

Tourist Accommodation Report

September Quarter 2008

Background

The Australian Bureau of Statistics (ABS) has released the September quarter 2008 results from the Survey of Tourist Accommodation, Australia.

Key Messages

Nationwide September year ending room occupancy results confirm a 7.5% increase in takings to \$7.85 billion for hotels, motels and serviced apartments with 15 or more rooms. In the September quarter 2008 compared with the September quarter 2007 nationwide accommodation takings for hotels, motels and serviced apartments with 15 or more rooms have experienced steady growth up 3.7% to \$2.01 billion. Nationwide September year ending room occupancy results revealed a -0.9% decrease to 64.8% for hotels, motels and serviced apartments with 15 or more rooms. The room occupancy rate for hotels, motels and serviced apartments with 15 or more rooms decreased -2.1% to 65% in the September quarter 2008 (compared with the September quarter 2007)

National Accommodation Results

Australian Hotels, Motels and Serviced Apartments with 15 or more rooms, year ending September 2008.

- Room occupancy rates decreased by -0.9% to 64.8%.
- Average length of stay in hotels, motels and serviced apartments with 15 or more rooms was 2.2 days down from 2.3 nights for the year ending September 2007.
- The average takings per room night occupied was \$151, a \$9 increase compared to year ending September 2007.

Australian Hotels, Motels and Serviced Apartments with 15 or more rooms, quarter ending September 2008.

- Accommodation takings for the September quarter 2008 were \$2.09 billion for hotels, motels and serviced apartments with 5 or more rooms, comprising \$2.01 billion for hotels, motels and serviced apartments with 15 or more rooms and \$76.9 million for hotels, motels and serviced apartments with 5 to 14 rooms.
- The national September quarter 2008 average for room night occupied was \$149.10 for establishments with 5 or more rooms. This was heavily influenced by hotels, motels and serviced apartments with 15 or more rooms (\$151.79) which contributed 96.3% to total takings. The average for 5 to 14 room establishments was \$101.89.
- In the September quarter 2008 the room occupancy rate for hotels, motels and serviced apartments with 5 or more rooms was 63.4%, for 15 or more rooms was 65.0%, and for 5 to 14 rooms 44.9%.
- The average length of stay in the September quarter 2008 for hotels, motels and serviced apartments with 5 or more rooms was 2.2 days. For establishments with 5 to 14 rooms, the average length of stay was 1.8 days and in establishments with 15 or more rooms, the average length of stay was 2.3 days. The longest average length of stay was in Queensland (2.7 days) and the shortest in Tasmania (1.9 days).

Tasmanian Accommodation Results

Tasmanian Hotels, Motels and Serviced Apartments with 15 or more rooms, year ending September 2008.

- Room occupancy rates increased by 0.9% to 59.8%.
- Average length of stay in Tasmanian accommodation with 15+ rooms was 1.9 days the same as year ending September 2007; the national average decreased to 2.2 nights from 2.3 nights for the year ending September 2007.
- The average Tasmanian taking per room night occupied was \$129, a \$3 increase compared to year ending September 2007 (September 2008 National year ending average was \$151).

Tasmanian Hotels, Motels and Serviced Apartments with 15 or more rooms, September quarter 2008.

- Takings from accommodation increased 1.6% to \$35.5 million (up from \$34.9 million).
- Room occupancy rates reached 47.2% (Sept qtr 2008) down from 48.8% (Sept qtr 2007).
- The Tasmanian average taking per room night occupied was \$124, the lowest of all the states and territories (the national average was \$152).
- There were 155 accommodation establishments with 15+ rooms, one more than the previous corresponding quarter. These constitute approximately 3.6% of all establishments with 15 or more rooms in Australia.
- There were 4,640 persons employed in Tasmanian accommodation with 15+ rooms which represents approximately 4% of all nationwide employment in accommodation with 15+ rooms.

Regional Accommodation Results

- Room occupancy rates in smaller hotels, motels and serviced apartments (5-14 rooms) in the North West tourism region increased by 5.6% and those in the West Coast decreased by -6.8%.
- The North West tourism region had the greatest percentage increase in published takings for smaller accommodation (5-14 rooms) in regional Tasmania at 23%, whereas the West Coast had the largest decrease -22% in this category.
- Takings from accommodation in hotels, motels and serviced apartments with 15+ rooms in the southern tourism region increased by 22% to \$850,000.

Room Occupancy Rates for Hotels, Motels and Serviced Apartments, Tasmania by Tourist Region

Hotels, motels and serviced apartments with:	September * Establishments	Qtr 07 (%) Occupancy	September * Establishments	Qtr 08 (%) Occupancy	Occupancy % Point Change: Sept Qtr 07 to Sept Qtr 08
Hobart and Surrounds					
5 to 14 rooms	29	37.9	29	33.6	-4.3
15 or more rooms	45	64.3	45	60.6	-3.7
5 or more rooms	74	61.7	74	57.9	-3.8
Southern					
5 to 14 rooms	11	23.1	11	np	np
15 or more rooms	9	27.8	9	26.8	-1.0
5 or more rooms	20	26.7	20	np	np
East Coast					
5 to 14 rooms	14	26.3	14	28.7	2.4
15 or more rooms	18	26.8	18	21.7	-5.1
5 or more rooms	32	26.7	32	22.6	-4.1
Northern					
5 to 14 rooms	16	np	15	np	np
15 or more rooms	4	44.6	4	43.6	-1.0
5 or more rooms	19	np	19	np	np
Launceston and Tamar Valley					
5 to 14 rooms	21	37.7	19	41.2	3.5
15 or more rooms	36	51.3	36	50.7	-0.6
5 or more rooms	57	49.9	55	49.9	0.0
North West					
5 to 14 rooms	26	30.6	25	36.2	5.6
15 or more rooms	31	40.2	31	44.3	4.1
5 or more rooms	57	38.5	56	42.9	4.4
West Coast					
5 to 14 rooms	8	39.7	8	32.9	-6.8
15 or more rooms	12	24.3	12	24.5	0.2
5 or more rooms	20	26.1	20	25.4	-0.7
Tasmania					
5 to 14 rooms	125	np	121	32.9	np
15 or more rooms	154	48.8	155	47.2	-1.6
5 or more rooms	279	np	276	45.3	np

np: Not Published by ABS

* Number of establishments surveyed by the Australian Bureau of Statistics

Total Hotels, Motels & Serviced Apartments with 15 or more Rooms, Australian States Totals with year ending calculations

	No. of Establishments: Sept Qtr 08	Growth: Sept Qtr 08 on Sept Qtr 07	No. of Rooms Available: Sept Qtr 08	Growth: Sept Qtr 08 on Sept Qtr 07	Room Nights Occupied: Sept 08 ('000') YE	Growth (%): Sept 08 on Sept 07 YE	Room Occupancy Rate: Sept 08 YE	% Point Change in Occupancy from Sept 07 YE	Average Length of Stay: Sept 08 YE	Takings from Accommodation: Sept 08 ('000') YE	Growth (%): Sept 08 on Sept 07 YE	Average Takings Per Room: Night Occupied: Sept 08* YE	Average Takings Per Room: Night Occupied: Sept 07* YE	Average Takings Growth: Sept 08 on Sept 07* YE
TAS	155	1	6,583	117	1,442	3.2%	59.8%	1.2%	1.9	\$185,615	5.8%	\$129	\$126	\$3
NSW	1,434	13	71,025	2,039	16,227	1.9%	63.2%	-0.7%	2.1	\$2,528,415	5.9%	\$156	\$150	\$6
VIC	801	6	38,466	724	8,985	1.2%	64.7%	-0.4%	2.1	\$1,422,372	8.0%	\$158	\$148	\$10
QLD	1,117	17	60,655	1,398	14,366	-0.1%	65.2%	-2.3%	2.7	\$2,081,995	5.2%	\$145	\$138	\$7
SA	257	4	11,831	267	2,729	0.6%	63.3%	-0.7%	2.0	\$353,320	8.7%	\$129	\$120	\$10
WA	352	3	21,527	355	5,415	1.9%	69.0%	-0.1%	2.4	\$835,055	15.7%	\$154	\$136	\$18
NT	95	3	7,025	315	1,638	5.1%	66.8%	2.4%	2.1	\$241,559	13.8%	\$147	\$136	\$11
ACT	56	0	5,154	206	1,287	-4.2%	69.6%	-4.3%	2.2	\$205,130	8.1%	\$159	\$141	\$18
Australia	4,267	47	222,266	5,421	52,088	1.1%	64.8%	-0.9%	2.2	\$7,853,462	7.5%	\$151	\$142	\$9

Total Hotels, Motels & Serviced Apartments with 15 or more Rooms, Australian States Quarter Results

	No. of Establishments: Sept Qtr 08	Growth: Sept Qtr 08 on Sept Qtr 07	No. of Rooms Available: Sept Qtr 08	Growth: Sept Qtr 08 on Sept Qtr 07	Room Nights Occupied: Sept 08 ('000')	Growth (%): Sept 08 on Sept 07	Room Occupancy Rate: Sept 08	% Point Change in Occupancy from Sept 07	Average Length of Stay: Sept 08	Takings from Accommodation: Sept 08 ('000')	Growth (%): Sept 08 on Sept 07	Average Takings Per Room: Night Occupied: Sept 08*	Average Takings Per Room: Night Occupied: Sept 07*	Average Takings Growth: Sept 08 on Sept 07*
TAS	155	1	6,583	117	286	-1.4%	47.2%	-1.6%	1.9	\$35,451	1.6%	\$124	\$120	\$4
NSW	1,434	13	71,025	2,039	4,046	-0.2%	61.9%	-2.1%	2.1	\$626,107	1.7%	\$155	\$152	\$3
VIC	801	6	38,466	724	2,217	0.4%	62.7%	-1.0%	2.1	\$349,072	3.7%	\$157	\$152	\$5
QLD	1,117	17	60,655	1,398	3,874	-1.9%	69.6%	-2.9%	2.7	\$565,580	1.0%	\$146	\$142	\$4
SA	257	4	11,831	267	666	-0.5%	61.1%	-1.8%	2.0	\$86,415	7.9%	\$130	\$120	\$10
WA	352	3	21,527	355	1,353	-1.8%	68.4%	-2.4%	2.4	\$213,468	11.6%	\$158	\$139	\$19
NT	95	3	7,025	315	505	4.8%	78.2%	0.1%	2.2	\$86,176	17.0%	\$171	\$153	\$18
ACT	56	0	5,154	206	328	-6.3%	69.1%	-7.7%	2.1	\$52,482	3.9%	\$160	\$144	\$16
Australia	4,267	47	222,266	5,421	13,274	-0.8%	65.0%	-2.1%	2.3	\$2,014,752	3.7%	\$152	\$145	\$7

* Rounded to nearest dollar

np: Not Published by ABS

Total Hotels, Motels & Serviced Apartments with 5 to 14 Rooms, Australian States Quarter Results

	No. of Establishments: Sept Qtr 08	Growth: Sept Qtr 08 on Sept Qtr 07	No. of Rooms Available: Sept Qtr 08	Growth: Sept Qtr 08 on Sept Qtr 07	Room Nights Occupied: Sept 08 ('000')	Growth (%): Sept 08 on Sept 07	Room Occupancy Rate: Sept 08	% Point Change in Occupancy from Sept 07	Average Length of Stay: Sept 08	Takings from Accommodation: Sept 08 ('000')	Growth (%): Sept 08 on Sept 07	Average Takings Per Room Night Occupied: Sept 08*	Average Takings Per Room Night Occupied: Sept 07*	Average Takings Growth: Sept 08 on Sept 07*
TAS	121	-4	1,021	np	31	np	32.9%	np	1.7	\$3,335	np	\$109	np	np
NSW	606	-6	6,010	-40	234	-2.7%	42.6%	-0.8%	1.8	\$24,230	0.9%	\$103	\$100	\$4
VIC	455	-6	4,416	-1	154	0.5%	38.2%	0.2%	1.6	\$15,540	5.8%	\$101	\$96	\$5
QLD	419	-5	4,155	-73	227	-3.2%	59.5%	-0.9%	2.1	\$21,536	4.7%	\$95	\$88	\$7
SA	141	-2	1,341	-37	46	-3.0%	37.4%	0.1%	1.7	\$3,797	-1.4%	\$83	\$82	\$1
WA	143	1	1,221	3	53	0.4%	48.0%	0.1%	2.3	\$7,055	11.4%	\$132	\$119	\$13
NT	16	4	153	23	7	1.4%	49.4%	-8.4%	1.6	\$1,244	96.2%	\$179	\$92	\$87
ACT	3	1	30	np	2	np	57.5%	np	1.6	\$117	np	\$74	np	np
Australia	1,904	-17	18,347	-125	754	2.4%	44.9%	-0.5%	1.8	\$76,854	4.6%	\$102	\$96	\$6

Total Hotels, Motels & Serviced Apartments with 5 or more Rooms, Australian States Quarter Results

	No. of Establishments: Sept Qtr 08	Growth: Sept Qtr 08 on Sept Qtr 07	No. of Rooms Available: Sept Qtr 08	Growth: Sept Qtr 08 on Sept Qtr 07	Room Nights Occupied: Sept 08 ('000')	Growth (%): Sept 08 on Sept 07	Room Occupancy Rate: Sept 08	% Point Change in Occupancy from Sept 07	Average Length of Stay: Sept 08	Takings from Accommodation: Sept 08 ('000')	Growth (%): Sept 08 on Sept 07	Average Takings Per Room Night Occupied: Sept 08*	Average Takings Per Room Night Occupied: Sept 07*	Average Takings Growth: Sept 08 on Sept 07*
TAS	276	-3	7,604	np	317	np	45.3%	np	1.9	\$38,786	np	\$122	np	np
NSW	2,040	7	77,035	1,999	4,280	-0.4%	60.4%	-1.9%	2.0	\$650,337	1.7%	\$152	\$149	\$3
VIC	1,256	0	42,882	723	2,371	0.4%	60.1%	-0.9%	2.1	\$364,612	3.8%	\$154	\$149	\$5
QLD	1,536	12	64,810	1,325	4,101	-2.0%	68.9%	-2.8%	2.6	\$587,117	1.1%	\$143	\$139	\$4
SA	398	2	13,172	230	711	-0.7%	58.8%	-1.4%	1.9	\$90,212	7.4%	\$157	\$117	\$40
WA	495	4	22,748	358	1,407	-1.7%	67.3%	-2.2%	2.4	\$220,524	11.6%	\$157	\$138	\$19
NT	111	7	7,178	338	512	4.7%	77.6%	-0.1%	2.2	\$87,420	17.7%	\$171	\$152	\$19
ACT	59	1	5,184	np	329	np	69.1%	np	2.1	\$52,599	np	\$160	np	np
Australia	6,171	30	240,613	5,293	14,028	-0.9%	63.4%	-2.0%	2.2	\$2,091,606	3.7%	\$149	\$142	\$7

* Rounded to nearest dollar

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