Tourist Accommodation Snapshot

JUNE QTR 2014

Source: Australian Bureau of Statistics

no change	increase	decrease

All Establishments (Hotels, motels and serviced apartments with 15 rooms or more)

	Qtr	SUPPLY			DEMAND		REVENUE		
		Establish-ments	Rooms	Room nights available (000)	Room nights occupied (000)	Room occupancy rate[1]	Takings from accommo-dation	Average room rate	Yield[2]
	Qtr	no.	no.	no.	no.	%	$ millions	$	$
AUST	Jun-2014	4204	229,646	20,789	12,776	61.5	2,088.6	163.48	100.47
	Jun-2013	4237	230,064	20,833	12,916	62.0	2,099.6	162.55	100.78
	% ch	-0.8%	-0.2%	-0.2%	-1.1%	-0.5	-0.5%	0.6%	-0.3%
NSW	Jun-2014	1,375	70,800	6,390	4,013	62.8	677.2	168.78	105.99
	Jun-2013	1,385	70,758	6,383	3,994	62.6	662.7	165.90	103.82
	% ch	-0.7	0.1	0.1	0.5	0.2	2.2	1.7	2.1
VIC	Jun-2014	814	43,478	3,912	2,535	64.8	420.4	165.83	107.47
	Jun-2013	814	43,449	3,920	2,486	63.4	405.3	162.99	103.39
	% ch	0.0	0.1	-0.3	1.9	1.4	3.7	1.7	3.9
QLD	Jun-2014	1,124	61,274	5,568	3,252	58.4	493.9	151.88	88.71
	Jun-2013	1,137	61,768	5,610	3,383	60.3	515.5	152.38	91.89
	% ch	-1.1	-0.8	-0.7	-3.9	-1.9	-4.2	-0.3	-3.5
Sydney	Jun-2014	281	33,842	3,076	2,376	77.2	458.8	193.06	149.13
	Jun-2013	283	33,724	3,055	2,337	76.5	449.1	192.17	147.03
	% ch	-0.7	0.3	0.8	1.7	0.7	2.1	0.5	1.4
Melbourne	Jun-2014	303	27,950	2,541	1,898	74.7	337.9	178.03	132.97
	Jun-2013	302	27,779	2,523	1,857	73.6	325.2	175.16	128.86
	% ch	0.3	0.6	0.7	2.2	1.1	3.9	1.6	3.2
Brisbane	Jun-2014	193	13,115	1,193	839	70.3	140.5	167.53	117.85
	Jun-2013	194	13,258	1,207	885	73.3	160.0	180.80	132.61
	% ch	-0.5	-1.1	-1.2	-5.2	-3.0	-12.2	-7.3	-11.1

Notes:

1. The change in occupancy rate is measured in percentage point difference.

2. Yield is average takings per room per night, for all rooms whether they are occupied or not.

Key findings for the June quarter 2014:

• NSW continues to lead Australia in accommodation supply, demand and revenue takings.

• While there has been a slight decline in number of establishments in Australia and in NSW for the June quarter 2014 when compared to the same quarter in 2013, the number of rooms available slightly increased in the State (+0.1%). This was mainly due to growth in room nights available in motels (+1.2%) and hotels (+0.4%).

• NSW revenue for the quarter increased in terms of takings (+2.2%), yield per room (+2.1%) and average room rate (+1.7%). The revenue growth in serviced apartments exceeded NSW revenue growth in all three metrics (+5.1%, +3.9% and +6.9%, respectively).

• While room occupancy rates for the June quarter declined in Australia, NSW occupancy rates grew from 62.6% to 62.8%. The increase in NSW occupancy rate was mostly due to high hotel occupancy rate (up from 73.2% to 74.6%).

• Sydney accounts for 20 per cent of NSW establishments but 49 per cent of NSW rooms. Sydney room nights occupied (+1.7%) increased higher than its room nights available (+0.8%) and this resulted in the high occupancy rate of 77.2%, up from 76.5% in June quarter 2013.

• Regional NSW recorded declines in supply and demand in the quarter but exceeded growth in Sydney revenue takings (+2.3% vs. +2.1%).

• North Coast leads Regional NSW in tourist accommodation. It accounts for more than a fifth of Regional NSW's accommodation supply, demand and revenue takings.

Tourist Accommodation Snapshot

JUNE QTR 2014

Source: Australian Bureau of Statistics

| | no change | increase | decrease |

All Establishments (Hotels, motels and serviced apartments with 15 rooms or more)

		SUPPLY			DEMAND		REVENUE		
		Establish-ments	Rooms	Room nights available (000)	Room nights occupied (000)	Room occupancy rate[1]	Takings from accommo-dation	Average room rate	Yield[2]
	Qtr	no.	no.	no.	no.	%	$ millions	$	$
Regional NSW	Jun-2014	1,094	36,958	3,314	1,636	49.4	218	133.52	65.91
	Jun-2013	1,102	37,034	3,328	1,657	49.8	214	128.85	64.17
	% ch	-0.7	-0.2	-0.4	-1.3	-0.4	2.3	3.6	2.7
South Coast	Jun-2014	120	3,729	339	160	47.0	21.9	137.15	64.48
	Jun-2013	123	3,839	350	150	42.8	20.1	134.06	57.42
	% ch	-2.4	-2.9	-2.9	6.6	4.2	9.1	2.3	12.3
Snowy Mountains	Jun-2014	64	2,457	175	45	25.6	6.7	150.25	38.45
	Jun-2013	64	2,421	179	50	27.8	8.1	163.28	45.35
	% ch	0.0	1.5	-1.9	-9.7	-2.2	-16.9	-8.0	-15.2
Capital Country	Jun-2014	61	2,016	184	93	50.9	11.8	126.08	64.21
	Jun-2013	61	2,018	184	97	52.6	12.4	128.98	67.79
	% ch	0.0	-0.1	0.0	-3.2	-1.7	-5.4	-2.2	-5.3
The Murray	Jun-2014	104	3,093	282	125	44.5	13.7	109.42	48.74
	Jun-2013	106	3,130	285	133	46.8	14.3	107.20	50.19
	% ch	-1.9	-1.2	-1.1	-6.0	-2.3	-4.0	2.1	-2.9
Riverina	Jun-2014	69	2,031	185	103	55.6	12.1	117.57	65.37
	Jun-2013	69	2,065	188	106	56.6	12.4	117.08	66.24
	% ch	0.0	-1.6	-1.7	-3.4	-1.0	-3.0	0.4	-1.3
Central NSW	Jun-2014	131	3,921	356	197	55.4	22.9	116.22	64.41
	Jun-2013	132	3,916	355	193	54.3	22.4	115.84	62.85
	% ch	-0.8	0.1	0.2	2.3	1.1	2.6	0.3	2.5
Hunter [3]	Jun-2014	117	5,481	499	255	51.1	38.1	149.36	76.39
	Jun-2013	101	4,303	392	220	56.1	32.5	148.03	83.08
	% ch	15.8	27.4	27.4	16.1	-5.0	17.1	0.9	-8.1
New England North West	Jun-2014	96	2,774	252	135	53.3	15.7	116.38	62.03
	Jun-2013	95	2,657	242	133	55.2	15.3	114.78	63.35
	% ch	1.1	4.4	4.4	0.8	-1.9	2.2	1.4	-2.1
Outback NSW	Jun-2014	33	910	83	49	59.4	5.2	104.74	62.26
	Jun-2013	34	935	85	55	64.7	5.8	104.64	67.70
	% ch	-2.9	-2.7	-2.6	-10.6	-5.3	-10.5	0.1	-8.0
Central Coast	Jun-2014	41	1,772	161	74	46.0	11.7	157.11	72.25
	Jun-2013	41	1,798	164	73	44.8	10.8	147.48	66.12
	% ch	0.0	-1.4	-1.6	1.1	1.2	7.7	6.5	9.3
Blue Mountains	Jun-2014	33	1,232	112	63	56.0	11.9	189.04	105.84
	Jun-2013	33	1,249	114	55	48.6	10.6	192.05	93.33
	% ch	0.0	-1.4	-1.4	13.6	7.4	11.9	-1.6	13.4
North Coast [3]	Jun-2014	225	7,542	685	337	49.2	46.9	139.10	68.41
	Jun-2013	243	8,703	792	392	49.5	48.8	124.49	61.59
	% ch	-7.4	-13.3	-13.5	-14.0	-0.3	-3.9	11.7	11.1

Notes:

1. The change in occupancy rate is measured in percentage point difference.

2. Yield is average takings per room per night, for all rooms whether they are occupied or not.

3. Statistical areas of Nelson Bay Peninsula, Raymond Terrace and Williamtown-Medowie-Karuah were classified under the North Coast region in 2013 and have been reclassified under the Hunter region in 2014.