



Image: Mantra on Salt Beach

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

## Tourist Accommodation Snapshot

## SEPTEMBER 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 <sup>1</sup>	Room Nights Available ('000)	% Change <sup>1</sup>	Room Occupancy %	Change (% point)	Takings (\$ millions)	% Change <sup>1</sup>	Average Room Rate \$	% Change <sup>1</sup>	Yield <sup>2</sup> \$	% Change <sup>1</sup>
Australia	4,231	-1.2%	20,770	-0.5%	66.8	1.0	2193.5	4.9%	158.10	3.9%	105.61	5.5%
NSW	1,398	-1.2%	6,477	-1.1%	65.4	0.6	666.9	3.5%	157.44	3.6%	102.97	4.6%
QLD	1,124	-1.5%	5,599	-1.7%	70.5	1.6	592.3	3.3%	150.05	2.7%	105.79	5.0%
VIC	804	-0.9%	3,822	1.0%	64.2	0.9	404.1	6.3%	164.69	3.8%	105.73	5.3%

There has been a decrease in the total number of establishments nationwide in the Sep Quarter 2011 with the largest fall recorded by QLD (-1.5%). This plummet resulted in a decline in the number of room nights available in QLD and NSW (-1.7% and -1.1% respectively) while VIC performed well this quarter, showing an increase of 1.0%. Room occupancy rates for all three states grew with QLD showing the largest increase on the Sep Qtr 2010 (+1.6%). Despite QLD's growth in room occupancy it had the slowest growth in takings from accommodation (+3.3%) when compared to NSW (+3.5%) and VIC (+6.3%). NSW accounts for the largest proportion of national takings from accommodation (\$667 million) but still showed the lowest yield (\$102.97) among the three states. VIC had the highest average room rate (\$164.69) this qtr followed by NSW (\$157.44).

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

	Supply				Demand		Revenue					
	Establishments	% Change <sup>1</sup>	Room Nights Available ('000)	% Change <sup>1</sup>	Room Occupancy %	Change (% point)	Takings (\$ millions)	% Change <sup>1</sup>	Average Room Rate \$	% Change <sup>1</sup>	Yield <sup>2</sup> \$	% Change <sup>1</sup>
Hotels	206	-0.5%	2,276	-0.8%	75.2	0	324.0	3.9%	189.33	4.8%	142.4	4.8%
Motels	998	-1.1%	3,098	-0.8%	57.0	0.5	213.9	2.7%	121.11	2.6%	69.0	3.5%
Serviced Apartments	194	-2.5%	1,105	-2.1%	68.7	1.9	129.1	3.6%	170.08	2.9%	116.8	5.8%
Total	1,398	-1.2%	6,477	-1.1%	65.4	0.6	666.9	3.5%	157.44	3.6%	103.0	4.6%

The decline in all establishments in NSW in the Sep Qtr 2011 was mainly driven by a drop in Serviced Apartments (-2.5%) and Motels (-1.1%), which also reduced the room supply (-2.1% and -0.8%, respectively). Hotel establishments remained fairly stable this quarter while room supply showed the same decline as for Motels. Serviced Apartments had the fastest growth in occupancy rates (1.9 percentage points) while Hotels recorded the highest occupancy rate this qtr (75.2%) in line with the Sept qtr 2010. Revenue grew across all establishments, with hotels having the strongest growth (+3.9%) on the Sep Qtr 2010, followed by Serviced Apartments (+3.6%) and Motels (+2.7%). 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 <sup>1</sup>	Room Nights Available ('000)	% Change <sup>1</sup>	Room Occupancy %	Change (% point)	Takings (\$ millions)	% Change <sup>1</sup>	Average Room Rate \$	% Change <sup>1</sup>	Yield <sup>2</sup> \$	% Change <sup>1</sup>
Hotels	152	0.0%	1,497	2.1%	70.7	0.9	199.3	6.7%	188.38	3.2%	133.2	4.6%
Motels	502	-0.8%	1,461	-0.8%	53.2	0.6	95.2	3.9%	122.46	3.5%	65.1	4.7%
Serviced Apartments	150	-2.0%	869	2.7%	71.2	0.5	109.6	7.8%	177.19	4.3%	126.2	5.0%
Total	804	-0.9%	3,822	1.0%	64.2	0.9	404.1	6.3%	164.69	3.8%	105.7	5.3%

The decline in the number of establishments in VIC in the Sep Qtr 2011 was mainly driven by decrease in Serviced Apartments (-2.0%) and Motels (-0.8%). The number of Hotel establishments remained the same when compared to the Sep Qtr 2010. All establishments recorded growth in room supply except for Motels which declined by 0.8% on the previous period. Hotels saw the highest increase in room occupancy, up by 0.9 percentage points to 70.7% while Serviced Apartments had the highest room occupancy rate (71.2%). Revenue grew across all establishments with Serviced Apartments recording the highest increase in takings and yield (+7.8% and +5.0% respectively).

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

	Supply				Demand		Revenue					
	Establishments	% Change <sup>1</sup>	Room Nights Available ('000)	% Change <sup>1</sup>	Room Occupancy %	Change (% point)	Takings (\$ millions)	% Change <sup>1</sup>	Average Room Rate \$	% Change <sup>1</sup>	Yield <sup>2</sup> \$	% Change <sup>1</sup>
Hotels	175	-5.4%	1,892	-3.3%	71.6	1.2	231.8	0.4%	171.10	2.1%	122.5	3.8%
Motels	529	-0.6%	1,736	-0.2%	71.3	4.4	153.3	12.6%	123.89	5.9%	88.3	12.9%
Serviced Apartments	420	-0.9%	1,969	-1.2%	68.8	-0.5	207.2	0.4%	152.91	2.4%	105.2	1.7%
Total	1,124	-1.5%	5,599	-1.7%	70.5	1.6	592.3	3.3%	150.05	2.7%	105.8	5.0%

The number of establishments in QLD have been reduced to some extent when compared to the Sep Qtr 2010. The largest decrease was seen by Hotels (-5.4%), Serviced Apartments went down by 0.9% and Motels decreased by 0.6%. Motels remained fairly stable in room nights available, while Hotels and Serviced Apartments declined by 3.3% and 1.2% respectively. Furthermore, takings for accommodation for both Hotels and Serviced Apartments remained steady in the Sep Quarter 2011 while Motels recorded quite a significant increase (+12.6%). Average room rates and yield went up across all establishments with the largest increase recorded for Motels (up 5.9% and 12.9% 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