



Image: Mantra on Salt Beach

Source: Survey of Tourist Accommodation conducted by the Australian Bureau of Statistics

Tourist Accommodation Snapshot

JUNE QTR 2011

All Establishments (Hotels, motels, and serviced apartments with at least 15 rooms)

steady
 increase
 decrease
 -0.5 to 0.5% > 0.5% < 0.5%

	Supply				Demand		Revenue					
	Establishments	% Change ¹	Room Nights Available ('000)	% Change ¹	Room Occupancy %	Change (% point)	Takings (\$ millions)	% Change ¹	Average Room Rate \$	% Change ¹	Yield ² \$	% Change ¹
Australia	4,250	-1.2%	20,492	-0.3%	62.8	1.9	1979.0	7.5%	153.78	4.5%	96.57	7.7%
NSW	1,406	-1.1%	6,383	-0.8%	62.9	1.9	619.8	7.8%	154.38	5.4%	97.10	8.6%
QLD	1,125	-1.6%	5,519	-1.4%	61	2.5	488.7	5.9%	145.16	3.0%	88.55	7.4%
VIC	809	-1.2%	3,766	1.6%	63.2	2.4	376.0	9.3%	157.99	3.5%	99.85	7.6%

There has been a decrease in the total number of establishments nationwide in the June Quarter 2011 with the largest fall recorded by QLD. This plummet resulted in a decline in the number of room nights available in NSW and QLD (-0.8 % and -1.4 % respectively) while VIC performed well this quarter, showing an increase of 1.6%. Room occupancy rates for all three states grew above the national average with QLD showing the largest increase on the June Quarter 2010 (+2.5%). Despite QLD's growth in room occupancy it had the slowest growth in takings from accommodation (+5.9%) when compared to NSW (+7.8%) and VIC (+9.3%). NSW accounts for about a third of national takings for accommodation (\$620 million) and records the highest growth in the average room rate and yield compared to the June Qtr 2010.

New South Wales by type of establishment (establishments with at least 15 rooms)

	Supply				Demand		Revenue					
	Establishments	% Change ¹	Room Nights Available ('000)	% Change ¹	Room Occupancy %	Change (% point)	Takings (\$ millions)	% Change ¹	Average Room Rate \$	% Change ¹	Yield ² \$	% Change ¹
Hotels	205	-1.9%	2,224	-0.6%	71.8	1.3	297.7	8.3%	186.44	7.0%	133.9	9.0%
Motels	1,006	-0.5%	3,060	-0.2%	55.6	1.9	201.7	8.2%	118.53	4.7%	65.9	8.4%
Serviced Apartments	195	-3.5%	1,098	-2.9%	65.3	3.3	120.4	5.7%	168.04	3.3%	109.7	8.8%
Total	1,406	-1.1%	6,383	-0.8%	62.9	1.9	619.8	7.8%	154.38	5.4%	97.1	8.6%

The decline in establishments in NSW in the June Qtr 2011 was mainly driven by a plunge in Serviced Apartments (-3.5%) and Hotels (-1.9%), which also reduced the room supply (-2.9% and -0.6%, respectively). Motel establishments and room supply remained fairly stable this quarter. As for occupancy rates, the fastest growth was recorded by Serviced Apartments (3.3 percentage points), however, the highest occupancy rate this quarter was for Hotels (+71.8%), up 1.3 percentage points compared to June Qtr 2010. Revenue grew across all establishments, with hotels having the strongest growth (+8.3%) on the June Qtr 2010, followed by Motels (+8.2%) and Serviced Apartments (+5.7%). The revenue increase was supported by growth in average room rates and yield.

Victoria by type of establishment (establishments with at least 15 rooms)

	Supply				Demand		Revenue					
	Establishments	% Change ¹	Room Nights Available ('000)	% Change ¹	Room Occupancy %	Change (% point)	Takings (\$ millions)	% Change ¹	Average Room Rate \$	% Change ¹	Yield ² \$	% Change ¹
Hotels	153	-1.9%	1,480	2.1%	68.9	3.8	186.4	11.7%	182.80	3.4%	125.9	9.4%
Motels	503	-1.6%	1,425	-0.9%	53.2	0.5	88.6	2.2%	116.95	2.2%	62.2	3.1%
Serviced Apartments	153	0.7%	861	5.0%	70.0	2.5	101.0	11.6%	167.64	2.5%	117.3	6.3%
Total	809	-1.2%	3,766	1.6%	63.2	2.4	376.0	9.3%	157.99	3.5%	99.8	7.6%

The decline in the number of establishments in VIC in June Quarter 2011 was mainly driven by decrease in Hotels (-1.9%) and Motels (-1.6%). Only Serviced Apartments establishments went up (+0.7%) when compared to June Qtr 2010. All establishments recorded growth in room supply except for Motels which declined by 0.9% on the previous period. Hotels saw the highest increase in room occupancy, up by 3.8 percentage points to 68.9% while Serviced Apartments had the highest room occupancy rate (70%). Revenue grew across all establishments with Hotels and Serviced Apartments sharing almost equal increases in takings. Hotels recorded a 9.4% increase in yield, Serviced Apartments' yield increased by 6.3% while Motels recorded 3.1% growth in June Quarter 2011.

Queensland by type of establishment (establishments with at least 15 rooms)

	Supply				Demand		Revenue					
	Establishments	% Change ¹	Room Nights Available ('000)	% Change ¹	Room Occupancy %	Change (% point)	Takings (\$ millions)	% Change ¹	Average Room Rate \$	% Change ¹	Yield ² \$	% Change ¹
Hotels	174	-7.0%	1,850	-4.1%	61.8	1.5	188.1	-0.5%	164.58	1.2%	101.7	3.7%
Motels	531	-0.6%	1,718	-0.8%	63.4	4.5	131.2	12.8%	120.46	5.6%	76.4	13.7%
Serviced Apartments	420	-0.5%	1,953	0.7%	58.1	1.8	169.4	8.5%	149.28	4.4%	86.7	7.8%
Total	1,125	-1.6%	5,519	-1.4%	61.0	2.5	488.7	5.9%	145.16	3.0%	88.5	7.4%

The number of establishments in QLD have been reduced to some extent when compared to June Qtr 2010. The largest decrease was seen by Hotels (-7%), Motels went down by 0.6% while Serviced Apartments remained stable and also showed a 0.7% growth in room nights available. Furthermore, both hotel room supply and takings fell in the June Quarter 2011 (4.1% and 0.5% respectively). In contrast, Motels recorded quite a significant increase (+12.8%) in takings for accommodation while Serviced Apartments grew by 8.5%. Average room rates and yield went up across all establishments with the largest increase in Motels (up 5.6% and 13.7% respectively).

Notes:

1. Percentage change between the reported quarter and the corresponding quarter in the previous year
2. Average takings per room per night for all rooms whether they are occupied or not