

Tourist Accommodation Data Sheet

Year ended December 2010

ALL ESTABLISHMENTS

All establishments refers to hotels and resorts; motels, private hotels, and guest houses; and serviced apartments.

IMPACT OF WEATHER EVENTS IN QUEENSLAND:

Significant flooding and cyclone events occurred in Queensland in late December 2010 and continued into 2011. The full impact of these events will not be seen in tourism data until year ended March 2011 data (published in June 2011). Many of Queensland's tourism regions were affected either directly or indirectly by these weather events.

	SUPPLY				DEMAND				REVENUE					
	Establishments	% Change ¹	Room Nights Available	% Change ¹	Room Nights Occupied	% Change ¹	Room Occupancy %	Change (%point) ²	Takings \$ (millions)	% Change ¹	Average Room Rate \$	% Change ¹	Yield ³ \$	% Change ¹
Australia	4,279	-0.7%	82,473,205	0.0%	52,836,100	3.3%	64.1%	2.0%	\$8,088	6.0%	\$153.08	2.6%	\$98.07	6.0%
QLD	1,141	-0.1%	22,401,816	-0.7%	14,049,300	0.9%	62.7%	1.0%	\$2,061	2.7%	\$146.72	1.8%	\$92.01	3.4%
NSW	1,411	-1.0%	25,901,936	-0.4%	16,696,900	4.3%	64.5%	2.9%	\$2,595	8.2%	\$155.43	3.7%	\$100.19	8.6%
VIC	810	-1.1%	14,913,213	2.5%	9,551,900	7.0%	64.0%	2.7%	\$1,517	9.1%	\$158.77	1.9%	\$101.69	6.4%
WA	346	-2.0%	7,894,773	-0.9%	5,142,900	0.2%	65.1%	0.7%	\$849	3.6%	\$165.00	3.4%	\$107.49	4.6%
SA	265	0.4%	4,431,524	0.4%	2,802,200	3.4%	63.2%	1.8%	\$381	6.0%	\$135.82	2.5%	\$85.89	5.6%
Gold Coast	154	0.0%	4,762,270	-1.2%	3,243,663	1.3%	68.1%	1.7%	\$472	1.2%	\$145.62	-0.1%	\$99.18	2.5%
Brisbane	194	1.0%	4,733,593	1.7%	3,505,187	5.3%	74.0%	2.5%	\$574	10.5%	\$163.74	4.9%	\$121.25	8.6%
Sunshine Coast	130	1.6%	2,035,909	-2.5%	1,142,996	-3.9%	56.1%	-1.0%	\$189	-2.9%	\$165.30	1.1%	\$92.81	-0.4%
Fraser Coast⁴	47	-4.1%	686,797	1.5%	336,577	-3.6%	49.0%	-2.6%	\$37	-3.1%	\$109.45	0.4%	\$53.64	-4.6%
Darling Downs	104	-3.7%	977,220	-6.4%	567,328	-8.8%	58.1%	-1.5%	\$60	-6.2%	\$106.30	2.8%	\$61.71	0.3%
Bundaberg	34	3.0%	295,035	-7.1%	168,366	-7.7%	57.1%	-0.4%	\$19	-13.9%	\$112.86	-6.7%	\$64.40	-7.3%
Central QLD	107	0.9%	1,462,686	3.3%	812,341	0.2%	55.5%	-1.4%	\$101	6.5%	\$124.37	6.3%	\$69.07	3.1%
Mackay	55	-1.8%	803,342	3.9%	530,449	0.9%	66.0%	-1.9%	\$81	3.0%	\$152.88	2.0%	\$100.95	-0.9%
Whitsundays	35	-2.8%	1,055,830	-1.0%	543,235	-1.1%	51.5%	0.0%	\$121	1.8%	\$222.37	2.9%	\$114.41	2.9%
Townsville⁴	59	0.0%	1,080,313	1.2%	672,111	4.8%	62.2%	2.1%	\$82	7.3%	\$122.10	2.3%	\$75.97	6.0%
TNQ	180	0.6%	4,188,945	0.1%	2,282,161	-0.9%	54.5%	-0.5%	\$299	-2.1%	\$130.90	-1.3%	\$71.31	-2.2%
Outback	42	0.0%	443,560	7.0%	244,921	9.0%	55.2%	1.1%	\$26	10.4%	\$106.76	1.3%	\$58.95	3.2%

Key Points:

- Nationally, the commercial accommodation sector continued to recover, however demand was weaker to Queensland and WA. VIC and NSW saw the greatest percentage growth, driven by a recovery in the larger business markets to these states.
- Room supply was stable nationally, however declined to Queensland, NSW and WA. VIC was again the only state to see strong growth in room supply in 2010, driven by hotels, resorts and serviced apartments.
- Increased demand for commercial accommodation helped drive up average room rates nationally, and this translated into a healthy boost to takings and yield over the year.

- Brisbane saw demand for commercial accommodation increase, as domestic holiday and business travel rebounded, resulting in a recovery in room occupancy and revenue over the year.
- An increase in demand for commercial accommodation on the Gold Coast was dominated by strong demand for hotel and resort accommodation, where the region saw the most significant rebound.
- The Sunshine and Fraser Coasts witnessed an easing in demand, a result of weaker domestic holiday markets over the year.
- In contrast, the Whitsundays saw an easing in the rate of decline, with room occupancy stabilising over the year, a sign that the regions domestic market is recovering.

Tourist Accommodation Data Sheet

Year ended December 2010

HOTELS and RESORTS

Establishments with fifteen or more rooms which are licensed to operate a public bar and which provide accommodation on a room/suite basis, with a bath/shower and toilet in most guest rooms, but which do not have full cooking facilities (i.e. hot plates and oven/microwave) in most guest rooms.

	SUPPLY				DEMAND				REVENUE					
	Establishments	% Change ¹	Room Nights Available	% Change ¹	Room Nights Occupied	% Change ¹	Room Occupancy %	Change (%point) ²	Takings \$ (millions)	% Change ¹	Average Room Rate \$	% Change ¹	Yield ³ \$	% Change ¹
Australia	857	-0.2%	31,437,110	1.7%	21,641,300	5.1%	68.8%	2.2%	\$3,806	7.1%	\$175.86	1.9%	\$121.06	5.2%
QLD	184	0.0%	7,749,625	0.9%	5,013,500	1.7%	64.7%	0.5%	\$851	2.6%	\$169.81	0.8%	\$109.85	1.6%
NSW	206	-1.9%	9,139,539	1.0%	6,720,900	6.1%	73.5%	3.5%	\$1,257	9.4%	\$186.98	3.1%	\$137.50	8.3%
VIC	155	2.0%	5,784,129	5.2%	3,997,900	10.0%	69.1%	3.0%	\$738	11.5%	\$184.50	1.3%	\$127.52	5.9%
WA	125	-2.3%	3,743,372	-1.2%	2,529,900	0.5%	67.6%	1.2%	\$447	3.2%	\$176.77	2.6%	\$119.47	4.5%
SA	74	0.0%	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p
Gold Coast	26	0.0%	2,251,206	-0.3%	1,611,755	2.1%	71.6%	1.7%	\$256	2.0%	\$159.11	-0.1%	\$113.91	2.3%
Brisbane	32	6.7%	1,532,437	5.0%	1,187,882	8.4%	77.5%	2.4%	\$231	12.9%	\$194.35	4.1%	\$150.65	7.4%
Sunshine Coast	5	0.0%	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p
Fraser Coast⁴	5	0.0%	141,676	-3.3%	65,664	-11.9%	46.3%	-4.3%	\$7	-12.3%	\$101.91	-0.5%	\$47.23	-9.3%
Darling Downs	17	-5.6%	180,763	-6.3%	88,018	-6.4%	48.7%	0.2%	\$9	-1.5%	\$99.74	5.2%	\$48.57	5.1%
Bundaberg	2	0.0%	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p
Central QLD	16	0.0%	356,522	0.6%	173,290	-4.9%	48.6%	-2.8%	\$23	-4.8%	\$134.52	0.1%	\$65.38	-5.4%
Mackay	12	-7.7%	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p
Whitsundays	10	0.0%	742,936	-1.4%	388,062	-3.7%	52.2%	-1.2%	\$98	2.3%	\$252.23	6.2%	\$131.75	3.7%
Townsville⁴	12	-7.7%	327,609	3.6%	205,493	12.6%	62.7%	5.0%	\$26	14.3%	\$125.55	1.5%	\$78.75	10.3%
TNQ	40	5.3%	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p
Outback	7	0.0%	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p

Key Points:

- Hotel and resort accommodation recorded the largest growth in room supply over the year, driven by an expanding Victorian market.
- The increase in supply was met with strong demand nationally; however VIC and NSW again drove much of the increase.
- The strengthening in demand drove up revenue nationally. Room occupancy and takings growth in hotels and resorts was the highest compared with other types of commercial accommodation nationally.
- Queensland saw a recovery in demand, however, occupancy and average room rates remain below the national average, takings and yield results were strong for the majority of Queensland's regions in the hotel and resort sector.

- The regions of Brisbane and Townsville performed the strongest in the hotel and resort accommodation sector. Supply increased for Brisbane (however declined for Townsville), but both regions recorded an upswing in room nights available.
- The increased supply to Brisbane and Townsville was met with stronger demand. Upward pressure on average room rates drove the increases in takings and yield for both regions.
- The Gold Coast saw increased demand for hotel and resort accommodation, led by a strong international market, boosting takings and yield results over the year.
- Demand for hotel and resort accommodation was again weaker in the Whitsundays, however an upswing in average room rates drove up yield and takings over the year.

Tourist Accommodation Data Sheet

Year ended December 2010

MOTELS, PRIVATE HOTELS and GUEST HOUSES

Establishments with fifteen or more rooms which are not licensed to operate a public bar, and which provide accommodation on a room/suite basis, with a bath/shower and toilet in most guest rooms, but which do not have full cooking facilities (i.e. hot plates and oven/microwave) in most guest rooms.

	SUPPLY				DEMAND				REVENUE					
	Establishments	% Change ¹	Room Nights Available	% Change ¹	Room Nights Occupied	% Change ¹	Room Occupancy %	Change (%point) ²	Takings \$ (millions)	% Change ¹	Average Room Rate \$	% Change ¹	Yield ³ \$	% Change ¹
Australia	2,450	-1.1%	31,644,889	-0.7%	18,027,100	1.4%	57.0%	1.2%	\$2,139	4.8%	\$118.64	3.4%	\$67.59	5.6%
QLD	534	-0.2%	6,936,470	-1.9%	4,148,700	-1.8%	59.8%	0.1%	\$481	0.5%	\$115.86	2.4%	\$69.30	2.5%
NSW	1,007	-0.6%	12,396,614	0.2%	6,928,600	3.4%	55.9%	1.7%	\$818	7.6%	\$118.13	4.1%	\$66.02	7.4%
VIC	503	-2.9%	5,866,512	-1.1%	3,176,700	2.0%	54.1%	1.7%	\$373	3.8%	\$117.36	1.7%	\$63.55	4.9%
WA	130	-1.5%	2,323,337	0.4%	1,388,400	-0.6%	59.8%	-0.6%	\$176	5.2%	\$126.75	5.8%	\$75.74	4.7%
SA	156	-0.6%	1,931,767	n/p	1,066,500	n/p	55.2%	n/p	\$121	n/p	\$113.92	n/p	\$62.89	n/p
Gold Coast	30	0.0%	511,722	-7.2%	304,998	-2.6%	59.6%	2.8%	\$36	-3.6%	\$118.65	-1.1%	\$70.72	3.9%
Brisbane	92	0.0%	1,463,212	-1.3%	965,835	-0.8%	66.0%	0.3%	\$126	3.5%	\$129.96	4.4%	\$85.78	4.9%
Sunshine Coast	28	7.7%	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p
Fraser Coast⁴	23	-8.0%	229,450	5.5%	119,642	1.1%	52.1%	-2.3%	\$11	6.1%	\$88.24	4.9%	\$46.01	0.6%
Darling Downs	82	-3.5%	719,461	-6.9%	430,327	-8.2%	59.8%	-0.9%	\$46	-4.6%	\$106.28	4.0%	\$63.57	2.4%
Bundaberg	26	4.0%	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p
Central QLD	76	0.0%	898,729	1.2%	521,166	-1.7%	58.0%	-1.5%	\$60	1.2%	\$114.88	3.0%	\$66.62	0.1%
Mackay	34	0.0%	417,384	3.6%	296,317	4.3%	71.0%	0.4%	\$37	6.8%	\$123.69	2.4%	\$87.81	3.1%
Whitsundays	11	-8.3%	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p
Townsville⁴	38	2.7%	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p
TNQ	60	1.7%	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p
Outback	34	0.0%	353,313	6.2%	197,237	8.8%	55.8%	1.5%	\$22	12.9%	\$112.56	3.7%	\$62.84	6.3%

Key Points:

- Motels, private hotels and guest houses represent the largest commercial accommodation sector nationally. Although seeing the lowest room occupancy rate, the sector saw growth in takings, as average room rates increased and yield recovered. These types of establishments are the more affordable compared with hotels, resorts and serviced apartments and this is potentially supporting the sector nationally.
- Real growth in takings was seen nationally, driven by NSW and WA, whilst Queensland and Victoria continued to recover. WA and Queensland are benefitting from a strengthening resources sector.

- Evidence of a strong resources sector assisted the results for Mackay and Brisbane; led by the surge in business visitation in 2010.
- Demand for commercial accommodation in Mackay gained momentum, with the region recording the highest room occupancy in Queensland, followed by Brisbane.
- Average room rates increased to all Queensland regions, except the Gold Coast. Brisbane drove the upswing in room rates to reach the highest average room rate in the state, followed by Mackay.
- Supply of motels, private hotels and guest houses in the Outback increased, and this was met with stronger demand in the region. A recovery in average room rates assisted both takings and yield to recover in 2010.

Tourist Accommodation Data Sheet

Year ended December 2010

Establishments with fifteen or more units which mostly comprise self-contained units at the same location, and which are available on a unit/apartment basis to the general public for a minimum of one night. The units should have full cooking facilities (i.e. hot plates and oven/microwave), refrigerator and bath/shower and toilet facilities; all bed linen and towels should be provided, and daily servicing (i.e. cleaning and bed making) must be available through the on-site management, although this service may not necessarily be used.

SERVICED APARTMENTS

	SUPPLY				DEMAND				REVENUE					
	Establishments	% Change ¹	Room Nights Available	% Change ¹	Room Nights Occupied	% Change ¹	Room Occupancy %	Change (%point) ²	Takings \$ (millions)	% Change ¹	Average Room Rate \$	% Change ¹	Yield ³ \$	% Change ¹
Australia	972	-0.2%	19,845,687	0.8%	13,167,500	3.2%	66.3%	1.5%	\$2,144	5.4%	\$162.79	2.1%	\$108.01	4.5%
QLD	423	0.0%	7,839,405	0.5%	4,887,300	2.5%	62.3%	1.2%	\$729	4.4%	\$149.21	1.9%	\$93.02	3.9%
NSW	198	-2.0%	4,508,105	-1.6%	3,047,700	2.7%	67.6%	2.8%	\$520	6.5%	\$170.62	3.7%	\$115.35	8.2%
VIC	152	2.0%	3,344,888	7.1%	2,377,400	9.1%	71.1%	1.3%	\$406	10.0%	\$170.84	0.8%	\$121.42	2.7%
WA	91	-2.2%	1,871,336	0.2%	1,224,500	0.4%	65.4%	0.1%	\$225	3.2%	\$184.06	2.9%	\$120.44	3.0%
SA	35	6.1%	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p
Gold Coast	98	0.0%	1,999,342	-0.6%	1,326,910	1.3%	66.4%	1.3%	\$180	1.1%	\$135.44	-0.2%	\$89.89	1.8%
Brisbane	70	0.0%	1,737,944	1.5%	1,351,470	7.3%	77.8%	4.2%	\$218	12.3%	\$160.99	4.7%	\$125.19	10.6%
Sunshine Coast	97	0.0%	1,509,300	-3.2%	844,860	-4.9%	56.0%	-1.0%	\$142	-0.8%	\$168.04	4.3%	\$94.07	2.5%
Fraser Coast⁴	19	5.6%	315,556	1.1%	151,271	-2.0%	47.9%	-1.5%	\$20	-4.2%	\$129.50	-2.2%	\$62.08	-5.2%
Darling Downs	5	0.0%	76,996	-2.4%	48,983	-15.3%	63.6%	-9.5%	\$6	-22.0%	\$118.31	-7.9%	\$75.27	-20.1%
Bundaberg	6	0.0%	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p
Central QLD	15	7.1%	207,435	19.9%	117,885	20.2%	56.8%	1.9%	\$18	16.6%	\$151.43	-3.0%	\$86.06	-2.7%
Mackay	9	0.0%	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p
Whitsundays	14	0.0%	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p
Townsville⁴	9	0.0%	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p
TNQ	80	-2.4%	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p
Outback	1	0.0%	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p

Key Points:

- Supply of serviced apartments was weaker nationally, driven by softer NSW and WA markets. In contrast VIC continued to outstrip the other states in terms of supply growth, whilst supply in Queensland was stable. Queensland has the largest supply of serviced apartment establishments nationally.
- Demand for serviced apartment accommodation was stronger in Queensland compared with other forms of accommodation in the state; perhaps due to a recovery in domestic markets.
- Occupancy rates and average room rates to Queensland, although recovering, remained the weakest nationally, as growth in supply continued to outstrip demand in the state.

- At a regional level results were mixed. Queensland's largest serviced apartment markets of the Gold and Sunshine Coasts saw differing results; whilst growth seen to Brisbane and Central Queensland outperformed the state average.
- The Gold Coast's increase in demand and room occupancy for serviced apartment accommodation was stimulated by lower than average room rates. In contrast, the Sunshine Coasts' average room rates increased (to record the highest in the state) and demand declined over the same period. Affordability remained a core driver of domestic travel in 2010.
- The Brisbane and Central Queensland regions saw results for serviced apartment accommodation gain momentum, as supply was met with strong demand over the year.

Year ended December 2010

Notes

All regions referred to in this publication reflect ABS Tourism Regions.

1. % change refers to the percentage change between the year ended December 2010 and the year ended December 2009.
2. Change % point refers to the difference between room occupancy in the year ended December 2010 and the year ended December 2009, e.g. where room occupancy for year ended December 2010 was 60% and for year ended December 2009 was 59%, the percentage point change over the year would equal 1%, i.e. 60% minus 59%.
3. Yield refers to average takings per room night available.
4. Fraser Coast refers to the Hervey Bay/Maryborough ABS Tourism Region, while Townsville refers to the Northern ABS Tourism Region.

n/p denotes not publishable, due to limitations of ABS data.

Data Source:

The information included in this report is extracted from the Survey of Tourist Accommodation (STA), conducted by the Australian Bureau of Statistics (ABS). The scope of the STA includes hotels, motels, serviced apartments with 15 or more rooms/units.

The statistics in this report depict rolling data for the year ended December 2010. This removes seasonality from the data allowing the measurement of real growth/decline.

Please note that there are some differences between RTO regions and ABS statistical regions.

The scope of the STA has been reduced to cover hotels, motels and serviced apartments with 15 or more rooms from September 2010 issue of this publication and onwards. Therefore, the following information is excluded from the scope:

- hotels, motels and serviced apartments with 5 to 14 rooms
- caravan parks with 40 or more powered sites
- holiday flats, units and houses of letting entities with 15 or more rooms or units
- visitor hostels with 25 or more bed spaces.

State and Territory tourism organisations have worked with RET (Department of Resources, Energy and Tourism) and the ABS in an effort to continue the collection of data for the above accommodation categories. Unfortunately, a satisfactory resolution has not been reached, with the costs to continue such collections exceeding the funds available from State and Territory tourism organisations across Australia.

The ABS has begun development of an electronic data capture system in an effort to reduce the costs of conducting surveys, including the STA. In the future this may allow for the reinstatement of data collection for the abovementioned accommodation categories. Currently, the ABS is not able to provide a definitive timeline as to when electronic data capture will be introduced.

For further information, refer to the [Information Paper: Future Changes to Tourist Accommodation, Australia, May 2010](#) (cat. no. 8635.0.55.003).

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