NSW Minerals Council

Upper Hunter Housing Research Study (Stage 2)

COMPONENT 2

SHORT TERM ACCOMMODATION
BASELINE SURVEY REPORT

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TABLE OF CONTENTS

Executive Summary

This paper reports the findings of a baseline survey of the short term accommodation in the Upper Hunter sub-region (defined as the Muswellbrook, Singleton and Upper Hunter Shires). It is one of a series of papers being prepared as part of the Upper Hunter Housing Research Study commissioned by the NSW Minerals Council. The baseline survey sought to report on the current supply of short term accommodation by type and industry characteristics and trends. It also sought to understand how the short term accommodation sector has been affected (across the years from 2011 to 2013) during recent coal mining expansion and downturn periods. The information captured will help inform future planning for short term accommodation in the sub-region, including the development of short term accommodation projections for the Upper Hunter sub-region as part of the Housing Research Study.

In order to maximise survey participation, the information recorded is based on best estimates reported by accommodation providers rather than verifiable data. This means that the findings reported are estimated values and trends.

Profile of Short Term Accommodation

The Upper Hunter sub-region has a wide range of short term accommodation (e.g. motels, hotels, caravan parks, bed & breakfast) that caters for a variety of clientele including, temporary workers, tourists and travellers.

A total of 159 short term accommodation establishments were identified in the Upper Hunter sub-region, dominated in number (but not necessarily capacity) by bed and breakfast and guest house establishments (81), followed by hotels (30), motel/resort/serviced apartment establishments (29) and caravan parks/tourist parks (14). These establishments are distributed across the three Shires as follows:

- 63 (40%) were located in the Upper Hunter Shire (predominantly bed & breakfast/lodges/guest house/cottage accommodation establishments)
- 61 (38%) were located in Singleton Shire (predominantly bed & breakfast/lodges/guest house/cottage accommodation establishments)
- 35 (22%) were located in Muswellbrook Shire (mainly motels/resorts/serviced apartments).

Survey Response

Surveys were distributed to 159 establishments with a sound response rate of 37% (59 responses). A breakdown of these responses by type of establishment shows highly representative samples were achieved for motels/resorts/serviced apartments (with a response rate of 83%) and caravan parks/tourists parks (with a response rate of 64%). While a lower response rate at 37%, a reasonable level of confidence can be had in information reported for hotels, while for bed and breakfast / lodges/ guest house / cottage establishments less confidence can be had with the lower response rate of 16%.

- Survey responses indicated a combined total of 1,070 units of accommodation (from 56 responses) across the Upper Hunter sub-region, dominated by 'room only' accommodation units. It should be noted that this under-reports the total supply of accommodation in the absence of a 100% response rate to the survey.

Clientele

Quite distinct differences were revealed between the clientele targeted by different accommodation establishments:

- Motel/resort/serviced apartment establishments reported accommodating mostly contractors
- Hotels reported accommodating a greater mix of mining workers, other contractors and tourists
- Caravan parks reported being balanced equally between accommodating tourists and other contractors
- Bed & breakfast/lodge/guest house/cottage establishments appear to accommodate mainly tourists.

Occupancy Rates and Capacity

It is evident that demand for short term accommodation, other than bed and breakfast establishments, is largely driven by mining activity and to a lesser extent contract work (associated with infrastructure projects and railway maintenance). It is also apparent that a squeeze on short term accommodation occurred in 2012, driven by the combined effects of growth in mining and some major infrastructure projects in Singleton (including road works associated with the F3 expansion and the upgrading of the Army Barracks), but has fallen significantly since.

Anecdotally, occupancy rates amongst short term accommodation providers were said to be at or above capacity during the recent upturn in mining. However, the survey responses suggest a different picture. Only 4 providers reported being at full occupancy (90-99%) during 2012 and 1 in 2011. During the mining expansion years of 2011 and 2012, occupancies in all but bed & breakfast/lodge/guest house/cottage establishments were recorded at median rates of 70-79% and 80-89%, considerably higher compared with occupancy rates for similar establishments in NSW suggesting a tighter market. Whilst the data reports estimated occupancies across the year it may not reflect short periods of full occupancy. Notwithstanding, the data does suggest that even when the demand peaked in 2012, there was still some capacity to absorb more visitors.

It was also reported anecdotally that bookings at motels could be difficult to achieve due to block bookings made by contractors. However, the data indicates that only 20% of bookings are made in this way.

Between 2011 and 2012 the change in occupancy was being felt most strongly in hotels (80% of all hotel respondents), with most caravan parks (60%) and half (50%) the motels/resorts/serviced apartment establishments also reporting change. By the period 2012 to 2013 the impact of the decline in occupancies was more widespread, with the mining downturn appearing to be felt in the industry more towards the end of 2012. The exception seems to be amongst bed & breakfast/lodge/guest house/cottage establishments which have maintained similar occupancy rates across the three year period.

A number of providers report that there has been an increase in tourists returning to the region in response to the freeing up of accommodation.

Plans for Future Growth

Of the 56 responses received, 70% (49) indicated they were not planning to expand whilst 30% (17) indicated they were. Of the latter, most commented that any expansion would depend on the mining sector with some suggesting that plans have been put on hold during the current mining downturn. Others have identified expansion/redevelopment plans designed to diversify current stock to attract new clientele so that they are less vulnerable to movement in the mining sector. One commented that the industry had become too dependent on mining.

It can be concluded from the survey findings that demand for short term accommodation, other than for bed & breakfast/lodge/guest house/cottage establishments, is largely driven by the mining industry and to a lesser extent by other contract workers. Other conclusions are reported in more detail in Section 4.

1. INTRODUCTION

This paper reports the findings of a baseline survey of the short term accommodation in the Upper Hunter sub-region (meaning the Muswellbrook, Singleton and Upper Hunter Shires). It is one of a series of papers being prepared as part of the Upper Hunter Housing Research Study commissioned by the NSW Minerals Council, including the following:

- Identifying options for pooling the sub-region's resources to increase the supply of affordable housing.

- Identifying options to address infrastructure constraints impacting on housing supply.

- Update of available housing needs projections.

The baseline survey sought to report on the current supply of short term accommodation by type and industry characteristics and trends (across the years from 2011 to 2013) during recent coal mining expansion and downturn periods to understand how the short term accommodation sector has been affected. The information captured will help inform future planning for short term accommodation in the sub-region, including the development of short term accommodation projections for the Upper Hunter sub-region as part of the Housing Research Study.

The main reasons for conducting the baseline study were the:

- Lack of information on the current supply of short term accommodation to understand and plan for demand.
- The need to understand the role of mining in generating demand and explore the reported domination in recent years of short term accommodation by mining and contractor workforces and declining tourist usage.
- Absence of a planning framework for providing short term accommodation and guide market initiated workers villages[1].
- Lack of shared expectations between the mining industry and the community about the role of a non-residential workforce and how it should be accommodated.

1.1. Defining Short Term Accommodation

For the purposes of this paper, short term accommodation means accommodation for visitors (including temporary workers and tourists) in the following types of establishments:

- Motel/Resort/Serviced Apartment establishments

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[1] A recent proposal for a 1500 room village in Singleton resulted in strong community resistance and was not approved by Council. An approved 240 unit temporary accommodation facilities to be developed by the MAC Group for non-resident workers has not proceeded

- Hotel establishments
- Caravan Parks/Tourist Parks establishment
- Bed & Breakfast/Lodge/Guest House/Cottage establishments.

1.2. Method

1.2.1. Short Term Accommodation Survey

Information was gathered through a survey conducted with accommodation providers in the Muswellbrook, Singleton and Upper Hunter Shires. The survey aimed to collect information about the extent and type of supply, for the nature of occupancy and future development intentions for short-term accommodation in the Upper Hunter sub-region (the survey instrument is reproduced in Appendix 1).

The survey was distributed by the NSW Minerals Council to 159 short-term accommodation providers in the Upper Hunter sub-region (130 by email and 29 by post – refer to Table 2). It was endorsed by the following local organisations:

- Upper Hunter Shire Council
- Muswellbrook Shire Council
- Singleton Council
- Singleton Chamber of Commerce and Industry
- Scone Chamber of Commerce and Industry
- Denman Chamber of Commerce
- Muswellbrook Chamber of Commerce and Industry.

Follow-up telephone calls were made to service providers that had not responded to either the electronic or postal survey.

In order to maximise survey participation, the information recorded is based on best estimates rather than verifiable data, meaning that the findings reported are estimated values and trends. The survey required some answers to be selected from a choice of categories (such as different categories of room rates charged). Where this was the case, the data is reported as a median value which represents the midpoint in the sorted responses received.

1.2.2. Response Rate

At total of 59 service providers completed the survey (n=59). It should be noted that one respondent was considered to be outside the study area (located in the Liverpool Shire) and has therefore not been included in this count. Four respondents did not identify which Local Government Area (LGA) they were located in (they have been assumed to be within the study area). Table 1 identifies the number of respondents that completed the survey by accommodation type and LGA.

Table 1. Survey Respondents by LGA

	Muswellbrook LGA	Singleton LGA	Upper Hunter LGA	Other LGA	LGA not Identified	TOTAL	%
Motels/Resorts/Serviced Apartments	8	6	9		1	**24**	41%
Hotels	3	5	2	1		**11**	19%
Caravan Parks /Tourist Parks	2	2	3		2	**9**	15%
Bed & Breakfast/Lodges/Guest House/Cottage	2	6	6			**14**	24%
Establishment Not Identified					1	**1**	2%
TOTAL	**15**	**19**	**20**	**1**	**4**	**59**	**100%**

Table 2 details the response rate received, broken down by accommodation type. With and sound response rate of 37% (or more than a third of all providers), the information can be considered to be reasonably representative. A closer examination of responses in Table 2 shows highly representative samples were achieved for motels/resorts/serviced apartments (with a response rate of 83%) and caravan parks/tourists parks (with a response rate of 64%), so that a very high level of confidence can be had in results reported for these establishments. A reasonable level of confidence can be had in information reported for hotels (with a sound response of 37%) while less confidence can be had in the information reported for bed and breakfast / lodges/ guest house / cottage establishments (with a response rate of 16%).

It should be noted that whilst there were 59 respondents who participated in the overall survey, not every respondent answered every question.

Table 2. Response Rate of Accommodation Type

	Total No. of Accommodation	Total No. of Responses	Response Rate by Accommodation Type
Motels/Resorts/Serviced Apartments	29	24	83%
Hotels	30	11	37%
Caravan Parks/Tourist Parks	14	9	64%
Bed & Breakfast/Lodges/Guest House/Cottage	86	14	16%
Establishments not Identified	NA	1	NA
TOTAL	**159**	**59**	**37%**

2. SHORT TERM ACCOMMODATION PROFILE

2.1.1. Audit of Existing Accommodation

At November 2013, there were a total of 159 short term accommodation establishments identified in the Upper Hunter sub-region (refer to Table 3). Of the 159 establishments:

- 63 (40%) were located in the Upper Hunter Shire (predominantly bed & breakfast/lodges/guest house/cottage accommodation establishments)
- 61 (38%) were located in Singleton Shire (predominantly bed & breakfast/lodges/guest house/cottage accommodation establishments)
- 35 (22%) were located in Muswellbrook Shire (mainly motels/resorts/serviced apartments).

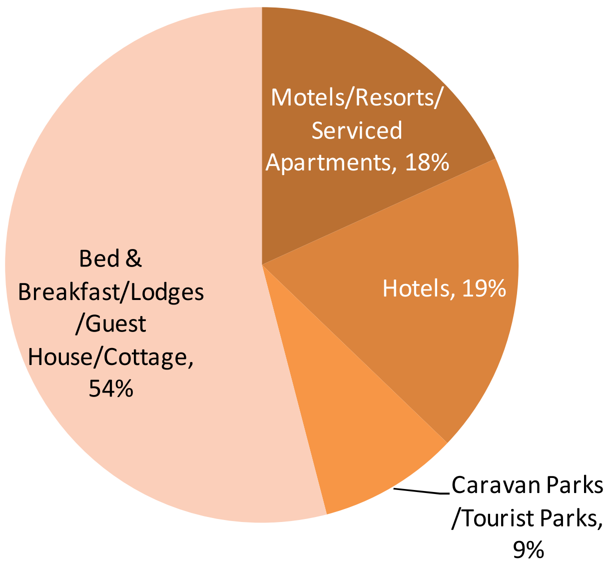
Table 3. Existing Short Term Accommodation Establishments by LGA

Accommodation Type	Muswellbrook LGA	Singleton LGA	Upper Hunter LGA	Upper Hunter Sub-region	% of Total
Motels/Resorts/Apartments	13	7	9	**29**	**18%**
Hotels	7	9	14	**30**	**19%**
Caravan Parks /Tourist Parks	5	3	6	**14**	**9%**
Backpacker Hostels	0	0	0	**0**	**0%**
Bed & Breakfast/Lodges/Guest House/Cottage	10	42	34	**86**	**54%**
TOTAL	**35**	**61**	**63**	**159**	**100%**

The following summarises the type of short term accommodation establishments in the sub-region:

- 86 bed & breakfast/lodges/guest house/cottage establishments accounted for 54% of all accommodation establishments (noting that the number of rooms provided per establishment is relatively low[2])
- 30 hotels accounting for 19% of all establishments
- 29 motel/resort/serviced apartment establishments accounting for 18% of all establishments
- 14 caravan parks/tourist parks accounting for 9% of all establishments.
- No backpacker accommodation establishments were identified.

Figure 1. Short Term Accommodation by Type, Upper Hunter Sub-Region

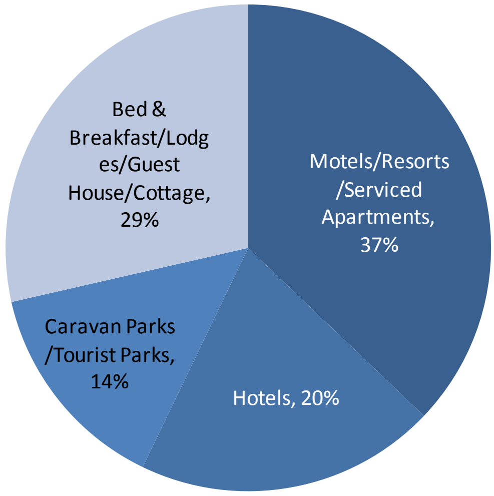


[2] The sample surveyed suggests an average of 4.2 units of accommodation per establishment.

Muswellbrook Shire

As noted above, Muswellbrook accounted for 22% of total short term accommodation establishments in the Upper Hunter sub-region, the least amount of establishments when compared across the sub-region. Although, when compared to the other two Shires, Muswellbrook has the majority of motel/resort/ serviced apartment as well as caravan parks/tourist parks accounting for 37% and 14% respectively.

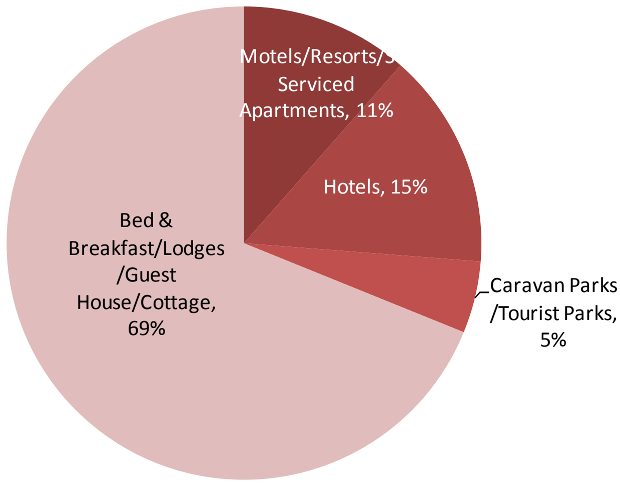
Figure 2. Short Term Accommodation by Type, Muswellbrook Shire



Singleton Shire

The majority of short term accommodation establishments in the Singleton Shire are bed & breakfast/lodges/guest house/ Cottage accounting for 69% of all establishments. Singleton also has the majority of this type of short term accommodation across the Upper Hunter sub-region. When compared to the other two Shires, Singleton has the least amount of motel/resort/serviced apartment (11%), hotels (15%) and caravan parks/tourist parks (5%).

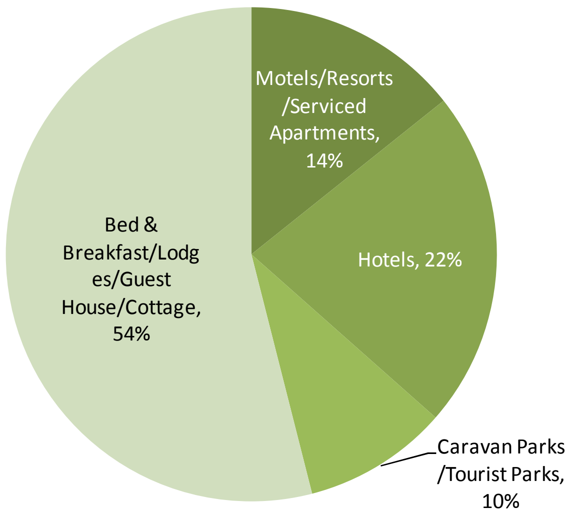
Figure 3. Short Term Accommodation by Type, Singleton Shire



Upper Hunter

Similar to Singleton Shire, the majority of short term accommodation establishments in the Upper Hunter Shire are bed & breakfast/lodges/guest house/ Cottage accounting for 54% of all establishments. When compared to the other two Shires, the Upper Hunter Shire has the most number of hotels accounting for 22% of all establishments.

Figure 4. Short Term Accommodation by Type, Singleton Shire



3. ANALYSIS OF SHORT TERM ACCOMMODATION PROVISION

3.1. Reported Supply of Short Term Accommodation

This section of the paper provides a summary of the current reported supply of short term accommodation, expressed as units of accommodation (ranging from single bedrooms and serviced apartments to caravans and cabins). Units of accommodation are reported for each of the following types of accommodation:

- Motel/Resort/Serviced apartment
- Hotels
- Caravan Parks/Tourist Parks
- Bed & Breakfast/Lodge/Guest House/Cottage Establishments.

The 56 establishments that responded to this question indicated that they supply a total of 1,070 units of accommodation (refer Table 4). The predominant units of accommodation are:

- 548 'room only' accommodation units (mostly 1 bedroom) –rooms
- 278 'self-contained' accommodation units (mostly 1 & 2 bedroom)
- 101 powered caravan sites.

A discussion of this supply follows below.

Table 4. Total Count of Units of Accommodation

Units of Accommodation	No.
Self-Contained (1 Bedroom)	118
Self-Contained (2 Bedroom)	114
Self-Contained (3+ Bedroom)	46
Room Only (1 Bedroom)	534
Room Only (2 Bedroom)	3
Room Only (3 + Bedroom)	11
Cabin - Not Self-Contained (1 Bedroom)	3
Cabin - Not Self-Contained (2 Bedroom)	4
Cabin - Not Self-Contained (3+ Bedroom)	2
Caravan Site (Unpowered)	60
Caravan Site (Powered)	101
Tent Site	50
Other	24
TOTAL	**1070**

Motel/Resort/Serviced Apartment

Table 4 reports the accommodation provided by the 24 (of 29) motel/resort/serviced apartment establishments that responded. The following supply was identified:

- 560 units of accommodation provided by motel/resort/serviced apartment establishments

- Of these, the majority were 'room only (1 bedroom)' accounting for 77% of all units of accommodation
- 'Self-Contained' serviced apartments accounted for around 21% of all units of accommodation, through a combination of 1, 2 and 3+ bedroom configurations
- A limited supply of 'room only (2 bedroom)' and 'cabin-not self-contained' accommodation.

Table 5. Supply of Units of Accommodation Reported for Motel/Resort/Serviced Apartment Establishments (N=24 from a total of 29 establishments)

Motel/Resort/Serviced Apartments	No. of Units	% of Total
Self-Contained (1 Bedroom)	40	7%
Self-Contained (2 Bedroom)	56	10%
Self-Contained (3+ Bedroom)	21	4%
Room Only (1 Bedroom)	431	77%
Room Only (2 Bedroom)	3	1%
Cabin - Not Self-Contained (2+ Bedroom)	4	1%
Cabin - Not Self-Contained (3+ Bedroom)	2	0%
Other	3	1%
TOTAL	560	100%

Hotels

Table 6 reports the accommodation supplied by the 10 (of 30) hotel establishments that responded. The following supply was identified:

- Respondents identified a total of 122 hotel rooms
- 'Room only (1 bedroom)' accommodation which accounts for 80% of all room types supplied
- 'Self-Contained (1 bedroom)' serviced apartments accounted for around 11% of supply
- One establishment indicated 12 other room types, but did not provide further information on what this room type might be.

Table 6. Supply of Units of Accommodation Reported for Hotels (N=10 from a total of 30 establishments)

Hotel	No. of Units	% of Total
Self-Contained (1 Bedroom)	13	11%
Room Only (1 Bedroom)	97	80%
Other	12	10%
TOTAL	122	100%

Caravan Parks/Tourist Parks

Table 7 reports the accommodation supplied by the 9 (of 14) caravan park/tourist park establishments that responded. A total of 368 units of accommodation were identified, with the dominant type of being 'powered and unpowered' caravan sites (at 43% of supply), followed by 'cabins/units/villas' (at 35%) and then by 'tent' sites (at 14%). There were very few 'on-site van' sites reported (at only 8%).

Table 7. Supply of Units of Accommodation Reported for Caravan Parks (N=9 from a total of 14 establishment)

Caravan Park/Tourist Park	No. of Units	% of Total
On-site vans	28	8%
Powered sites	101	27%
Unpowered sites	60	16%
Cabins/units/villas	129	35%
Tents	50	14%
TOTAL	**368**	**100%**

Bed & Breakfast/Lodge/Guest House/Cottage Establishments

Table 8 reports the accommodation supplied by the 13 (of 86) bed & breakfast/lodge/guest house/cottage establishments that responded. A total of 60 accommodation units was reported with self-contained rooms making up the majority (at 62% of supply) with most being 3 + bedroom units.

Table 8. Supply of Units of Accommodation Reported for Bed & Breakfast/Lodge/Guest House/Cottage Establishments (N=13 from a total of 86 establishments)

Bed & Breakfast	No. of Units	% of Total
Self-Contained (1 Bedroom)	8	13%
Self-Contained (2 Bedroom)	4	7%
Self-Contained (3+ Bedroom)	25	42%
Room Only (1 Bedroom)	3	5%
Room Only (3 + Bedroom)	11	18%
Other	9	15%
TOTAL	**60**	**100%**

3.2. Daily Charge for Accommodation

Only 26 (of 59) respondents provided information on their current charge for accommodation according to a range of room rate categories. Table 9 shows the median range for charge rates by room type for each type of establishment. The following key points are noted:

- Motel/resort/serviced apartments establishments charge the highest room rate, with median prices starting from $100-$199 per night for 'room only', increasing to $200-$299 for 'self-contained room'
- Bed & breakfast/lodge/guest house/cottage establishments are the next most costly, with a median rate for both 'room only' and 'self-contained' of $100-$199 per room per night
- Hotel establishments charge have a much lower median charge rate at $50-$99 per room per night for both 'room only' and 'self-contained' accommodation
- Caravan park/tourist park establishments are priced similarly to hotels for self-contained cabins with a median rate of $50-$99, while rates for powered and unpowered sites, cabin not self-contained and tent sites are in the $0-$49 range.

Table 9. Median Room Rate Range by Accommodation Establishment (N=26 from a total of 59 Establishments)

Room Type	Motel/ Resort/ Serviced Apartments	Hotel	Caravan Park/Tourist Park	Bed & Breakfast/ Lodge/Guest House/ Cottage
Self-contained unit/cabin/other	$200-$299	$50-$99	$50-$99	$100-$199
Cabin not self-contained			$0-$49	
Room only	$100-$199	$50-$99		$100-$199
Caravan site - Powered			$0-$49	
Caravan Site - Unpowered			$0-$49	
Tent site			$0-$49	

3.3. Clientele

Table 10 reports the range of clientele by type of establishment for the 57 responses received. Respondents were asked to select the most representative range for each of the following groups of clientele:

- Tourists
- Mining workers
- Other contractors (including contractors associated with mining, railway and other construction projects)
- Seasonal workers
- Other.

The responses reveal quite distinct differences between clientele targeted by different types of accommodation:

- Motel/resort/serviced apartment establishments accommodate mostly contractors (reporting a median of 50-59%) and to a lesser extent mining workers and tourists both (reporting a lower median of 10-19%)
- Hotel establishments accommodate a greater mix of mining workers (reporting a median of 50-59% of clientele), other contractors (median of 40-49%) and tourists (median of 30-39%)

- Caravan park establishments have a spread of clientele balanced equally between tourists and other contractors (reporting a median of 40-49%)
- Bed & breakfast/lodge/guest house/cottage establishments appear to supply mainly to tourists (median of 70-79% of their clientele) and to a lesser extent mining workers (median of 20-29%). Seasonal workers and walk-in ('other') clientele make up the remainder. It is noted that this is off the base of a small sample of establishments. However, through the survey follow up calls made to bed and breakfast providers, many chose not to participate in the survey as they said they do not service the mining industry
- 'Walk-in' clientele are the least represented clientele (median of 0-9%) in all but hotel accommodation where they were not recorded at all.

Table 10. Median Range of Clientele by Accommodation Establishment (N=57)

Clientele	Motel/ Resort/ Serviced Apartments	Hotel	Caravan Park/Tourist Park	Bed & Breakfast/ Lodge/Guest House/ Cottage
Tourists	10-19%	30-39%	40-49%	70-79%
Mining Workers	10-19%	50-59%	20-29%	20-29%
Other Contractors	50-59%	40-49%	40-49%	10-19%
Seasonal Workers (e.g. agriculture)	0-9%			10-19%
Other	0-9%		0-9%	0-9%

To observe the potential impact of the current downturn in mining on short term accommodation providers, respondents were asked whether their clientele had changed over the last 12 months (from 2012 to 2013). A mixed response was received, with less than half reporting there had been change (45% of 25), with the remaining 55% of respondents (31 of 56) indicating that there had been no change. These responses were received across all types of accommodation establishments, suggesting an uneven impact was being felt across the sector. Of those who did indicate there had been a change, most (76%) attributed the change largely to the reduction in mining clientele. Some observed that more tourists were coming back into the market now that there were more vacancies.

Respondents described their reasons for this change as follows:

Motel/Resort/Serviced Apartments:

- *Less tourists since Oct 2012. The tourists have reduced to around 2% of the clientele. There's been an increase in contract workers to 60% and a reduction in mining workers to 38 percent. We have accommodated for this change in clientele and gone with it.*
- *There are less 'other contractors' at the moment and more travellers. This might be because of the dip in the mining industry. Now that accommodation has been freed up in Muswellbrook and Singleton, there is more space for travellers and we are also getting them because they are travelling through the area now there are accommodation vacancies.*
- *Fewer guests from within the mining industry and fewer extended stays*
- *There are less of the larger mining clients and smaller to medium businesses, leisure market has also increased.*

Hotel:

- *Because there are less mining workers, our clientele is about 50% mining workers, 50% tourists at the moment.*

Caravan Parks/Tourist Parks:

- *There has been a drop in contract workers and mining workers, but tourism has stayed steady.*
- *There has been a drop in mining and contract workers. There has been a drop in our regular guests who are engineers and environmental workers who say they are getting less hours in the mining industry now. We don't see them as regularly as we used to. We are also a bit further out of town so they can stay closer to town now if they want to.*
- *We lost about a third of our clientele that were mining workers when there was a downturn last year and they were laid off, so there has been a drop in the mining workers clientele. It is starting to pick up again now though.*
- *There used to be 30% mine workers, and 60% contractors, but now there are less contractors in the area so we actually have space for the permanent mine workers so we have more of them staying with us.*

Bed & Breakfast/Lodge/Guest House/Cottage:

- *At the beginning of the year we had some contractors but there hasn't been any since.*
- *We have more tourists interested in booking the entire property on weekends and there has been a decrease in contract workers - last year we had some contractor clientele, but not this year.*

3.4. Occupancy Rates

Occupancy rates refer to the percentage of nights each accommodation establishment was occupied during a given period. As part of the survey, respondents were asked to provide information on occupancy for the following:

- Peak occupancy in a given week (32 responses)
- Occupancy rate per year for the last 3 years (2011, 2012, 2013) (44 responses)
- Change in occupancy rate between 2011-2021 (37 responses) and 2012-2013 (53 responses).

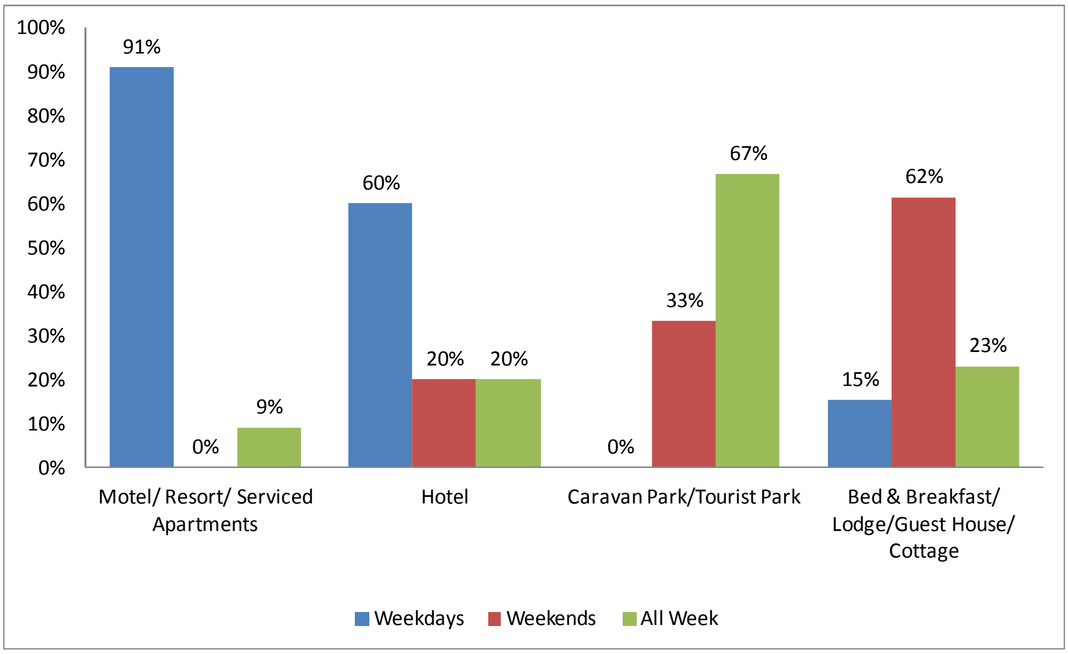
3.5. Peak Occupancy in a Given Week

Table 11 shows that occupancy during a given week varies by type of accommodation. Motel/resort/serviced apartment respondents indicated that the peak occupancy is during weekdays (91%) with minimal occupancy on weekends. Similarly, hotels respondent also indicated that they experienced peak occupancy during weekdays (60%). By contrast, most caravan park/tourist park establishments indicted consistent occupancy across the full week (67%). Given the majority of clientele for bed and breakfast/lodge/guest house/cottage establishments are tourists, it is not surprising that for most peak occupancy is on weekends (62%).

Table 11. Peak Occupancy in a Given Week by Accommodation Establishment, Percent (N=32)

Period	Motel/ Resort/ Serviced Apartments	Hotel	Caravan Park/Tourist Park	Bed & Breakfast/ Lodge/Guest House/ Cottage
Weekdays	91%	60%	0%	15%
Weekends	0%	20%	33%	62%
All Week	9%	20%	67%	23%

Figure 5. Peak Occupancy in a Given Week by Accommodation Establishment (N=32)



3.6. Occupancy Rate for the Last 3 Years

Anecdotally occupancy rates amongst short term accommodation providers were said to be at or above capacity during the recent upturn in mining. The survey responses show a different picture, though with still high levels of occupancy when compared with rates for motels in NSW and with more volatility (see below). During the mining expansion years of 2011 and 2012, occupancy rates in all but bed & breakfast/lodge/guest house/cottage establishments were recorded at median ranges of 70-79% and 80-89%. Only 4 providers reported being at full occupancy (90-99%) during 2012 and 1 in 2011. Whilst the data reports estimated occupancy rates across the year, it may not reflect short periods of full occupancy. Notwithstanding, the data does suggest that even when the demand peaked in 2012, there was still some capacity to absorb more visitors. Table 12 highlights the median occupancy rate for the

2011, 2012, and 2013. The survey data suggests that occupancy rates for motels and hotels peaked in 2012 and decreased since in all establishments except for bed & breakfast/lodge/guest house/lodge establishments. This is to be expected given the current downturn in the mining sector and the representation of mining workers amongst their clientele (as discussed earlier).

The following trends in occupancy can be discerned from the data (a more detailed breakdown of occupancy rates by establishment is reported in Appendix 2):

- Motel/resort/serviced apartment establishments recorded median occupancy range between 2011 and 2012 at a consistent 70-79% (higher than the 2012 occupancy rates for motels in NSW recorded at 57.7%)[3]. In 2011, 1 establishment indicated an occupancy range of 90-99% and by 2012 this had increased to 4 establishments. By 2013, the median occupancy range had dropped to 60-69% (within a reported range of 0-24% and 99%, with only 1 establishment reporting occupancies of 90-99%). Whereas the occupancy rate for motels in NSW in 2013 remained similar to 2012 levels (at 56.2% compared with 57.7%)
- Hotel establishments recorded a median occupancy range in 2011 of 80-89%, steadily decreasing in 2012 to 70-79% and in 2013 to 25-49%. By comparison occupancy rates recorded for all hotels in NSW was relatively consistent at 78% during 2012 and 2013
- Bed & breakfast/lodge/guest house/cottage establishments recorded a consistent median occupancy range over the period from 2011 to 2013 but at a much lower at 25-49%. As noted earlier, bed & breakfast/lodge/guest house/cottage establishments generally cater to the tourist market and may therefore be more resistant to movements in the mining industry.

Table 12. Median Occupancy Range by Accommodation Establishment and Year (N=44)

Year	Motel/ Resort/ Serviced Apartments	Hotel	Caravan Park/Tourist Park	Bed & Breakfast/ Lodge/Guest House/ Cottage
2011	70-79%	80-89%	70-79%	25-49%
2012	70-79%	80-89%	70-79%	25-49%
2013	60-69%	50-59%	50-59%	25-49%

3.7. Change in Occupancy Rate

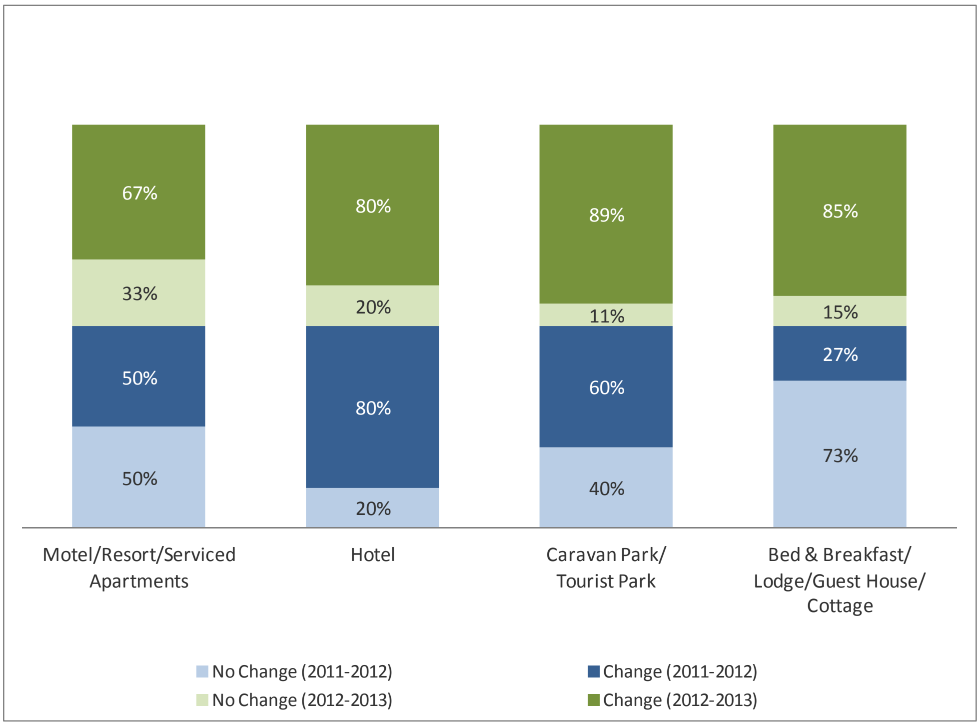
Respondents were asked to indicate whether the occupancy rate had changed between the periods 2011 to 2012 and 2012 to 2013. A mixed response was received for the period 2011 to 2012, with 53% of respondents indicating that there has been no change, whilst 47% of respondents suggesting there had been a change. The situation

[3] Source: Australian Bureau of Statistics, cited in Tourist Accommodation Snapshot, Destination NSW March Quarter 2013

had changed by the period 2012 to 2013 with 77% of respondents indicating there had been a change and only 23% indicating no change.

This shift is evident in Table 13 which provides a further breakdown of respondents' perceptions of change in occupancy by accommodation establishment. As can be seen, between 2011-2012 the change in occupancy was being felt most strongly in hotels which overwhelming indicated change (80% of all hotel respondents), with most caravan parks (60%) and half (50%) the motels/resorts/serviced apartment establishments reporting change. By the period 2012 to 2013, nearly all establishments were overwhelmingly reporting change in occupancy, suggesting the downturn in mining, accentuated by the completion of some major contracting projects (in Singleton), was starting to be fully felt.

Figure 6. Change in Occupancy between 2011-2012 (N=37) and 2012-2013 (N=53) by Accommodation Establishment, Percent



3.7.1. Reasons for Changes in Occupancy Rates from 2011 to 2012

There were mixed responses from respondents about the causes of change in occupancy from 2011 to 2012. Some have attributed increases in occupancy to the growth in the mining industry whilst others have indicated a decrease in occupancy for the same reason. This mixed response suggests that the mining downturn may have been felt in the industry more towards the end of 2012. Movements in the contracting industry (such as railway contractors) also had a notable impact. The following comments were provided by respondents:

Motel/Resort/Serviced Apartments:

- *There has been a dip in the mining industry.*
- *There was a big downturn in contract workers after the 2011 Queensland floods.*

- *There was an increase in work in the mining industry and in connected industries in the area.*
- *Mining Boom for increase families relocating to the area.*

Hotel:

- *The mines were producing a lot and there was a lot of mining construction happening so the town was packed with mining workers.*
- *We had [contractors] building a new sighting (sic) on the rail line at Willow Tree and they occupied approximately 8 rooms, In Mon, Out Fri. This project has now been completed.*

Caravan Parks/Tourist Parks:

- *The mining downturn began in late 2012.*

Bed & Breakfast/Lodge/Guest House/Cottage:

- *New Owners, we have upgraded our rooms & sleep more people.*

3.7.2. Reasons for Changes in Occupancy Rates from 2012 to 2013

The main reasons cited for change in occupancy from 2012 to 2013 was due to the economic downturn and contraction in the mining industry. The following comments support the earlier indication (in s3.7) that the mining downturn was being fully felt by this period:

Motel/Resort/Serviced Apartments:

- *Prior to the mining downturn we could have filled the hotel twice over the demand for accommodation was so high. Since the mining downturn it's dropped however and we've been directly affected by the drop in workers and industry in the area. Everyone around here really has all their eggs in one basket so to speak.*
- *There are less contractors due to the mining downturn which we've felt directly.*
- *There was a mining downturn and a lot less work so there is a lot less demand for accommodation.*
- *It was exceptionally full last year, and while it is steady now, it's nowhere near as full as it was last year. Also, all of the infrastructure works in Singleton have finished (they were upgrading the army base, the railway and the expressway as well as the shopping centre) and the coal price has dropped since last year.*
- *The completion of many infrastructure projects in the region such as the third rail line, the Army Barracks expansion, the F3 extension and associated road works, the Gowrie St Mall expansion etc have removed a lot of the need for short-term accommodation in Singleton. The summer season of 2013 was drastically affected by flooding and fires along the east coast of Australia. Traditional road travellers were hindered by the uncertainty of road closures from northern flooding and southern fires. The high Australian dollar has also hindered international tourism and domestic travellers are increasingly choosing overseas holidays in lieu of driving holidays.*

Hotel:

- *After the mine shut downs and people being fired or made redundant during the middle of the year the town is just dead. It has been horrible and no one is coming to stay.*
- *A flow on effect from the mining downturn has meant we just aren't getting the visitors that we used to.*

- *The mining downturn has been a dramatic decline in occupancy - to about 30 %.*

Caravan Parks/Tourist Parks:

- *A considerable drop in the last year - upwards of 50% drop. Mainly drop in contract workers and mining workers.*
- *There was a drop last year when many mining workers and contractors and people employed by the power industry were laid off.*

It is evident from the data and commentary provided by respondents that demand for short term accommodation, other than bed and breakfast establishments, is largely driven by mining activity and contract work associated with the railway, road works and other projects. There is some indication that external factors such as major disaster recovery efforts elsewhere can also reduce contractor numbers (as was reported to have occurred during the 2011 Queensland floods). It is also apparent that the squeeze on short term accommodation peaked in 2012, driven by the combined effects of growth in mining and some major infrastructure projects in Singleton (including road works associated with the F3 expansion and the upgrading of the Army Barracks).

3.8. The Nature of Bookings

In total, 26 respondents provided information regarding the nature of bookings for their establishments.

Table 14 shows the preferred method that clients use when making bookings for accommodation in the Upper Hunter sub-region. The most common method of booking for all establishments is phone booking and this is particularly so for caravan park/tourist park operators who take 100% of their bookings by phone. Whilst anecdotally it has been said that motel accommodation is largely booked out by block bookings by contractors, the data indicates that only 20% of bookings are taken as block bookings.

Other key findings include:

- Online bookings are most common for bed & breakfast/lodge/guest house/cottage establishments (35%) and motel/resort/serviced apartment establishments (20%)
- Bookings through referrals from local Visitor Information Centres are most popular with hotels (11%) and bed & breakfast/lodge/guest house/cottage (15%) establishments
- Block bookings by contracting and/or mining companies are confined to motel/resort/serviced apartment and hotel establishments making up 20% and 22% respectively of all bookings for these types of establishments
- Walk in bookings comprise around 20% of bookings for both motel/resort/serviced apartment and hotel establishments and about 10% for bed & breakfast/lodge/guest house/cottage.

Table 13. Nature of Bookings by Accommodation Establishment (N=26)

Nature of Bookings	Motel/ Resort/ Serviced Apartments	Hotel	Caravan Park/Tourist Park	Bed & Breakfast/ Lodge/Guest House/ Cottage
Phone bookings	40%	44%	100%	40%
Online bookings	20%	0%	0%	35%
Referrals from your local Visitor Information Centre	0%	11%	0%	15%
Block bookings by contracting and/or mining companies	20%	22%	0%	0%
Walk in bookings	20%	22%	0%	10%

3.9. Plans for Expansion/Redevelopment

Planning for short term accommodation requires an understanding of both current supply and planned supply. The survey therefore included a question asking respondents whether they have any plans to expand their current establishment. Of the 56 responses received, 70% (49) indicated they were not planning to expand whilst 30% (17) indicated they were. Interestingly, many of the respondents who indicated that they were considering expanding also noted that any expansion would depend on the mining sector, with some suggesting that plans have been put on hold due to the mining downturn.

The following comments were made:

- *If we knew what the mining industry and the economy in general was doing, we may consider building extra rooms but while there is some uncertainty within the economy we have put those plans on hold.*
- *Potentially in the next few years depending on whether the mining industry picks up again. We are expecting it too (sic), but we aren't sure if it will come back as big as it was.*
- *With the uncertainty of the mining industry, I would not be prepared to commit myself to any accommodation expansion at the moment. If the mining companies told us their intentions, we might consider building some 2 bedroom units.*
- *[One respondent advised they have approval] to have another 32 serviced apartment (sic) on the land adjoining the property, this is currently on hold due to the mining downturn.*
- *My intention is to provide another cottage with at least three bedrooms rooms which would provide accommodation for short and long term tenants in the 2014 year. This is my business plan. If I know that I can rely on an ongoing demand for my accommodation by contractors who are brought into the region, then I would be able to ensure continuity for my developments.*

Other establishments looking to expand are doing so to diversify current stock and create further business opportunity by attracting new clientele. In discussion with some providers during follow-up phone calls, some providers indicated their plans were a direct result of the mining downturn and the need to diversify their business. The following comments were made in relation to expansion plans:

- *We intend to increase the power supply and to have more powered sites, but these won't be regimented. They will be so caravan and van travellers can just pull in for the night.*

- *We are looking at putting in 30 more powered sites by the lake as well and some bunkhouse/dormitory accommodation for fishing tourists. Both of these upgrades are to capture more tourists but will happen sometime in the next few years. There is no set time.*
- *We are installing 3 new non-selfcontained (sic) cabins (no private shower/toilet facilities) which means they will be cheaper to rent. We want to accommodate for the contractors and mining workers who can't afford to spend the $98 per night that our fully self-contained cottages and cabins cost.*
- *In the future we are looking to have some smaller accommodation - like studio rooms to accommodate smaller groups or families as at the moment we only have large self-contained houses available to rent. We want to diversify so smaller groups don't have to book the entire house and so that we can accommodate them. This is in the early ideas stage though and there's no concrete plan as yet.*
- *We have received approval to add 7 cabins to the property which we will do in the next 3 years. This is to capture more tourists and wedding and function guests. We want to attract the groups who want to book out larger spaces (for example weddings or parties where all the guests want to stay at the property) for the entire weekend. Eventually we are looking to capture guests for conferences and potentially convert the barn into a conference centre but that is a lot more work and a lot further off.*

4. SUMMARY AND CONCLUSIONS

The survey revealed a combined total of 1,070 units of accommodation (from 56 responses) across the Upper Hunter sub-region, with the predominant units of accommodation being:

- ‘Room only’ accommodation units (mostly 1 bedroom) – 548 rooms
- ’Self-contained’ accommodation units (mostly 1 & 2 bedroom) - 278 rooms
- Powered caravan sites – 101 sites.

Quite distinct differences were revealed between the clientele targeted by accommodation establishments:

- <u>Motel/resort/serviced apartment establishments reported</u> accommodating mostly contractors
- <u>Hotels</u> reported accommodating a greater mix of mining workers, other contractors and tourists
- <u>Caravan parks</u> reported being balanced equally between accommodating tourists and other contractors
- <u>Bed & breakfast/lodge/guest house/cottage</u> establishments appear to accommodate mainly tourists.

Occupancy Rates and Capacity

It is evident from the data and commentary provided by respondents that demand for short term accommodation, other than bed and breakfast establishments, is largely driven by mining activity and to a lesser extent contract work (associated with infrastructure projects and railway maintenance). There is some indication that external factors such as major disaster recovery efforts elsewhere can also reduce contractor numbers (as was reported to have occurred during the 2011 Queensland floods). It is also apparent that a squeeze on short term accommodation occurred in 2012, driven by the combined effects of growth in mining and some major infrastructure projects in Singleton (including road works associated with the F3 expansion and the upgrading of the Army Barracks), but has fallen significantly since.

Anecdotally, occupancy rates amongst short term accommodation providers were said to be at or above capacity during the recent upturn in mining. However, the survey responses suggest a different picture. Only 4 providers reported being at full occupancy (90-99%) during 2012 and 1 in 2011. During the mining expansion years of 2011 and 2012, occupancies in all but bed & breakfast/lodge/guest house/cottage establishments were recorded at median rates of 70-79% and 80-89%, considerably higher compared with occupancy rates for similar establishments in NSW suggesting a tighter market. Whilst the data reports estimated occupancies across the year it may not reflect short periods of full occupancy. Notwithstanding, the data does suggest that even when the demand peaked in 2012, there was still some capacity to absorb more visitors.

It was also reported anecdotally that bookings at motels could be difficult to achieve due to block bookings made by contractors. However, the data indicates that only 20% of bookings are made in this way.

Between 2011-2012 the change in occupancy was being felt most strongly in hotels (80% of all hotel respondents), with most caravan parks (60%) and half (50%) the motels/resorts/serviced apartment establishments also reporting change. By the period 2012 to 2013 the impact of the decline in occupancies was widespread, with nearly all establishments overwhelmingly reporting a change, suggesting the downturn in mining, accentuated by the completion of some major contracting projects (in Singleton), was starting to be fully felt. From the responses received, it would appear that the mining downturn may have been felt in the industry more towards the end of 2012. The exception appears to be amongst bed & breakfast/lodge/guest house/cottage establishments which seem to have maintained similar occupancy rates across the three year period.

A number of providers report that there has been an increase in tourists returning to the region in response to the freeing up of accommodation.

Further interrogation of the median occupancy rate by type of establishment showed quite a large variation. Hotels had the highest occupancy rate (with a median range of 80-89%) in 2011 and 2012 when compared to motels/resort/serviced apartments and caravan parks/tourist parks (70-79%) and bed & breakfast/lodge/guest house/cottage (25-49%). However, by 2013 occupancy rates had fallen across all but bed & breakfast/lodge/guest house/cottage establishments (which remained consistently lower at 25-49%), with motels/resort/serviced apartment establishments recording a median occupancy range of 60%-69%, with both hotel and caravan park/tourist park establishments reporting 50-59%.

Plans for Future Growth

Of the 56 responses received, 70% (49) indicated they were not planning to expand whilst 30% (17) indicated they were. Of the latter, most commented that any expansion would depend on activity in the mining sector, with some suggesting that plans have been put on hold during the current mining downturn. Others have identified expansion/redevelopment plans designed to diversify current stock to attract new clientele so that they are less vulnerable to movement in the mining sector. One commented that the industry had become too dependent on mining.

The main conclusions that can be drawn from the survey are:

- Demand for short term accommodation, other than for bed & breakfast/lodge/guest house/cottage establishments, is largely driven by the mining industry and to a lesser extent by other contract workers.
- While operating at higher levels compared to data reported for similar types of establishments for NSW, during peak demand there appears to have been capacity within the existing supply to accommodate more guests.
- There is a relationship suggested between the level of demand for short term accommodation generated by mining and contract workers and the number of tourists accommodated in the region. Under high mining and contractor demand scenarios, tourists reduce in their presence as guests. Even given that there appears to have been capacity during the peak demand for more guests. Under the current downturn, operators report a return of tourists to the region. It is not clear why the fall in tourists occurs during a mining / contractor peak if there is still capacity in supply to accommodate more people. It could be that tourists 'believe' there is no accommodation, or it could be that providers are no longer marketing to them.
- The recent downturn has caused some in the short term accommodation sector to reassess their dependence on mining workers, with a view to diversifying their business to include tourists.
- The recent downturn in mining has caused a significant fall in demand generally, accentuated by corresponding completion of major infrastructure projects.
- Future expansion within the short term accommodation supply appears to be dependent on the future activities of the mining sector.

APPENDIX 1 SURVEY

Survey of Visitor Accommodation in the Upper Hunter Valley (2013)

Introduction

The NSW Minerals Council is undertaking a housing research study for the Upper Hunter region (defined as the Muswellbrook, Singleton and Upper Hunter Shires) to understand what drives the housing market here. The Muswellbrook, Singleton and Upper Hunter Shire Councils, the Singleton Chamber of Commerce, Housing NSW and the Department of Planning and Infrastructure are represented on the Steering Group guiding the study, which has been commissioned for the Upper Hunter Mining Dialogue. The study report will be publicly available in early 2014.

A survey of visitor accommodation is being conducted as part of this study. This survey will provide important information for the business and general communities to better understand and prepare for short term accommodation supply pressures. It will also help the local tourist industry to plan for and promote visitor accommodation.

The survey is being conducted by Andrea Young Planning Consultants on behalf of the NSW Minerals Council and is supported by three local Councils as well as the Singleton Chamber of Commerce.

ALL INFORMATION YOU PROVIDE WILL REMAIN CONFIDENTIAL AND WILL ONLY BE COLLECTIVELY SUMMARISED to provide an overall picture of visitor accommodation available in the region.

We would appreciate if you could take the time to carefully fill out the questions below.

We thank you for your participation and if you have any enquiries please contact Thao Ashford at thao@thaoplanning.com.au or 0419840390 alternatively Andrea Young on 0417720037.

1. Please complete the following:

Business Name:

Street Address:

Locality/Town:

Local Shire Council:

Postcode:

Your Name (Optional):

Your Position (e.g.manager):

Email:

Phone Number:

2. Please indicate whether or not you would be happy for your email address to be provided to your Local Visitor Information Centre to include on their database?

- No
- Yes
- NA

3. What type of accommodation premises do you operate?

- [ ] Motel/Resort/Apartments
- [ ] Hotel
- [ ] Caravan Park/Tourist Park
- [ ] Backpacker Hostel
- [ ] Bed & Breakfast/Lodge/Guest House/Cottage

Other (please specify)

4. What type of accommodation do you offer (select all that apply)?

- [ ] Self-Contained (suite or cabin with own kitchen facilities)
- [ ] Room Only
- [ ] Cabin (not self-contained)
- [ ] Caravan Site - Powered
- [ ] Caravan Site - Unpowered
- [ ] Tent Site

Other (please specify)

5. How much accommodation do you provide (please indicate the quantity for each of the following types as relevant)?

Self-Contained (1 Bedroom)	
Self-Contained (2 Bedroom)	
Self-Contained (3+ Bedroom)	
Room Only (1 Bedroom)	
Room Only (2 Bedroom)	
Room Only (3 + Bedroom)	
Cabin - Not Self-Contained (1 Bedroom)	
Cabin - Not Self-Contained (2 Bedroom)	
Cabin - Not Self-Contained (3+ Bedroom)	
Caravan Site (Powered)	
Caravan Site (Unpowered)	
Tent Site	
Other (Please Specify)	

6. What is your daily charge for accommodation?

	Self-contained unit/cabin/other	Cabin not self-contained	Room only	Caravan site - Powered	Caravan Site - Unpowered	Tent site
$0-$49	☐	☐	☐	☐	☐	☐
$50-$99	☐	☐	☐	☐	☐	☐
$100-$199	☐	☐	☐	☐	☐	☐
$200-$299	☐	☐	☐	☐	☐	☐
$300+	☐	☐	☐	☐	☐	☐

7. Are there any circumstances under which you would vary this rate?

☐ Decrease rate for extended bookings

☐ Decrease rate for particular client groups

☐ Increase rate for extended bookings

☐ Increase rate for particular client groups

☐ No

☐ Other (Please Specify Below)

Please list other circumstances and indicate client groups to whom you offer decreased/increased rates

8. What do you consider to be your peak season for occupancy (you can select more than 1)

☐ Summer

☐ Winter

☐ All Year

☐ Spring

☐ Autumn

☐ School Holidays

☐ Easter

☐ Christmas/New Year

Other (Please Specify)

9. What do you consider to be your peak for occupancy in a given week?

- ☐ Weekdays
- ☐ Weekends
- ☐ All Week

10. What has been the average occupancy rate of your accommodation for the following years (estimate)?

	2011	2012	2013
0% - 24%	☐	☐	☐
25% - 49%	☐	☐	☐
50% - 59%	☐	☐	☐
60% - 69%	☐	☐	☐
70%-79%	☐	☐	☐
80%-89%	☐	☐	☐
90%-99%	☐	☐	☐
100%	☐	☐	☐

11. Has there been a change in occupancy between 2011 and 2012?

- ◯ No
- ◯ If yes, what do you consider to be the reason for this change?

12. Has there been a change in occupancy between 2012 and 2013?

- ◯ No
- ◯ If yes, what do you consider to be the reason for this change?

13. What is the makeup of your clientele (please estimate what share of the following groups you would typically accommodate)?

	Tourists	Mining Workers	Other Contractors	Seasonal Workers (e.g. agriculture)	Other (please specify)
0%-9%	☐	☐	☐	☐	☐
10%-19%	☐	☐	☐	☐	☐
19%-29%	☐	☐	☐	☐	☐
30%-39%	☐	☐	☐	☐	☐
40%-49%	☐	☐	☐	☐	☐
50%-59%	☐	☐	☐	☐	☐
60%-69%	☐	☐	☐	☐	☐
70%-79%	☐	☐	☐	☐	☐
80%-89%	☐	☐	☐	☐	☐
90%-100%	☐	☐	☐	☐	☐

Please Indicate Other Clientele:

14. Has your clientele changed in the last 12 months?

◯ No

◯ Yes (how has it changed?)

15. How do you make your bookings (please select most common one)?

- [ ] Phone bookings
- [ ] Online bookings
- [ ] Referrals from your local Visitor Information Centre
- [ ] Block bookings by contracting and/or mining companies
- [ ] Walk in bookings

Other (please specify)

16. Do you have any plans to expand your accommodation supply?

- ○ No
- ○ Yes - Please describe in general your intentions (e.g. how many additional rooms) and indicative time frames including any comment on barriers or constraints:

17. Do you have any comments you would like to make about the provision of or demand for visitor accommodation in the Upper Hunter region?

Thank you for your participation.

APPENDIX 2 DETAILED OCCUPANCY BY ACCOMMODATION TYPE

The survey required respondents to estimate occupancy rates from a choice of categories provided. The data below is reported as a median value, representing the midpoint in the sorted responses received.

Motel/ Resort/ Serviced Apartments									TOTAL	Median
Year	0-24%	25-49%	50-59%	60-69%	70-79%	80-89%	90-99%	100%		
2011	0	1	4	1	6	5	1	0	18	70-79%
2012	0	1	5	1	5	4	4	0	20	70-79%
2013	0	2	5	3	5	3	1	0	19	60-69%
Hotel									TOTAL	Median
Year	0-24%	25-49%	50-59%	60-69%	70-79%	80-89%	90-99%	100%		
2011	0	0	0	1	1	3	1	1	7	80-89%
2012	0	1	1	1	1	2	2	1	9	80-89%
2013	2	2	1	0	2	2	0	0	9	50-59%
Caravan Park/Tourist Park									TOTAL	Median
Year	0-24%	25-49%	50-59%	60-69%	70-79%	80-89%	90-99%	100%		
2011	1	0	0	1	2	0	0	1	5	70-79%
2012	0	0	1	0	3	1	1	0	6	70-79%
2013	0	1	2	1	2	0	0	0	6	50-59%
Bed & Breakfast/Lodge/Guest House/Cottage									TOTAL	Median
Year	0-24%	25-49%	50-59%	60-69%	70-79%	80-89%	90-99%	100%		
2011	0	4	2	1	0	1	0	0	8	25-49%
2012	0	5	2	0	1	1	0	0	9	25-49%
2013	2	4	1	2	0	1	0	0	10	25-49%