

Tourist Accommodation Establishments in Australia

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There are limited sources to determine a clear picture of the total tourist accommodation market in Australia. The following sources have been used; the Australian Bureau of Statistics, Accommodation Association of Australia, the Australian Tourism Data Warehouse, selected online rental websites and news media. What this report shows is the considerable disparity between government records and actual market size.

1. Number of trading accommodation providers

The Australian Bureau of Statistics primarily takes their accommodation figures from the star rating organisation AAA Tourism. The ABS monitoring covers accommodation with 15 plus rooms – Table 1. These exclude small operators, caravan parks, holiday homes and businesses non star rated to present a figure of 4,237 accommodation providers. This appears to be the regular breakdown quoted for statistical purposes.

Table 1: ABS (2013) accommodation 15 rooms plus. ABS code 8635

Category	Number
Motels & Guest Houses	2392
Hotels	856
Serviced Apartments	989
Total	4237

(2013)

There have been ABS surveys which include small accommodation providers with the last figures generated in 2010, Table 2. Here the total accommodation providers are put at 6,109.

Table 2: ABS (2010) accommodation 5 rooms plus

Category	Number
Motels & Guest Houses	3521
Hotels	1277
Serviced Apartments	1311
Total	6109

(2010)

In addition the ABS does publish results from Australian Business Number by business sector i.e. businesses registered for tax purposes. Here accommodation includes: camping ground, caravan parks, holiday house/flat operation, hotel, motel, resort, serviced apartments, ski lodge, student resident and youth hostel table 3. The total national figures is put at 13,500

Table 3: ABS data from ABN registration (code 81650)

State	Number
NSW	4251
Victoria	3044
Queensland	3233
South Australia	897
Western Australia	1224
Tasmania	558
Northern Territory	199
ACT	91
Unknown	3
Total	13,500

(2012)

A further source is provided from those businesses which want to promote their accommodation through state and regional tourism bodies and who register with the Australian Tourism Data Warehouse. Table 4 shows the ATDW accommodation breakdown at 19,966.

Table 4: Australian Tourism Data Warehouse/Accommodation

ATDW Accommodation	Listings Count
Apartments	2266
Backpackers and Hostels	444
Bed and Breakfasts	1994
Cabins and Cottages	2762
Caravan and Camping	1126
Farm Stays	354
Holiday Houses*	1701
Hotel	1492
Motel	1397
Resorts	531
Retreat and Lodge	344
Self Contained	5509
Wilderness Safari Retreat	46
TOTAL	19966

However, the ATDW does not include unofficial holiday homes* which are rented out via real estate offices and www.stayz.com.au Stayz.com.au is one of the largest online accommodation retailers, Table 5, with both official and unofficial accommodation (holiday homes, B&Bs, guest houses and self-contained apartments) to offer a claimed 38,587 different properties in Australia.

Table 5: Comparison between Official and Publically Promoted Online Accommodation

Stayz.com.au	38,587
Australian Tourism Data Warehouse	19,966

The Tourism Research Australia and Sustainable Tourism Cooperative Research centre quote ABS figures. However, it is likely that the environmental and economic factors are more complex due to the nature of the regulated and unregulated accommodation market.

2. Accommodation Rating Share

Star rating can be used as a guide to demonstrate accommodation market demands. In Australia there are few one or two star properties, Table 6, with 86% of accommodation 3 or 4 star. This is because 1 and 2 star properties have low appeal, not socially accepted as having suitable amenities (the author was a member of the AAATourism advisory panel). This can be compared to a market like France where 1 and 2 star properties are socially acceptable to domestic travelers. Type of accommodation (and its footprint) is therefore influenced by social attitudes and historic market presence.

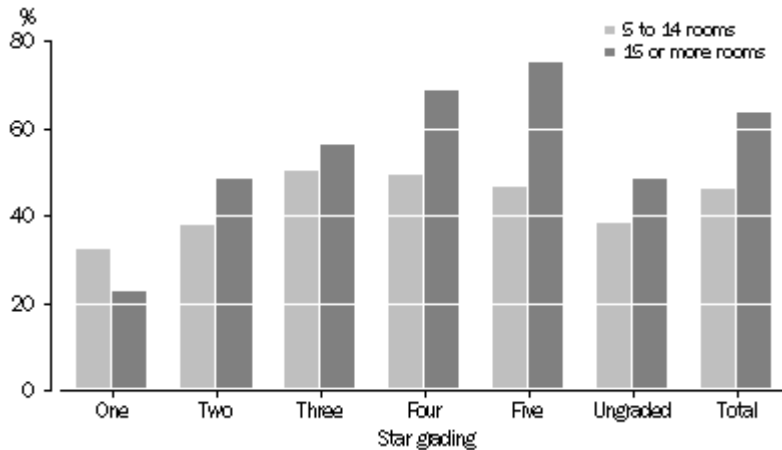
Table 6: ABS breakdown of Star Rated Properties

<i>Star rating</i>	<i>Category</i>	<i>Number</i>	<i>Share</i>
One	Hotels and Resorts	17	1%
	Motels, Private Hotels and Guest Houses	16	
	Serviced Apartments	0	
	TOTAL one star	33	
Two	Hotels and Resorts	109	7%
	Motels, Private Hotels and Guest Houses	163	
	Serviced Apartments	12	
	TOTAL two star	284	
Three	Hotels and Resorts	265	53%
	Motels, Private Hotels and Guest Houses	1,666	
	Serviced Apartments	298	
	TOTAL three star	2,229	
Four	Hotels and Resorts	308	33%
	Motels, Private Hotels and Guest Houses	473	
	Serviced Apartments	609	
	TOTAL four star	1,390	
Five	Hotels and Resorts	74	3%
	Motels, Private Hotels and Guest Houses	10	
	Serviced Apartments	38	
	TOTAL five star	122	
Upgraded	Hotels and Resorts	83	4%
	Motels, Private Hotels and Guest Houses	64	
	Serviced Apartments	32	
	TOTAL	179	
Total		4237	

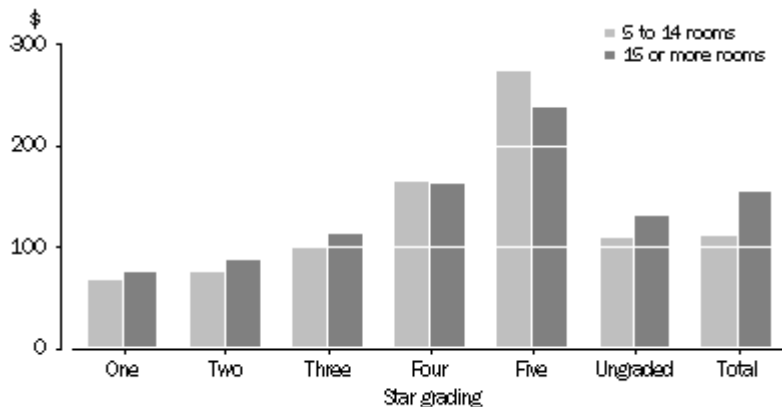
3. Accommodation Occupancy/Takings by rating

The following graphs (ABS report) show that higher star rated properties achieve higher occupancy and booking value. Such accommodation is also likely to consume higher levels of resources based on room sizes and facilities.

Occupancy rates, Stargrading - March Qtr 2010



Average takings (a), Star grading - March Qtr 2010



(a) Per room night occupied

<http://www.abs.gov.au/AUSSTATS/abs@.nsf/allprimarymainfeatures/6746847A966A470FCA2577A0014A516?opendocument>

4. Shared Economy

Airbnb has over 40,000 listings in Australia some of these are duplicate listings of legitimate businesses <http://www.afr.com/real-estate/australian-listings-on-airbnb-double-in-12-months-20150527-ghat2s> . Revenues are claimed to go directly to community individuals, but there is no detail of where owners are actually located i.e. are they living in the accommodation or elsewhere. Share economy accommodation covers city apartments to rurally located houses.

5. Overall Size

The accommodation sector appears to be between 20,000 – +40,000 with consequently significantly different economic impacts, resource use and waste, and value to communities.