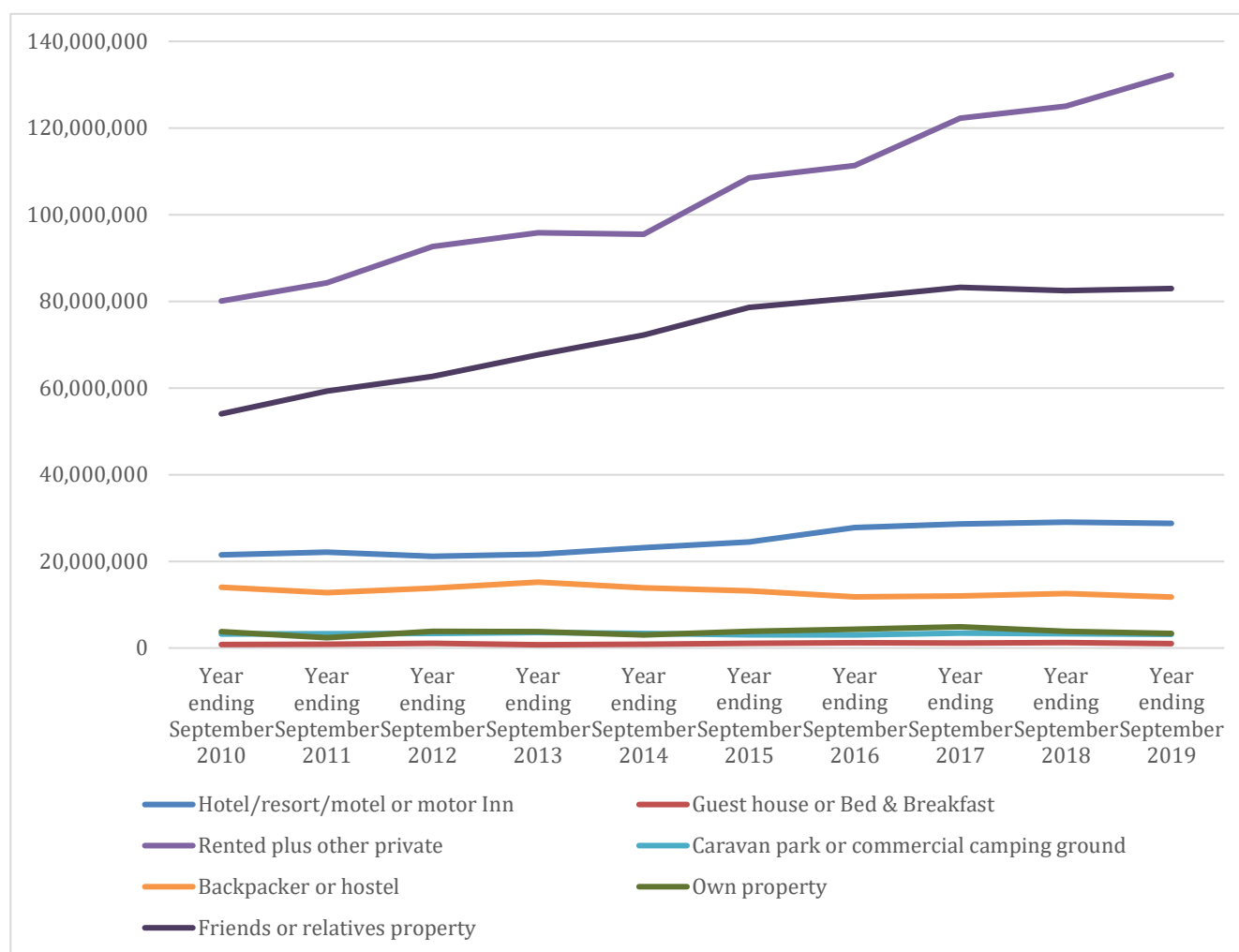
Rank	Regional	Year Ending September 2018	Year Ending September 2019	Change
1	QLD	16,638,596	16,938,164	1.80%
2	NSW	14,532,946	14,722,768	1.31%
3	VIC	7,888,183	9,437,042	19.64%
4	WA	5,069,105	5,403,049	6.59%
5	TAS	1,596,719	1,824,835	14.29%
6	SA	1,786,363	1,750,546	-2.01%
7	NT	1,596,095	1,708,555	7.05%
Total	Regional	49,612,834	52,283,849	5.38%

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 65% from YE September 2010 to YE September 2019. Over the same period, 'Hotel/resort/motel or motor inn' increased 34%. 'Rented plus Other Private' composes almost 48% of total accommodation at present, whilst 'Hotel/resort/motel or motor inn' comprises just under 11%. Note that the measure of what constitutes unregulated accommodation is somewhat imperfect.

MEMBER BULLETIN

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: September 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