

Survey of Tourist Accommodation

March Quarter 2011: Hotels, Motels &

Serviced Apartments (15+ Rooms)



Summary Results

Key indicators of Victoria's accommodation performance for Hotels, Motels and Serviced Apartments (HMSA) of 15 rooms or more for the March 2011 quarter are:

- There were 812 establishments in Victoria in the March 2011 quarter, down by 11 from the March 2010 quarter.
- The number of rooms available in Victoria increased by 1,154 to a total of 41,971 in the March 2011 quarter compared to the March 2010 quarter. This was driven by the strong increase for Melbourne (+1,245 rooms to 26,230, largely attributed to the opening of Crown Metropol in April 2010), with regional Victoria decreasing by 91 rooms to 15,741.
- Room nights occupied in Victoria increased by 4.9% to 2.5 million. For regional Victoria, the number of room nights occupied decreased marginally (-0.3% to 703,700), with growth recorded in Phillip Island (+9.0% to 38,600), Goldfields (+3.6% to 88,100), Mornington Peninsula (+3.4% to 48,600) and Victoria's High Country (+0.7% to 53,200). Room nights occupied increased in Melbourne (+7.1% to 1.8 million).
- Room occupancy rates in Victoria increased by 1.2 percentage points to 67.4% in the March 2011 quarter compared to the March 2010 quarter, with regional Victoria increasing by 0.1 percentage points to 49.7%. Melbourne (+1.5% pts to 76.2%), Phillip Island (+6.5% pts to 56.9%), Mornington Peninsula (+3.8% pts to 59.5%), Goldfields (+1.6% pts to 56.2%) and Yarra Valley and Dandenong Ranges (+0.2% pts to 37.4%) all experienced growth.
- Victoria's total accommodation takings in the March 2011 quarter increased by 8.7% over the March 2010 quarter to \$414.4 million. Regional Victoria experienced a 1.6% increase in accommodation takings to \$90.3 million, with growth in Yarra Valley and Dandenong Ranges (+7.6% to \$4.1 million), Goldfields (+5.8% to \$10.3 million), Victoria's High Country (+5.8% to \$6.0 million), Mornington Peninsula (+5.4% to \$7.3 million) and Phillip Island (+1.5% to \$6.1 million). Takings in Melbourne increased by 10.9% to \$324.1 million.
- In the March 2011 quarter, 22,298 people in Victoria were employed in HMSA of 15 rooms or more, an increase of 0.4% from the March 2010 quarter, while regional Victoria was down 4.5% to 6,438. Phillip Island (+15.1% to 321), Victoria's High Country (+7.3% to 576) and Goldfields (+2.0% to 722) registered an increase in employment, with employment in Melbourne also increasing 2.5% to 15,860.

Please note that due to confidentiality issues, estimates are not available in the March 2011 quarter for Daylesford and the Macedon Ranges and the Grampians, as well as comparison to the March 2010 quarter for these regions. Estimates for the Murray region are not available for the March 2010 quarter and as such comparison results are not included for this region.

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March Quarter 2011	Establishments	Rooms Available	Room nights occupied ('000)	Room occupancy rates	Takings (\$'000)	Employment
Total Victoria	812	41,971	2,502.7	67.4%	\$414,351	22,298
Change (March Qtr 10-11)	-11	+1,154	+4.9%	+1.2% pts	+8.7%	+0.4%
Regional Victoria	516	15,741	703.7	49.7%	\$90,257	6,438
Change (March Qtr 10-11)	-9	-91	-0.3%	+0.1% pts	+1.6%	-4.5%
Victoria's Campaign Regions and Sub-Regions						
Macedon	6	n/a	n/a	n/a	n/a	n/a
Spa Country	6	318	12.8	44.6%	\$2,537	331
Daylesford & the Macedon Ranges	12	n/a	n/a	n/a	n/a	n/a
Change (March Qtr 10-11)	+0	n/a	n/a	n/a	n/a	n/a
Gippsland	38	1,195	49.6	46.1%	\$5,339	326
Lakes	23	683	37.9	62.0%	\$4,669	256
Gippsland	61	1,878	87.5	51.8%	\$10,008	582
Change (March Qtr 10-11)	-2	-7	-3.5%	-1.7% pts	-1.0%	-9.1%
Ballarat	29	884	41.7	52.4%	\$4,927	363
Bendigo Loddon	33	859	46.4	60.0%	\$5,331	359
Goldfields	62	1,743	88.1	56.2%	\$10,258	722
Change (March Qtr 10-11)	+0	+12	+3.6%	+1.6% pts	+5.8%	+2.0%
Central Highlands	14	337	10.7	35.2%	\$1,023	92
Western Grampians	20	493	23.1	52.1%	\$2,676	239
Wimmera	6	n/a	n/a	n/a	n/a	n/a
Grampians	40	n/a	n/a	n/a	n/a	n/a
Change (March Qtr 10-11)	-2	n/a	n/a	n/a	n/a	n/a
Geelong	29	965	57.4	66.0%	\$8,003	500
Western	66	1,968	111.6	63.0%	\$16,258	779
Great Ocean Road	95	2,933	168.9	64.0%	\$24,261	1,279
Change (March Qtr 10-11)	-2	-40	-2.1%	-0.5% pts	-1.8%	-15.1%
Melbourne	296	26,230	1,799.0	76.2%	\$324,094	15,860
Change (March Qtr 10-11)	-2	+1,245	+7.1%	+1.5% pts	+10.9%	+2.5%
Mornington Peninsula	26	907	48.6	59.5%	\$7,281	475
Change (March Qtr 10-11)	-1	-30	+3.4%	+3.8% pts	+5.4%	-10.7%
Central Murray	22	622	26.7	47.7%	\$2,968	150
Goulburn	32	905	40.6	49.9%	\$4,655	361
Mallee	42	1,304	58.2	49.6%	\$6,085	425
Murray East	9	237	13.5	63.1%	\$1,297	60
Murray	105	3,068	139.0	50.3%	\$15,005	996
Change (March Qtr 10-11)	+0	n/a	n/a	n/a	n/a	n/a
Phillip Island	13	753	38.6	56.9%	\$6,134	321
Change (March Qtr 10-11)	+0	-26	+9.0%	+6.5% pts	+1.5%	+15.1%
Victoria's High Country	80	2,268	53.2	37.0%	\$5,969	576
Change (March Qtr 10-11)	-1	+40	+0.7%	-2.7% pts	+5.8%	+7.3%
Melbourne East	16	598	22.4	41.7%	\$3,788	605
Upper Yarra	6	161	3.1	22.4%	\$326	77
Yarra Valley & Dandenong Ranges	22	759	25.6	37.4%	\$4,113	682
Change (March Qtr 10-11)	-1	-20	-2.0%	+0.2% pts	+7.6%	-3.9%