



# Tourist Accommodation Data Sheet

## Year ended March 2010



### ALL ESTABLISHMENTS

All establishments refers to hotels, motels, serviced apartments, holiday flats, units and houses.

	SUPPLY				DEMAND				REVENUE					
	Establishments	% Change <sup>1</sup>	Room Nights Available	% Change <sup>1</sup>	Room Nights Occupied	% Change <sup>1</sup>	Room Occupancy %	Change (%point) <sup>2</sup>	Takings \$ (millions)	% Change <sup>1</sup>	Average Room Rate \$	% Change <sup>1</sup>	Yield <sup>3</sup> \$	% Change <sup>1</sup>
<b>Australia</b>	6,687	-1.0%	99,618,972	0.9%	59,037,359	-0.8%	59.3%	-1.0%	\$8,614	-1.6%	\$145.92	-0.8%	\$86.47	-2.5%
<b>QLD</b>	1,892	0.0%	28,998,469	0.5%	17,459,074	-2.9%	60.2%	-2.1%	\$2,449	-2.7%	\$140.25	0.2%	\$84.44	-3.3%
<b>NSW</b>	2,162	-0.9%	31,552,124	-0.3%	18,289,448	1.1%	58.0%	0.8%	\$2,683	-1.0%	\$146.69	-2.1%	\$85.03	-0.7%
<b>VIC</b>	1,271	-1.5%	17,380,206	3.3%	9,916,603	0.2%	57.1%	-1.7%	\$1,508	-1.4%	\$152.09	-1.6%	\$86.78	-4.5%
<b>WA</b>	505	-2.1%	8,872,616	1.3%	5,557,764	-5.4%	62.6%	-4.4%	\$877	-4.8%	\$157.85	0.5%	\$98.87	-6.0%
<b>SA</b>	406	-2.2%	5,218,592	0.8%	3,038,913	1.2%	58.2%	0.3%	\$394	1.7%	\$129.64	0.4%	\$75.49	0.9%
<b>Gold Coast</b>	348	-1.4%	7,078,684	-2.6%	4,595,742	-3.0%	64.9%	-0.3%	\$635	-3.7%	\$138.10	-0.6%	\$89.66	-1.1%
<b>Brisbane</b>	250	-1.6%	5,157,057	2.2%	3,576,521	-1.7%	69.4%	-2.7%	\$549	-2.8%	\$153.37	-1.2%	\$106.37	-4.9%
<b>Sunshine Coast</b>	305	5.2%	3,847,289	-0.6%	2,221,127	-1.6%	57.7%	-0.6%	\$346	1.6%	\$155.82	3.3%	\$89.96	2.2%
<b>Fraser Coast<sup>4</sup></b>	78	-17.0%	1,026,279	-2.4%	507,347	-7.3%	49.4%	-2.6%	\$56	-3.1%	\$109.49	4.5%	\$54.12	-0.7%
<b>Darling Downs<sup>5</sup></b>	144	23.1%	991,812	7.0%	571,983	10.0%	57.7%	1.6%	\$60	16.2%	\$104.64	5.7%	\$60.35	8.6%
<b>Bundaberg<sup>5</sup></b>	57	-17.4%	459,074	-4.1%	258,827	-4.9%	56.4%	-0.5%	\$29	-0.9%	\$110.68	4.2%	\$62.40	3.4%
<b>Fitzroy<sup>5</sup></b>	153	9.3%	1,556,533	9.3%	840,311	-7.5%	54.0%	-9.8%	\$100	-2.6%	\$119.00	5.2%	\$64.25	-10.9%
<b>Mackay<sup>5</sup></b>	70	2.9%	844,993	5.7%	555,885	-8.7%	65.8%	-10.4%	\$81	-6.6%	\$145.64	2.4%	\$95.81	-11.6%
<b>Whitsundays</b>	57	-3.4%	1,185,890	-0.5%	583,203	-4.0%	49.2%	-1.8%	\$128	-1.6%	\$220.07	2.4%	\$108.23	-1.1%
<b>Northern<sup>5</sup></b>	77	2.7%	1,147,586	10.1%	672,338	-2.4%	58.6%	-7.5%	\$79	-2.1%	\$118.20	0.4%	\$69.25	-11.1%
<b>TNQ</b>	265	0.8%	4,812,433	-0.1%	2,505,810	-3.1%	52.1%	-1.6%	\$337	-7.4%	\$134.56	-4.4%	\$70.07	-7.3%
<b>Outback<sup>5</sup></b>	73	-27.7%	709,523	-6.3%	375,150	-10.5%	52.9%	-2.5%	\$38	-6.9%	\$101.67	4.0%	\$53.75	-0.6%

### Key Points:

- The supply of commercial accommodation rooms saw incremental growth at a national level in the year to March 2010. All states, with the exception of NSW, saw an increased number of room nights available over the last year.
- The growth in room supply was not matched by stronger demand with room nights occupied easing. There were differing results for Australia's states with both Queensland and WA seeing the more pronounced declines in room nights occupied, while Victoria saw demand remain stable.
- Weaker demand saw both Queensland and WA record the strongest declines in room occupancy. Demand was stable for Victoria, however, the states' increased room supply drove a decline in room occupancy.

- Although NSW and Victoria achieved growth in room nights occupied, this was at the expense of room rates, with both states seeing average room rates decline. Queensland and WA saw marginal increases in room rates.
- Most of Queensland's regions also enjoyed continued growth in room rates. However, TNQ, Gold Coast and Brisbane saw room rates decline. TNQ continues to be impacted by the weaker Japanese market but a recovery from it's interstate market is a positive for the region.
- Weaker demand and average room rates again saw yield decline for commercial accommodation nationally. Despite room rates improving, albeit slightly, for Queensland and WA, lower room occupancies also forced yield down for these states.



# Tourist Accommodation Data Sheet

## Year ended March 2010



### HOTELS

Establishments with five 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 <sup>1</sup>	Room Nights Available	% Change <sup>1</sup>	Room Nights Occupied	% Change <sup>1</sup>	Room Occupancy %	Change (%point) <sup>2</sup>	Takings \$ (millions)	% Change <sup>1</sup>	Average Room Rate \$	% Change <sup>1</sup>	Yield <sup>3</sup> \$	% Change <sup>1</sup>
<b>Australia</b>	1,277	-0.8%	32,517,426	2.6%	21,331,751	1.2%	65.6%	-1.3%	\$3,619	-3.1%	\$169.63	-4.3%	\$111.28	-5.6%
<b>QLD</b>	273	-0.7%	7,996,788	0.4%	5,045,961	-1.6%	63.1%	-1.3%	\$836	-4.8%	\$165.73	-3.2%	\$104.57	-5.1%
<b>NSW</b>	314	-0.3%	9,497,350	2.3%	6,594,497	3.5%	69.4%	0.8%	\$1,179	-3.2%	\$178.82	-6.5%	\$124.16	-5.3%
<b>VIC</b>	245	0.0%	5,851,503	6.4%	3,793,581	3.3%	64.8%	-1.9%	\$675	-2.2%	\$178.04	-5.4%	\$115.42	-8.1%
<b>WA</b>	149	-3.2%	3,858,529	-0.3%	2,512,741	-6.9%	65.1%	-4.6%	\$428	-8.4%	\$170.35	-1.6%	\$110.93	-8.1%
<b>SA</b>	137	-2.1%	2,055,250	3.5%	1,302,863	4.3%	63.4%	0.5%	\$183	3.9%	\$140.80	-0.4%	\$89.26	0.4%
<b>Gold Coast</b>	31	-3.1%	2,268,868	-1.9%	1,575,183	-1.0%	69.4%	0.6%	\$250	-4.6%	\$158.93	-3.6%	\$110.34	-2.7%
<b>Brisbane</b>	39	0.0%	1,506,504	1.5%	1,135,192	-0.5%	75.4%	-1.6%	\$210	-3.7%	\$185.34	-3.2%	\$139.66	-5.2%
<b>Sunshine Coast</b>	10	11.1%	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p
<b>Fraser Coast<sup>4</sup></b>	12	-7.7%	170,755	0.0%	83,337	-4.8%	48.8%	-2.5%	\$8	-2.7%	\$99.67	2.2%	\$48.64	-2.8%
<b>Darling Downs</b>	26	23.8%	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p
<b>Bundaberg</b>	6	-25.0%	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p
<b>Fitzroy</b>	32	3.2%	402,015	0.7%	195,048	-9.6%	48.5%	-5.5%	\$25	-9.8%	\$126.33	-0.2%	\$61.29	-10.4%
<b>Mackay</b>	19	0.0%	300,012	-0.4%	199,553	-6.7%	66.5%	-4.5%	\$39	-7.2%	\$197.70	-0.6%	\$131.50	-6.9%
<b>Whitsundays<sup>4</sup></b>	10	0.0%	750,709	-0.8%	400,230	-2.6%	53.3%	-1.0%	\$96	1.2%	\$240.92	4.0%	\$128.44	2.0%
<b>Northern<sup>4</sup></b>	13	8.3%	326,519	9.5%	186,304	-4.5%	57.1%	-8.4%	\$23	-11.5%	\$122.40	-7.3%	\$69.84	-19.2%
<b>TNQ</b>	45	-2.2%	1,615,711	2.8%	923,701	1.1%	57.2%	-1.0%	\$136	-7.5%	\$147.62	-8.5%	\$84.39	-10.0%
<b>Outback</b>	20	-20.0%	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:** ■ Growth in room supply for hotels over the last year outstripped that for all other forms of commercial accommodation, with NSW, Victoria and SA all seeing an expansion in room stock. Whilst, room supply remained stable in Queensland.

■ At a national level, demand for hotel rooms also improved, with NSW, Victoria and SA all seeing healthy increases in room nights occupied. In contrast, Queensland experienced a small decline in room nights occupied. However, WA saw a more significant reduction in room nights occupied, with the state impacted by the downturn in the resources sector.

■ With increasing competition between different forms of accommodation, room rates continued to decline for hotels, a trend seen across all states.

■ The strongest declines in room rates occurred in TNQ, driven by a weaker Japanese market, and Townsville, where hotels are yet to fully recover from the downturn in business travel during the Global Financial Crisis.

■ The Whitsundays saw room rates improve despite room occupancy easing. Such stronger room rates helped the region achieve higher yields over the last year.

■ A decline in room occupancy and room rates across most states contributed to significant declines in hotel yield across Australia.

# Tourist Accommodation Data Sheet

## Year ended March 2010

### MOTELS

*Establishments with five 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 <sup>1</sup>	Room Nights Available	% Change <sup>1</sup>	Room Nights Occupied	% Change <sup>1</sup>	Room Occupancy %	Change (%point) <sup>2</sup>	Takings \$ (millions)	% Change <sup>1</sup>	Average Room Rate \$	% Change <sup>1</sup>	Yield <sup>3</sup> \$	% Change <sup>1</sup>
<b>Australia</b>	3,521	-1.3%	35,669,510	-1.1%	19,499,038	-3.5%	54.7%	-2.5%	\$2,234	-2.0%	\$114.57	1.5%	\$62.63	-1.0%
<b>QLD</b>	762	0.4%	7,852,873	-1.3%	4,148,535	-8.8%	58.4%	-4.7%	\$510	-8.5%	\$111.25	0.1%	\$64.96	-7.3%
<b>NSW</b>	1,406	-0.9%	13,828,275	-1.3%	7,406,515	-0.7%	53.6%	0.4%	\$842	1.0%	\$113.67	1.6%	\$60.88	2.3%
<b>VIC</b>	780	-3.1%	6,943,938	-1.4%	3,557,477	-3.2%	51.2%	-1.0%	\$407	-1.0%	\$114.45	2.3%	\$58.64	0.4%
<b>WA</b>	187	-1.6%	2,515,194	2.1%	1,455,418	-3.2%	57.9%	-3.2%	\$178	0.6%	\$122.52	3.9%	\$70.90	-1.5%
<b>SA</b>	207	-1.9%	2,112,842	0.0%	1,132,504	0.4%	53.6%	0.2%	\$125	1.4%	\$110.19	1.0%	\$59.06	1.4%
<b>Gold Coast</b>	60	-1.6%	633,343	-10.1%	357,992	-10.2%	56.5%	-0.1%	\$42	-9.2%	\$116.83	1.2%	\$66.04	1.1%
<b>Brisbane</b>	120	-1.6%	1,574,017	0.2%	1,011,558	-8.8%	64.3%	-6.3%	\$125	-9.3%	\$123.23	-0.5%	\$79.20	-9.5%
<b>Sunshine Coast</b>	57	21.3%	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p
<b>Fraser Coast<sup>4</sup></b>	33	-21.4%	327,145	-4.2%	176,778	-11.9%	54.0%	-4.7%	\$15	-7.5%	\$87.41	5.0%	\$47.23	-3.5%
<b>Darling Downs</b>	111	23.3%	720,845	5.5%	425,017	6.3%	59.0%	0.4%	\$44	10.0%	\$103.52	3.5%	\$61.03	4.2%
<b>Bundaberg</b>	44	-8.3%	319,410	-3.0%	187,838	-3.7%	58.8%	-0.5%	\$19	2.0%	\$101.03	6.0%	\$59.41	5.1%
<b>Fitzroy</b>	97	6.6%	952,636	5.3%	535,538	-12.9%	56.2%	-11.7%	\$59	-8.9%	\$110.26	4.6%	\$61.99	-13.5%
<b>Mackay</b>	40	2.6%	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p
<b>Whitsundays</b>	20	-4.8%	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p
<b>Northern</b>	45	2.3%	576,242	2.1%	336,557	-11.9%	58.4%	-9.3%	\$38	-10.2%	\$112.17	1.9%	\$65.52	-12.1%
<b>TNQ</b>	85	2.4%	1,230,268	-8.7%	691,964	-10.0%	56.2%	-0.8%	\$69	-17.3%	\$99.19	-8.2%	\$55.79	-9.5%
<b>Outback</b>	50	-29.6%	535,000	-5.7%	290,718	-13.5%	54.3%	-4.9%	\$31	-8.8%	\$105.98	5.5%	\$57.59	-3.3%

- Key Points:**
- Unlike hotels and serviced apartments, room supply eased for motels, with declines experienced in Queensland, NSW and Victoria.
  - Demand declined more substantially for motels than for other forms of accommodation, and particularly in Queensland. Some of the loss in room nights occupied in motels may well have been spent in other forms of accommodation such as hotels or serviced apartments.
  - Since the onset of the Global Financial Crisis, room rates for different types of accommodation have converged. The premium paid for hotel rooms over motel rooms and other forms of accommodation has declined significantly.

- Despite competing with discounting from other forms of accommodation, motel room rates have remained resilient, being stronger for all states and most of Queensland's regions, with TNQ the only exception. The improved affordability of hotel rooms in the TNQ region may well have influenced the motel sector's performance.
- While motel room rates remained virtually stable for Queensland and for most of its regions, yield was eroded due to the significantly weaker demand seen over the last year.
- The Gold Coast, Darling Downs and Bundaberg were the only regions to see yield improve for motel rooms.

# Tourist Accommodation Data Sheet

## Year ended March 2010

### SERVICED APARTMENTS

Establishments with five 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.

	SUPPLY				DEMAND				REVENUE					
	Establishments	% Change <sup>1</sup>	Room Nights Available	% Change <sup>1</sup>	Room Nights Occupied	% Change <sup>1</sup>	Room Occupancy %	Change (%point) <sup>2</sup>	Takings \$ (millions)	% Change <sup>1</sup>	Average Room Rate \$	% Change <sup>1</sup>	Yield <sup>3</sup> \$	% Change <sup>1</sup>
<b>Australia</b>	1,311	-0.1%	20,836,158	2.2%	13,429,670	0.5%	64.5%	-1.7%	\$2,130	0.6%	\$158.60	0.1%	\$102.22	-1.6%
<b>QLD</b>	519	1.2%	8,152,269	3.1%	4,991,606	2.4%	61.2%	-0.4%	\$726	3.3%	\$145.54	0.9%	\$89.11	0.3%
<b>NSW</b>	286	-1.7%	4,835,822	-0.2%	3,129,214	-0.7%	64.7%	-0.3%	\$515	-1.4%	\$164.50	-0.7%	\$106.45	-1.2%
<b>VIC</b>	213	3.4%	3,379,488	5.4%	2,314,449	1.3%	68.5%	-2.8%	\$387	-0.1%	\$167.11	-1.3%	\$114.45	-5.2%
<b>WA</b>	147	-2.6%	2,051,193	3.3%	1,289,046	-5.6%	62.8%	-5.9%	\$231	-3.5%	\$179.55	2.3%	\$112.83	-6.5%
<b>SA</b>	46	-4.2%	700,773	-4.7%	486,508	-6.3%	69.4%	-1.1%	\$72	-4.7%	\$148.79	1.7%	\$103.30	0.1%
<b>Gold Coast</b>	110	1.9%	2,044,330	-1.5%	1,352,388	-0.3%	66.2%	0.8%	\$182	0.4%	\$134.63	0.6%	\$89.06	1.9%
<b>Brisbane</b>	74	-2.6%	1,726,979	4.0%	1,277,727	3.1%	74.0%	-0.6%	\$197	1.0%	\$153.86	-2.0%	\$113.84	-2.8%
<b>Sunshine Coast</b>	132	3.9%	1,642,545	-3.2%	942,736	-1.8%	57.4%	0.8%	\$151	3.0%	\$160.19	4.9%	\$91.94	6.4%
<b>Fraser Coast<sup>4</sup></b>	23	-14.8%	350,594	0.9%	168,294	-0.1%	48.0%	-0.5%	\$22	-2.1%	\$130.50	-2.0%	\$62.64	-3.0%
<b>Darling Downs</b>	7	16.7%	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p
<b>Bundaberg</b>	7	-46.2%	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p
<b>Fitzroy</b>	24	33.3%	201,882	67.6%	109,725	41.0%	54.4%	-10.3%	\$16	53.5%	\$148.65	8.9%	\$80.79	-8.4%
<b>Mackay</b>	11	10.0%	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p
<b>Whitsundays</b>	19	5.6%	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p
<b>Northern</b>	11	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
<b>TNQ</b>	98	4.3%	1,491,632	4.0%	740,090	0.3%	49.6%	-1.9%	\$105	0.5%	\$141.24	0.2%	\$70.08	-3.4%
<b>Outback</b>	3	-40.0%	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:

- Serviced apartments have remained popular with consumers and particularly during the Global Financial Crisis. The self-contained nature of this accommodation has resonated with tourists wanting to contain their holiday costs.

- Serviced apartments are continuing to see the strongest growth in room supply across most states, excluding SA. Queensland saw the strongest growth with this occurring across a number of regions, including: Brisbane, Fraser Coast, Fitzroy and TNQ.

- Queensland also saw the strongest growth in room nights occupied, followed by Victoria, which was the only other state to see demand for serviced apartments increase.

- Despite seeing the strongest growth in room nights occupied of any state, Queensland saw a small decline in room occupancy for serviced apartments over the last year. Brisbane, Fraser Coast, Fitzroy and TNQ were the regions where occupancy declined.

- Room rates for serviced apartments remained stable at a national level over the last year, with Queensland seeing increases, while NSW and Victoria saw declines. Declining room rates were a factor for yield easing for serviced apartments in NSW and Victoria.

- Stronger room rates were balanced by weaker room occupancy in Queensland, with yield remaining stable for serviced apartments. The Sunshine Coast enjoyed a strong increase in room rates with this also boosting yield for the region.



# Tourist Accommodation Data Sheet

Year ended March 2010



## HOLIDAY FLATS, UNITS and HOUSES

The total number of holiday flats, units and houses (excluding establishments predominantly operated on a time-share basis) operated by letting entities (i.e. owners, managers or real estate agents) who have sole letting rights to at least 15 flats, units or houses for short-term letting. These flats, units or houses should be mainly self-contained in terms of cooking, bath (or shower) and toilet facilities and should not have breakfast available for guests. Data for holiday flats, units or houses include short-term owner operators as well as paying guest accommodation.

	SUPPLY				DEMAND				REVENUE					
	Establishments	% Change <sup>1</sup>	Room Nights Available	% Change <sup>1</sup>	Room Nights Occupied	% Change <sup>1</sup>	Room Occupancy %	Change (%point) <sup>2</sup>	Takings \$ (millions)	% Change <sup>1</sup>	Average Room Rate \$	% Change <sup>1</sup>	Yield <sup>3</sup> \$	% Change <sup>1</sup>
<b>Australia</b>	578	-1.9%	10,595,878	0.4%	4,776,900	-1.7%	48.7%	-0.9%	\$632	1.7%	\$132.30	3.5%	\$59.65	1.3%
<b>QLD</b>	338	-2.0%	5,029,081	-0.4%	2,921,387	-4.6%	58.1%	-2.6%	\$381	-1.5%	\$130.26	3.3%	\$75.67	-1.1%
<b>NSW</b>	156	0.0%	3,453,033	-1.2%	1,129,180	-0.5%	32.5%	0.0%	\$135	0.0%	\$119.63	0.6%	\$39.12	1.2%
<b>VIC</b>	33	-2.9%	1,165,537	14.1%	255,086	1.7%	21.9%	-2.6%	\$40	9.7%	\$155.46	7.8%	\$34.02	-3.8%
<b>WA</b>	22	4.8%	445,472	2.6%	303,357	1.9%	68.1%	-0.5%	\$39	13.3%	\$129.66	11.1%	\$88.30	10.4%
<b>SA</b>	16	0.0%	338,983	-4.7%	111,494	8.1%	32.9%	3.9%	\$12	5.2%	\$111.75	-2.7%	\$36.76	10.4%
<b>Gold Coast</b>	147	-3.3%	2,132,143	-1.9%	1,310,179	-6.0%	61.4%	-2.7%	\$160	-5.1%	\$122.45	1.0%	\$75.24	-3.2%
<b>Brisbane</b>	17	0.0%	349,557	5.8%	152,044	3.7%	43.5%	-0.9%	\$17	22.1%	\$111.03	17.8%	\$48.29	15.5%
<b>Sunshine Coast</b>	106	-0.9%	1,617,022	0.2%	944,233	-2.4%	58.4%	-1.6%	\$143	2.1%	\$151.57	4.6%	\$88.50	1.8%
<b>Fraser Coast<sup>4</sup></b>	10	-16.7%	177,785	-7.4%	78,938	-12.8%	44.4%	-2.8%	\$10	1.8%	\$124.49	16.7%	\$55.28	9.9%
<b>Darling Downs</b>	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
<b>Bundaberg</b>	3	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
<b>Fitzroy</b>	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	n/p
<b>Mackay</b>	1	-50.0%	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p
<b>Whitsundays</b>	6	-25.0%	63,894	0.0%	35,938	-16.4%	56.2%	-4.6%	\$7	-1.7%	\$185.78	17.6%	\$104.49	8.7%
<b>Northern</b>	4	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
<b>TNQ</b>	37	-7.5%	474,822	0.0%	219,980	-5.7%	46.3%	-3.9%	\$28	-6.3%	\$125.75	-0.7%	\$58.26	-8.5%
<b>Outback</b>	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	n/p

### Key Points:

- Results for holiday, flats units and houses (HFUH) were more stable than for other forms of accommodation.
- Supply of rooms remained stable with Victoria (and to a lesser degree WA) seeing the only increase in room stock.
- Room nights occupied eased at a national level and particularly for Queensland. Competition between different forms of accommodation and increased preference for short breaks may have contributed to this result.
- The Gold Coast in particular experienced a decline in demand for HFUH rooms, while demand eased only slightly for hotels and serviced apartments.
- Room occupancy declined for Queensland, falling below 60%. Although room occupancies for HFUH establishments in the Gold Coast and Sunshine Coast regions also declined, room occupancy levels remain comparable with that for other types of commercial accommodation establishments.
- Stronger room rates for HFUH rooms in Queensland reduced the impact of weaker overall demand, with yield showing only a marginal decline.
- A decline in room rates and weaker room occupancy in HFUH, for both the Gold Coast and TNQ, saw yield decline for both regions in the year to March 2010.



# Tourist Accommodation Data Sheet

## Year ended March 2010



### Notes

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

1. % change refers to the percentage change between the year ended March 2010 and the year ended March 2009.
  2. Change % point refers to the difference between room occupancy in the year ended March 2010 and the year ended March 2009, e.g. where room occupancy for year ended March 2010 was 60% and for year ended March 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.
  5. All Establishments data for Bundaberg, Fitzroy, Mackay, Northern, Darling Downs and Outback does not include holiday flats, units and houses due to limitations within the ABS data source.
  6. Northern and Whitsunday hotels data refers to establishments containing 15 or more rooms, as 5 or more room data is not published by the ABS due to confidentiality issues. All other data for the Northern and Whitsundays regions refers to 5 or more room establishments.
- 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, and holiday flats, units and houses with 5 or more rooms/units.

The statistics in this report depict rolling data for the year ended March 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.

### For Further Information:

Research Department  
Tourism Queensland  
Email: [research@tq.com.au](mailto:research@tq.com.au)  
Website: [www.tq.com.au/research](http://www.tq.com.au/research)

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