

# Tourist Accommodation Report, June 2009

## Background:

The Australian Bureau of Statistics (ABS) has released the June quarter 2009 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 is provided by establishments with 15 or more rooms. Nationally 92.7% of rooms are in establishments with 15+ rooms and 7.3% are in establishments with 5-14 rooms. In Tasmania 87.0% of rooms are in establishments with 15+ rooms and 13.0% are in establishments with 5-14 rooms. The STA does not include establishments with less than 5 rooms.

## Key Results:

### Hotels, Motels and Serviced Apartments with 15 or more rooms

In the year ending June 2009 the occupancy in Tasmanian accommodation establishments with 15+ rooms was 60.3%, the same level as the year ending June 2008. Tasmania performed better than the other states and territories during this challenging period. All other states and territories experienced a decline with a nationwide decline of 2.3% to 63% (Table 2). Similarly while the number of room nights occupied in establishments with 15+ rooms increased 0.6% to 1.46 million nights in Tasmania in the year ending June 2009, all other states and territories, with the exception of the Northern Territory, experienced small declines in the number of room nights occupied with a 1.8% decline nationally to 51.2 million nights (Table 2).

Tasmanian establishments with 15+ rooms have the lowest occupancy levels among all the states and territories, however they had an improved occupancy level in the June quarter 2009. In contrast the trend was negative for all other states and territories. In the June quarter 2009 the occupancy in Tasmanian establishments with 15+ rooms was 55.1%, 1.4% points higher than the June quarter 2008. Nationally there was a 3% point decline in occupancy to 59.1%. In the June quarter 2009 the number of room nights occupied was 333,000 in Tasmania, an increase of 3.5% compared with the June quarter 2008. Among the other states and territories, only the Northern Territory recorded an increase in room nights occupied (+7% to 442,000). The increase in room nights occupied in the Northern Territory in concert with a decrease in occupancy levels was due to the addition of 6 properties to the survey. Nationally there was a 3.3% decline to 12.1 million room nights occupied in the June quarter 2009 compared with the June quarter 2008 (Table 3).

Takings from accommodation for establishments with 15+ rooms in Tasmania increased 3.7% to \$192 million in the year ending June 2009 compared with the previous year; and there was a 7.5% increase in takings to \$42.9 million in the June quarter 2009 compared with the June quarter 2008. Nationally there was a 0.7% decline to \$7.73 billion in takings for the year ending June 2009 compared with the previous financial year and a 5.4% decline to \$1.74 billion in the June quarter 2009 compared with the June quarter 2008 (Tables 2 and 3).

### Hotels, Motels and Serviced Apartments with 5 to 14 rooms

In the June quarter 2009 the occupancy level in Tasmanian establishments with 5-14 rooms was 38.4%, which was lower than the average occupancy of 44.4% for establishments in this size category nationally. Nationally there was a 0.9% point increase in occupancy compared with the June quarter 2008, but a 2.6% decline in room nights due to reduction in the number of properties in the survey. Data for establishments in the 5-14 room category for

Tasmania were not published by the ABS in the June quarter 2008, so year on year and quarter and quarter comparisons cannot be made (Table 4).

The Tasmanian average for room takings per room night for establishments with 5-14 rooms was \$121 per night in the June quarter 2009, which was higher than the national average of \$102 (Table 4). In contrast the Tasmanian average for room takings per room night for establishments with 15+ rooms was \$128 per night in the June quarter 2009, which was lower than the national average of \$149 (Table 2).

#### Regional Trends in Tasmania

The East Coast region had the largest increase in occupancy levels in Tasmania in the June quarter 2009 compared with the June quarter 2008 with a 7.9% point increase to 41.4% for establishments with 5-14 rooms and a 3.3% point increase to 35.0% in establishments with 15 or more rooms (Table 1).

The West Coast region had the largest decrease in occupancy levels in Tasmania in the June quarter 2009 compared with the same quarter in 2008, with a 5.2% point decrease to 39.3% in establishments with 5-14 rooms and a 2.5% point decrease to 35.5% in establishments with 15 or more rooms (Table 1).

The highest occupancy levels in establishments with 15 or more rooms in Tasmania was in the Hobart and Surrounds region where occupancy increased 2% points to 68.3% in the June quarter 2009 compared with the June quarter 2008. In addition this area gained 3 establishments with 15 or more rooms according to the ABS (Table 1).

Table 1. ROOM OCCUPANCY RATES FOR HOTELS, MOTELS AND SERVICED APARTMENTS, TASMANIA BY TOURIST REGION

Hotels, motels and serviced apartments with:	June Qtr 08 *		June Qtr 09 *		% Point Change: Qtr on Qtr
	Establishments	Occupancy	Establishments	Occupancy	
<b>Hobart and Surrounds</b>					
5 to 14 rooms	31	41.7	26	36.5	-5.2
15 or more rooms	45	66.3	48	68.3	2.0
5 or more rooms	76	63.7	74	65.4	1.7
<b>Southern</b>					
5 to 14 rooms	11	24.8	12	np	np
15 or more rooms	10	31.0	9	29.6	-1.4
5 or more rooms	21	29.7	21	np	np
<b>East Coast</b>					
5 to 14 rooms	14	33.5	14	41.4	7.9
15 or more rooms	18	32.7	18	36.0	3.3
5 or more rooms	32	32.8	32	36.7	3.9
<b>Northern</b>					
5 to 14 rooms	15	np	15	np	np
15 or more rooms	4	44.1	4	41.6	-2.5
5 or more rooms	19	np	19	np	np
<b>Launceston and Tamar Valley</b>					
5 to 14 rooms	21	45.3	20	44.9	-0.4
15 or more rooms	36	57.2	35	58.7	1.5
5 or more rooms	57	56.0	55	57.4	1.4
<b>North West</b>					
5 to 14 rooms	24	42.9	23	41.0	-1.9
15 or more rooms	32	47.3	30	47.3	0.0
5 or more rooms	56	46.6	53	46.3	-0.3
<b>West Coast</b>					
5 to 14 rooms	8	44.5	8	39.3	-5.2
15 or more rooms	12	38.0	12	35.5	-2.5
5 or more rooms	20	38.8	20	35.9	-2.9
<b>Tasmania</b>					
5 to 14 rooms	124	np	118	38.4	np
15 or more rooms	157	53.7	156	55.1	1.4
5 or more rooms	281	np	274	52.9	np

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: Jun Qtr 09	Growth: Jun Qtr 09 on Jun Qtr 08	No. of Rooms Available: Jun Qtr 09	Growth: Jun Qtr 09 on Jun Qtr 08	Room Nights Occupied: Jun 09 ('000) YE	Growth (%): Jun 09 on Jun 08 YE	Room Occupancy Rate: Jun 09 YE	% Point Change in Occupancy from Jun 08 YE	Average Length of Stay: Jun 09 YE	Takings from Accommodation: Jun 09 ("000") YE	Takings from Accommodation Growth (%): Jun 09 on Jun 08 YE	Average Takings Per Room Night Occupied: Jun 09 YE *	Average Takings Per Room Night Occupied: Jun 08 YE *	Average Takings Growth: Jun 09 on Jun 08 YE
TAS	156	-1	6,660	62	1,455	0.6%	60.3%	0.0%	1.9	\$191,886	3.7%	\$132	\$128	\$4
NSW	1,422	-14	71,229	196	15,883	-2.2%	61.8%	-2.0%	2.1	\$2,423,830	-3.7%	\$153	\$155	-\$2
VIC	813	8	39,548	1,084	8,900	-0.8%	63.3%	-1.7%	2.1	\$1,399,438	-0.7%	\$157	\$157	\$0
QLD	1,135	19	61,876	1,454	14,066	-2.6%	62.8%	-3.1%	2.7	\$2,047,334	-1.4%	\$146	\$144	\$2
SA	262	5	12,086	225	2,702	-1.1%	61.9%	-1.9%	2.0	\$359,872	3.7%	\$133	\$127	\$6
WA	351	1	21,718	157	5,291	-2.7%	67.2%	-2.4%	2.5	\$844,930	4.0%	\$160	\$149	\$10
NT	97	6	7,359	775	1,657	2.6%	63.6%	-3.1%	2.1	\$253,877	10.9%	\$153	\$142	\$11
ACT	56	2	5,105	61	1,284	-2.0%	69.0%	-2.5%	2.1	\$205,737	1.3%	\$160	\$155	\$5
Australia	4,292	26	225,581	4,014	51,237	-1.8%	63.0%	-2.3%	2.3	\$7,726,903	-0.7%	\$151	\$149	\$2

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

	No. of Establishments: Jun Qtr 09	Growth: Jun Qtr 09 on Jun Qtr 08	No. of Rooms Available: Jun Qtr 09	Growth: Jun Qtr 09 on Jun Qtr 08	Room Nights Occupied: Jun 09 ('000)	Room Night Growth (%): Jun 09 on Jun 08	Room Occupancy Rate: Jun 09	% Point Change in Occupancy from Jun 08	Average Length of Stay: Jun 09	Takings from Accommodation : Jun 09 ("000")	Takings from Accommodation Growth (%): Jun 09 on Jun 08	Average Takings Per Room Night Occupied: Jun 09 *	Average Takings Per Room Night Occupied: Jun 08 *	Average Takings Growth: Jun 09 on Jun 08 *
TAS	156	-1	6,660	62	333	3.5%	55.1%	1.4%	2.0	\$42,944	7.5%	\$129	\$124	\$5
NSW	1,422	-14	71,229	196	3,705	-3.9%	57.7%	-2.4%	2.0	\$524,913	-9.5%	\$142	\$151	-\$9
VIC	813	8	39,548	1,084	2,119	-3.5%	59.7%	-3.3%	2.1	\$318,466	-6.8%	\$150	\$156	-\$5
QLD	1,135	19	61,876	1,454	3,243	-4.1%	57.6%	-3.9%	2.6	\$451,330	-3.1%	\$139	\$138	\$1
SA	262	5	12,086	225	656	-0.3%	59.6%	-1.4%	2.0	\$84,794	4.7%	\$129	\$128	\$2
WA	351	1	21,718	157	1,253	-5.0%	63.4%	-4.1%	2.4	\$197,903	-5.1%	\$158	\$158	-\$0
NT	97	6	7,359	775	442	7.0%	66.3%	-2.7%	2.2	\$70,291	16.3%	\$159	\$146	\$13
ACT	56	2	5,105	61	312	-6.1%	67.5%	-4.8%	2.1	\$48,632	-16.3%	\$156	\$175	-\$19
Australia	4,292	26	225,581	4,014	12,063	-3.3%	59.1%	-3.0%	2.2	1,739,272	-5.4%	\$144	\$147	-\$3

\* 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: Jun Qtr 09	Growth: Jun Qtr 09 on Jun Qtr 08	No. of Rooms Available: Jun Qtr 09	Growth: Jun Qtr 09 on Jun Qtr 08	Room Nights Occupied: Jun 09 ('000')	Room Night Growth (%): Jun 09 on Jun 08	Room Occupancy Rate: Jun 09	% Point Change in Occupancy from Jun 08	Average Length of Stay: Jun 09	Takings from Accommodation : Jun 09 ("000")	Takings from Accommodation Growth (%): Jun 09 on Jun 08	Average Takings Per Room Night Occupied: Jun 09 *	Average Takings Per Room Night Occupied: Jun 08 *	Average Takings Growth: Jun 09 on Jun 08 *
TAS	118	-6	998	np	34	np	38.4%	np	1.8	\$4,129	np	\$121	np	np
NSW	591	-21	5,868	-187	231	1.9%	43.6%	2.0%	1.8	\$22,568	8.0%	\$98	\$92	\$6
VIC	430	-29	4,183	-276	152	-2.5%	40.4%	1.7%	1.7	\$15,174	0.9%	\$100	\$96	\$3
QLD	407	-20	4,034	-207	192	-5.6%	52.5%	-0.4%	2.0	\$18,301	-1.2%	\$95	\$91	\$4
SA	134	-8	1,259	-111	45	-1.3%	39.2%	2.6%	1.8	\$3,904	1.6%	\$87	\$84	\$3
WA	135	-11	1,168	-79	48	-10.1%	45.9%	-1.4%	2.5	\$6,858	2.4%	\$143	\$126	\$17
NT	15	3	142	15	5	-13.0%	36.4%	-12.9%	1.5	\$968	74.7%	\$206	\$103	\$103
ACT	4	1	41	np	2	np	49.8%	np	1.5	\$154	np	\$83	np	np
Australia	1,834	-91	17,693	-845	708	-2.8%	44.4%	0.9%	1.9	\$72,054	3.1%	\$102	\$96	\$6

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

	No. of Establishments: Jun Qtr 09	Growth: Jun Qtr 09 on Jun Qtr 08	No. of Rooms Available: Jun Qtr 09	Growth: Jun Qtr 09 on Jun Qtr 08	Room Nights Occupied: Jun 09 ('000')	Room Night Growth (%): Jun 09 on Jun 08	Room Occupancy Rate: Jun 09	% Point Change in Occupancy from Jun 08	Average Length of Stay: Jun 09	Takings from Accommodation : Jun 09 ("000")	Takings from Accommodation Growth (%): Jun 09 on Jun 08	Average Takings Per Room Night Occupied: Jun 09 *	Average Takings Per Room Night Occupied: Jun 08 *	Average Takings Growth: Jun 09 on Jun 08 *
TAS	274	-7	7,658	np	367	np	52.9%	np	1.9	\$47,073	np	\$128	np	np
NSW	2,013	-35	77,097	9	3,935	-3.5%	56.6%	-2.1%	2.0	\$547,481	-8.9%	\$139	\$147	-\$8
VIC	1,243	-21	43,731	808	2,271	-3.5%	57.8%	-2.7%	2.1	\$333,639	-6.4%	\$147	\$152	-\$5
QLD	1,542	-1	65,910	1,247	3,435	-4.2%	57.3%	-3.6%	2.5	\$469,630	-3.0%	\$137	\$135	\$2
SA	396	-3	13,345	114	701	-0.3%	57.7%	-0.8%	2.0	\$88,698	1.0%	\$127	\$125	\$2
WA	486	-10	22,886	78	1,301	-5.2%	62.6%	-3.8%	2.5	\$204,761	-4.9%	\$157	\$157	\$1
NT	112	9	7,501	790	447	6.8%	65.7%	-2.9%	2.2	\$71,258	16.8%	\$159	\$146	\$14
ACT	60	3	5,146	np	314	np	67.3%	np	2.1	\$48,785	np	\$156	np	np
Australia	6,126	-65	243,274	3,144	12,771	-3.3%	58.0%	-2.7%	2.2	\$1,811,327	-5.1%	\$142	\$145	-\$3

\* Rounded to nearest dollar

np: Not Published by ABS