Tourist Accommodation Data Sheet

Tourism Queensland

Year ended June 2011

ALL ESTABLISHMENTS

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

IMPACT OF NATURAL DISASTERS IN QUEENSLAND :
Widespread natural disasters have not adversely affected the quality of estimates in this release. The events are likely to have had some impact on small area data for March and June quarter 2011. However, as tourist accommodation is influenced by a range of factors, it is not possible to quantify the specific impacts of these 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	4,250	-1.2%	82,872,824	0.2%	53,368,600	3.0%	64.4%	1.8%	$8,331	7.1%	$156.10	4.0%	$100.53	6.9%
QLD	1,125	-1.6%	22,406,985	-0.4%	14,146,900	1.9%	63.1%	1.4%	$2,095	4.4%	$148.08	2.4%	$93.49	4.8%
NSW	1,406	-1.1%	25,924,863	-0.4%	16,859,200	2.9%	65.0%	2.1%	$2,692	8.3%	$159.67	5.3%	$103.84	8.8%
VIC	809	-1.2%	15,156,446	2.3%	9,794,100	6.8%	64.6%	2.7%	$1,582	10.7%	$161.49	3.6%	$104.35	8.2%
WA	341	-2.3%	7,894,286	-1.4%	5,216,200	2.8%	66.1%	2.7%	$885	8.3%	$169.61	5.4%	$112.07	9.8%
SA	266	0.8%	4,523,534	2.3%	2,839,100	2.9%	62.8%	0.4%	$389	5.5%	$136.99	2.5%	$85.98	3.1%
Gold Coast	152	-1.3%	4,789,784	1.0%	3,180,036	-0.4%	66.4%	-0.9%	$467	0.6%	$146.70	1.0%	$97.40	-0.4%
Brisbane	192	-0.5%	4,737,188	1.3%	3,581,741	5.6%	75.6%	3.0%	$602	12.8%	$168.17	6.8%	$127.15	11.3%
Sunshine Coast	130	3.2%	2,047,715	0.5%	1,126,049	-1.4%	55.0%	-1.0%	$186	-2.3%	$165.01	-0.9%	$90.74	-2.8%
Fraser Coast[4]	47	-4.1%	672,322	-3.2%	322,398	-7.4%	48.0%	-2.1%	$36	-4.7%	$110.68	2.9%	$53.07	-1.5%
Darling Downs	104	0.0%	976,876	-0.9%	588,814	1.4%	60.3%	1.3%	$64	3.4%	$108.67	2.0%	$65.50	4.3%
Bundaberg	35	6.1%	306,874	8.0%	166,932	-3.1%	54.4%	-6.2%	$19	-1.4%	$113.90	1.7%	$61.96	-8.8%
Central QLD	106	-0.9%	1,462,035	-0.3%	880,480	14.6%	60.2%	7.8%	$111	15.1%	$126.53	0.4%	$76.20	15.4%
Mackay	54	-3.6%	780,353	-2.9%	540,246	3.3%	69.2%	4.2%	$84	6.1%	$155.40	2.7%	$107.58	9.3%
Whitsundays	34	-2.9%	1,018,568	-3.8%	505,834	-7.5%	49.7%	-2.0%	$112	-5.9%	$221.79	1.7%	$110.14	-2.2%
Townsville[4]	57	-5.0%	1,054,965	-3.4%	694,565	6.7%	65.8%	6.2%	$88	11.5%	$126.54	4.5%	$83.31	15.4%
TNQ	173	-4.9%	4,120,752	-1.8%	2,316,299	1.2%	56.2%	1.7%	$299	-0.4%	$129.27	-1.6%	$72.66	1.4%
Outback	41	-6.8%	439,553	-2.3%	243,484	-1.2%	55.4%	0.6%	$27	3.1%	$109.51	4.4%	$60.66	5.5%

Key Points:

- QLD's commercial accommodation sector is continuing to recover from declines experienced following the Global Financial Crisis (GFC). However, the rate of growth in demand remains below that achieved by other states, particularly VIC.
- In terms of supply, QLD had a decline of 18 establishments (or -1.6%), however room nights available were relatively stable (down -0.4%), indicating that there has been a shift towards larger establishments at the expense of smaller establishments, a trend also seen at the national level.
- Demand for commercial accommodation increased nationally with room nights occupied up 3%. QLD also had growth in room nights occupied, with an increase of 1.9%. This growth was lower than the rate achieve by VIC (up 6.8%).
- There were increases in takings, average room rates and yield, although with demand being below the national average the growth in profitability for QLD was also subdued, when compared with strong growth achieved by VIC, NSW and WA. However, the results are positive given that QLD is still recovering from natural disasters that occured in early 2011.
- Brisbane had an increase in the demand for commercial accommodation, which translated to strong growth in takings, average room rates and yield. This reflects the strong growth in visitation the region has recently been experiencing, particularly from business and holiday visitors.
- The Gold Coast's hotels, motels and serviced apartments had a slight increase in supply, but slight declines in demand. As a result, revenue was relatively flat with takings and average room rates up slightly (0.6% and 1%, respectively), but yield down (-0.4%).
- Tropical North QLD had declines in room supply and takings, but modest increases in demand. This suggests that there has been a slight shift towards more affordable accommodation.
- The Sunshine and Fraser Coasts, and the Whitsundays had a fall in demand as a result of declines in international visitors, with Fraser Coast also having declines in domestic visitors. Subsequently, takings and yield were also soft in these regions.
- In contrast, Central QLD, the Darling Downs, Mackay and Townsville had declines in supply, but growth in demand, which drove increases in revenue.
- Bundaberg had growth in supply, but declines in demand leading to mixed results in revenue. While the average room rate increased, takings per room night available (yield) declined. Conversely, the Outback had declines in supply, but only slightly softer demand, which resulted in yield increasing. As a result, overall takings in the Outback increased.

Tourist Accommodation Data Sheet

Year ended June 2011

HOTELS and RESORTS

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) 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	841	-2.5%	31,434,201	0.8%	21,830,500	3.6%	69.4%	1.9%	$3,926	8.0%	$179.85	4.3%	$124.90	7.2%
QLD	174	-7.0%	7,631,982	-1.0%	4,947,500	0.1%	64.8%	0.7%	$841	1.5%	$170.04	1.4%	$110.23	2.5%
NSW	205	-1.9%	9,081,317	-0.4%	6,772,800	3.1%	74.6%	2.6%	$1,315	10.0%	$194.15	6.7%	$144.80	10.5%
VIC	153	-1.9%	5,912,624	4.7%	4,168,600	10.3%	70.5%	3.6%	$782	14.2%	$187.57	3.5%	$132.24	9.1%
WA	122	-3.2%	3,738,427	-0.6%	2,558,500	2.6%	68.4%	2.2%	$470	9.8%	$183.51	7.0%	$125.59	10.5%
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%	2,260,804	0.6%	1,563,046	-1.1%	69.1%	-1.2%	$250	0.0%	$160.13	1.1%	$110.71	-0.6%
Brisbane	31	0.0%	1,538,586	3.2%	1,183,291	3.6%	76.9%	0.3%	$236	10.5%	$199.15	6.7%	$153.16	7.0%
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 Coast[4]	5	-16.7%	135,363	-6.5%	60,332	-17.2%	44.6%	-5.8%	$6	-16.2%	$105.66	1.2%	$47.09	-10.5%
Darling Downs	17	0.0%	181,036	-0.4%	89,977	0.4%	49.7%	0.4%	$9	5.1%	$102.51	4.7%	$50.95	5.6%
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	15	-6.3%	353,963	-0.3%	185,691	7.8%	52.5%	3.9%	$25	10.2%	$133.58	2.2%	$70.08	10.5%
Mackay	11	-15.4%	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p
Whitsundays	9	-10.0%	706,919	-5.3%	357,618	-9.9%	50.6%	-2.6%	$90	-6.8%	$252.27	3.5%	$127.62	-1.5%
Townsville[4]	10	-23.1%	305,064	-9.3%	205,761	3.1%	67.4%	8.1%	$27	13.4%	$133.60	10.0%	$90.11	25.0%
TNQ	36	-12.2%	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:

- The decline in accommodation establishments was particularly seen in the number of Hotels and Resorts in QLD, with 7% (or 13 establishments) fewer establishments in the year ending June 2011. This decline primarily occured in the March quarter 2011 as a result of the impact of the QLD floods and cyclones, with establishments declining by 8 establishments during the quarter. This rate of decline was over three times higher than that recorded in other states and territories.
- While the number of Hotels and Resorts in QLD declined, room nights occupied remained relatively stable suggesting that those businesses who continued to operate had moderate growth. This is reflected in a 0.7% increase in occupancy and growth in total takings, average room rates and yield per room. This growth, however, was lower than that achieved by VIC and NSW.
- Brisbane recorded growth in supply, demand and revenue for hotels and resorts, boosted by strong growth in holiday and business travel to the region.
- The Gold Coast had a slight increase in the supply of hotels and resorts, but declines in demand, which resulted in little growth in revenue.
- Central QLD and Townsville had declines in supply, however achieved good growth in demand and revenue for the year ending June 2011.
- Fraser Coast and the Whitsundays had declines in supply, demand and revenue, the result of a soft holiday market and declines in international visitation, particularly from the United Kingdom and Europe.

Tourist Accommodation Data Sheet

Tourism Queensland

Year ended June 2011

MOTELS, PRIVATE HOTELS and GUEST HOUSES

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) 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	2,440	-1.0%	31,515,992	-0.8%	18,208,500	2.3%	57.8%	1.7%	$2,197	6.1%	$120.67	3.8%	$69.72	7.0%
QLD	531	-0.6%	6,904,704	-1.2%	4,284,500	3.6%	62.1%	2.9%	$508	8.2%	$118.57	4.4%	$73.57	9.5%
NSW	1,006	-0.5%	12,396,034	0.3%	7,011,400	3.2%	56.6%	1.6%	$841	7.0%	$119.96	3.8%	$67.85	6.7%
VIC	503	-1.6%	5,821,218	-1.8%	3,172,200	1.0%	54.5%	1.5%	$376	3.1%	$118.68	2.2%	$64.67	5.0%
WA	128	-2.3%	2,300,294	-2.0%	1,406,500	1.7%	61.1%	2.2%	$181	6.1%	$128.85	4.3%	$78.78	8.3%
SA	156	-0.6%	1,933,273	n/p	1,064,500	n/p	55.1%	n/p	$124	n/p	$116.10	n/p	$63.93	n/p
Gold Coast	30	0.0%	510,814	-0.4%	301,047	-2.1%	58.9%	-1.0%	$35,500	-3.0%	$117.92	-0.9%	$69.50	-2.6%
Brisbane	91	-1.1%	1,443,220	-1.9%	1,017,648	6.3%	70.5%	5.4%	$135,978	13.1%	$133.62	6.4%	$94.22	15.2%
Sunshine Coast	29	11.5%	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 Coast[4]	23	-4.2%	225,571	2.2%	115,206	-2.8%	51.1%	-2.6%	$10,249	8.4%	$88.96	11.5%	$45.43	6.1%
Darling Downs	82	0.0%	720,463	-0.9%	446,181	1.7%	61.9%	1.6%	$48,491	5.1%	$108.68	3.3%	$67.30	6.0%
Bundaberg	25	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	76	0.0%	898,195	-0.9%	566,853	15.2%	63.1%	8.8%	$67,225	21.5%	$118.59	5.4%	$74.84	22.5%
Mackay	34	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	10	-9.1%	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p
Townsville[4]	38	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	60	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
Outback	33	-8.3%	349,034	-0.4%	197,645	2.7%	56.6%	1.7%	$22,902	4.6%	$115.88	1.8%	$65.62	5.0%

Key Points:

- QLD recorded growth in motels and guest houses in the year ending June 2011, at a rate above the national average. Indeed, this was the strongest growth in Australia in terms of room nights occupied (up 3.6%) and occupancy (up 2.9 percentage points).
- As a result, there were increases in total takings (up 8.2%), average room rates (up 4.4%) and yield per room (up 9.5%). This reflects the trend towards cheaper accommodation reflected in the visitation data.
- The declines in room nights available in motels, private hotels and guest houses were the largest decline in room nights available across all accommodation categories, indicating that this sector has either been previously been struggling and as a result supply has contracted or the recent floods have taken supply offline in the short-term while repairs are made.
- The trend in the majority of the QLD regions, including Brisbane, the Darling Downs, Central QLD and the Outback, was for declines in supply of motels, private hotels and guest houses, but growth in demand and revenue. This indicates a recovery in this accommodation category, driven by a shift towards more affordable forms of accommodation.
- Fraser Coast was the only region to record growth in room nights available, however the region had soft demand, which reflects declines seen in visitation trends. Despite this, the region recorded healthy increases in revenue for motel type accommodation.
- The Gold Coast recorded declines in supply, demand and revenue for motels, private hotels and guest houses.

Tourist Accommodation Data Sheet

Tourism Queensland

Year ended June 2011

SERVICED APARTMENTS

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 on-site management, although this service may not necessarily be used.

	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	969	-0.5%	19,922,631	0.8%	13,329,300	3.2%	66.9%	1.6%	$2,208	6.5%	$165.62	3.2%	$110.81	5.7%
QLD	420	-0.5%	7,870,299	1.0%	4,915,100	2.3%	62.5%	0.8%	$746	5.3%	$151.70	2.9%	$94.74	4.3%
NSW	195	-3.5%	4,447,512	-2.5%	3,075,200	1.6%	69.1%	2.7%	$536	6.1%	$174.27	4.5%	$120.49	8.8%
VIC	153	0.7%	3,422,604	5.4%	2,453,300	9.0%	71.7%	2.4%	$423	11.5%	$172.53	2.3%	$123.67	5.8%
WA	91	-1.1%	1,855,565	-2.1%	1,251,300	4.5%	67.4%	4.2%	$234	7.1%	$186.98	2.6%	$126.09	9.4%
SA	36	9.1%	n/p	n/p	496,500	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p
Gold Coast	96	-2.0%	2,018,166	1.9%	1,315,943	0.9%	65.2%	-0.6%	$181	2.2%	$137.33	1.3%	$89.55	0.3%
Brisbane	70	0.0%	1,755,382	2.5%	1,380,802	6.8%	78.7%	3.2%	$231	15.0%	$167.10	7.7%	$131.44	12.2%
Sunshine Coast	96	1.1%	1,512,862	0.8%	836,276	-3.2%	55.3%	-2.3%	$141	-0.8%	$168.45	2.5%	$93.12	-1.5%
Fraser Coast[4]	19	0.0%	311,388	-4.0%	146,860	-6.8%	47.2%	-1.4%	$19	-6.4%	$129.78	0.4%	$61.21	-2.6%
Darling Downs	5	0.0%	75,377	-1.6%	52,656	0.4%	69.9%	1.4%	$6	-10.0%	$119.14	-10.3%	$83.23	-8.5%
Bundaberg	8	n/p	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	0.0%	209,877	2.0%	127,936	23.1%	61.0%	10.4%	$19	26.6%	$151.45	2.9%	$92.32	24.1%
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	15	7.1%	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p
Townsville[4]	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	77	-4.9%	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:

- QLD continues to have the largest stock of serviced apartments out of all the states and territories. This accommodation type continued to see growth in the year ending June 2011, with increases in demand resulting in growth in room nights occupied (up 2.3%) and occupancy (up 0.8%).
- Serviced apartment room nights available continued to grow (up 1.0%) at a rate above the national average, reflecting the increasing popularity of this form of accommodation.
- Total takings increased (up 5.3%), with growth in average room rates (up 2.9%) and yield (4.3%). Growth in demand and revenue for serviced apartments in QLD was just below the national average due to strong increases achieved by VIC and NSW.
- The Gold Coast, Brisbane and Central QLD recorded growth in supply, demand and revenue. The Gold Coast recorded a decline in occupancy, the result of supply growing faster than demand. Brisbane continued to have strong growth in serviced apartments and, despite having only the second largest stock of serviced apartments, achieved the highest yield and total takings of all QLD regions. Central QLD recorded the greatest growth in demand for serviced apartments in QLD, this may be driven by the resources boom.
- The Darling Downs had a contraction in supply, but growth in demand for serviced apartments. Despite this, the average room rate declined, resulting in lower total takings.
- The Sunshine and Fraser Coast had declines in demand and, as a result, revenue in the year ending June 2011. The Fraser Coast serviced apartment stock has declined, while the Sunshine Coast has increased its supply of serviced apartments.

Tourist Accommodation Data Sheet

Year ended June 2011

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

1. % change refers to the percentage change between the year ended June 2010 and the year ended June 2011.
2. Change % point refers to the difference between room occupancy in the year ended June 2010 and the year ended June 2011, e.g. where room occupancy for year ended June 2010 was 59% and for year ended June 2011 was 60%, 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 March 2011. 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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