Queensland Treasury and Trade

Queensland Government Statistician's Office

Tourist accommodation in resource regions, 2013

Report on the supply and availability of commercial tourist accommodation in key resource regions of Queensland in June 2013, and its occupation by drive tourists and resource industry workers.

Great state. Great opportunity.

Queensland Government

Queensland Government Statistician's Office
Queensland Treasury and Trade
http://www.qgso.qld.gov.au

Contents

Technical notes

This report draws upon accommodation information gathered by Queensland Government Statistician's Office (QGSO) as part of its Resource Communities Research program, supplemented by primary data collections undertaken for the purpose of this study. QGSO's annual Survey of Accommodation Providers counts non-resident workers staying in worker accommodation villages (WAVs), hotels, motels, caravan parks and other commercial accommodation in resource regions on a medium to long-term basis during the last week of June each year. The 2013 survey included supplementary questions to inform this study. A one-off survey of accommodation providers was also conducted in the parts of these regions not directly associated with resource industry activity and not usually covered by the annual Survey of Accommodation Providers (the Gemfields in Central Highlands (R), the town of Bowen in Whitsunday (R) (Bowen only) and parts of Toowoomba (R)).

Data presented in this report are a point-in-time measure, based on the information available at the time of survey. The nominal date for the survey response was a typical day during the week ending Friday 28 June 2013. Non-resident worker numbers and their take-up of commercial accommodation may vary in response to changing production demands, prevailing weather and industrial disputes. At the time of the 2013 survey, the number of non-resident workers on-shift was unaffected by adverse weather events or industrial action. Drive tourist numbers and demand for accommodation vary by season and other factors. The survey was conducted during peak drive tourist season. While drive tourists comprise the overwhelming majority of all tourists who visit the study area, the group identified in this report as 'drive tourists' may also include other tourists staying in commercial accommodation at the time of the survey.

In some areas, the number of non-resident workers on-shift in hotels/motels includes workers counted in other forms of overflow accommodation or head-leased housing (including serviced apartments and rental houses). These accommodation units are not included in the count of hotel/motel rooms for these areas.

The Bowen, Surat and Galilee Basins refer to the geological formations or coal basins that give these regions their names. For the purposes of reporting population statistics, QGSO has defined these regions in demographic rather than geological terms, to include relevant populations and align with the statistical geography used by the Australian Bureau of Statistics (ABS). Local government area (LGA) boundaries are based on the 2011 edition of the Australian Statistical Geography Standard (ASGS). Whitsunday (R) (Bowen only) comprises the Statistical Areas, Level 2 (SA2s) of Bowen and Collinsville, equivalent to the area of former Bowen Shire.

Figures in tables have been rounded to the nearest five. As a result of rounding, discrepancies may occur between sums of the component items and totals. Percentages and other calculations are made prior to rounding of figures and discrepancies might therefore exist between these calculations and those that could be derived from the rounded figures.

QGSO's 2013 population reports for the Bowen Basin, Surat Basin and Gladstone region are available on-line at http://www.qgso.qld.gov.au/products/publications/index.php.

Acknowledgements

QGSO acknowledges the support and assistance of all accommodation providers who participated in primary data collections conducted for the purposes of this study in 2013, as well as organisations that assisted in promoting it, including:

- Caravan Parks Association of Queensland
- Queensland Hotels Association
- Accommodation Association of Australia
- Regional Tourism Organisations.

Executive summary

With fly-in/fly-out or drive-in/drive-out (FIFO/DIDO) work arrangements commonplace in the mining, gas and construction industries, Queensland's resource regions now have significant populations of non-resident workers. While on-shift, most of these workers stay in worker accommodation villages (WAVs), however, some also occupy commercial accommodation such as hotels, motels and caravan parks. During periods of industry expansion, the non-resident workforce of an area may grow substantially and add to existing demand for many services, including accommodation.

To date, the extent to which accommodation demand presented by non-resident workers overlaps with demand from drive tourists has been difficult to verify. Consultation undertaken by the Department of Tourism, Major Events, Small Business and the Commonwealth Games (DTESB) in 2012 during early development of the Queensland Drive Tourism Strategy 2013–2015 highlighted concerns by tourists and operators regarding limited availability of tourist accommodation in some resource communities. Qualitative information gathered suggested that some tourists were bypassing these areas altogether, while others were driving unsafe distances in order to find accommodation.

This study, and the survey data that support it, was commissioned by DTESB to provide a quantitative evidence base to inform further stakeholder discussions, and to answer the following questions:

- Does demand for accommodation for resource industry workers adversely affect availability for drive tourists?
- How does demand vary by visitor and accommodation type?
- Where are accommodation shortages most acute?
- Are there peak periods when demand is most acute?
- How has the supply of and demand for accommodation changed over time?
- What factors are likely to drive future demand? Where are the future hotspots?

The study reports the take-up of commercial accommodation by non-resident workers and drive tourists in Queensland's major resource regions at the end of June 2013, which is during the peak tourist season. Time series data from collections undertaken by Queensland Government Statistician's Office (QGSO) in June 2011 and June 2012 are also presented, which provide a basis for examining changes to supply and demand over that period. Regions covered by the study include the Bowen Basin, the Surat Basin, the Gladstone region and the emerging Galilee Basin.

Summary findings

With a few exceptions, the availability of hotel/motel and caravan park cabin/van accommodation for drive tourists was not unduly constrained by demand from resource industry workers in June 2013.

- The supply of hotel/motel and caravan park cabin/van accommodation was sufficient to meet demand from drive tourists and other guests, including non-resident workers, in most areas covered by the study. There were, however, shortages of vacant and available hotel/motel rooms in Western Downs (R), and caravan park cabins/vans in Banana (S) and Western Downs (R). In all of these cases, high demand for accommodation from non-resident workers was the main reason for diminished availability.

Hotel/motel accommodation availability improved for most resource areas in 2013, but some 'hot spots' persisted.

- Time series data indicate that the supply of vacant and available hotel/motel rooms improved for most LGAs in the study area in 2013, compared with preceding years. Some LGAs that were 'hot spots' for hotel/motel accommodation in 2011 and 2012, including Isaac (R), Central Highlands (R), Banana (S) and Gladstone (R), saw a significant improvement in availability in 2013. Other 'hot spots' from preceding years, notably Western Downs (R) and Maranoa (R), continued to have tight accommodation availability in 2013. In all regions, availability of hotel/motel accommodation closely followed changes to the size of the non-resident workforce and availability of WAV accommodation between 2011 and 2013.

Compared with non-resident workers, drive tourists occupied a relatively small proportion of all hotel/motel rooms and caravan park cabins/vans in resource regions.

- Drive tourists made up a relatively small proportion of all guests who occupied hotel/motel rooms and caravan park cabins/vans across all resource region LGAs in June 2013, with the exception of Whitsunday (R) (Bowen only). Other than drive tourists and non-resident workers, most hotel/motels and some caravan parks also catered for short–term business and government visitors among their most usual guests.

Drive tourists and resource industry workers did not compete for powered /unpowered sites in caravan parks.

- Drive tourists clearly outnumbered other guests staying in powered/unpowered caravan parks sites for all regions surveyed in June 2013. Long haul drive tourists with their own caravans or camper homes predominantly sought and occupied site accommodation, whereas non-resident workers were more likely to occupy hotel/motel rooms or caravan park cabins/vans. Accordingly, reported instances of unmet demand for powered sites in caravan parks were more likely to indicate limited supply in that area, rather than conflicting demand from non-resident workers.

Availability of caravan park sites was limited in some areas.

- Some regions reported limited availability of powered caravan park sites in June 2013, most notably Banana (S) which had no powered sites that were vacant and available. Powered sites were also in short supply in Gladstone (R) (15% vacant and available) and Barcaldine (17% vacant and available). Most caravan park operators indicated that they were usually able to offer unpowered sites to clients wherever powered sites were unavailable.

Peak demand periods for commercial accommodation in resource regions are influenced by seasonal factors and resource industry cycles.

- Most resource LGAs have well–defined drive tourist seasons, which usually run from April through to October. Demand is highest from 'southern nomads' with caravans and campervans, who largely seek caravan park sites or other camping arrangements. Regular tourist events, such as rodeos and show weeks, also create short, relatively predictable periods of high demand for all types of visitor accommodation in local areas.
- Accommodation demand from non-resident workers is cyclical rather than seasonal, driven by fluctuations in resource industry activity. This demand is more volatile, and peak periods are more difficult to predict. Recurring non-tourist events such as power station maintenance shutdowns, scheduled servicing of mining equipment and harvest seasons also draw large workforces to local areas on a short–term basis. These events usually create high demand for hotel/motel rooms and caravan park cabins/vans, rather than caravan park sites.

Availability of alternative worker accommodation can mitigate demand for commercial accommodation from resource industry workers.

- The availability of WAV accommodation in a resource area can mitigate demand for commercial accommodation from non-resident workers. Where such accommodation is not available, or is inadequate for the size of the non-resident workforces in the area, demand for commercial accommodation may remain high for the duration of the project.

Regional and local trends

Levels of resource industry activity and demand for worker accommodation varied considerably across the regions covered by this study. Some regions that recorded acute shortages of vacant and available accommodation in 2011 and 2012, were relatively unconstrained in 2013. Most of these variations can be attributed to the different development trajectories of the dominant resource industries in each region, namely coal mining in the Bowen Basin, coal seam gas (CSG) development in the Surat Basin, and construction of liquefied natural gas (LNG) and coal export facilities in Gladstone.

Bowen Basin

A downturn in the coal industry and workforce restructuring saw reduced demand for worker accommodation in the Bowen Basin, most notably in Isaac (R) and Central Highlands (R). Unlike previous years, there was a ready supply of vacant and available hotel/motel accommodation in these areas in 2013. The capacity of Bowen Basin WAVs increased significantly during 2012–13, particularly in the LGA of Isaac (R), which further contributed to reduced accommodation demand from non-resident workers.

- **Banana (S)** had no vacant and available caravan park sites and very low availability of rental cabins/vans in June 2013. On the other hand, hotel/motel rooms were readily available, an improvement over the preceding two years. Non-resident workers, including road workers and CSG pipeline construction crews, made up a large proportion of guests occupying vans/cabins and hotel/motel rooms, whereas drive tourists occupied almost all van sites.
- **Central Highlands (R)** was adversely affected by a downturn in coal mining activity in 2012–13, resulting in fewer non-resident workers occupying commercial accommodation than in preceding years. Availability of hotel/motel

rooms was notably higher in 2013 compared with 2011 and 2012, while caravan parks recorded high levels of vacant vans/cabins and van sites.

- **Isaac (R)** also experienced cutbacks in coal industry workforces in 2012–13. The number of non-resident workers occupying hotel/motel rooms fell significantly in 2013, although some of this reduction was due to increased availability of WAV beds. As a result, the extremely low rates of vacant and available hotel/motel accommodation seen in 2011 and 2012 improved considerably in 2013. Most towns in Isaac (R), with the exception of Clermont, are not located on main tourist routes, and most accommodation providers usually tend to focus on providing accommodation for workers and business visitors rather than drive tourists.
- **Whitsunday (R) (Bowen only)** has a relatively small non-resident worker population, largely associated with coal mines near Collinsville. While mine closures in 2012–13 saw a small decline in the number of non-resident workers occupying hotel/motel and caravan park vans/cabins, they had little effect on the availability of commercial accommodation for drive tourists in the region.

Surat Basin

In contrast, demand for commercial accommodation from non-resident workers continued to be high in the Surat Basin in 2013, largely due to expansion of the CSG industry. While the capacity of WAVs increased across the region in 2012–13, most of the additional beds provided were located outside of town centres and did little to reduce demand for hotel/motel accommodation.

- **Maranoa (R)** recorded slightly improved availability of hotel/motel accommodation in 2013, after extreme lows in 2011 and 2012. While the number of non-resident workers actually increased in Maranoa in 2012–13, many of these were accommodated in WAVs located on the gas fields, rather than in towns. In the main centre of Roma, movement of some non-resident workers out of commercial accommodation and into a new WAV may have contributed to lower demand for hotel/motel and caravan park cabins/vans.
- **Toowoomba (R)** had moderate availability of hotel/motel rooms and cabins/vans in June 2013, while caravan park sites were readily available. Unlike other Surat Basin LGAs, Toowoomba (R) has a relatively small non-resident population, and accommodation supply is largely unaffected by resource industry activity.
- **Western Downs (R)** continued to experience significant growth in the number of non-resident workers engaged in the CSG industry in the year to June 2013. Many of the centres in Western Downs (R) were accommodation 'hot spots' in June 2013, most notably the towns of Miles, Chinchilla and Dalby on the Warrego Highway. Vacancy rates for hotel/motel rooms and caravan park cabins/vans were particularly low in these centres, due largely to increased demand from resource industry workers. Advice from accommodation providers confirmed numerous instances of unmet demand from other users, including drive tourists, during the preceding year.

Gladstone region

While non-resident workforce numbers increased in Gladstone (R) between 2011 and 2013, occupancy of hotel/motel rooms by workers actually declined over the same period. As a result, the low vacancy rates for commercial accommodation seen in 2011 and 2012, when Gladstone was regarded as a 'hot spot' for hotel/motel accommodation, improved in 2013. This change was largely due to the increasing availability of WAV accommodation in 2013, and its occupation by workers previously accommodated in commercial and private housing arrangements.

Galilee Basin

The emerging Galilee Basin region, represented by **Barcaldine (R),** was largely unaffected by resource industry activity in 2013. Accommodation availability in the LGA has remained relatively high since 2011. Drive tourists and business visitors were the predominant users of all forms of commercial accommodation in 2013.

Future accommodation demand

Assuming that demand from tourism remains relatively constant into the near future, ongoing demand for commercial accommodation in most regions covered by this study will continue to be linked closely to activity levels within the resource and construction industries. To that extent, the location, scale and nature of demand for worker accommodation will vary according to the implementation of new projects, as well as fluctuations in the size of workforces engaged in coal and CSG production. The availability of WAV accommodation will also be a key factor in mitigating demand for commercial accommodation from resource industry workers, and in reducing potential competition with other users.

Two regions that were 'hot spots' for commercial accommodation availability in recent years should return to normal as demand from resource industry workforces dissipates.

- CSG pipeline construction projects in **Banana (S)** are scheduled for completion by the end of 2014, and non-resident construction workforces for these projects will move out of the area.
- LNG plant and port construction activities will continue in **Gladstone (R),** with non-resident workforce numbers declining by the end of 2014. Occupancy of WAVs by most non-resident workers will reduce reliance on other forms of accommodation.

There are potential 'hot spots' where future demand for commercial accommodation from non-resident workers could limit accommodation availability.

- The accommodation impacts of resource industry development are likely to be ongoing in the Surat Basin, particularly in the LGA of **Western Downs** (R). Strong demand for worker accommodation associated with the CSG industry is expected to moderate as the pipeline construction and gas field development phases of existing projects diminish by 2015. Beyond this point, non-resident workforce numbers have the potential to return to current levels should all other proposed CSG and coal projects proceed to commencement[1].
- In **Barcaldine (R)**, the large construction and operational workforces of proposed Galilee Basin coal mines and rail projects would be predominantly FIFO/DIDO, and housed in WAVs located on-site rather than in towns. Nevertheless, constraints on commercial accommodation could occur if these developments proceed, given likely demand from indirect workers and the very limited supply of hotel/motel rooms and caravan park accommodation in the area. The small towns of Alpha and Jericho are most likely to be affected.
- In **Whitsunday (R) (Bowen only),** a temporary but sizeable influx of non-resident workers associated with construction of new coal export terminal facilities at Abbot Point (to service proposed Galilee Basin projects) would generate significant demand for accommodation around the town of Bowen, which would affect availability for drive tourists and other holiday makers. Rail projects linking the Galilee Basin mines to Abbot Point will be constructed around the same time as the port, which will have sizeable non-resident construction workforces. Timely and adequate provision of WAV accommodation would be crucial in limiting the take-up of existing commercial accommodation by these workforces.
- Timing of the proposed Galilee Basin mines, rail and port projects is difficult to establish, as none had proceeded through to final investment decision at the time this report was prepared.

[1] See Government Statistician's *Surat Basin non-resident population projections* for different growth scenarios based on these assumptions http://www.qgso.qld.gov.au/products/publications/index.php. The 2012–13 edition projections are the latest available at time of writing. The 2013–14 edition projections will be available in the second quarter, 2014.

Introduction

About the study

In early 2013 the Department of Tourism, Major Events, Small Business and the Commonwealth Games (DTESB) engaged the Queensland Government Statistician's Office (QGSO) to conduct research and provide information on the supply and availability of commercial accommodation for drive tourists in resource areas of Queensland. This research forms part of Action 5.5 of the *Queensland Drive Tourism Strategy 2013–2015* (December 2012), to "increase the supply and availability of tourist accommodation in resource communities by ... establishing accurate information on the availability of commercial and non-commercial accommodation in resource communities". DTESB sought and received endorsement and support for the study from peak organisations, including the Caravan Park Association of Queensland (CPAQ) and Regional Tourism Organisations.

Consultation undertaken by DTESB during early development of the *Queensland Drive Tourism Strategy* highlighted anecdotal concerns by tourists and operators about constraints on availability of tourist accommodation in some resource communities. In response, the primary objective of the QGSO research was to provide a quantitative evidence base to inform further stakeholder discussions, and to answer the following questions:

- Does demand for worker accommodation in resource areas adversely affect availability for drive tourists?
- How does demand vary by visitor and accommodation type?
- Where are accommodation shortages most acute?
- Are there peak periods when demand is most acute?
- How has the supply of and demand for accommodation changed over time?
- What factors are likely to drive future demand? Where are the future hotspots?

Survey methodology and responses

Data to support the study were obtained primarily from QGSO's 2013 Survey of Accommodation Providers, which canvassed providers of hotel, motel and caravan park accommodation in these resource regions (see technical notes for further details). Data were collected by a combination of email, an online survey tool, and telephone follow-up. The nominal date for the survey response was a typical day for accommodation demand during the week ending Friday 28 June 2013.

Responses were received from 258 of 285 hotels/motels (a 91% response rate) and 74 of 84 caravan parks (88% response rate). Table 1 details the number of responses received and response rates by local government area (LGA).

Table 1: Responses by accommodation type and LGA

	Hotels/motels		Caravan parks	
	Responses	Response rate	Responses	Response rate
LGA	— number —	— % —	— number —	— % —
Banana (S)	16	100	3	60
Central Highlands (R)	36	92	16	100
Isaac (R)	20	100	4	100
Whitsunday (R) (Bowen only)	20	83	5	50
Bowen Basin total	***92***	***93***	***28***	***80***
Maranoa (R)	25	100	6	100
Toowoomba (R)	49	73	9	90
Western Downs (R)	42	98	15	94
Surat Basin total	***116***	***86***	***30***	***94***
Gladstone (R)	36	100	12	100
Barcaldine (R)	14	93	4	80
TOTAL	**258**	**91**	**74**	**88**

Source: QGSO, Survey of Accommodation Providers, 2013

Geographical scope

The geographical scope of the study encompasses four of Queensland's major resource regions[2] (Figure 1) and the LGAs within them.

Bowen Basin

The Bowen Basin, which includes the LGAs of Banana (S), Central Highlands (R), Isaac (R) and Whitsunday (R) (Bowen only), is Queensland's most important source of export coal. The region has a sizeable population of non-resident resource industry workers, who live in commercial accommodation as well as worker accommodation villages (WAVs) while on-shift. Major drive tourist attractions within the region include the seaside town of Bowen, gold fossicking around Clermont, the Gemfields west of Emerald, and numerous out-of-town caravan and camping locations.

Surat Basin

The Surat Basin contains the LGAs of Maranoa (R), Western Downs (R) and Toowoomba (R). While the region's economy has traditionally revolved around grain growing and grazing, recent years have seen massive expansion of the coal seam gas (CSG) industry, along with limited development of coal mining. Many of the resource industry jobs that have been created in the Surat Basin are undertaken by fly-in/fly-out or drive-in/drive-out (FIFO/DIDO) workers. The predominantly rural nature of the region attracts mature drive tourists and other travellers, while events such as the Toowoomba Carnival of Flowers draw large numbers of short-term visitors from the more populous south-east corner of the state.

Gladstone region

The Gladstone region comprises the LGA of Gladstone (R), which includes the city and port of Gladstone, as well as other residential centres and the rural hinterland. Ongoing construction of three liquefied natural gas (LNG) processing plants, a new coal export terminal and associated infrastructure has substantially boosted the population of non-resident workers in Gladstone (R) since 2011, placing additional demand on hotel/motel and caravan park accommodation. The Gladstone region contains many attractions for holiday makers, including the nearby Barrier Reef, the seaside towns of Agnes Water and Seventeen Seventy, and camping and fishing at Awoonga Dam.

Galilee Basin

The Galilee Basin in Queensland's central west is represented in this report by the LGA of Barcaldine (R). While the region's economy is predominantly based on cattle grazing, several large projects to mine its extensive thermal coal deposits are in advanced stages of planning. To date, resource industry development in the region has been limited to sporadic exploration and testing activities. Drive tourists are attracted to Barcaldine (R) in winter months, drawn by the region's remoteness and attractions such as the Tree of Knowledge in Barcaldine.

Drive routes

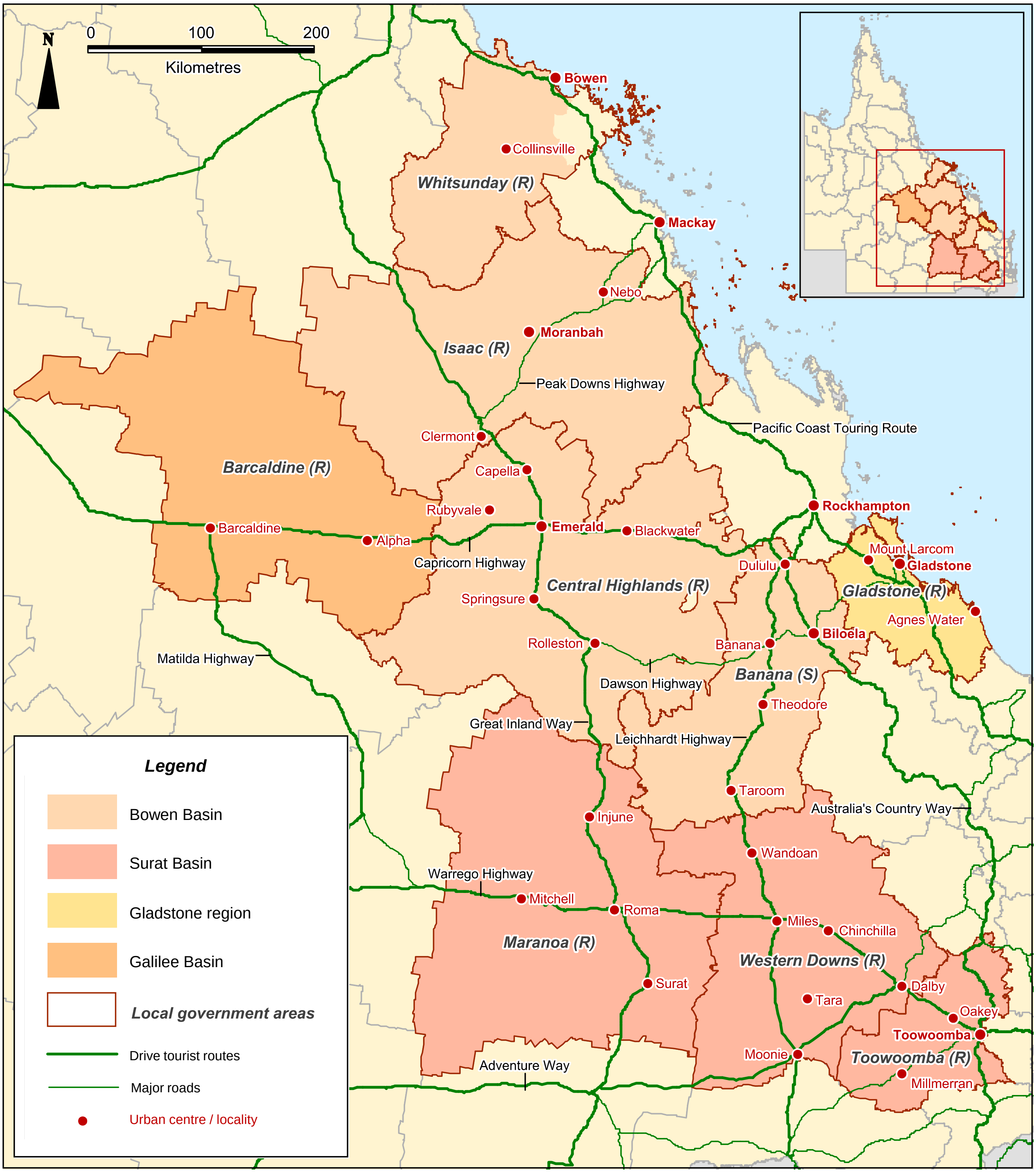
Several tourist drive routes pass through these resource regions, notably:

- The Capricorn Highway, which starts in Rockhampton and transits west through the Bowen Basin (Bluff, Blackwater, Emerald) and the Galilee Basin (Alpha, Jericho, Barcaldine) where it joins the north-south Matilda Highway.
- The Warrego Highway, which travels west through the Surat Basin (Toowoomba, Dalby, Chinchilla, Miles, Roma) on its way to Charleville.
- The Leichhardt Highway, which travels north from the NSW border through the Surat Basin (Moonie, Miles) and the Bowen Basin (Theodore, Dululu) to Rockhampton.
- The Great Inland Way, which travels north through the Surat Basin (Roma, Injune) and the Bowen Basin (Rolleston, Springsure, Emerald, Capella, Clermont) on its way to Charters Towers.
- The Pacific Coast Touring Route, which transits through the ports of Gladstone, Mackay and Bowen.

Other major routes that tourists may utilise in travelling through resource regions include the Dawson Highway, which travels west from Gladstone through the Bowen Basin; and the Peak Downs Highway, which is the main route through the northern Bowen Basin (Nebo, Moranbah, and Clermont).

[2] The geographical scope of this study aligns with the regions covered by QGSO's Resource Communities Research Program. Other resource regions in Queensland (such as Mackay and the North West region) are not covered by the program, and are beyond the scope of this work.

Figure 1: Study area – resource regions, drive routes, and selected UC/Ls



Source: QGSO, 2013

Background to resource regions

With fly-in/fly out or drive-in/drive-out (FIFO/DIDO) work arrangements now commonplace in the mining, gas and construction industries, many of Queensland's resource regions have significant populations of non-resident workers. While on-shift, these workers usually stay in WAVs, but can also occupy commercial accommodation (hotels, motels and caravan parks) and head-leased housing. Commercial accommodation establishments in some resource regions may have limited capacity to accommodate drive tourists or other visitors, due to strong demand from non-resident workers.

Non-resident workers in established resource regions

QGSO conducts an annual Survey of Accommodation Providers to establish the size of the non-resident population, the supply of commercial accommodation, and its take-up by non-resident workers in major resource regions of Queensland[3]. Summary data from these surveys (Table 2) show that the total non-resident population of the Bowen Basin, Surat Basin and Gladstone regions was 40,270 persons in June 2013, an increase of 15,280 or 61% from June 2011[4].

A characteristic feature of non-resident populations associated with the resource industry is their capacity to grow (and decline) rapidly in response to changes in employment demand. As Table 2 shows, the two regions most affected by the emerging CSG/LNG industry, Gladstone and the Surat Basin, grew collectively by 12,900 persons from 2011 to 2013, accounting for 84% of total growth. By contrast, the non-resident population of the Bowen Basin increased by 4,515 between 2011 and 2012, and then declined by 2,135 between 2012 and 2013.

Non-resident workers on-shift

Non-resident workers are people who fly-in/fly-out or drive-in/drive-out (FIFO/DIDO) to work and live in the area temporarily while rostered on, but who have their usual place of residence elsewhere.

Due to shift arrangements, not all members of the non-resident workforce are present in the local area at one time. For that reason, figures given in this report refer to the number of non-resident workers *on-shift*, or non-resident population, rather than total non-resident workforce numbers.

Table 2: Non-resident workers on-shift, established resource regions

	Non-resident workers on-shift			
Region	2011	2012	2013	Change, 2011–2013
Bowen Basin	20,520	25,035	22,900	2,380
Surat Basin	3,265	6,445	12,480	9,215
Gladstone (R)	1,205	3,615	4,890	3,685
TOTAL	**24,990**	**35,095**	**40,270**	**15,280**

Data at the LGA level are available in Appendix A.

Source: QGSO, Survey of Accommodation Providers, 2011 to 2013

Demand for non-resident worker accommodation

The nature, extent and duration of accommodation demand presented by non-resident workers associated with a resource project or operation varies according to a number of factors, including:

- The size of the non-resident workforce relative to local accommodation supply. Commercial accommodation in a population centre may be sufficient for a small project or instances where the peak workforce will be for a short duration. Where this is not the case, alternative accommodation arrangements (usually WAVs) must be made.
- The stage of the project/operation. In general, non-resident construction workforces are larger than operational workforces, but are only present in the region for the relatively short construction phase.
- The availability of existing WAV accommodation. Where this is not readily available, a new project may utilise commercial accommodation for its pioneer workforce while a WAV is being constructed and occupied.
- The distance of the project from established population centres. The remoteness of a project/operation may preclude safe daily commuting from accommodation in the nearest population centre, in which case non-resident workers will usually be accommodated in a dedicated WAV located on or near near the work site.

[3] Regions covered are the Bowen Basin, Surat Basin, Gladstone region, and Galilee Basin. The emerging Galilee Basin is not included in data for this chapter as resource industry activity has been limited in this area to date.
[4] For full details, refer to the *Bowen Basin population report, 2013* ,*Surat Basin population report, 2013* and *Gladstone region population report, 2013* http://www.qgso.qld.gov.au/products/publications/index.php. Time series data for preceding years are available as web tables.

Worker accommodation villages

In 2013, WAVs provided the main source of accommodation for non-resident workers across all established resource regions in Queensland. WAVs have several advantages over other types of accommodation for this purpose, including:

- economies of scale for large workforces
- relatively short construction times
- capacity to expand (or contract) rapidly according to changing workforce demand.

WAV bed capacity has grown markedly across Queensland's major resource regions since 2011 (Figure 2). In total, WAV bed capacity in the Bowen Basin, Surat Basin and Gladstone region expanded from 25,780 beds in June 2011 to 54,950 beds in June 2013 — an increase of 29,170 beds or 91%. This net growth in capacity takes into account expansions of existing WAVs and construction of new facilities, as well as losses from facilities that were closed or downsized during this period.

Worker accommodation villages (WAVs)

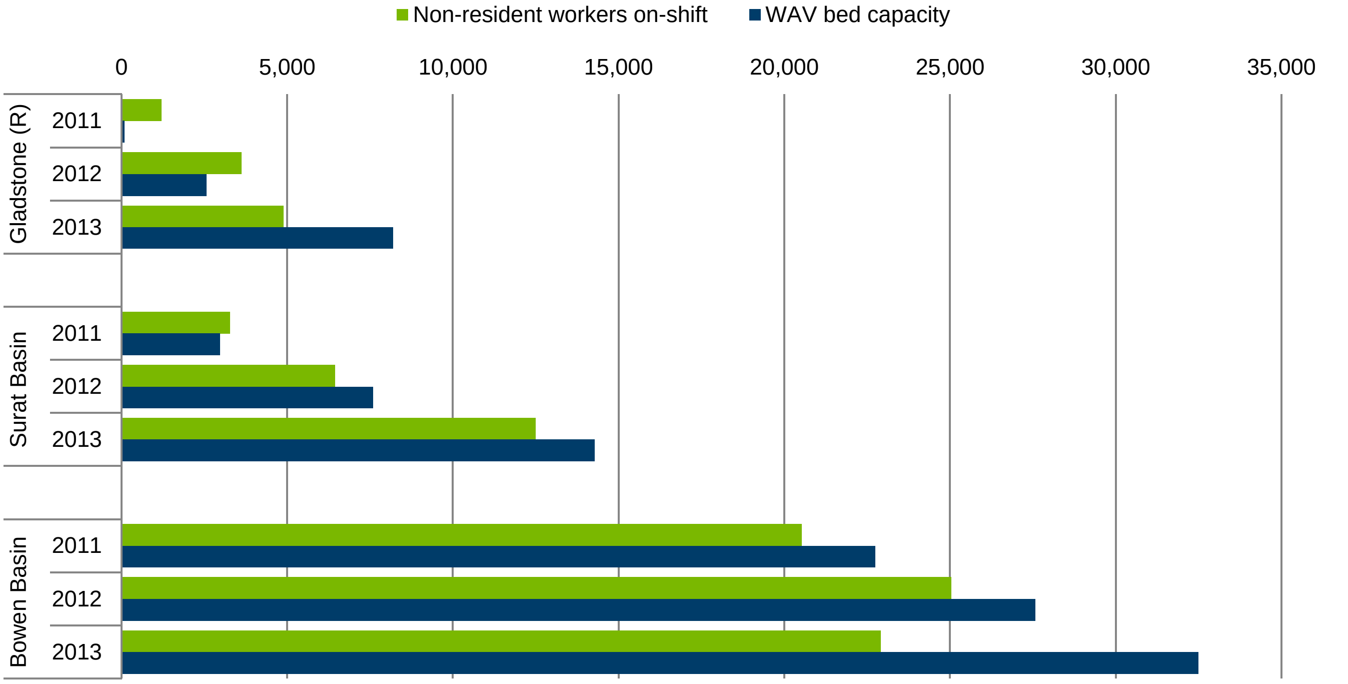
WAVs, also known as single person quarters (SPQs) or worker camps, are commonly used to house unaccompanied non-resident workers. WAVs typically consist of demountable dwellings arranged in a village, with common messing, laundry and recreational facilities.

As a general rule, the capacity of a WAV usually exceeds the number of non-resident workers who occupy it at a given point in time. The extent to which this occurs varies according to arrangements whereby rooms are retained for some workers when rostered off.

The comparison of non-resident workforce numbers to WAV bed capacity shown in Figure 2 provides an insight into how supply and demand for worker housing impacts on other forms of accommodation. This is most evident in the case of Gladstone (R), where the size of the non-resident population outstripped the capacity of WAV accommodation in 2011 and 2012. To a lesser extent, a similar imbalance occurred in the Surat Basin in 2011. In those instances, other forms of accommodation were called into play to meet the shortfall, including hotels, motels and caravan parks, as well as head-leased private housing.

In contrast, the number of WAV beds in the Bowen Basin continued to increase in 2013, while the size of the non-resident population declined. As a result, the resulting oversupply of WAV accommodation has eased demand for other forms of commercial accommodation across the region. It should be noted that these trends are based on regional level data, and that exceptions to the rule are apparent at small area levels (see LGA summaries for details).

Figure 2: Non-resident workers on-shift and WAV bed capacity, established resource regions



Source: QGSO, Survey of Accommodation Providers, 2011 to 2013

Non-resident workers and commercial accommodation

Data obtained from ongoing QGSO monitoring in the Bowen Basin, the Surat Basin and Gladstone region show that non-resident workers in all of these resource regions utilise hotel/motel and caravan park accommodation while on-shift, as well as dedicated WAV accommodation where it is available. Of all establishments surveyed in these three regions in June 2013, at the LGA level 60% or more of hotels/motels and 44% or more of caravan parks regarded non-resident workers as part of their usual clientele[5].

As Table 3 shows, the proportion of workers housed in commercial accommodation is relatively small compared with that occupying WAVs, and has steadily decreased over time. These changes are most apparent in the case of Gladstone (R), where no WAV accommodation existed in June 2011, and where the non-resident population at that time was accommodated in hotels/motels (73%) and caravan parks (26%).

It is evident from these data that where WAV accommodation is not available or is in limited supply, commercial accommodation is utilised for worker accommodation. This situation frequently occurs during the start-up phase of a project, where pioneering construction workforces occupy commercial accommodation or head-leased private housing while new WAVs are being built for the main body of construction workers.

Table 3: Non-resident workers on-shift by accommodation type, established resource regions

		Non-resident workers on-shift, end of June			
		2011	2012	2013	2013
Region	Accommodation(a)	— % —			— number —
Bowen Basin	WAVs	86	88	93	21,205
	Hotels/motels	10	8	5	1,040
	Caravan parks	4	3	3	655
	Total	***100***	***100***	***100***	***22,900***
Surat Basin	WAVs	65	78	88	10,930
	Hotels/motels	28	14	10	1,190
	Caravan parks	7	8	3	340
	Total	***100***	***100***	***100***	***12,460***
Gladstone (R)	WAVs	0	64	89	4,330
	Hotels/motels	73	32	9	455
	Caravan parks	26	4	1	70
	Total	***100***	***100***	***100***	***4,855***

(a) Data for hotels/motels include some non-resident workers living in other forms of accommodation, including serviced apartments and other rental housing.

Data at the LGA level are available in Appendix A.

Source: QGSO, Survey of Accommodation Providers, 2011 to 2013

[5] Refer to Table 5 for further details, including responses by LGA.

Survey results

Surveys were undertaken to quantify the supply of hotel/motel rooms, caravan park cabins, vans and sites across the area, and the numbers of non-resident workers and drive tourists occupying that accommodation at the end of June 2013. These surveys also gathered information on the number of vacant and available accommodation units, and the estimated number of days during the preceding year where proprietors of commercial accommodation were unable to accommodate drive tourists.

To qualify the relevance of the data gathered, accommodation providers were also asked to identify their usual client base, and to identify periods of peak demand during the year. Detailed survey results are provided in this section, and in the Appendices.

Drive tourists

The Queensland Drive Tourist Strategy 2013–15 defines drive tourists as...*"visitors who use some form of vehicular transport...to reach their destination, where the main purpose of visit is leisure...This includes day trips and overnight trips to one or multiple destinations".*[4]

Overnight drive leisure visitors include short break visitors, who are away from home for one to three nights; and long haul visitors, who are away from home for four nights or more.

Supply of commercial accommodation

Three main categories of commercial accommodation were covered in QGSO's 2013 survey – hotel/motel rooms, rental vans and cabins in caravan parks, and powered and unpowered caravan park sites (Table 4).

Hotels and motels covered by the survey usually provided fully contained rooms, although some older hotels still utilised shared bathroom facilities. In isolated cases, some hotel operators also provided overflow accommodation in the form of on-site cabins, as well as rooms in nearby rental houses. Where this was reported, the number of cabins is included in the count of hotel/motel rooms shown in Table 4. Rooms in rental houses are not shown in Table 4, as they are not generally utilised by tourists.

Caravan park rental accommodation comprises caravans and cabins located in the park. Some caravan parks in resource areas focus on catering for non-resident resource industry workers, although they may still retain some facilities for accommodating drive tourists. Where these establishments provide meals and other services to workers as part of the general tariff, the Survey of Accommodation Providers reported the worker accommodation component as a WAV, while the tourist accommodation component was reported as a caravan park.

Most caravan parks surveyed provided a mix of powered and unpowered caravan sites, with the latter utilised as overflow accommodation during periods of peak demand. This type of accommodation is mostly utilised by drive tourists with caravans or camper vans, as well as those with tents. Some parks also have permanent residents occupying van sites, usually in their own caravan.

Table 4: Accommodation capacity by accommodation type, resource region LGAs, June 2013

	Hotels/ motels	Caravan parks					
		Rental accommodation			Sites		
LGA	Rooms	Cabins	Vans	Total rental	Powered	Unpowered	Total sites
Banana (S)	455	205	0	205	55	25	75
Central Highlands (R)	1,165	285	45	335	575	135	710
Isaac (R)	760	615	10	625	220	60	280
Whitsunday (R) (Bowen only)	440	45	5	50	350	25	375
Bowen Basin total	***2,825***	***1,150***	***60***	***1,215***	***1,200***	***245***	***1,445***
Maranoa (R)	610	85	10	95	180	40	220
Toowoomba (R)	1,050	210	25	240	395	225	620
Western Downs (R)	955	320	60	380	240	80	320
Surat Basin total	***2,620***	***620***	***95***	***710***	***810***	***345***	***1,160***
Gladstone (R)	760	175	125	300	490	90	580
Barcaldine (R)	235	30	20	50	125	35	155

Source: QGSO, Survey of Accommodation Providers, 2013

Usual clientele for commercial accommodation establishments

Survey respondents were asked to indicate which types of guests they usually accommodated, with the choices being:

- drive tourists and other holiday makers
- non-resident (FIFO/DIDO) construction or mining/gas industry workers
- short term commercial or government visitors
- seasonal agricultural workers
- permanent residents
- other (please identify).

Table 5 summarises the survey responses by accommodation type and LGA. Between 30% and 88% of **hotels/motels** identified drive tourists among their usual clientele, while more than 75% of **caravan parks** (with the exception of Isaac (R) regarded drive tourists among their usual clientele.

The low proportion of caravan parks (25%) and hotels/motels (30%) in Isaac (R) that counted drive tourists as usual clients compared with non-resident workers (100% and 85% respectively) reflects the fact that most towns in the area are not located on major tourist routes.

Other than drive tourists and non-resident workers, hotel/motels in all areas usually cater for short-term commercial and government visitors, as do caravan parks in Banana (S), Central Highlands (R), Whitsunday (R) – Bowen only, and Barcaldine (R). Most caravan parks also cater for permanent residents.

Table 5: Groups usually accommodated by accommodation type, resource region LGAs

	Groups usually accommodated						
	Drive tourists	Non-resident workers	Commercial/ government	Agricultural workers	Permanent residents	Other	Total responses
LGA	— % of establishments[(a)] —						— number —
	Hotels/motels						
Banana (S)	88	75	63	19	19	0	16
Central Highlands (R)	74	68	74	21	3	3	34
Isaac (R)	30	85	80	5	5	0	20
Whitsunday (R) (Bowen only)	80	75	85	25	10	0	20
Maranoa (R)	80	92	88	16	0	16	25
Toowoomba (R)	63	70	78	13	4	17	46
Western Downs (R)	49	93	76	20	2	5	41
Gladstone (R)	43	60	77	0	3	7	30
Barcaldine (R)	57	50	79	0	0	14	14
	Caravan parks						
Banana (S)	100	67	67	0	100	0	3
Central Highlands (R)	94	44	56	25	63	0	16
Isaac (R)	25	100	25	0	100	0	4
Whitsunday (R) (Bowen only)	100	60	80	80	80	0	5
Maranoa (R)	83	50	0	0	0	0	6
Toowoomba (R)	90	50	40	50	70	40	10
Western Downs (R)	80	67	33	20	40	7	15
Gladstone (R)	75	50	33	0	50	0	12
Barcaldine (R)	100	33	67	0	33	0	3

% of establishments	**0**	**1–20%**	**21–40%**	**41–60%**	**61–80%**	**81–100%**

(a) Represents the percentage of establishments who reported that they usually accommodate each of the nominated groups.

Source: QGSO, Survey of Accommodation Providers, 2013

Visitors by accommodation type

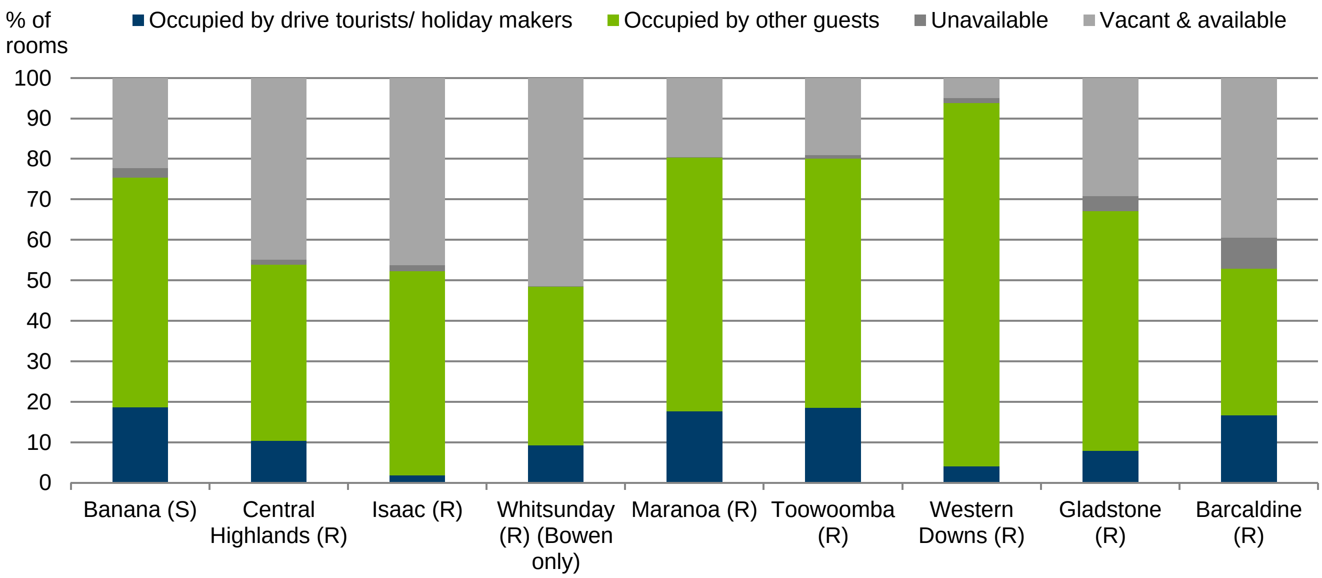
Survey respondents were asked to differentiate how much of their accommodation was occupied by drive tourists and holiday makers at the end of June 2013, and how much was occupied by other guests[6]. Respondents were also asked to identify how much of their accommodation was vacant and available, and that which was unavailable (i.e. reserved or withdrawn for maintenance) at the time of the survey. Detailed survey results are provided in Appendix B, while LGA summaries for each accommodation category are illustrated below.

In general, survey results clearly show that drive tourists occupied a relatively small proportion of hotel/motel rooms and caravan park cabins/vans for all LGAs in June 2013. In contrast, drive tourists outnumbered all other guests staying in powered/unpowered sites in caravan parks. Irrespective of the relative proportions of drive tourists and other guests occupying each category, the proportion of accommodation that was vacant and available was constrained only in specific instances.

Drive tourists occupied a smaller share of hotel/motel rooms than other guests for all LGAs surveyed in June 2013 (Figure 3). Between 2% and 19% of rooms were occupied by drive tourists, while between 36% and 90% of rooms were occupied by other guests. Of all areas surveyed, Isaac (R) recorded the lowest proportion of rooms occupied by drive tourists (2%), followed by Western Downs (4%) and Gladstone (R) (8%). LGAs with the highest occupancy of hotel/motel rooms by drive tourists were Banana (S) and Toowoomba (R) (19% each), followed by Maranoa (R) (18%).

The proportion of hotel/motel rooms that were vacant and available (i.e. not occupied by drive tourists, other users or otherwise unavailable) varied considerably across all areas surveyed. Availability of hotel/motel rooms was highest in the Bowen Basin LGAs of Whitsunday (R) (51%), Isaac (R) (46%) and Central Highlands R) (45%). By contrast, lowest availability was in the Surat Basin LGAs of Western Downs (R) (5%), Maranoa (R) and Toowoomba (19% each).

Figure 3: Hotel/motel room occupancy, resource region LGAs, June 2013



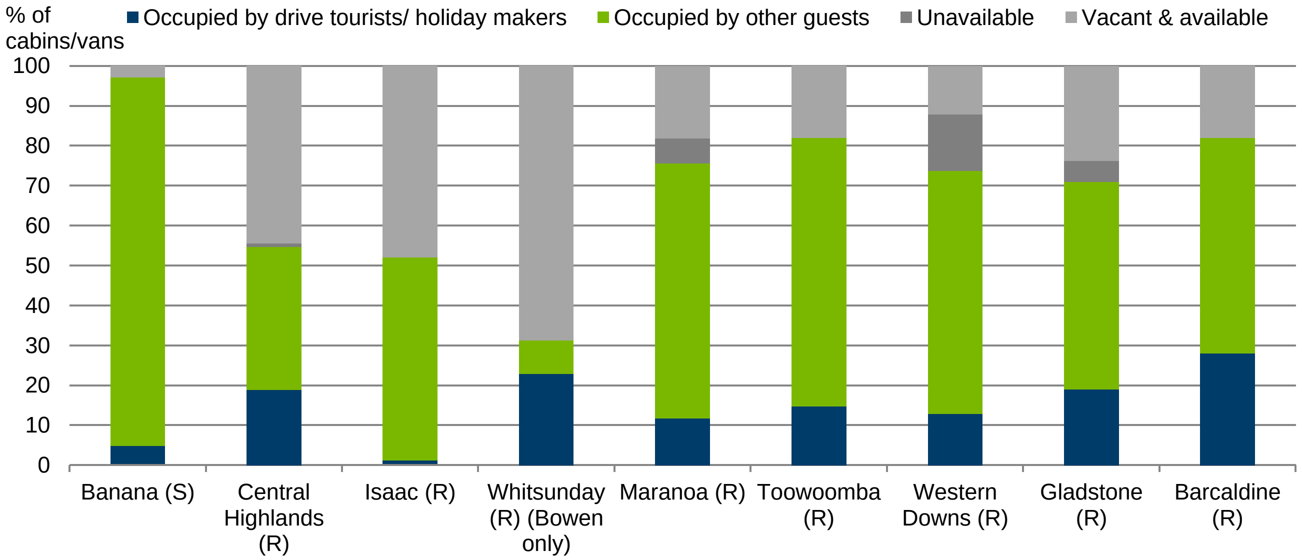
Source: QGSO, Survey of Accommodation Providers, 2013

Drive tourists occupied a smaller share of caravan park cabins/vans than other guests for all LGAs surveyed in June 2013, with the exception of Whitsunday (R) (Bowen only) (Figure 4). Between 1% and 28% of cabins/vans across all areas were occupied by drive tourists, while other guests occupied 8% to 92% of cabins/vans. The highest shares of drive tourists staying in caravan park rental accommodation were found in Barcaldine (R) (28%) and Whitsunday (R) (Bowen only) (23%), reflecting the popularity of these areas with drive tourists over the winter months. Isaac (R) recorded the lowest share of cabins/vans occupied by drive tourists (1%).

[6] While drive tourists comprise the overwhelming majority of all tourists who visit the study area, the group identified in this report as 'drive tourists' may also include small numbers of tourists from other categories. 'Other guests' comprises all categories of non-tourist occupants, including non-resident workers, as previously outlined.

The proportion of caravan park cabins/vans that were vacant and available (i.e. not occupied by drive tourists, other users or otherwise unavailable) varied considerably across all areas surveyed. Availability of cabins/vans was notably high in Whitsunday (R) (69%), Isaac (R) (48%) and Central Highlands R) (45%). By contrast, lowest availability was in the Surat Basin LGAs of Western Downs (R) (5%), Maranoa (R) and Toowoomba (19% each). The LGA of Banana (S) was notable for having a very high proportion of cabins/vans occupied by other guests (92%), as well as low proportions occupied by drive tourists (5%) and vacant and available (3%).

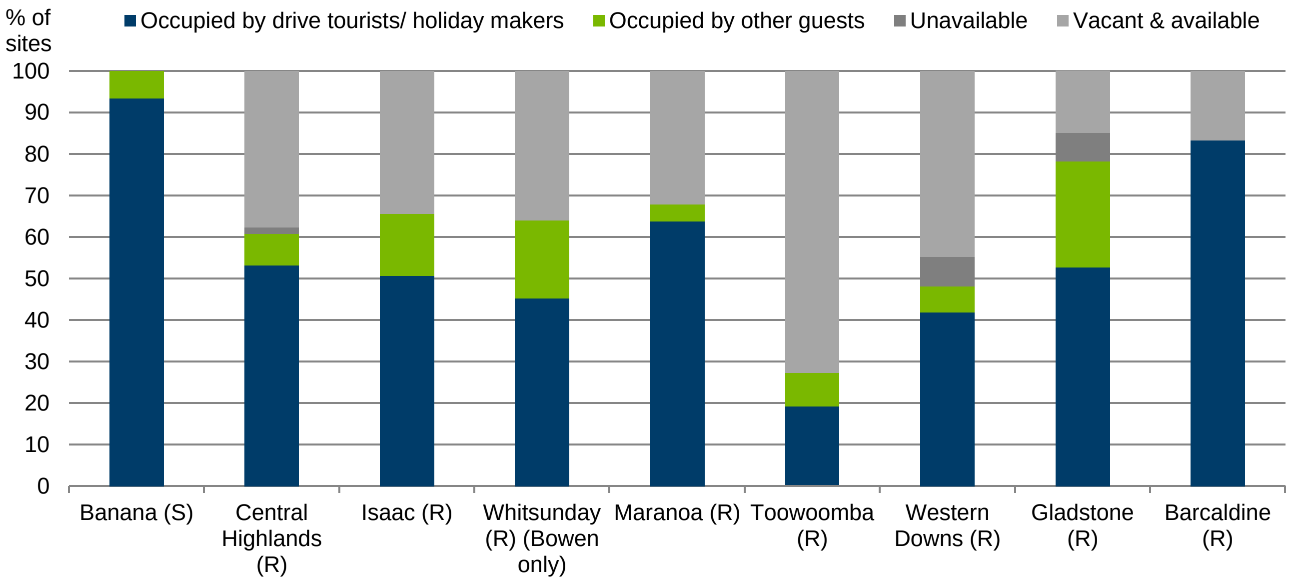
Figure 4: Caravan park cabin/van occupancy, resource region LGAs, June 2013



Source: QGSO, Survey of Accommodation Providers, 2013

In contrast to the occupancy patterns for hotel/motel rooms and rental cabins/vans, drive tourists occupied a greater share of caravan park sites than other guests across all resource region LGAs (Figure 5), with drive tourists occupying between 19% and 93% of caravan park sites in June 2013. Demand from drive tourists was notably highest in Banana (S) (93%), where no sites were vacant and available.

Figure 5: Caravan park site occupancy, resource region LGAs, June 2013



Source: QGSO, Survey of Accommodation Providers, 2013

Non-resident workers by accommodation type

The extent to which non-resident workers were likely to be included in the category of 'other guests' occupying commercial accommodation is shown in Tables 6 and 7. Note that there is not a one-to-one relationship between the number of non-resident workers counted in each establishment and the number of accommodation units (rooms, cabins/vans, or sites) occupied by other guests, as more than one non-resident worker may have been staying in each unit.

Table 6 shows the number of hotel/motel rooms occupied by persons in the other guest category and the number of non-resident workers counted in those establishments. The number of non-resident workers on-shift staying in hotels/motels, also shown, largely aligns with the number of rooms occupied by other guests.

Table 6: Hotel/motel rooms occupied and non-resident workers on-shift, existing resource regions, June 2013

	Hotel/motel rooms		Non-resident workers on-shift in hotels/motels[(a)]
	Occupied by drive tourists	Occupied by other guests	
Region	— number of rooms —		— number of people —
Bowen Basin	260	1,325	1,040
Surat Basin	340	1,890	1,190
Gladstone (R)	60	450	455

(a) Figures include non-resident workers on-shift counted in serviced apartments and rooms in rental houses, which are not included in the count of hotel/motel rooms.

Source: QGSO, Survey of Accommodation Providers, 2013

While the number of non-resident workers counted in caravan parks also aligned with the number of rental cabins/vans occupied by other guests, the data suggest that a small number of these workers occupied caravan park sites, particularly in the Bowen Basin (Table 7).

Table 7: Caravan park accommodation occupied and non-resident workers on-shift, existing resource regions, June 2013

	Cabins/vans		Sites		Non-resident workers on-shift in caravan parks
	Occupied by drive tourists	Occupied by other guests	Occupied by drive tourists	Occupied by other guests	
Region	— number of cabins/vans —		— number of sites —		— number of people —
Bowen Basin	90	630	760	170	655
Surat Basin	95	450	395	80	340
Gladstone (R)	55	155	305	150	70

Source: QGSO, Survey of Accommodation Providers, 2013

In summary, survey data for June 2013 indicate that there was some overlap in demand for commercial accommodation between drive tourists and other guests in resource regions. As a general rule, non-resident workers were more likely to stay in hotels/motels or in rented caravan park vans/cabins rather than powered or unpowered caravan park sites. In contrast, drive tourists, particularly long haul visitors with caravans and camper homes, were more likely to occupy powered or unpowered caravan park sites rather than other forms of accommodation. Advice provided by respondents suggests that drive tourists travelling without their own vans are more likely to occupy hotel/motel rooms or caravan park cabins/vans. This group, therefore, is more likely to come into competition with non-resident workers for accommodation in resource regions.

Vacant and available accommodation

Survey respondents were asked to identify how much of their accommodation was vacant and available at the end of June 2013. The proportion of vacant and available accommodation is an indicator of accommodation shortages and where these are most acute. Detailed responses are available in Appendix B.

The proportion of vacant and available accommodation varied by accommodation type and differed for each LGA in the study area. In the Bowen Basin, Banana (S) recorded notably low levels of vacancies for caravan park cabins/vans (3%) and powered/ unpowered sites (0%) (Table 8). By contrast, other LGAs in the Bowen Basin reported high levels of vacant and available accommodation across all categories.

Hotel/motel rooms and rental cabins/vans were in limited supply across all LGAs of the Surat Basin in June 2013. Accommodation shortages were particularly acute in Western Downs (R), with just 5% of hotel/motel rooms and 12% of cabins/vans vacant and available. Maranoa (R) and Toowoomba (R) also had limited availability of hotel/motel rooms (19% each) and cabins/vans (18% each). By contrast, caravan park sites were more readily available in all three LGAs of the region.

The supply of vacant and available caravan park sites in Gladstone (R) was low (15%) in June 2013, while hotel/motel rooms (29%) and rental vans/cabins in caravan parks (25%) were readily available. In Barcaldine (R), just 18% of caravan park cabins/vans and 17% of sites were vacant and available, while hotel/motel rooms were in good supply (39%).

Vacant and available

In resource regions, it is not uncommon for resource companies to maintain permanent weekly bookings for non-resident workers on a 'take or pay' basis. This accommodation may be unavailable to other occupants whether or not it is actually occupied by workers on any given night.

The 'vacant and available' measure refers to the number of hotel/motel rooms, cabins/vans and caravan park sites that were not occupied, reserved or undergoing maintenance on the night of the survey.

Table 8: Vacant and available accommodation, resource region LGAs, June 2013

	Hotel/motels	Caravan parks	
	Rooms	Rental cabins/vans	Powered/unpowered sites
LGA	— % vacant and available —		
Banana (S)	22	3	0
Central Highlands (R)	45	45	38
Isaac (R)	46	48	34
Whitsunday (R) (Bowen only)	51	69	36
Bowen Basin total	***43***	***40***	***35***
Maranoa (R)	19	18	32
Toowoomba (R)	19	18	73
Western Downs (R)	5	12	45
Surat Basin total	***14***	***15***	***57***
Gladstone (R)	29	24	15
Barcaldine (R)	39	18	17

% vacant and available	**< 10%**	**10–19%**	**20–29%**	**30–39%**	**40–49%**	**50% +**

Source: QGSO, Survey of Accommodation Providers, 2013

Whether the rates of vacant and available accommodation shown above were typical for those LGAs or influenced by abnormal events is not evident from the 2013 data alone. Time series data for vacant and available hotel/motel rooms obtained from the 2011 and 2012 surveys of accommodation providers provide a basis for comparison (Table 9). Data for vacant and available caravan park accommodation were not gathered in previous years.

Time series data clearly indicate that the rates of vacant and available hotel/motel rooms in June 2013 changed substantially from preceding years for all LGAs in the study area. Most areas saw a substantial improvement in hotel/motel room availability compared with earlier years, with the exception of Western Downs (R) where availability declined in 2012 and 2013.

The influences underlying these changes are not readily apparent in isolation from other information, including qualitative evidence collected from accommodation providers during the course of these surveys (see LGA summaries for more detailed discussion). Additional context may also be gained from annual population reports for these regions published by QGSO[7]. Changes to vacant and available hotel/motel accommodation may be summarised as follows:

Banana (S) – availability improved in 2013 (22%) after extreme lows in 2011 and 2012 (4% each). Constrained supply in previous years was largely due to local factors, including accommodation taken up by non-resident construction workers engaged in flood reconstruction and infrastructure projects.

Central Highlands (R) – availability was notably higher in 2013 (45%) compared with 2011 (3%) and 2012 (7%). Numbers of non-resident mining workers living in hotel/motel rooms fell markedly at the end of 2012, following several mine closures and mining industry cutbacks.

Isaac (R) – availability jumped to 46% in 2013 after being low in 2011 and 2012 (3% and 14% respectively). This change was largely due to a significant decline in the non-resident population in 2013, as well as greater availability of WAV beds.

Whitsunday (R) (Bowen only) – time series data for 2011 and 2012 are not comparable with 2013 data, as the town of Bowen was not included in surveys for these preceding years.

Maranoa (R) – availability improved markedly in 2013 (19%) after extreme lows in 2011 (1%) and 2012 (7%). Movement of non-resident workers into new WAV accommodation in 2012–13 improved hotel/motel availability, particularly in Roma.

Toowoomba (R) – availability improved slightly in 2013 (19%) from 2012 (15%), but remained lower than 2011 (35%). Changes were unlikely to be associated with non-resident resource industry workforces, as these are relatively small.

Western Downs (R) – availability declined further in 2013 (5%) from previous low points in 2011 (15%) and 2012 (11%). The non-resident population of this LGA has continued to expand rapidly since 2011, driving up accommodation demand.

Gladstone (R) – availability improved considerably in 2013 (29%) after being very low in 2011 (4%) and 2012 (12%). The changes in 2012 and 2013 were largely due to increased availability of WAV beds for construction workforces, which reduced reliance on other forms of accommodation.

Barcaldine (R) – availability has remained relatively high since 2011. This LGA has been largely unaffected by resource industry workforces to date.

Table 9: Vacant and available hotel/motel rooms, resource region LGAs, June 2011 to June 2013

LGA	2011	2012	2013
	— % vacant and available —		
Banana (S)	4	4	22
Central Highlands (R)	3	7	45
Isaac (R)	3	14	46
Whitsunday (R) (Bowen only)	n.p.	n.p.	51
Bowen Basin total	***3***	***8***	***43***
Maranoa (R)	1	7	19
Toowoomba (R)	35	15	19
Western Downs (R)	15	11	5
Surat Basin total	***18***	***11***	***14***
Gladstone (R)	4	12	29
Barcaldine (R)	30	43	39

% vacant and available	**< 10%**	**10–19%**	**20–29%**	**30–39%**	**40–49%**	**50% +**

n.p. — not published

Source: QGSO, Survey of Accommodation Providers, 2011 to 2013

[7] For full details, refer to the *Bowen Basin population report, 2013* ,*Surat Basin population report, 2013* and *Gladstone region population report, 2013* http://www.qgso.qld.gov.au/products/publications/index.php. Time series data for preceding years are available as web tables.

Periods of unmet demand

The survey asked respondents to identify if there was any period over the 12 months to June 2013 when they could not meet demand for accommodation from drive tourists and, if so, the approximate number of nights that they were unable to meet this demand. Respondents were also asked to identify the reason for this unmet demand and (for caravan parks) the type of accommodation they were unable to provide. LGAs with the greatest unmet demand over the past year coincide with the areas with the lowest vacancy rates at June 2013 identified in Table 8.

The majority of hotels/motels across resource region LGAs recorded low to moderate levels of unmet demand over the year to June 2013 (Table 10). Western Downs (R) was the most notable exception to this rule — 51% of hotels/motels turned visitors away on more than 50 occasions, with many reporting that they were 'always full with workers' during the week. Nearly one-quarter of establishments in Maranoa (R) (24%) and Gladstone (R) (23%) also recorded high levels of unmet demand.

All caravan parks in Banana (S) reported moderate levels of unmet demand from drive tourists over the past year (attributed to higher than usual demand from other guests), while a considerable share of caravan parks in the Surat Basin and Gladstone (R) experienced high levels of unmet demand as a result of higher than usual demand from both drive tourists and other guests (including FIFO/DIDO workers).

Table 10: Periods of unmet demand by accommodation type, resource region LGAs, year to June 2013

LGA	Level of unmet demand: Low[(a)]	Moderate[(b)]	High[(c)]	Total responses	Main reason/s for unmet demand[(d)] and type of accommodation in demand[(e)]
	— % of establishments —			—number—	
Hotels/motels					
Banana (S)	56	44	0	16	Other guests (gas pipeline workers)
Central Highlands (R)	71	21	9	34	Other guests (FIFO/DIDO workers and others)
Isaac (R)	85	10	5	20	Other guests
Whitsunday (R) (Bowen only)	100	0	0	20	—
Maranoa (R)	36	40	24	25	Other guests (FIFO/DIDO workers); also drive tourists
Toowoomba (R)	41	46	13	46	Other guests (power station workers); also drive tourists (special events)
Western Downs (R)	34	15	51	41	Other guests (FIFO/DIDO workers)
Gladstone (R)	67	10	23	30	Other guests; also drive tourists
Barcaldine (R)	85	0	15	13	Drive tourists and other guests (construction workers)
Caravan parks					
Banana (S)	0	100	0	3	Other guests; demand for rental cabins/vans during power station shutdowns
Central Highlands (R)	75	25	0	16	Drive tourists; demand for sites
Isaac (R)	75	25	0	4	—
Whitsunday (R) (Bowen only)	80	20	0	5	—
Maranoa (R)	67	17	17	6	Drive tourists and other guests; demand for cabins/vans and sites
Toowoomba (R)	60	20	20	10	Drive tourists (special events) and other guests; demand for cabins/vans and sites
Western Downs (R)	53	20	27	15	Other guests and drive tourists; demand for cabins/vans and sites
Gladstone (R)	50	33	17	12	Drive tourists; also other guests (FIFO/DIDO workers); demand for sites and cabins/vans
Barcaldine (R)	100	0	0	3	—

(a) Less than 10 nights or no period of unmet demand from drive tourists identified in the past 12 months.
(b) 10–50 nights of unmet demand from drive tourists in the past 12 months.
(c) More than 50 nights of unmet demand from drive tourists in the past 12 months.
(d) Higher than usual numbers of drive tourists and/or other guests.
(e) Caravan parks only.
Source: QGSO, Survey of Accommodation Providers, 2011 to 2013

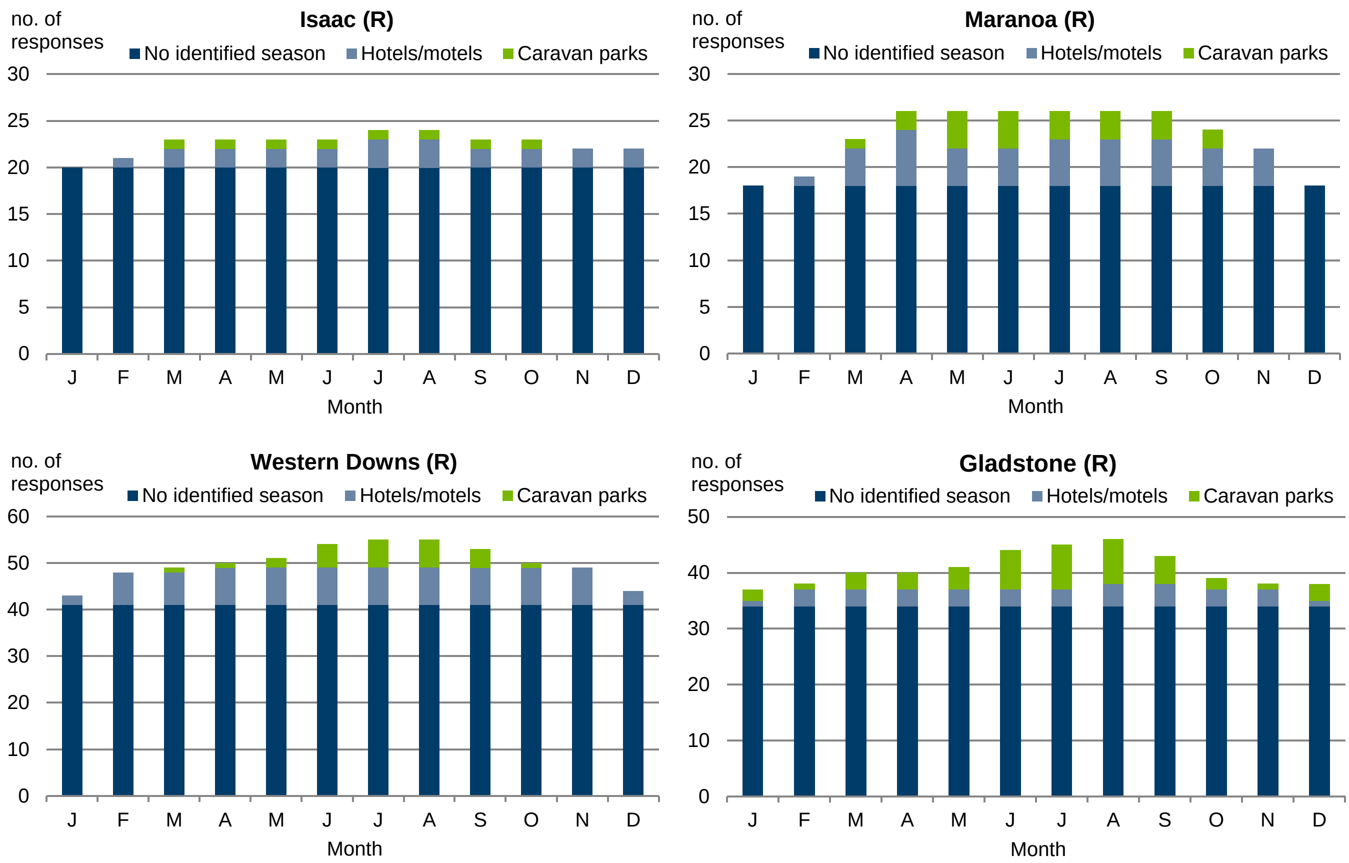
Demand by season

Survey respondents were asked to identify if there were times during the preceding year when demand for accommodation was higher than normal and, if so, to identify the relevant months. Respondents were also asked to identify the reason for high demand (hotels/motels) and the type of accommodation in demand (caravan parks).

Demand for accommodation from drive tourists is highly seasonal in most areas, running approximately from April through to October and peaking in the winter months – as demonstrated by strong demand for caravan park accommodation (predominantly sites) during this period. Resource industry activity is cyclical and project driven rather than seasonal, with demand for non-resident worker accommodation more stable year round (with a slight decline over December–January). Conflicting demand is therefore more likely to occur over the winter months. Peaks in demand can also be event driven in some locations (e.g. by power station shutdowns, industry conventions or show days). Where these events coincide with the regular drive tourist season, short periods of conflicting demand can occur.

Patterns of seasonal demand demonstrate different drivers across the LGAs surveyed. Demand for accommodation is relatively stable throughout the year in Isaac (R), Maranoa (R), Western Downs (R) and Gladstone (R) (Figure 6). The majority of establishments in these LGAs did not identify months of peak demand, reporting that they are busy year round with workers (including both resource industry workers and commercial and government visitors).

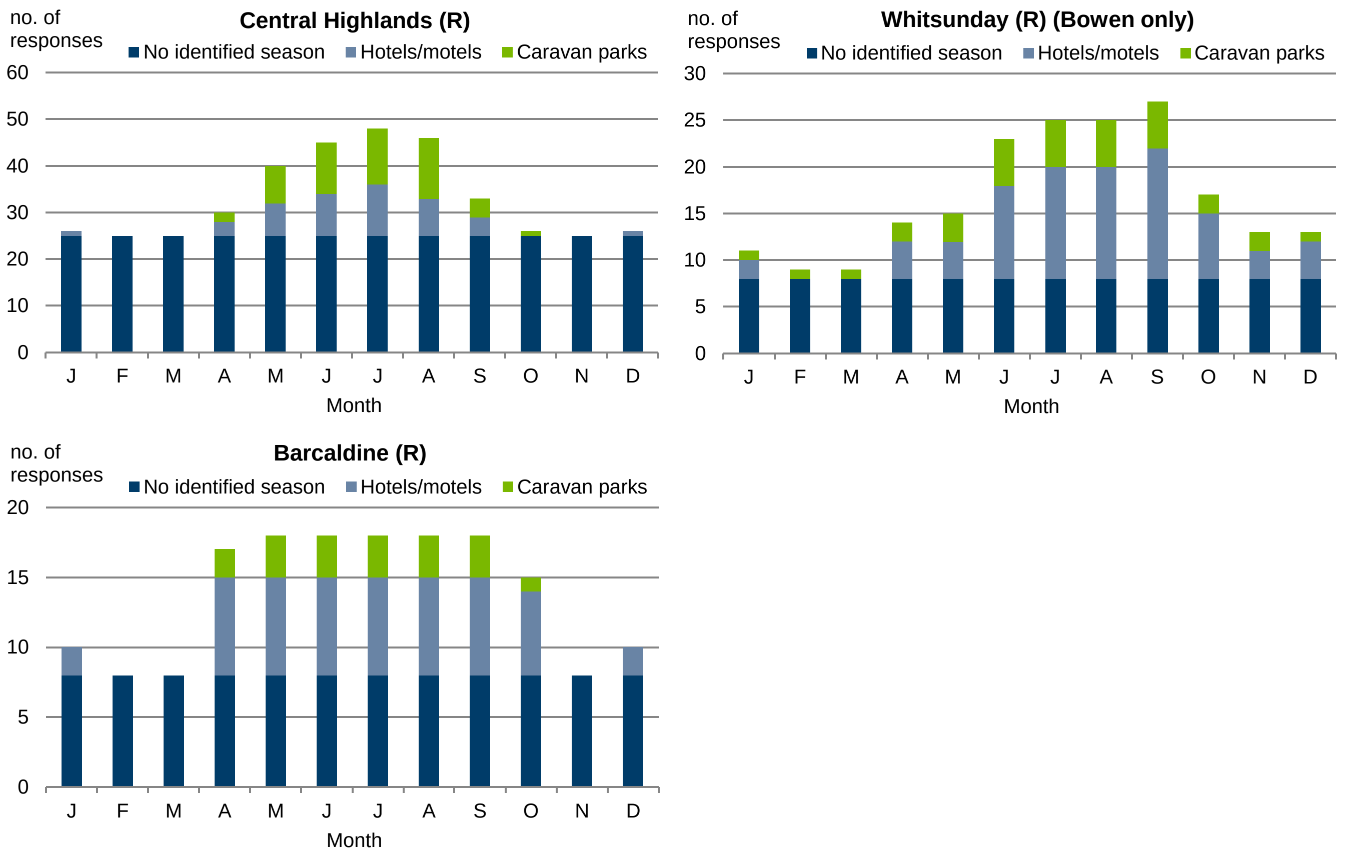
Figure 6: Seasons of peak demand by accommodation type, non-seasonal LGAs



Source: QGSO, Survey of Accommodation Providers, 2013

In contrast, notable seasons of peak demand for accommodation were clearly evident in Central Highlands (R), Whitsunday (R) (Bowen only) and Barcaldine (R) (Figure 7). These LGAs are more strongly influenced by demand from drive tourists and other holiday makers), with peaks over the winter months and school holidays.

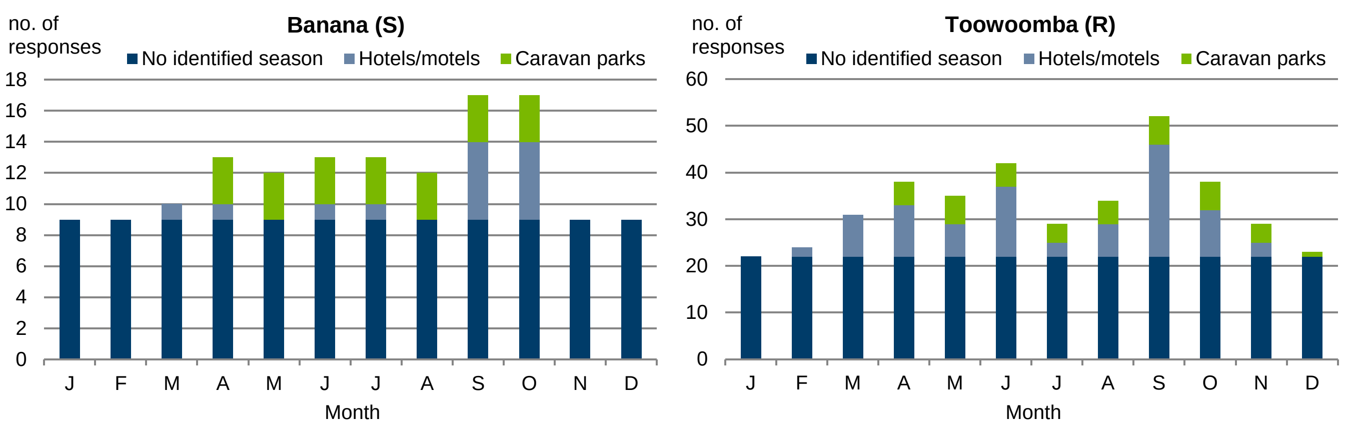
Figure 7: Seasons of peak demand by accommodation type, seasonal LGAs



Source: QGSO, Survey of Accommodation Providers, 2013

Banana (S) and Toowoomba (R) also experience months of high demand for accommodation, with peaks that are event driven rather than seasonal (Figure 8). Scheduled maintenance shutdowns at the Callide power station create a notable spike in demand in Banana (S) in September–October. Key events in Toowoomba (R) include the Carnival of Flowers and Ag Show (September), Farmfest and the Surat Basin Expo (June), and Easterfest and the Toowoomba Show (March–April) in the city of Toowoomba, as well as power station shutdowns in Oakey and Millmerran around September–October.

Figure 8: Seasons of peak demand by accommodation type, event-driven LGAs



Source: QGSO, Survey of Accommodation Providers, 2013

LGA summaries

Banana (S)

Usual clientele

Accommodation providers in Banana (S) usually cater for a range of groups. The majority of hotels/motels and caravan parks include drive tourists, non-resident workers and commercial or government visitors among their usual clientele, while some also accommodate seasonal agricultural workers (Table 5). All caravan parks housed permanent residents. Operators of caravan parks and hotels/motels identified that periods of highest demand occurred during the winter tourist season, and in September–October during maintenance shutdowns at the Callide Power Station (Figure 8).

Industry influences

The LGA of Banana (S) had three coal mines operating at the time of survey, and substantial activity associated with construction of three gas pipelines from the Surat Basin to Gladstone. Around 2,750 non-resident workers on-shift were counted in Banana (S) in June 2013, an increase of 1,160 from June 2012 (Appendix A). While the majority of the 2013 non-resident population was accommodated in WAVs (2,395 people), around 170 were counted in hotels/motels and 180 in caravan parks. The substantial boost in the non-resident population of Banana (S) between 2012 and 2013 was largely due to gas pipeline construction, which should be largely complete by June 2014. Other non-resident workers in the area in 2013 were employed in coal production and gas exploration, civil construction crews (especially road workers), and power station maintenance.

Conflicting demand

Along with demand from drive tourists and other groups, demand for accommodation from non-resident workers contributed to limited availability of all accommodation types in June 2013. Demand for caravan park accommodation — both rental vans/cabins and sites — was particularly strong, as demonstrated by low vacancy rates (Table 8) and considerable periods of unmet demand over the preceding year (Table 10). While the limited availability of vans/cabins in Banana (S) in June 2013 was driven largely by temporary demand from FIFO/DIDO construction workers (including road crews), high demand from drive tourists was the main reason for limited availability of caravan park sites.

Locality level

Caravan park accommodation in the town of Biloela was particularly tight in June 2013. Park operators reported that cabins/vans set aside for worker accommodation were largely full, but cabins were still available for drive tourists. Some operators observed that while powered sites were generally full, southern drive tourist numbers were lower this year, possibly due to road works forcing them to travel further inland.

Future influences

Completion of road construction should reduce demand for accommodation from non-resident workers in the LGA. Completion of pipeline projects in 2014 will have less influence on hotel/motel and caravan park availability, as these groups are largely housed in WAVs. Cyclical demand from power station maintenance workers will be ongoing.

Central Highlands (R)

Usual clientele

Accommodation providers in Central Highlands (R) usually cater for a broad range of groups. The majority of hotels/motels and caravan parks include drive tourists, non-resident workers and commercial or government visitors among their usual clientele (Table 5). Around 21% of hotels/motels and 25% of caravan parks also identified agricultural workers as usual clients, while around two-thirds of caravan parks also housed permanent residents. Operators of caravan parks and hotels/motels identified a peak season stretching from April to September, and to a lesser extent during December to January (Figure 7).

Industry influences

The LGA of Central Highlands (R) contained ten operating coal mines at the time of survey, following the closure of the Gregory mine in September 2012. Around 4,740 non-resident workers on-shift were counted in June 2013, a fall of 840 people from June 2012 (Appendix A). While the majority of the 2013 non-resident population was accommodated in WAVs (4,300 people), around 325 were counted in hotels/motels and 115 in caravan parks. The fall in the non-resident population between 2012 and 2013 was largely due to coal mine closures and industry restructuring, as well as completion of mine expansion works. Other non-resident workers in the area in 2013 included gas exploration and pipeline construction workers, civil construction crews (especially road workers), and mine maintenance workers.

Conflicting demand

Accommodation providers across Central Highlands (R) reported little to no demand from the resource industry in June 2013, citing an ongoing downturn in coal mining operations since November–December 2012. While a number of non-resident workers were engaged in gas drilling and pipeline construction and road works in the southern end of the LGA, most were accommodated in WAVs and placed little demand on commercial accommodation. Additional WAV bed capacity in Emerald also drew resource industry workers away from commercial establishments.

Locality level

As a result of declining demand from the resources sector, the proportion of vacant and available hotel/motel rooms in Central Highlands (R) increased substantially in 2013 (Table 9). Motel occupancy in Emerald and Blackwater in June 2013 was reported to be much lower than in previous years, while caravan park and hotel/motel operators in some smaller towns (notably Capella and Springsure) reported extremely low demand from groups other than drive tourists. Road workers and gas exploration crews generated temporary demand for accommodation in Rolleston.

The Gemfields are a notable tourist destination within Central Highlands (R), attracting family groups over the winter school holidays as well as grey nomads (including a number of regular winter visitors and longer-term guests staying for up to three months). While demand for accommodation usually peaks during Gemfest in August, caravan parks and hotels/motels reported that the tourist season was much quieter than usual in June 2013 (the 'worst year in memory', according to one provider). Some caravan park operators cited free caravan park sites provided by Council as a factor driving reduced demand for their accommodation.

Future influences

Unlike previous years, availability of drive tourist accommodation and competing demand from non-resident workers was not a problem in Central Highlands (R) in 2013. Completion of road and pipeline works in 2014 will have little influence on demand for commercial accommodation, as these groups are largely housed in WAVs. The reduction in demand from non-resident workers in the coal industry is likely to continue into the near future, although new coal projects planned for Central Highlands (R) have the potential to influence demand in the longer term.

Isaac (R)

Usual clientele

Unlike most other LGAs, the majority of accommodation providers in Isaac (R) tend to focus on non-resident resource industry workers as usual clients rather than drive tourists (Table 5). In particular, the low proportion of caravan parks catering for drive tourists (25%) relative to non-resident worker clients (100%) reflects both a high degree of specialisation for the latter group, as well as the location of most parks away from major tourist routes. All caravan parks also housed permanent residents, but few identified agricultural workers among their usual clients. Most caravan park and hotels/motel operators noted that demand for accommodation was relatively constant year round, without discernable peaks (Figure 6).

Industry influences

The LGA of Isaac (R) contained 22 operating coal mines at the time of survey, following the commencement of early production at Daunia mine. Around 14,950 non-resident workers on-shift were counted in June 2013, a fall of 2,180 people from June 2012 (Appendix A). The majority of the 2013 non-resident population was accommodated in WAVs (14,285 people), with the remainder staying in hotels/motels (305 people) and caravan parks (360 people). The fall in the non-resident population of Isaac (R) between 2012 and 2013 was largely due to coal mine closures and industry restructuring, as well as completion of new mine construction and mine expansion works.

Conflicting demand

Operators of caravan parks and hotel/motels across Isaac (R) reported a marked fall in demand from the resource industry in 2013, citing an ongoing downturn in coal mining operations since late 2012 and increased availability of WAV accommodation as the main driving factors. While a number of FIFO/DIDO construction workers (particularly road crews and civil construction) were counted in caravan parks and motels, no establishments identified that non-resident workers placed constraints on supply of accommodation for drive tourists.

Locality level

With the exception of Clermont, most towns in Isaac (R) are situated away from main drive tourist routes and are predominantly orientated to the needs of the mining industry, rather than to tourism. Caravan parks surveyed in mining centres other than Clermont reported that although they retain some powered and unpowered sites for use by drive tourists, demand was limited.

Clermont, on the Great Inland Way, attracts north–south drive tourists in transit during the peak tourist season, while some tourists stay for extended periods to engage in gold fossicking. Closure of the Blair Athol mine near Clermont, in 2012, reduced demand from non-resident mining workers, with all caravan park and hotel/motel operators reporting low occupancy rates for rental accommodation in June 2013.

Future influences

Availability of drive tourist accommodation and competing demand from non-resident workers is not currently a problem in Isaac (R), due to reduced demand from workers and limited demand from drive tourists in most parts of the LGA. The downturn in the coal industry and increased use of WAVs for worker accommodation contributed to this fall in demand in 2013. New coal projects planned for Isaac (R) and the neighbouring Galilee Basin may influence demand in the longer term.

Whitsunday (R) (Bowen only)

Usual clientele

Accommodation providers in Whitsunday (R) (Bowen only) cater for a range of usual visitors, although the clientele varies somewhat by accommodation type (Table 5). The majority of hotels/motels and caravan parks include drive tourists, non-resident workers and commercial clients among their usual guests, with most caravan parks also housing seasonal agricultural workers and permanent residents. Qualitative information supplied by respondents indicated that the tourist market in Bowen has changed in recent years, with a fall in international visitors offset to some extent by more local tourists attracted by cut-price motel and holiday apartment rates. Some caravan parks reportedly focus on attracting long-term holiday makers from the southern states, who stay for two to three months over winter. Accommodation for backpackers, a notable market segment in this area, is largely separate and set up to cater for international visitors on working holiday visas engaged in fruit and vegetable picking.

Industry influences

The LGA of Whitsunday (R) (Bowen only) contained two operating coal mines at the time of survey, both located near the town of Collinsville. One of these mines (Glencore Xstrata Collinsville Coal Mine) suspended operations subsequent to the survey date. At 30 June 2013, the non-resident population of Whitsunday (R) (Bowen only) was 460, some 275 people fewer than in the preceding year (Appendix A). Most non-resident workers were accommodated in Collinsville.

Conflicting demand

With the non-resident population declining in 2013, conflicting demand for commercial accommodation from resource industry workers was not identified as an issue in Whitsunday (R) (Bowen only). Overall occupancy rates for commercial accommodation were low across all accommodation types (Table 8).

Locality level

Most commercial accommodation occupied by non-resident resource industry workers in 2013 was in Collinsville, with providers reporting significantly lower occupancy rates from the preceding year. Providers of caravan park and hotel/motel accommodation in the town of Bowen reported a reduction in demand from tourists and other clients in June 2013, with low occupancy rates. Some operators cited free caravan park sites provided by Council as a factor driving reduced demand for their accommodation. None of the establishments that were surveyed reported any plans to expand.

Future influences

While availability of drive tourist accommodation and competing demand from non-resident workers is not currently a problem in Whitsunday (R) (Bowen only), it could become a pressing issue should resource industry projects associated with the Galilee Basin proceed to commencement. In particular, construction of new coal export terminals at Abbot Point would see a temporary but sizeable influx of non-resident workers into the town of Bowen. In this event, the take-up of existing commercial accommodation by these workforces, and the potential impacts of short supply on other user groups, would be strongly influenced by the timely provision of adequate WAV accommodation. At present there are no WAVs operating in the Bowen area.

Maranoa (R)

Usual clientele

Two major drive tourist routes traverse Maranoa (R) — the east–west Warrego Highway, and the Great Inland Way, which travels north–south (Figure 1). Both routes intersect in the town of Roma, which is also the commercial and administrative hub for the region, and the location of most commercial accommodation. Due to its size and relative distance from other large centres, Roma serves as a convenient way point for drive tourists, particularly during the winter season, and for long distance travellers driving between north-west Queensland and the south-east corner of the state.

Since 2010, rapid expansion of the CSG industry has been accompanied by increased demand for non-resident worker accommodation in Maranoa (R). At the same time, the region has also experienced a temporary influx of non-resident construction workers associated with post-flood road works and other infrastructure development.

Industry influences

The number of non-resident workers on-shift in Maranoa (R) has increased rapidly since the commencement of two major CSG projects in 2010. Most activity associated with the CSG industry has taken the form of gas field exploration, drilling, gas field development and pipeline construction. Unlike coal mining, these activities are widely dispersed across rural areas of the LGA, rather than being concentrated in one particular location. As of June 2013, there were 4,665 non-resident workers in Maranoa (R), an increase of 2,590 from the preceding year (Appendix A).

Conflicting demand

Given safety constraints on daily travelling times and the distances between most CSG operations and towns, the majority of CSG non-resident workers in Maranoa (R) are housed in WAVs, and do not compete with other users for commercial accommodation. In June 2013, some 4,325 of the non-resident workers on-shift in Maranoa (or 77% of total) were accommodated in WAVs (Appendix A). However, some workers engaged in activities associated with resource development, including sub-contractors, professional and management staff, and road construction workers, did occupy commercial accommodation in towns. In June 2013, 280 workers occupied rooms in hotels/motels in Maranoa (R) while a further 60 workers were counted in caravan parks.

Operators of commercial accommodation reported moderately low availability of hotel/motel rooms and caravan park cabins/vans in Maranoa (R) in June 2013 (Table 8), although most noted that availability had improved considerably from the two preceding years. In total, 24% of hotel/motels and 17% of caravan parks reported high levels of unmet demand from drive tourists (Table 10), most notably during peak tourist season (April–October) (Figure 6).

Locality level

Operators of caravan parks and hotel/motels in Roma reported strong demand for accommodation from non-resident workers (predominantly road workers) and drive tourists in June 2013, with some caravan park operators planning to increase their holdings of cabins to accommodate workers. While the number of non-resident workers counted in Roma grew from 290 in 2012 to 485 in 2013, most of this increase was absorbed by a new WAV that opened on the outskirts of town in late 2012.

Other towns in Maranoa (R) also accommodated non-resident workers in caravan parks and hotels/motels, most notably Injune (45 people) and Mitchell (20 people). These numbers were relatively small compared with Roma, but nevertheless significant given the limited supply of commercial accommodation in those centres.

Future influences

While the number of non-resident workers associated with the CSG industry is predicted to remain high in Maranoa (R) for some years to come, most will be accommodated in WAVs located on the gas fields rather than in town centres. Demand for worker accommodation in town centres is likely to decline slightly from current levels as major road works and infrastructure construction projects are completed, although there is likely to be an ongoing requirement to house short term resource industry contractors, specialists and management staff visiting the area.

Toowoomba (R)

Usual clientele

The LGA of Toowoomba (R) is a different accommodation market from other parts of the Surat Basin, being largely influenced by the size of Toowoomba city and its function as the major regional centre. Many hotels/motels have a predominantly corporate or government clientele, while FIFO/DIDO workers (road workers, other construction workers, gas industry) make up only a small proportion of usual visitors (Table 5). These establishments are busy all year round (but quieter in December–January), and are usually full, or close to full, during week nights.

Demand for hotel/motel accommodation from drive tourists in Toowoomba city appears to be limited and less driven by seasonal tourist migrations than other regions surveyed. Instead, tourism in Toowoomba largely revolves around specific events such as the annual Carnival of Flowers, Easterfest, Farmfest, and the Surat Basin Expo (Figure 8). These attract many visitors from the populous South East Queensland area for short term stays, as well as people from other regional areas. These visitors place high demand on hotel/motel accommodation during the span of the event, whereas caravan parks are more likely to service drive tourists from further afield.

As the regional centre, Toowoomba city also attracts out-of-town visitors for non-tourist activities and business. Hospital and school visitors — country people coming into town from out west for hospital stays or medical appointments (including Patient Travel Subsidy Scheme patients and carers); boarding school families in town for free weekends, parent/teacher interviews, open days, and school groups on regional sports trips — are a key segment. Self-contained accommodation is popular with these groups and tends to attract repeat customers.

Industry influences

Given the considerable supply of commercial accommodation in Toowoomba (R), the influence of the relatively small resource industry sector is minimal. In June 2013 there were only 330 non-resident workers counted in Toowoomba (R), of whom 200 were living in hotel/motel rooms and 110 in caravan parks (Appendix A). Toowoomba city serves as a service centre for coal mining and CSG industries operating in the Surat Basin, and is the assembly point for many FIFO/DIDO workers, specialists and management staff who fly or bus between there and their place of work. Some resource companies make regular bookings of hotel/motel rooms to cater for these crew changeovers.

Conflicting demand

In general, non-resident resource industry workers do not present conflicting demand for commercial accommodation normally used by drive tourists or other visitors. However, during peak events such as those mentioned earlier, occupancy rates for all types of accommodation are high, and temporary shortages are not uncommon in some areas.

Locality level

Outside of Toowoomba city, other towns in the LGA cater for a range of visitor types. Hotels/motels and caravan parks in centres such as Pittsworth and Millmerran mainly accommodate FIFO/DIDO workers (predominantly road crews and power station workers) and agricultural workers, with limited demand from drive tourists. Shortages of commercial accommodation in these centres usually occur during scheduled maintenance shutdowns from the nearby power stations. These towns also provide overflow accommodation for drive tourists unable to find lodgings in Toowoomba during periods of peak demand, such as the Carnival of Flowers. Where these events coincide, drive tourists may experience difficulty in finding accommodation.

Future influences

At present, direct competition between drive tourists and non-resident workers for commercial accommodation in Toowoomba (R) is not a major issue, except in isolated instances. Future resource industry developments in the Surat Basin will mainly occur in Western Downs (R) and Maranoa (R), and are more likely to impact on accommodation demand in those regions rather than in Toowoomba (R).

Western Downs (R)

Usual clientele

The LGA of Western Downs (R) has a diversified economy. Along with its long standing agricultural and grazing industries, the region also supports the rapidly growing CSG and coal mining sectors. Tourism plays a relatively small but essential part of the economy of Western Downs (R), due largely to the two major tourist routes that traverse the region. The Warrego Highway, which travels east–west through the major centres of Dalby, Chinchilla and Miles, is the main route for road traffic between the south-east corner of the state and far western regions. The Leichhardt Highway travels north-south through Miles and Wandoan, and is one of the routes used by southern drive tourists.

As well as drive tourists, most accommodation providers along these two routes cater for a mix of clients, including resource industry workers, road construction workers, tradespeople and business travellers (Table 5). Hotels/motels reported that non-resident workers involved in the gas industry, power station construction and associated sub-contractors were their main clientele in June 2013, with many companies taking permanent block bookings. Caravan park operators counted FIFO/DIDO workers and drive tourists among their regular clientele, although the proportions of each group varied from park to park according to the mix of rental cabins and sites.

Hotels/motels and caravan parks reported that they were busy all year round, with a quieter period over December-January (Figure 6). Demand in Dalby and Chinchilla is especially high during power station shutdowns. Similarly, most caravan parks reported constant demand throughout the year, with peaks from June to September during the winter drive tourist season.

Industry influences

Since late 2010 the CSG and coal mining industries have boomed in the Surat Basin, with the highest levels of activity occurring in Western Downs (R). As of June 2013, there were 7,485 non-resident workers in Western Downs (R), an increase of 3,310 or 79% from the preceding year (Appendix A). Most of these were CSG industry workers involved in exploration, drilling, gas field development and pipeline construction. While the majority of these lived in WAVs located on the gas fields (4,820 workers, or 64%) when on-shift, the proximity of some operations to existing towns meant that a large number of workers (2,665 workers, or 36%) occupied WAVs and other commercial accommodation in those towns.

Conflicting demand

Information gathered from providers indicates that there was conflicting demand between resource industry workers and other guests, including drive tourists, for hotel/motel and caravan park accommodation in most towns in Western Downs (R) in June 2013. Hotel/motels were routinely full with workers (resource industry and other workers) from Monday to Thursday nights, with operators reporting that enquiries from drive tourists and other travellers were regularly turned away during the week. Hotels/motels in Dalby generally had some availability for tourists on weekends, including drive tourists (road trippers/motorcyclists) from south-east Queensland and visitors in town for events (e.g. football).

Caravan parks reported strong demand from drive tourists for sites and cabins, citing regular occasions where they were unable to provide accommodation. Some caravan parks in the region have converted to providing worker accommodation (cabins only), leaving few sites remaining for drive tourists. As a result, there are shortages of site accommodation for drive tourists with caravans in some areas (notably Miles), leading to situations where Council provides powered and unpowered sites for vans in showgrounds (Miles and Chinchilla). Elsewhere, caravan park sites were more readily available, suggesting that a large segment of the drive tourist market (i.e. those with their own vans) was largely unaffected by demand from non-resident workers.

Operators of commercial accommodation reported critically low availability of hotel/motel rooms (5%) and caravan park cabins/vans (12%) in Western Downs (R) in June 2013, although caravan park sites were generally available (45%) (Table 8). Western Downs (R) was the only LGA covered by the survey where the availability of hotel/motel rooms in 2013 was lower than in the preceding year (11%) (Table 9). In total, 51% of hotel/motels and 27% of caravan parks reported that they were unable to meet demand from drive tourists for more than 50 nights during the year to June 2013 (Table 10).

Locality level

In June 2013, 'hot spots' for accommodation were concentrated along the Warrego Highway in the towns of Miles, Chinchilla and Dalby. Hotel/motel and caravan park operators reported high levels of unmet demand from drive tourists in all of these centres, with anecdotal reports of tourists driving all the way from Charleville or Roma to Toowoomba looking for a place to stay. Alternative accommodation is often available outside of the major centres — one motel in Dalby reported that they can usually find a room in satellite towns (e.g. Bell) — while overflow caravan park sites permitted by Council were available in most centres.

Elsewhere in Western Downs (R), hotels/motels in Wandoan reported that they catered mainly for FIFO/DIDO workers, with year-round demand from the gas industry. Accommodation providers in Tara had few non-resident workers, with mostly permanent residents, occasional construction workers, and a handful of tourists. Jandowae was unusually busy in June 2013, with FIFO/DIDO workers for an LNG pipeline project staying in commercial accommodation.

Future influences

The extent to which the resources sector will place further demand on commercial accommodation in Western Downs (R), and the likely duration of that demand depends on two main factors. First, the cumulative non-resident workforces of current and future projects in the region, which will be strongly influenced by project timing as well as the number of workers engaged on each project. Of equal importance is the question of supply, and whether adequate arrangements are made for accommodating future non-resident workers without undue reliance on the limited commercial sector.

The cumulative size of the region's non-resident workforces in future years will be largely influenced by the following considerations:

- Two out of the three CSG projects currently approved and under way in the Surat Basin are located largely in Western Downs (R). The gas field development and pipeline construction phases for these projects were well advanced in 2013, so total workforce numbers should gradually moderate from 2014 onward.
- The third CSG project that is approved and under way largely affects Maranoa (R) at present, but has a second stage that is progressing through an EIS process. Should it be approved and proceed, this stage of the project will have elements that are located in Western Downs (R) and will add to the region's non-resident worker population.
- A fourth CSG project with gas tenements located in Western Downs (R) and Toowoomba (R) has been approved, but has yet to proceed to final investment decision and commencement.
- The potential development of extensive coal mining operations in Western Downs (R) is currently uncertain. Final investment decision for the approved Surat Basin Rail project, which would link potential Surat Basin coalfields to export facilities in Gladstone, has been suspended for an indefinite period, along with final decision for the approved Glencore Xstrata Wandoan Coal Mine project.

The limited availability of hotel/motel and caravan park cabin accommodation in Western Downs (R) suggests that supply has not kept pace with growing demand, particularly that arising from growth in the resources sector. Data from QGSO surveys show that while the non-resident population increased by 3,310 people or 79% from June 2012 to June 2013, the supply of WAV accommodation increased by only 2,740 beds or 49% over the same period. Most of this growth in WAV capacity occurred in rural locations (2,205 beds) rather than in towns (535 beds).

It should be noted that the supply of hotel/motel and caravan park accommodation in Western Downs (R) is relatively limited outside of the regional centre of Dalby. In June 2013, two motels were under construction in Miles, and a new caravan park/WAV had just opened in Chinchilla. When completed and fully occupied, these facilities will add to the supply of commercial accommodation for workers and other users.

Gladstone (R)

Usual clientele

The Gladstone region comprises the LGA of Gladstone (R), which includes the industrial city and port of Gladstone as well as other residential centres and the rural hinterland. As the administrative and commercial hub for the region, the city of Gladstone regularly attracts a sizeable number of short-term business visitors, who are usually accommodated in hotels, motels and serviced apartments close to the city centre. These visitors include management staff, professionals, and contractors associated with the ongoing operations and maintenance of existing industries in the area.

As a gateway to the Barrier Reef and offshore fishing grounds, Gladstone (R) also caters for local, interstate and overseas holiday makers. Tourists are drawn to the seaside towns of Agnes Water and Seventeen Seventy, and camping and fishing at Awoonga Dam.

Demand for hotel/motel accommodation in Gladstone (R) is ongoing throughout the year, with a peak lasting from May to November (Figure 8). The peak period of demand for caravan park accommodation is from May through to October, although school holidays and public holiday periods are also busy.

Industry influences

Since 2011, construction of three LNG processing plants, a new coal export terminal and associated infrastructure in Gladstone (R) has temporarily boosted the size of the working population of Gladstone (R). The scale of these projects and the need for specialised skills necessitated the extensive use of non-resident workforces. Around 4,890 non-resident workers on-shift were counted in Gladstone (R) at the end of June 2013, an increase of 1,275 from the preceding year (Appendix A).

Conflicting demand

At the end of June 2013, the majority of non-resident workers in Gladstone (R) were housed in WAVs (4,330 people, or 89%), while a further 455 workers occupied rooms in hotels/motels and 105 lived in caravan parks. Demand for commercial accommodation by non-resident workers fell substantially from June 2012, when 1,660 workers were counted in hotels/motels and 120 in caravan parks (Appendix A). This reduction in demand was largely due to the transfer of all non-resident construction workers for the three LNG projects from mainland accommodation to new WAVs on Curtis Island.

Commercial accommodation providers reported ready availability of hotel/motel rooms (29%) and caravan park cabins/vans (24%) in Gladstone (R) in June 2013 (Table 8). This was a marked improvement over the two preceding years, where the supply of available hotel/motel rooms fell to critically low levels (4% in 2011 and 12% in 2012) (Table 9).

Around 15% of caravan park sites were vacant and available in June 2013, which coincides with the peak of the tourist season. Advice from most park operators was that availability of caravan park sites was not unduly constrained by demand from FIFO/DIDO workers.

Locality level

Most of the commercial accommodation occupied by non-resident workers in June 2013 was located in the city of Gladstone itself, or in the peri-urban areas of Calliope and Tannum Sands.

Outside of Gladstone city, commercial accommodation providers located on or close to the Bruce Highway (Mt Larcom, Benaraby) reported strong demand for accommodation from travellers stopping over between Brisbane and Townsville. Caravan parks in the coastal towns of Agnes Water and Seventeen Seventy recorded high occupancy of powered sites by drive tourists, noting that some holiday makers were willing to upgrade to cabins when sites were full.

Future influences

The availability of hotel/motel and caravan park accommodation in Gladstone (R) was not constrained by high demand from non-resident workers in June 2013, and is unlikely to return to the low levels seen in 2011 and 2012 in the near future due to the following factors:

- The large non-resident workforces in the region since 2011 are associated with the construction phases of the LNG and port development projects, and will rapidly decline as these near completion. Operational workforces for the projects will be relatively small, and largely resident in the area.
- The supply of WAV beds in Gladstone (R) has now caught up with existing demand for non-resident worker accommodation, meaning that there is less reliance on other sources such as commercial accommodation and rental housing than in previous years.
- Although a number of major projects are in the approval pipeline, none have yet proceeded to final approval and final investment decision.

Barcaldine (R)

Usual clientele

The economy of Barcaldine (R) is predominantly based on agriculture (particularly cattle grazing), along with other industries that support the rural sector. The region also benefits from tourism, particularly drive tourists travelling east–west on the Capricorn Highway through Alpha, Jericho and Barcaldine; and those travelling north–south on the Matilda Highway, which passes through Barcaldine. Most drive tourists are attracted to Barcaldine (R) in winter, drawn by the region's remoteness and local attractions such as the Tree of Knowledge and the Australian Workers Heritage Centre in the town of Barcaldine. The peak tourist season is the cooler months between April and October (Figure 7).

Commercial accommodation in Barcaldine (R) takes the form of hotels, motels and caravan parks. While drive tourists are by far the largest client group for caravan parks, hotel/motels identified short term government and business visitors as their most common clientele (Table 5). Hotel operators in the town of Barcaldine advised that long distance drivers travelling on the Matilda Highway frequently stayed there overnight, as Barcaldine was 'half way between Mount Isa and Brisbane'. The small number of non-resident resource industry workers in the region largely utilise commercial accommodation in Alpha and Barcaldine or temporary worker camps located outside of towns.

Industry influences

While the region contains extensive thermal coal deposits that form the underlying Galilee Basin, resource industry activity in Barcaldine (R) to date has been limited to sporadic exploration and testing activities. At the end of June 2013, around 135 non-resident workers were counted in Barcaldine (R) (Appendix A).

Conflicting demand

Demand for accommodation from resource industry workers in Barcaldine (R) has dwindled since preliminary coal exploration and testing activities wound up in 2012. Some of the FIFO/DIDO workers counted in the region in June 2013 were engaged in building road and rail infrastructure, and were staying in hotels/motels and caravan park cabins. Others were CSG drilling teams, who lived in on-site worker village accommodation outside of urban areas. Competition between non-resident workers and other users for commercial accommodation was not regarded as a problem by providers who were surveyed in 2013. Around 39% of hotel/motel rooms in the region were vacant and available, as were 18% of caravan park vans/cabins and 17% of caravan park sites (Table 8).

Locality level

Most hotel/motel and caravan park accommodation in Barcaldine (R) is located in the town of Barcaldine itself, with most caravan parks relatively full with southern grey nomads and other visitors when surveyed in June 2013. One hotel in town was undergoing restoration, which somewhat restricted the available supply of hotel/motel rooms. The towns of Alpha and Jericho on the Capricorn Highway attracted smaller numbers of drive tourists, while demand in the more isolated centres of Aramac and Muttaburra was relatively limited. Most caravan park operators were critical of free camping opportunities provided by Council for drive tourists, particularly in and around Barcaldine, feeling that this was competing for their business.

Future influences

The influence of non-resident workforces on commercial accommodation in Barcaldine (R) could rapidly change should one or more of the large coal mining projects proposed for the region proceed as planned. As of January 2014, two Galilee Basin coal mining projects located near Alpha have received government approvals but are awaiting FID. A third Galilee Basin project has also been approved and is awaiting FID, but is located too far north of existing population centres in Barcaldine (R) to affect them.

Given the distance of these mines from the town of Alpha, and the large size of their proposed workforces, most people directly employed by these projects are likely to be FIFO workers from outside of the region, and will be accommodated in WAVs located on or near the mine site rather than in town. This will not preclude Alpha from being affected by visiting workers, as it is likely to form part of the supply chain for services to the mines and will attract a sizeable population of indirect employees and contractors.

The limited supply of hotel/motel and caravan park accommodation in Alpha and Jericho is likely to be quickly taken up by workers should these projects proceed, leaving an accommodation gap for drive tourists travelling between the major centres of Emerald and Barcaldine.

Summary and conclusions

The purpose of this study was to provide an account of tourist accommodation in key resource regions of the state, with a focus on providing quantitative and qualitative data regarding supply and demand for that accommodation during peak periods. In particular, the study sought to answer the following questions:

- Does competing demand for accommodation from resource industry workers compromise the availability of commercial accommodation for drive tourists in resource areas?
- How does demand vary by visitor and accommodation type?
- Where are accommodation shortages most acute?
- Are there peak periods when demand is most acute?
- How has the supply of and demand for accommodation changed over time?
- What factors are likely to drive future demand? Where are the future 'hot spots'?

Availability of commercial accommodation

Analysis of survey data shows that while non-resident workers occupy a large number of hotel/motel and caravan park accommodation units in most LGAs surveyed, it does not necessarily follow that competing demand from this group restricts availability for other users, including drive tourists. In most instances, the supply of commercial accommodation in the areas covered by the June 2013 survey was not constrained to the point that demand from users could not be met.

The key indicator of unmet demand for commercial accommodation is the proportion of hotel/motel rooms, caravan park cabins/vans and sites that were vacant and available for use. Survey data for June 2013 show that:

- The supply of vacant and available hotel/motel rooms was particularly acute in Western Downs (R), representing only around 5% of total. Availability of hotel/motel rooms was also limited in Maranoa (R) and Toowoomba (R) (19% each), and to a lesser extent in Banana (S) (22%).
- The supply of vacant and available caravan park cabins/vans was severely constrained in Banana (S) (3%) and Western Downs (12%).
- The supply of vacant and available caravan park sites was nil in Banana (S), and limited in Gladstone (R) (15%) and Barcaldine (17%).

These were the only instances where the supply of vacant and available accommodation was notably constrained in June 2013. Time series data show that there has been a marked improvement in the supply of vacant and available hotel/motel accommodation for all LGAs in the study area over the previous two years, with the exception of Western Downs (R), where it has progressively fallen since 2011.

A secondary indicator of unmet demand is the estimated number of nights during the past year where a provider was unable to meet demand for accommodation. Survey data for June 2013 show that this was most commonly the case in Western Downs (R), where 51% of hotel/motel operators and 27% of caravan park operators indicated that they were unable to meet requests for accommodation for 50 or more nights during the preceding year. High levels of unmet demand for hotel/motel accommodation were also reported in Maranoa (R) and Gladstone (R).

Demand by visitor and accommodation type

Drive tourists made up a relatively small proportion of all guests who occupied hotel/motel rooms and caravan park cabins/vans across most resource region LGAs in June 2013. In contrast, drive tourists clearly outnumbered other guests staying in powered/unpowered sites in caravan parks. Other than drive tourists and non-resident workers, most hotel/motels and some caravan parks counted short-term business and government visitors among their usual guests. Permanent residents were identified among the usual clientele in most caravan parks.

Drive tourists occupied a smaller share of hotel/motel rooms than other guests across all resource region LGAs in June 2013. With the exception of Whitsunday (R) (Bowen only), drive tourists also occupied a smaller share of caravan park cabins/vans than other guests. In contrast, drive tourists occupied a considerably greater share of caravan park sites than other guests for all regions surveyed.

Advice from providers confirms that long haul drive tourists with their own caravans or camper homes predominantly seek caravan park site accommodation, while drive tourists travelling without their own vans are more likely to occupy hotel/motel rooms or caravan park cabins/vans[8]. The latter group, therefore, is most likely to be affected by demand for accommodation from non-resident workers. These findings indicate that other users, including non-resident workers, do not usually compete with drive tourists for caravan park sites. As a result, reported instances of unmet demand for powered/unpowered sites in caravan parks are usually an indication of constrained supply, rather than conflicting demand.

Accommodation 'hot spots'

Accommodation 'hot spots' occur where the supply of vacant and available accommodation is particularly constrained by high demand. 'Hot spots' may result from seasonal factors, such as peak periods for drive tourists, or through an increase in the take-up of commercial accommodation by other users, particularly non-resident workers.

Many of the centres in Western Downs (R) were 'hot spots' in June 2013, most notably the towns of Miles, Chinchilla and Dalby on the Warrego Highway. Vacancy rates for hotel/motel rooms and caravan park cabins/vans were particularly low in these centres, due largely to ongoing demand from resource industry workers. Advice from accommodation providers confirmed numerous instances of unmet demand from other users, including drive tourists, during the preceding year.

The LGA of Banana (S) experienced particularly strong demand for caravan park accommodation (both cabins/vans and sites) in the main population centre of Biloela in June 2013. While the limited availability of vans/cabins in Banana (S) in June 2013 was driven largely by temporary demand from FIFO/DIDO construction workers (including road crews), high demand from drive tourists was the main reason for limited availability of caravan park sites.

Drivers of peak demand

In the resource areas surveyed, the duration of high demand periods for commercial accommodation was affected by a number of factors, including:

- A well-defined drive tourist season, which usually runs from April through to October and peaks during the winter months. Demand is highest from 'southern nomads' with caravans and campervans, who largely seek caravan park sites or other camping arrangements. Some areas also have minor peaks coinciding with school holidays.
- Seasonal events that attract tourists to a specific area, such as Toowoomba's Carnival of Flowers, Agfest, rodeos, or show weeks. These events can create high demand for all types of accommodation, but this demand is usually of a relatively short duration.
- Regular events that draw large workforces to a specific area on a short-term basis, such as power station shutdowns for maintenance, servicing of mining equipment, and agricultural workforces during harvest seasons. These events usually create high demand for hotel/motel rooms and caravan park cabins/vans.
- Fluctuating demand for accommodation for non-resident workers due to changing activity levels in the mining and construction industries. Where non-resident workforces grow rapidly (e.g. to expand production capacity of an existing operation, or to construct infrastructure such as a pipeline or road), companies may utilise commercial accommodation, particularly hotels/motels or caravan park cabins/vans, to house the additional workforce. Conversely, any downward adjustment in resource industry activity may result in rapid downsizing of the non-resident workforce and falling demand for accommodation, as occurred in the Bowen Basin in 2012-13.
- Availability and capacity of WAV accommodation in an area, which can mitigate demand for commercial accommodation from non-resident workers. Where such accommodation is not available, or is inadequate for the size of the non-resident workforces in the area, demand for commercial accommodation may remain high for the duration of the project.
- Any combination of the above factors.

Peak demand periods due to seasonal tourism, specific tourist events and industry shutdowns are relatively predictable, and information from accommodation providers indicates that most are able to plan for those factors in advance. On the

[8] Survey respondents advise that many drive tourists are now staying outside of hotels, motels and caravan parks, preferring to camp in alternative venues such as those provided by councils. More detailed examination of drive tourists' accommodation preferences and issues surrounding non-commercial camping is outside the scope of this study, but is being addressed through the Queensland Camping Options Toolkit, which is available at http://www.dtesb.qld.gov.au/.

other hand, demand arising from resource industry workers is more volatile, and peak periods are more difficult to predict. Most hotel/motel and caravan park providers who regularly cater for resource industry workers advised that during normal times, demand for accommodation is relatively constant (i.e. there is no seasonal peak), but usually varies when industry cycles change.

Changes to accommodation demand

The surveys informing this study were conducted at the end of June 2013, which coincided with the middle of the drive tourist season indicated by most respondents. As such, the results may be considered as being representative of peak levels of demand arising from drive tourists for the 2013 calendar year. Data for drive tourists is not available for preceding years.

On the other hand, time series data from previous QGSO surveys show that demand for accommodation generated by non-resident workers changes over time, and 'hot spots' for vacant and available accommodation identified in 2013 were not the same as in previous years.

- A downturn in the coal industry and workforce restructuring saw reduced demand for worker accommodation in the Bowen Basin, most notably in the former 'hot spots' of Isaac (R) and Central Highlands (R). Unlike previous years, there was a ready supply of vacant and available hotel/motel accommodation in these areas in 2013. The capacity of WAVs increased significantly during 2012–13, particularly in the LGA of Isaac (R), which further reduced demand from non-resident workers.
- Increased WAV capacity in Gladstone (R) resulted in fewer non-resident workers utilising commercial accommodation in 2013, thereby reducing the peak levels of demand for hotel/motel rooms and caravan park cabins/vans seen in 2011 and 2012.
- In contrast, accommodation demand in Western Downs (R) increased from previous years, largely due to expansion of the CSG industry. While the capacity of WAVs increased across the region in 2012–13, most of the additional beds provided were located outside of town centres and did not reduce demand for hotel/motel and caravan park accommodation.

To that extent, the levels of demand for worker accommodation recorded in the 2013 survey should be regarded a point-in-time estimate of the situation in each area surveyed, which is likely to change over time.

Future accommodation demand

Assuming that demand from tourism remains relatively constant into the near future, ongoing demand for commercial accommodation in most regions covered by this study will continue to be linked closely to activity levels within the resource and construction industries. To that extent, the location, scale and nature of demand for worker accommodation will vary according to the implementation of new projects, as well as fluctuations in the size of workforces engaged in coal and CSG production. The availability of WAV accommodation will also be a key factor in mitigating demand for commercial accommodation from resource industry workers, and in reducing potential competition with other users.

Two regions that were 'hot spots' for commercial accommodation availability in recent years should return to normal as demand from resource industry workforces dissipates.

- CSG pipeline construction projects in **Banana (S)** are scheduled for completion by the end of 2014, and non-resident construction workforces for these projects will move out of the area.
- LNG plant and port construction activities will continue in **Gladstone (R),** with non-resident workforce numbers declining by the end of 2014. Occupancy of WAVs by most non-resident workers will reduce reliance on other forms of accommodation.

There are potential 'hot spots' where future demand for commercial accommodation from non-resident workers could limit accommodation availability.

- The accommodation impacts of resource industry development are likely to be ongoing in the Surat Basin, particularly in the LGA of **Western Downs** (R). Strong demand for worker accommodation associated with the CSG industry is expected to moderate as the pipeline construction and gas field development phases of existing projects diminish by

2015. Beyond this point, non-resident workforce numbers have the potential to return to current levels should all other proposed CSG and coal projects proceed to commencement[9].

- In **Barcaldine (R)**, the large construction and operational workforces of proposed Galilee Basin coal mines and rail projects would be predominantly FIFO/DIDO, and housed in WAVs located on-site rather than in towns. Nevertheless, constraints on commercial accommodation could occur if these developments proceed, given likely demand from indirect workers and the very limited supply of hotel/motel rooms and caravan park accommodation in the area. The small towns of Alpha and Jericho are most likely to be affected.
- In **Whitsunday (R) (Bowen only),** a temporary but sizeable influx of non-resident workers associated with construction of new coal export terminal facilities at Abbot Point (to service proposed Galilee Basin projects) would generate significant demand for accommodation around the town of Bowen, which would affect availability for drive tourists and other holiday makers. Rail projects linking the Galilee Basin mines to Abbot Point will be constructed around the same time as the port, which will have sizeable non-resident construction workforces. Timely and adequate provision of WAV accommodation would be crucial in limiting the take-up of existing commercial accommodation by these workforces.
- Timing of the proposed Galilee Basin mines, rail and port projects is difficult to establish, as none had proceeded through to final investment decision at the time this report was prepared.

[9] See Government Statistician's *Surat Basin non-resident population projections* for different growth scenarios based on these assumptions http://www.qgso.qld.gov.au/products/publications/index.php. The 2012–13 edition projections are the latest available at time of writing. The 2013–14 edition projections will be available in the second quarter, 2014.

Appendices

Appendix A —Non-resident workers on-shift by LGA

Table A1: Non-resident workers on-shift by accommodation type, resource region LGAs, June 2011 to June 2013

	Non-resident workers on-shift			
	WAVs	Hotels/motels[a]	Caravan parks[b]	Total
LGA		**2011**		
Banana (S)	960	295	125	1,380
Central Highlands (R)	3,640	1,005	190	4,835
Isaac (R)	12,540	590	455	13,590
Whitsunday (R) (Bowen only)[c]	555	85	75	715
Bowen Basin total	***17,695***	***1,975***	***850***	***20,520***
Maranoa (R)	760	345	55	1,155
Toowoomba (R)	0	105	5	105
Western Downs (R)	1,350	475	175	2,005
Surat Basin total	***2,110***	***920***	***235***	***3,265***
Gladstone (R)	5	925	275	1,205
Barcaldine (R)	30	70	10	110
		2012		
Banana (S)	1,140	255	195	1,590
Central Highlands (R)	4,450	1,020	115	5,585
Isaac (R)	16,105	490	535	17,125
Whitsunday (R) (Bowen only)[c]	460	275	0	735
Bowen Basin total	***22,150***	***2,035***	***845***	***25,035***
Maranoa (R)	1,595	335	145	2,075
Toowoomba (R)	0	155	40	190
Western Downs (R)	3,430	400	340	4,175
Surat Basin total	***5,025***	***890***	***525***	***6,445***
Gladstone (R)	1,835	1,660	120	3,615
Barcaldine (R)	20	70	20	110
		2013		
Banana (S)	2,395	170	180	2,750
Central Highlands (R)	4,300	325	115	4,740
Isaac (R)	14,285	305	360	14,950
Whitsunday (R) (Bowen only)[c]	225	235	0	460
Bowen Basin total	***21,205***	***1,040***	***655***	***22,900***
Maranoa (R)	4,325	280	60	4,665
Toowoomba (R)	20	200	110	330
Western Downs (R)	6,585	710	190	7,485
Surat Basin total	***10,930***	***1,190***	***360***	***12,480***
Gladstone (R)	4,330	455	105	4,890
Barcaldine (R)	25	90	20	135

(a) Hotels/motels data for 2013 include non-resident workers on-shift counted in other forms of overflow accommodation or head-leased housing.

(b) Caravan parks data for 2011 and 2012 include non-resident workers on-shift counted in other forms of overflow accommodation or head-leased housing.

(c) Data for Whitsunday (R) (Bowen only) for 2011 and 2012 do not include the town of Bowen, and are not directly comparable with data for 2013.

Source: QGSO, Survey of Accommodation Providers, 2011 to 2013

Appendix B — Occupancy by accommodation type

Table B1: Hotel/motel room occupancy, resource region LGAs, June 2013

LGA	Occupied by drive tourists/ holiday makers	Occupied by other guests	Unavailable	Vacant & available	Total hotel/ motel rooms
	— % —				— number —
Banana (S)	19	57	2	22	455
Central Highlands (R)	10	43	1	45	1,165
Isaac (R)	2	51	1	46	760
Whitsunday (R) (Bowen only)	9	39	0	51	440
Bowen Basin total	***9***	***47***	***1***	***43***	***2,825***
Maranoa (R)	18	63	0	19	610
Toowoomba (R)	19	62	1	19	1,050
Western Downs (R)	4	90	1	5	955
Surat Basin total	***13***	***72***	***1***	***14***	***2,620***
Gladstone (R)	8	59	4	29	760
Barcaldine (R)	17	36	8	39	235

Source: QGSO, Survey of Accommodation Providers, 2013

Table B2: Caravan park van/cabin occupancy, resource region LGAs, June 2013

LGA	Occupied by drive tourists/ holiday makers	Occupied by other guests	Unavailable	Vacant & available	Total caravan park cabins/vans
	— % —				— number —
Banana (S)	5	92	0	3	205
Central Highlands (R)	19	36	1	45	335
Isaac (R)	1	51	0	48	625
Whitsunday (R) (Bowen only)	23	8	0	69	50
Bowen Basin total	***8***	***52***	***0***	***40***	***1,215***
Maranoa (R)	12	64	6	18	95
Toowoomba (R)	15	67	0	18	240
Western Downs (R)	13	61	14	12	380
Surat Basin total	***13***	***63***	***8***	***15***	***710***
Gladstone (R)	19	52	5	24	300
Barcaldine (R)	28	54	0	18	50

Source: QGSO, Survey of Accommodation Providers, 2013

Table B3: Caravan park site occupancy, resource region LGAs, June 2013

LGA	Occupied by drive tourists/ holiday makers	Occupied by other guests	Unavailable	Vacant & available	Total caravan park sites
	— % —				— number —
Banana (S)	93	7	0	0	75
Central Highlands (R)	53	8	2	38	710
Isaac (R)	51	15	0	34	280
Whitsunday (R) (Bowen only)	45	19	0	36	375
Bowen Basin total	***53***	***12***	***1***	***35***	***1,445***
Maranoa (R)	64	4	0	32	220
Toowoomba (R)	19	8	0	73	620
Western Downs (R)	42	6	7	45	320
Surat Basin total	***34***	***7***	***2***	***57***	***1,160***
Gladstone (R)	53	26	7	15	580
Barcaldine (R)	83	0	0	17	155

Source: QGSO, Survey of Accommodation Providers, 2013

Appendix C — Hotel/motel survey form

Survey of Accommodation Providers 2013

For operators of Hotels/Motels and other rental accommodation

ADDRESS DETAILS

Name of accommodation centre				
Name of operator				
Address of accommodation centre	Street			
	Town		Postcode	

Your contact details

Name				
Position				
Work email				
Work phone and/or mobile	Work phone		Work mobile	

If your accommodation is located out of town

Name of nearest town	
Distance to town *(estimated km)*	
Direction to town	

ABOUT YOUR ACCOMMODATION CENTRE

Q1 What is the **maximum capacity** of your accommodation centre? *(specify number)*

Rooms	
Beds	

Q2 Are there any times during the year when demand is **higher than normal** for your accommodation?

If yes, please give details in the table below.

Otherwise please go to Q3.

High demand period		Reason for high demand *(specify - e.g. school holidays)*
From *(month)*	To *(month)*	

Q3 Do you plan to **expand** your accommodation during the upcoming year? If so please give details.
(e.g. we are planning for 10 more rooms)

Q4 Which of the following groups do you **usually** accommodate? *(tick where applicable)*

Drive tourists & other holiday makers	☐
FIFO/DIDO construction or mining/gas industry workers	☐
Short term commercial or government visitors	☐
Seasonal agricultural workers	☐
Permanent residents	☐
Other guests *(give details)*	

Survey of Accommodation Providers 2013

For operators of Hotels/Motels and other rental accommodation

INFORMATION ABOUT FIFO/DIDO WORKERS

The following questions ask you to estimate the number of **Fly-in/Fly-out and Drive-In/Drive-Out (FIFO/DIDO) workers** who were staying in your accommodation **on a typical night during the week ending 28 June 2013.** These include workers involved in mining, gas or construction related activities who were staying in the area for three nights or more while on-shift.

Q5 On a typical night in the week ending 28 June 2013, how many FIFO/DIDO workers stayed in your accommodation?
(Do not include overnight or short-term visitors, tourists or itinerant agricultural workers)

Number of FIFO/DIDO workers ______

Q6 Can you give details about the FIFO/DIDO workers who stayed there?

Contractor/Company name	Number of workers	Name of project, mine or gas field where they were working

INFORMATION ABOUT DRIVE TOURISTS AND HOLIDAY MAKERS

The following questions ask you to provide information about drive **tourists and holiday makers** who were staying in your accommodation **on a typical night during the week ending 28 June 2013.**

Q7 On a typical night in the week ending Friday 28 June 2013, how much of your accommodation was occupied and how much was vacant? *(specify number)*

Status	Number of rooms
Occupied by drive tourists/holiday makers	
Occupied by other guests *(including FIFO/DIDO workers)*	
Otherwise unavailable *(e.g. reserved/being renovated)*	
Vacant & available	

Q8 Was there a period during the past year when you couldn't meet demand for accommodation from drive tourists or holiday makers?

If yes, please tick box where applicable.
Otherwise please go to Q9

- Less than 10 nights ☐
- Between 10 & 25 nights ☐
- Between 26 & 50 nights ☐
- More than 50 nights ☐

Q9 What was the reason you could not meet this demand? *(tick where applicable)*

- Higher than normal drive tourist/holiday maker numbers ☐
- Higher than normal demand from other guests ☐
- Capacity of your accommodation temporarily restricted ☐
- Other *(give details e.g. adverse weather events)* ______

Thank you for completing this survey. Please save a copy for your own records and return to survey coordinator.

Appendix D — Caravan park survey form

Survey of Accommodation Providers 2013

For operators of Caravan Parks

ADDRESS DETAILS

Name of accommodation centre				
Name of operator				
Address of accommodation centre	Street			
	Town		Postcode	

Your contact details

Name				
Position				
Work email				
Work phone and/or mobile	Work phone		Work mobile	

If your accommodation is located out of town

Name of nearest town	
Distance to town *(estimated km)*	
Direction to town	

ABOUT YOUR ACCOMMODATION CENTRE

Q1 What is the **maximum capacity** of your accommodation centre? *(specify number)*

Rental caravans	
Rental cabins/studios	
Powered sites	
Unpowered sites	

Q2 Are there any times during the year when demand is **higher than normal** for your accommodation?
*If **yes**, please give details in the table below.*
Otherwise please go to Q3.

High demand period		Accommodation in high demand *(tick where applicable)*	
From *(month)*	To *(month)*	Rental vans/cabins/studios	Powered/unpowered sites

Q3 Do you plan to **expand** your accommodation during the upcoming year? If so please give details.
(e.g. we are planning for 10 more rental vans)

Q4 Which of the following groups do you **usually** accommodate? *(tick where applicable)*

Drive tourists & other holiday makers	
FIFO/DIDO construction or mining/gas industry workers	
Short term commercial or government visitors	
Seasonal agricultural workers	
Permanent residents	
Other guests *(give details)*	

Survey of Accommodation Providers 2013

For operators of Caravan Parks

INFORMATION ABOUT FIFO/DIDO WORKERS

The following questions ask you to estimate the number of **Fly-in/Fly-out and Drive-In/Drive-Out (FIFO/DIDO) workers** who were staying in your accommodation **on a typical night during the week ending 28 June 2013**. These include workers involved in mining, gas or construction related activities who were staying in the area for three nights or more while on-shift.

Q5 **On a typical night in the week ending 28 June 2013, how many FIFO/DIDO workers stayed in your accommodation?**
(Do not include overnight or short-term visitors, tourists or itinerant agricultural workers)

Number of FIFO/DIDO workers ☐

Q6 **Can you give details about the FIFO/DIDO workers who stayed there?**

Contractor/Company name	Number of workers	Name of project, mine or gas field where they were working

INFORMATION ABOUT DRIVE TOURISTS AND HOLIDAY MAKERS

The following questions ask you to provide information about **drive tourists and holiday makers** who were staying in your accommodation **on a typical night during the week ending 28 June 2013.**

Q7 **On a typical night in the week ending Friday 28 June 2013, how much of your accommodation was occupied and how much was vacant?** *(specify number)*

Status	Number of rental vans/cabins/ units/studios	Number of powered/ unpowered sites
Occupied by drive tourists/holiday makers		
Occupied by other guests *(including FIFO/DIDO workers)*		
Otherwise unavailable *(e.g. reserved/being renovated)*		
Vacant & available		

Q8 **Was there a period during the past year when you couldn't meet demand for accommodation from drive tourists or holiday makers?**

If yes, please tick box where applicable.
Otherwise please go to Q9

- Less than 10 nights ☐
- Between 10 & 25 nights ☐
- Between 26 & 50 nights ☐
- More than 50 nights ☐

Q9 **On those nights what type of accommodation were you unable to provide?** *(tick where applicable)*

- Rental vans/cabins/studios ☐
- Powered/unpowered sites ☐

Q10 **What was the reason you could not meet this demand?** *(tick where applicable)*

- Higher than normal drive tourist/holiday maker numbers ☐
- Higher than normal demand from other guests ☐
- Capacity of your accommodation temporarily restricted ☐
- Other *(give details e.g. adverse weather events)* ☐

Thank you for completing this survey. Please save a copy for your own records and return to survey coordinator.