

Tourist Accommodation Report, March 2010

Background:

The Australian Bureau of Statistics (ABS) has released the March quarter 2010 results for the Survey of Tourist Accommodation (STA). The STA includes hotels, motels and serviced apartments with 5 or more rooms. The large majority of hotel, motel and serviced apartment accommodation are provided by establishments with 15 or more rooms. Nationally 92.8% of rooms are in establishments with 15+ rooms and 7.2% are in establishments with 5-14 rooms. In Tasmania 87% of rooms are in establishments with 15+ rooms and 13% are in establishments with 5-14 rooms. The STA does not include establishments with less than 5 rooms. All percentage change figures are calculated against the previous corresponding year or quarter. E.g. year ending March 2010 compared with year ending March 2009.

Key Results:

Hotels, Motels and Serviced Apartments with 15 or more rooms

- For the year ending March 2010 occupancy rates in Tasmanian accommodation establishments with 15+ rooms increased 0.3% to 60.3% (was 60%) compared to the year ending March 2009. Nationwide room occupancy experienced a decline of 1.2% to 62.6% (Table 2).
- In Tasmania the number of room nights occupied in establishments with 15+ rooms increased 1.4% to 1.463 million nights. Nationally room nights occupied declined 0.6% to 51.4 million nights for the year ending March 2010 (Table 2).
- In the quarter ending March 2010 occupancy levels for Tasmanian establishments with 15+ rooms decreased -2.4% to 72.7% (was 75.1% March Qtr 2009) this is 9.3% higher than the national average (63.4%).
- There were 435,000 Tasmanian room nights occupied in the March quarter 2010 a decrease of 2.6% compared with the March quarter 2009. Nationally in the same period there was a 1.7% increase to 12.8 million room nights occupied. (Table 3).
- In the year ending March 2010 takings from accommodation for establishments with 15+ rooms in Tasmania increased 1.1% to \$191 million (was \$189 million year ending March 09). For the quarter ending March 2010 there was a decrease of 3.7% to \$59 million (was 61 million) in takings from accommodation for establishments with 15+ rooms in Tasmania.

- Nationally there was a 1.9% decline in takings for the year ending March 2010 to \$7.67 billion. In the quarter ending March 2010 there as was a 2.3% increase to \$1.97 billion (was 1.92 billion) (Tables 2 and 3).

Hotels, Motels and Serviced Apartments with 5 to 14 rooms

- In the March quarter 2010 the occupancy level in Tasmanian establishments with 5-14 rooms decreased to 54.7% (-6.2%). Nationally there was also a decrease albeit smaller to 46.2% (-1%).
- All states and territories decreased in room nights occupied (of those published), the National decline was 3.1% to 720,000 (was 743,000). Tasmania decreased (-12.3%) to 49,000 room nights occupied.
- The Tasmanian average for room takings per room night for establishments with 5-14 rooms increased to \$130 per night (+\$6) in the March quarter 2010. The National average for room takings per room night increased \$4 to \$110 per night, which is \$20 lower than the Tasmania average (Table 4).
- In contrast, the Tasmanian average for takings per room night for establishments with 15+ rooms for the quarter ending March 2010 was \$135 (-\$1) per night when compared to the March quarter 2009, which was lower than the national average of \$154 (\$1) (Table 2).

Regional Trends in Tasmania

- The number of establishments surveyed by the ABS in the 5 or more category decreased by three in Tasmania to 271, while room occupancy decreased (-2.9%). Room occupancy in the 5-14 room category decreased (-6.2%) and lost 4 establishments. The 15 or more room category gained one establishment while room occupancy declined 2.4% (Table 1).
- Hobart and surrounds decreased in the number of establishments surveyed in the category 5-14 rooms (-2) room occupancy in this category also decreased (-11%) to 51.8% (was 62.8%) for the March quarter 2010. (Table 1). The overall effect in the 5+ room category was a (-2.1%) decline in room occupancy. The southern area remained stable in regards to establishments and occupancy.

- The East Coast also lost 2 establishments in the 5-14 room categories, room occupancy also dropped (-9.8%) to 64.3% (was 74.1%). The overall effect in the 5+ room category was a 1.7 increase in room occupancy thanks positive room occupancy rates in the 15+ room category of 67.3% an increase of 3.5% when compared to the March quarter 2009.
- For Launceston and the Tamar Valley the number of establishments remained relatively stable. Occupancy in the 5-14 room category declined (-11.8%), whilst room occupancy in the 15+ room category declined (-6.8%). Room occupancy for the Northern region 15+ rooms dropped (-27%) although this is based on 4 establishments so it can be extremely volatile (Table I).
- Occupancy rates for the North West decreased in both the 5-14 room (-3.6%) and 15+ room category (-2.2%). Two establishments from the survey were lost in the 5 to 14 room category and one was gained in the 15+ room category for the March quarter 2010 (Table I).
- The West Coast Occupancy rates in both the 5-14 room (-5.4%) and 15+ room category (-1.9%) when compared to the March quarter 2009. The West Coast gained one establishment in the 5-14 room category but lost one in the 15+ category for the March quarter 2010 (Table I).

TABLE 1: ROOM OCCUPANCY RATES FOR HOTELS, MOTELS AND SERVICED APARTMENTS, TASMANIA BY TOURIST REGION

Hotels, motels and serviced apartments with:	March Qtr 09		March Qtr 10		% Point Change: Qtr on Qtr
	* Establishments	Occupancy	* Establishments	Occupancy	
Hobart and Surrounds					
5 to 14 rooms	28	62.8	26	51.8	-11.0
15 or more rooms	47	86.7	47	85.4	-1.3
5 or more rooms	75	84.5	73	82.4	-2.1
Southern					
5 to 14 rooms	11	np	12	np	np
15 or more rooms	8	51.4	7	50.7	-0.7
5 or more rooms	19	np	19	np	np
East Coast					
5 to 14 rooms	14	74.1	12	64.3	-9.8
15 or more rooms	18	63.8	18	67.3	3.5
5 or more rooms	32	65.2	30	66.9	1.7
Northern					
5 to 14 rooms	15	np	16	np	np
15 or more rooms	4	73.2	4	45.7	-27.5
5 or more rooms	19	np	20	np	np
Launceston and Tamar Valley					
5 to 14 rooms	20	63.4	19	51.6	-11.8
15 or more rooms	35	74.1	37	67.3	-6.8
5 or more rooms	55	73.1	56	66.1	-7.0
North West					
5 to 14 rooms	25	62.4	23	58.8	-3.6
15 or more rooms	29	70.2	30	68.0	-2.2
5 or more rooms	54	68.8	53	66.6	-2.2
West Coast					
5 to 14 rooms	8	59.0	9	53.6	-5.4
15 or more rooms	12	59.4	11	57.5	-1.9
5 or more rooms	20	59.4	20	57.0	-2.4
Tasmania					
5 to 14 rooms	121	60.9	117	54.7	-6.2
15 or more rooms	153	75.1	154	72.7	-2.4
5 or more rooms	274	73.2	271	70.3	-2.9

np: Not Published by ABS

* Number of establishments surveyed by the Australian Bureau of Statistics

TABLE 2: TOTAL HOTELS, MOTELS & SERVICED APARTMENTS WITH 15 OR MORE ROOMS, AUSTRALIAN STATES Totals with year ending calculations

	No. of Establishments: Mar Qtr 10	Growth: Mar Qtr 10 on Mar Qtr 09	No. of Rooms Available: Mar Qtr 10	Growth: Mar Qtr 10 on Mar Qtr 09	Room Nights Occupied: Mar 10 ('000') YE	Growth (%): Mar 10 on Mar 09 YE	Room Occupancy Rate: Mar 10 YE	% Point Change in Occupancy from Mar 09 YE	Average Length of Stay: Mar 10 YE	Takings from Accommodation: Mar 10 ('000') YE	Takings from Accommodation Growth (%): Mar 10 on Mar 09 YE	Average Takings Per Room Night Occupied: Mar 10 YE *	Average Takings Per Room Night Occupied: Mar 09 YE *	Average Takings Growth: Mar 10 on Mar 09 YE
TAS	154	1	6,658	44	1,463	1.4%	60.3%	0.3%	2.0	\$190,958	1.1%	\$131	\$131	-\$0
NSW	1,419	-9	71,739	273	16,172	0.9%	62.8%	0.4%	2.1	\$2,435,827	-1.7%	\$151	\$155	-\$4
VIC	823	10	40,817	1,378	9,037	0.7%	62.4%	-1.7%	2.2	\$1,403,613	-1.3%	\$155	\$158	-\$3
QLD	1,136	-2	61,534	-507	13,849	-2.5%	61.6%	-2.1%	2.7	\$1,996,637	-3.1%	\$144	\$145	-\$1.0
SA	262	-1	12,097	28	2,739	1.3%	62.0%	-0.3%	2.0	\$364,301	1.5%	\$133	\$133	\$0
WA	351	-1	22,045	411	5,069	-5.4%	63.3%	-4.9%	2.5	\$810,299	-5.3%	\$160	\$160	\$0
NT	96	-2	7,377	-34	1,681	3.3%	62.9%	-1.3%	2.2	\$254,497	4.3%	\$151	\$150	\$1
ACT	54	-2	4,964	-95	1,344	3.1%	72.9%	2.7%	2.1	\$218,263	1.4%	\$162	\$165	-\$3
Australia	4,295	-6	227,231	1,498	51,353	-0.6%	62.6%	-1.2%	2.3	\$7,674,395	-1.9%	\$149	\$152	-\$2

TABLE 3: TOTAL HOTELS, MOTELS & SERVICED APARTMENTS WITH 15 OR MORE ROOMS, AUSTRALIAN STATES - Quarter Results

	No. of Establishments: Mar Qtr 10	Growth: Mar Qtr 10 on Mar Qtr 09	No. of Rooms Available: Mar Qtr 10	Growth: Mar Qtr 10 on Mar Qtr 09	Room Nights Occupied: Mar 10 ('000')	Growth (%): Mar 10 on Mar 09	Room Occupancy Rate: Mar 10	% Point Change in Occupancy from Mar 09	Average Length of Stay: Mar 10	Takings from Accommodation: Mar 10 ('000')	Takings from Accommodation Growth (%): Mar 10 on Mar 09	Average Takings Per Room Night Occupied: Mar 10*	Average Takings Per Room Night Occupied: Mar 09*	Average Takings Growth: Mar 10 on Mar 09 YE
TAS	154	1	6,658	44	435	-2.6%	72.7%	-2.4%	2.0	\$58,717	-3.7%	\$135	\$136	-\$1
NSW	1,419	-9	71,739	273	4,185	4.2%	65.9%	2.4%	2.2	\$661,848	6.1%	\$158	\$155	\$3
VIC	823	10	40,817	1,378	2,386	4.9%	66.2%	0.7%	2.2	\$381,164	3.7%	\$160	\$162	-\$2
QLD	1,136	-2	61,534	-507	3,173	-2.3%	57.4%	-0.9%	2.7	\$464,352	-2.1%	\$146	\$146	\$0
SA	262	-1	12,097	28	707	4.2%	65.0%	2.5%	2.1	\$99,665	5.6%	\$141	\$139	\$2
WA	351	-1	22,045	411	1,255	-4.9%	63.2%	-4.9%	2.5	\$204,677	-4.1%	\$163	\$162	\$1.3
NT	96	-2	7,377	-34	342	6.2%	52.2%	2.5%	2.2	\$42,735	1.8%	\$125	\$130	-\$5
ACT	54	-2	4,964	-95	358	11.5%	80.2%	9.6%	2.2	\$60,812	15.7%	\$170	\$164	\$6.1
Australia	4,295	-6	227,231	1,498	12,840	1.7%	63.4%	0.5%	2.3	1,973,970	2.3%	\$154	\$153	\$1

* Rounded to nearest dollar
np: Not Published by ABS

TABLE 4: TOTAL HOTELS, MOTELS & SERVICED APARTMENTS WITH 5 TO 14 ROOMS, AUSTRALIAN STATES - Quarter Results

	No. of Establishments: Mar Qtr 10	Growth: Mar Qtr 10 on Mar Qtr 09	No. of Rooms Available: Mar Qtr 10	Growth: Mar Qtr 10 on Mar Qtr 09	Room Nights Occupied: Mar 10 ('000')	Growth (%): Mar 10 on Mar 09	Room Occupancy Rate: Mar 10	% Point Change in Occupancy from Mar 09	Average Length of Stay: Mar 10	Takings from Accommodation: Mar 10 ('000')	Takings from Accommodation Growth (%): Mar 10 on Mar 09	Average Takings Per Room Night Occupied: Mar 10*	Average Takings Per Room Night Occupied: Mar 09*	Average Takings Growth: Mar 10 on Mar 09 YE
TAS	117	-4	996	-28	49	-12.3%	54.7%	-6.2%	1.8	\$6,348	-8.2%	\$130	\$124	\$6
NSW	587	-10	5,831	-93	240	-0.3%	46.7%	0.6%	1.9	\$26,219	12.4%	\$109	\$105	\$4
VIC	415	-28	4,089	-199	167	-1.5%	45.9%	0.8%	1.7	\$18,064	1.9%	\$108	\$105	\$4
QLD	418	9	4,156	122	168	-6.4%	45.1%	-4.7%	2.1	\$16,929	-1.6%	\$101	\$96	\$5
SA	128	-8	1,220	-61	47	-3.1%	43.6%	0.8%	1.9	\$4,378	1.2%	\$93	\$89	\$4
WA	132	-11	1,142	-96	46	-9.4%	45.7%	-0.8%	2.4	\$6,806	-6.0%	\$149	\$144	\$5
NT	14	0	135	np	3	np	26.1%	np	1.5	\$405	np	\$131	np	np
ACT	3	0	30	np	2	np	57.7%	np	1.9	\$119	np	\$77	np	np
Australia	1,814	-52	17,599	-	720	-3.1%	46.2%	-1.0%	1.9	\$79,269	-0.4%	\$110	\$106	\$4

TABLE 5: TOTAL HOTELS, MOTELS & SERVICED APARTMENTS WITH 5 OR MORE ROOMS, AUSTRALIAN STATES - Quarter Results

	No. of Establishments: Mar Qtr 10	Growth: Mar Qtr 10 on Mar Qtr 09	No. of Rooms Available: Mar Qtr 10	Growth: Mar Qtr 10 on Mar Qtr 09	Room Nights Occupied: Mar 10 ('000')	Growth (%): Mar 10 on Mar 09	Room Occupancy Rate: Mar 10	% Point Change in Occupancy from Mar 09	Average Length of Stay: Mar 10	Takings from Accommodation: Mar 10 ('000')	Takings from Accommodation Growth (%): Mar 10 on Mar 09	Average Takings Per Room Night Occupied: Mar 10*	Average Takings Per Room Night Occupied: Mar 09*	Average Takings Growth: Mar 10 on Mar 09 YE
TAS	271	-3	7,654	16	484	-3.7%	70.3%	-2.9%	1.9	\$65,065	-4.1%	\$134	\$135	-\$0.6
NSW	2,006	-19	77,570	180	4,425	4.0%	64.5%	2.3%	2.1	\$688,068	6.0%	\$156	\$153	\$3
VIC	1,238	-18	44,906	1,179	2,553	4.4%	64.3%	0.8%	2.2	\$399,228	3.6%	\$156	\$158	-\$1
QLD	1,554	7	65,690	-385	3,340	-2.5%	56.6%	-1.2%	2.7	\$481,281	-2.1%	\$144	\$143	\$1
SA	390	-9	13,317	-33	755	3.7%	63.1%	2.5%	2.1	\$104,043	5.5%	\$138	\$136	\$2
WA	483	-12	23,187	315	1,300	-5.0%	62.4%	-4.5%	2.5	\$211,482	-4.2%	\$163	\$161	\$1
NT	110	-2	7,512	np	345	np	51.7%	np	2.2	\$43,140	np	\$125	np	np
ACT	57	-2	4,994	np	360	np	80.0%	np	2.2	\$60,931	np	\$169	np	np
Australia	6,109	-58	244,830	1,141	13,561	1.4%	62.2%	0.5%	2.3	\$2,053,238	2.2%	\$151	\$150	\$1

* Rounded to nearest dollar

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