

ACCOMMODATION AUDIT REPORT

FOR THE

SHIRE OF BUSSELTON

LOCAL TOURISM PLANNING STRATEGY

REPORT
March 2007

Prepared by
Sustainable Development Facilitation
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SDF wishes to express sincere thanks to all the accommodation operators who took time out of their busy days to answer questions about their facilities



EXECUTIVE SUMMARY

An Accommodation Audit was conducted in early 2007 as one input to the Shire of Busselton Local Tourism Planning Strategy. The main objectives of the Audit are, among others, to: assess the categories and number of accommodation facilities available for visitors; calculate the number of beds available for tourism purposes; ascertain the Shire's total capacity to accommodate visitors; and, determine the trends in occupancy rates. The main data generated by the Audit was through a telephone survey (Appendix 1):

- A total of 104 of the 128 accommodation facilities listed for the Shire of Busselton were surveyed, a response rate of 81% (See Appendix 2 for list of accommodation facilities).
- The largest accommodation category is the Cottage/Villa/Chalet sector followed by Bed and Breakfast (B&B) and Holiday Villages.¹
- The Shire can currently accommodate approximately 13,185 visitors per night.
- There are a total of 3,410 keys and 88% are available for tourism. The balance 12% is used as residential accommodation.
- 18% of accommodation is strata titled and accounts for 28% of total beds available within the Shire.
- 42% of accommodation has no star rating, but for those who have star rating, the average rating is 4 stars.

Other findings are that, despite an occupancy rate of 42.3%, according to the Australian Bureau of Statistics for 2005/2006, the feedback from formal accommodation operators provides an estimated overall occupancy rate of 26.3%. The difference in data is primarily due to the number of visitors who come to stay in the Shire, yet stay overnight with friends and relatives, or in the, as yet, unknown proportion of private holiday homes.

The occupancy rate for formal tourism accommodation is generally very high during peak season with many operators turning visitors away. The peak periods are heavily counteracted by low visitor rates during the longer off-peak seasons, resulting in the reported low occupancy figures. In an effort to address seasonal fluctuation in visitors, comments from operators are that there should be more focus on activities to attract visitors throughout the year.

The majority (92%) of operators in the Shire of Busselton are members of at least one Tourism Organisation with strong links into various market channels. Many operators (60%) of those surveyed took the opportunity to make additional comment (please see Appendix 3).

¹ Holiday villages are categorized as providing a mix of at least several of the following: on-site chalets, cottages, caravan, park homes, mobile van sites and tent sites.

1 Introduction

This report has been generated from information gathered from an Accommodation Audit requested by the Shire of Busselton as part of the Local Tourism Planning Strategy methodology. The purpose of this report is to identify the current status of tourist accommodation within the Shire, assess occupancy trends and gather other relevant information. The results of the audit are an important input to the strategic planning of tourism for the Shire of Busselton.

The report covers many aspects of the accommodation sector in the Shire of Busselton. The main query is the total capacity of accommodation per night. Knowledge regarding the accommodation capacity will assist in determining the likelihood of demand for further tourist accommodation facilities and hence the need to ensure sufficient land availability in appropriate locations. The report also reveals the occupancy rates and trends in the peak and off-peak seasons, the different categories of accommodation available in the Shire, the key markets using accommodation in the Shire and how long accommodation has been operating under current management. It examines how many accommodation operators are members of tourism organisations. The report has also records accommodation operator feedback. Their experience and knowledge gives stakeholders insight into present and future needs and is valuable for future planning.

2 Objectives

The main objectives of the Shire of Busselton Accommodation Audit are as follows:

- Assess what categories of accommodation are available for visitors to the Shire.
- Establish the number of accommodation facilities available for the purpose of tourism in the Shire (not including private rentals).
- Calculate how many keys/rooms are available in the Shire and what percentage is available for tourism purposes.
- Establish the occupancy rates in the peak and off-peak seasons and determine the trends in occupancy rates.
- Ascertain the Shire's total capacity to accommodate visitors per night.
- Determine what the key markets utilising accommodation facilities in the Shire.
- Determine how long operators have been in business in the Shire and establish an average operation age per category.
- Establish how many accommodation providers are members of tourism and associated organisations.

3 Audit Methodology

A list of all recorded tourism accommodation was generated from a range of difference sources including:

- Geographe Bay Tourism Association listings
- Tourism WA listings, including the Southwest Accommodation Audit
- West Australian newspaper advertisements
- Internet searches

A telephone survey was conducted for 128 accommodation providers. A copy of the survey is included in Appendix 1. An 81% response rate to the survey was achieved. Of those who did not provide a response, four did not respond to calls, eight were no longer operating; five were identified as private houses and one was group accommodation located on the Locke Estate. Six organisations contacted were property management companies; not direct accommodation providers. Based on the survey responses, an accommodation (Excel) database was compiled that can be sorted by accommodation category, locality, capacity, rating, main market and institutional linkages.

4 Shire of Busselton Accommodation

4.1 Accommodation Categories

Busselton Shire has a variety of accommodation available for visitors to use. The categories of accommodation available in the Shire include, cottage/villa/chalet, bed & breakfast (B&B), holiday village, apartments, resort, motel, lodge, guest house, backpackers, hotel, timeshare,, group accommodation and caravan park (see Table 1)².

TABLE 1 - SHIRE ACCOMMODATION CATEGORIES AND DISTRIBUTION

Accommodation Type	Number
Caravan park	1
Timeshare	1
Hotel	2
Backpackers	4
Guest House	6
Lodge	5
Motel	6
Resort	7
Apartments	9
Holiday Village	14
B&B	23
Cottage/Villa/chalet	26
Total	104

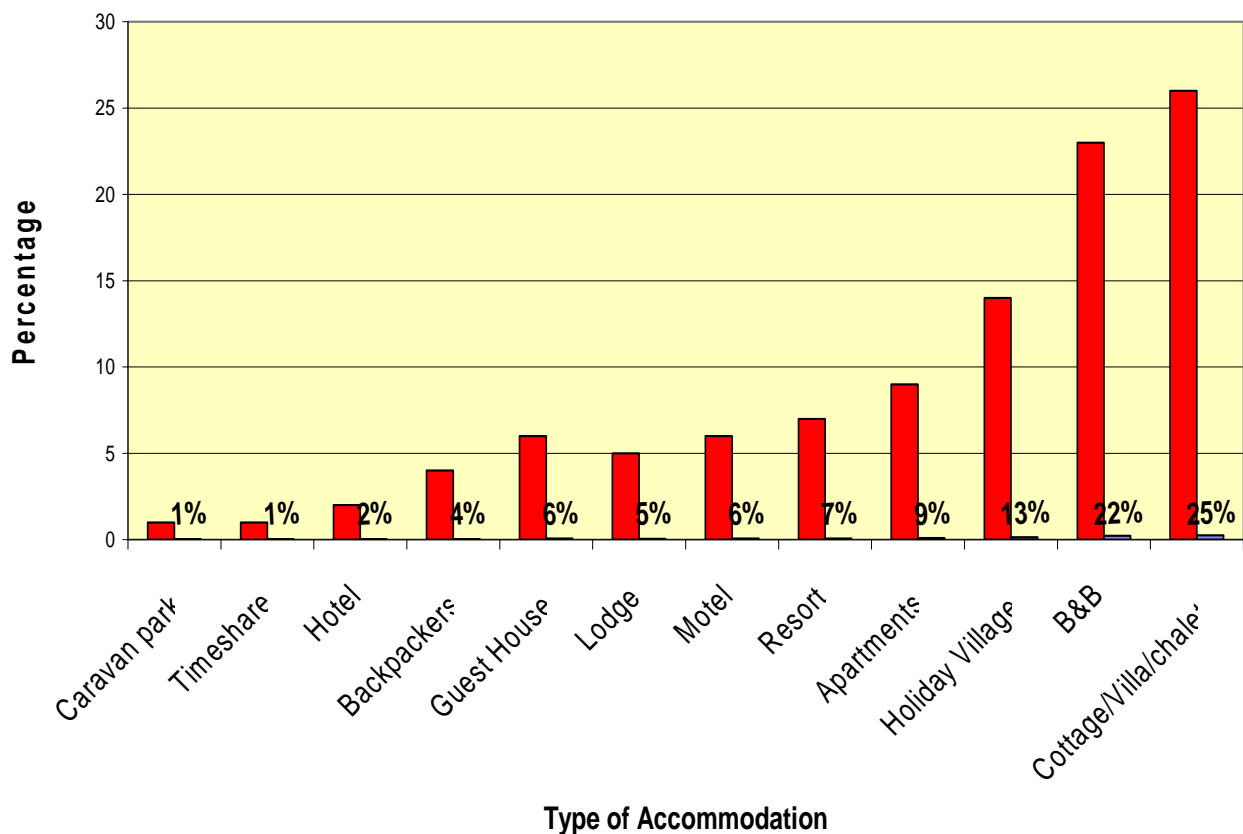
² This audit did not include data on private holiday homes used for tourist accommodation or any of the group type accommodation along the Locke Estate. These are covered in studies being undertaken at present. Findings from these, when available, will be considered in the development of the LTP Strategy.

4.2 Prevalence by Category

The accommodation audit confirms 104 accommodation facilities. When ranked according to prevalence, it is clear that the chalet and B&B facilities are the most common in terms of numbers of facilities, followed by holiday villages, apartments and Resorts (see Figure 1). The data could lead to an assumption that there will be future demand for more B&B facilities and chalets in the future. However, as the research progressed, it became clear that the B&B facilities in particular are facing establishment and operational constraints that need to be considered (see Section 6.3).

FIGURE 1

Shire of Busselton Accommodation Types



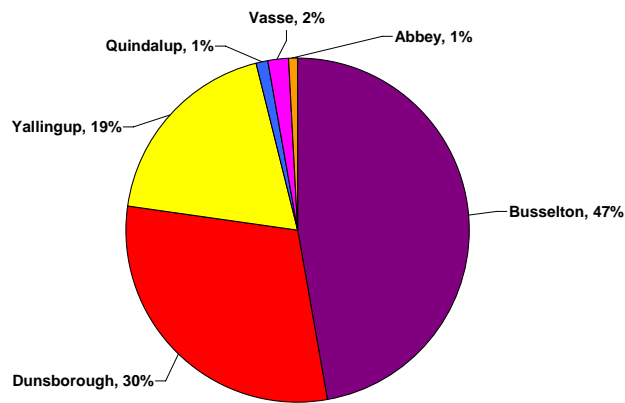
Note: there were a further 12 accommodation providers identified that are no longer operating or un-contactable.

If the accommodation types are clustered into those that offer catering and those that are self-catering, 65% of accommodation available within the Shire has self catering facilities, leaving 34% that are not self catering. This 35% is made up of hotels, motels, lodges and B&B's.

4.3 Locality

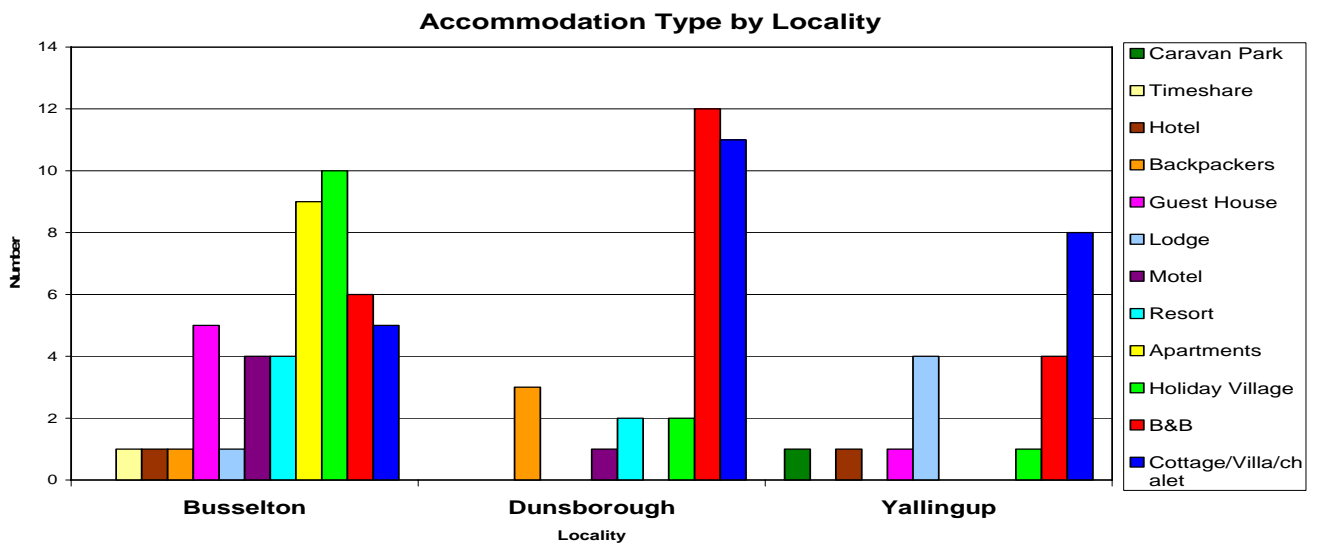
The Audit shows that 47% of accommodation is located within the locality of Busselton, 30% in Dunsborough and 19% in Yallingup. Two percent of accommodation suppliers indicated that their locality was Vasse, 1% at Abbey and 1% at Quindalup (see Figure 2).

**FIGURE 2
ACCOMMODATION LOCALITY**



Accommodation types available in the different localities within the Shire are shown in Figure 3. The majority of the Shires holiday village and apartment type accommodation is located in the locality of Busselton and the majority of cottage/villa/chalet type accommodation is located in Dunsborough and Yallingup localities. The high number of B&B's and cottage/villas/chalets in the Dunsborough area could be impacting on occupancy rates in the off season as shown in section 6.2 and Figure 9. Most of the Shires resorts, motels and guest houses are located in the Busselton locality and the majority of the Shires lodges are located within the Yallingup locality.

FIGURE 3



*Not shown in Figure 3 is one cottage/villa/chalet in Quindalup, one holiday village in Abbey and one cottage/villa/chalet and one B&B in Vasse.

4.4 Star Rating

Fifty-eight percent of accommodation providers in the Shire indicated that they have a Star Rating, as seen in Figure 4, which is broken down in Figure 4.1. 10% of accommodation in the Shire has a star rating of 5. A four star rating is the most common within the Shire with 31% of those rated achieving this, followed by 25% achieving a star rating of 3.5 and 21% achieving a star rating of 4.5. Thirteen percent indicated that they have a star rating of 3.

FIGURE 4

Accommodation Star Rating Holders

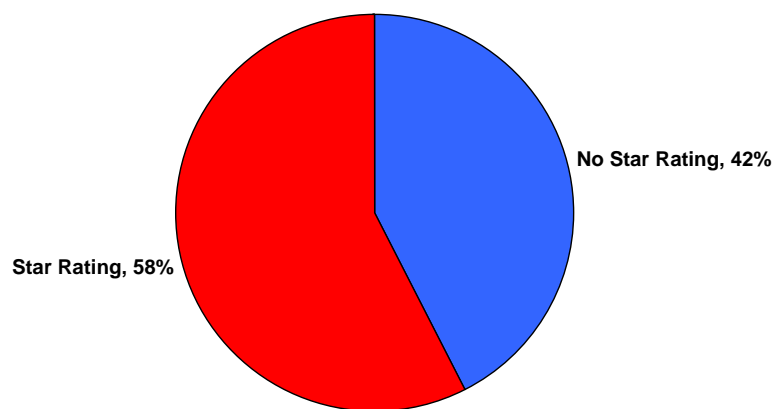
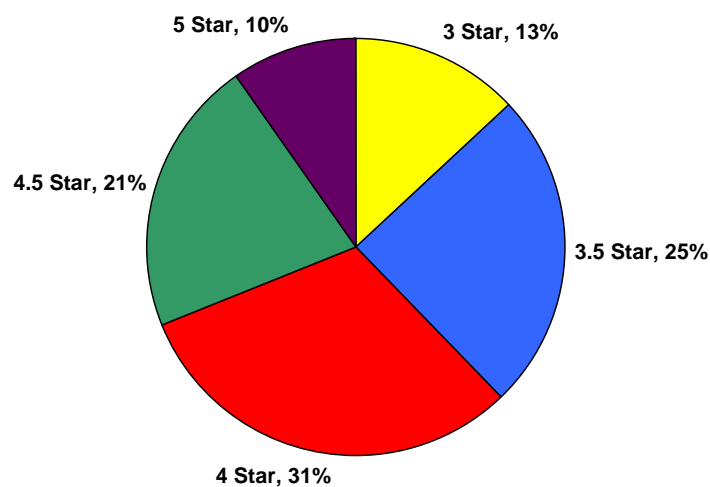


FIGURE 4.1

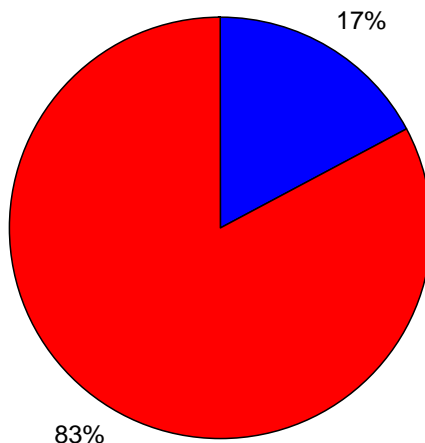
Star Rating Breakdown



4.5 Strata Title Accommodation

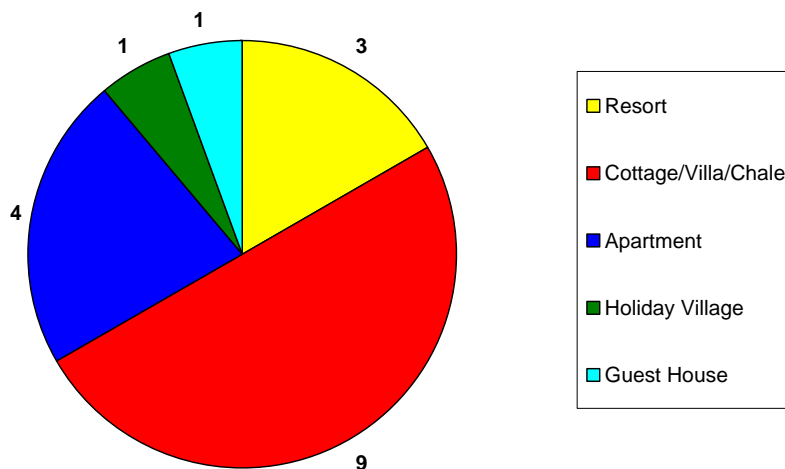
Based on feedback from the tourism operators, 17% of the accommodation available with the Shire is Strata Titled (see Figure 5).

FIGURE 5
Strate Titled Accommodation



Of the 18 accommodation providers who have strata titled properties, 9 are cottages/villas or chalets, 4 are apartments, 3 are resorts, 1 is a guest house and 1 is a holiday village. These strata titled properties offer a total of 3,725 beds which is 28% of the total beds available per night in the Shire (see Figure 6).

FIGURE 6
Strata Title By Accommodation Type

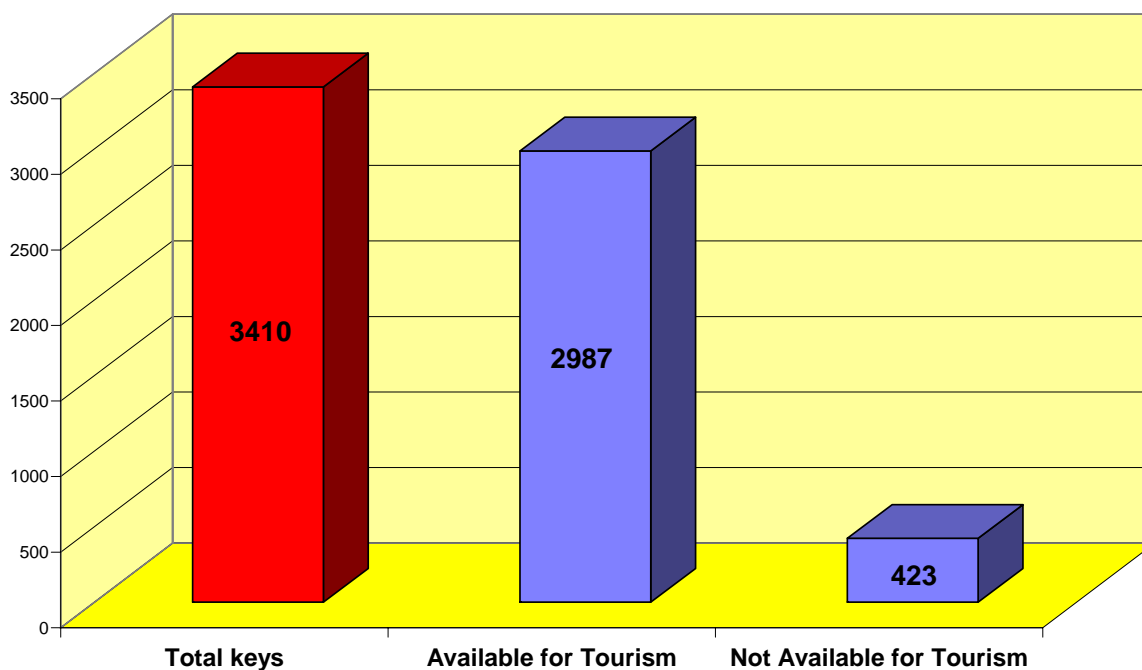


5 Availability for Tourism

Audit findings reveal that there are approximately 3,410 accommodation keys available within the Shire with 2,987 (88%) of these being available for tourism (see Figure 7). The remaining 12% of accommodation is utilised by caretakers, owners or medium to long term renters, such as permanent residents in caravan parks.

FIGURE 7

Accommodation Keys within the Shire



6 Tourism Accommodation Capacity and Occupancy

6.1 Capacity

Results from the accommodation audit indicate that the total capacity (Pax) for the Busselton Shire is 13,185 visitors per night (or 4,812,525 visitors per annum).

According to Tourism WA³, the average total visitors to the Shire for the 2005-2006 period was 603,500 per annum. This equated to 2,078,200 average visitor nights over the same period to the Shire, resulting in an average stay per visitor of 3.44 nights⁴.

This figure included visitors staying with friends and relatives (VFR), and therefore, not using formal tourism accommodation facilities. The accommodation audit was unable to capture the pattern of VFR accommodation; therefore, VFR numbers are deducted from the overall

³ TWA : Shire of Busselton Visitor Numbers Enquiry response Feb 2007

⁴ The specific average of 3.44 to two decimal points has been used for the purpose of calculation of capacity, although it is understood that the actual stay would be either 3 or 4 nights.

visitor nights for the Shire. The only data available on average overnight stay is the overall average of 3.44 nights per visitor which includes VFR stay. It may be argued that VFRs are likely to have a longer or shorter overnight stay and therefore the average for formal accommodation may be lower or higher average respectively. Nevertheless, as accurate data is not available, the Tourism WA average stay is used as a basis for this audit.

As a result, for formal tourism accommodation, the annual average number of visitors to the Shire for the period 2005-2006 is calculated to be 378,500, leading to an average occupancy rate of 26.5% (please refer to Table 2). Through the specific comments gained in the survey, the low average occupancy rate was confirmed, mainly as a result of seasonal fluctuation. The hotels and resorts indicated a higher occupancy levels, whereas the B&B's most commonly reported very low occupancy rates (see section 6.3 and Appendix 4).

**TABLE 2
SHIRE ACCOMMODATION CAPACITY**

	Busselton Accommodation Audit	Tourism WA Visitor Data
Total Visitors per annum	378,500 (exc. VFR)	603,500 (inc. VFR)
Total Visitor nights per annum	1,303,395 (exc. VFR)	2,078,200 (inc. VFR)
Average overnight stay per visitor ⁵	3.44	3.44
Total Beds available within the Shire	13,185	
Total Capacity for visitor nights per annum	4,812,525	
Occupancy rate	27.4% (exc. VFR)	48% ⁶ (inc VFR)

6.2 *Occupancy Rates*

Accommodation occupancy rates are operating at 100% during the Christmas, Easter and some long weekend periods only throughout the Shire. The peak periods equate to approximately 74 nights or 20% of the year. In the peak season 66% of all accommodation in the Shire operates at full or close to full capacity at 75-100% occupancy, 18% operate at medium capacity at 50-75% occupancy, 12% of accommodation operates at low capacity or 25-50% occupancy, and 2% only achieve a very low occupancy rate of between 0-25%. 2% of those surveyed did not indicate a rate.

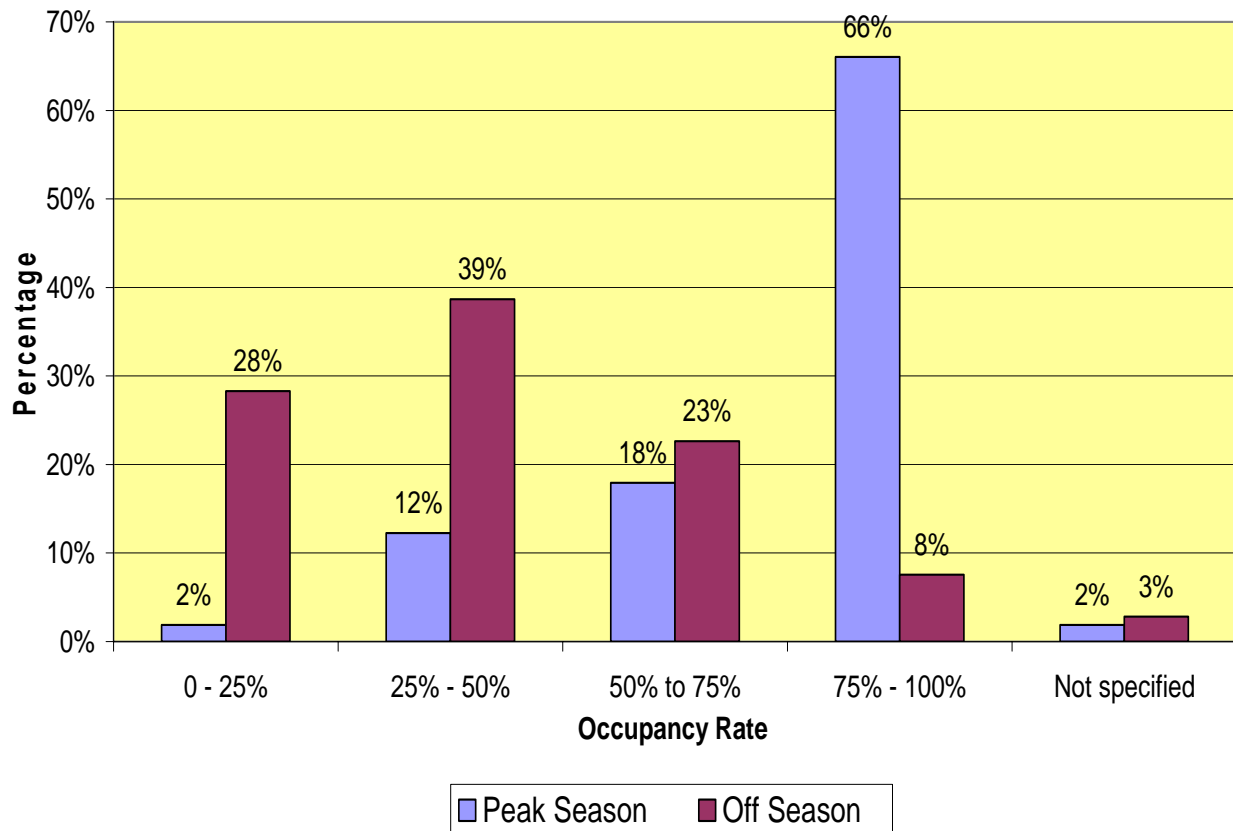
In the off-peak season, only 28% of accommodation operates at full or close to full capacity at 75-100% occupancy, 39% operate at 50-75% capacity, 23% of accommodation operates at 25-50% occupancy and 8% of accommodation operates at 0-25% occupancy (see Figure 8).

FIGURE 8

⁵ Based on use of average no. of visitor nights per visitor including VFR

⁶ ABS: Busselton Shire Tourism occupancy rates 2006

Shire of Busselton Accommodation Occupancy Rates

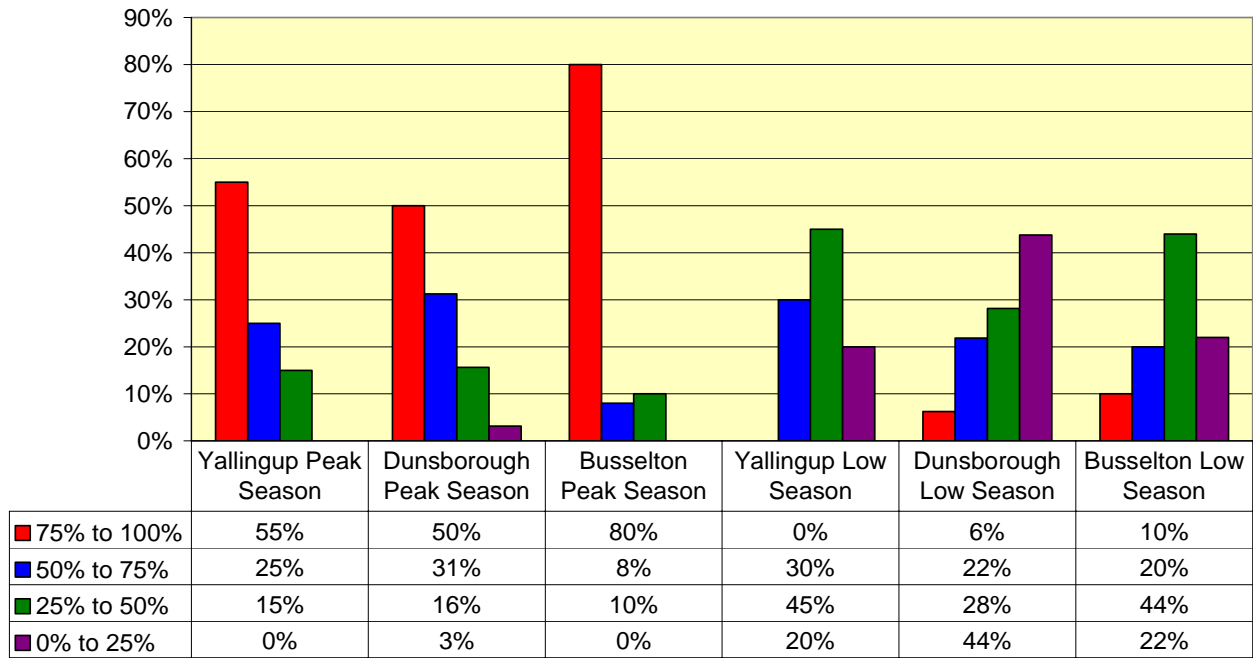


When broken down by the main localities within the Shire, the audit results indicate that 80% of accommodation providers in the locality of Busselton have an occupancy rate of 75% to 100% in the peak season while only 55% of accommodation providers in Yallingup and 50% of accommodation providers in Dunsborough reach this level of occupancy during the same periods (see Figure 9).

The higher number of accommodation providers in Dunsborough (44%) report a 0% to 25% occupancy rate in the low season, while accommodation providers in both Yallingup and Busselton report an occupancy rate of between 25% and 50% for the same period.

FIGURE 9

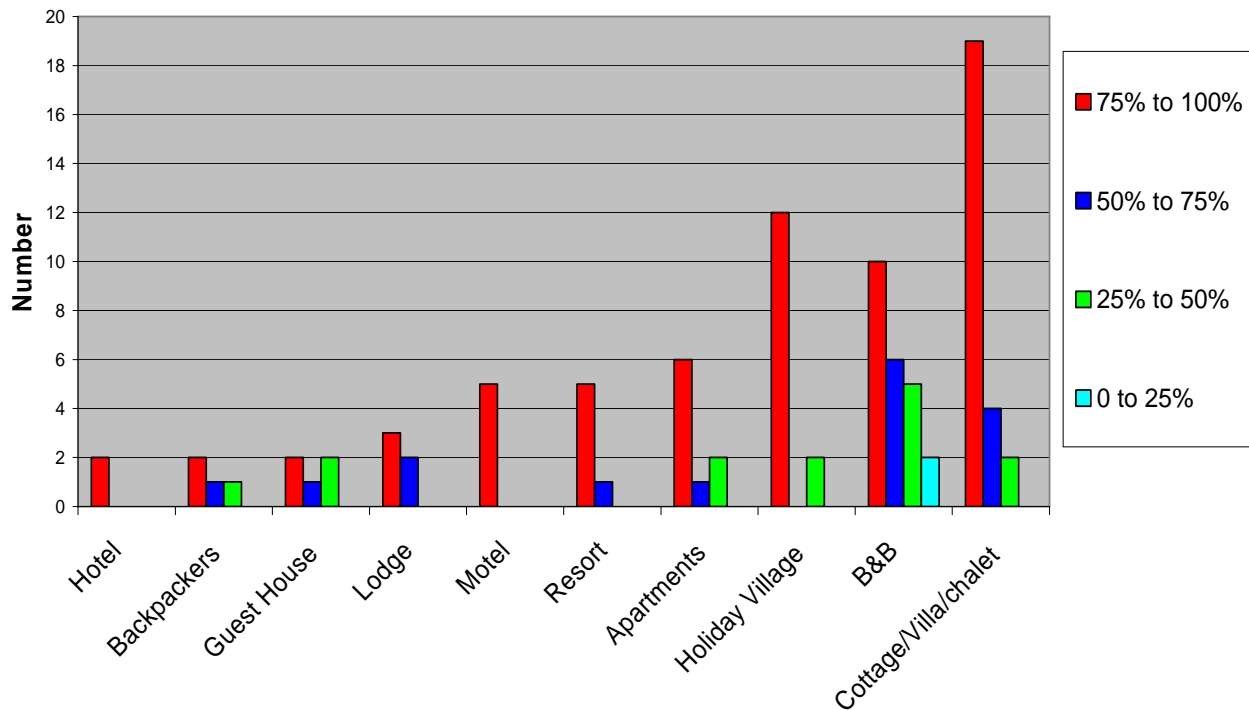
Occupancy Rate by Locality



When analysing the peak season occupancy rates by accommodation type it is clear that B&B's across the shire have the most erratic occupancy rates during this period, with 2 indicating a 0 to 25% occupancy rate and a further 5 indicating a 25% to 50% occupancy rate (see Figure 10 and Table 3).

FIGURE 10

Peak Season Occupancy by Accommodation Type



There was only one respondent each for caravan parks and timeshare accommodation both indicated a 75% to 100% occupancy rate during the peak season. However, a single operator

per type is not considered as a valid representation of an accommodation type so these two operators were not included in the analysis in Figure 10 but are shown in Table 3.

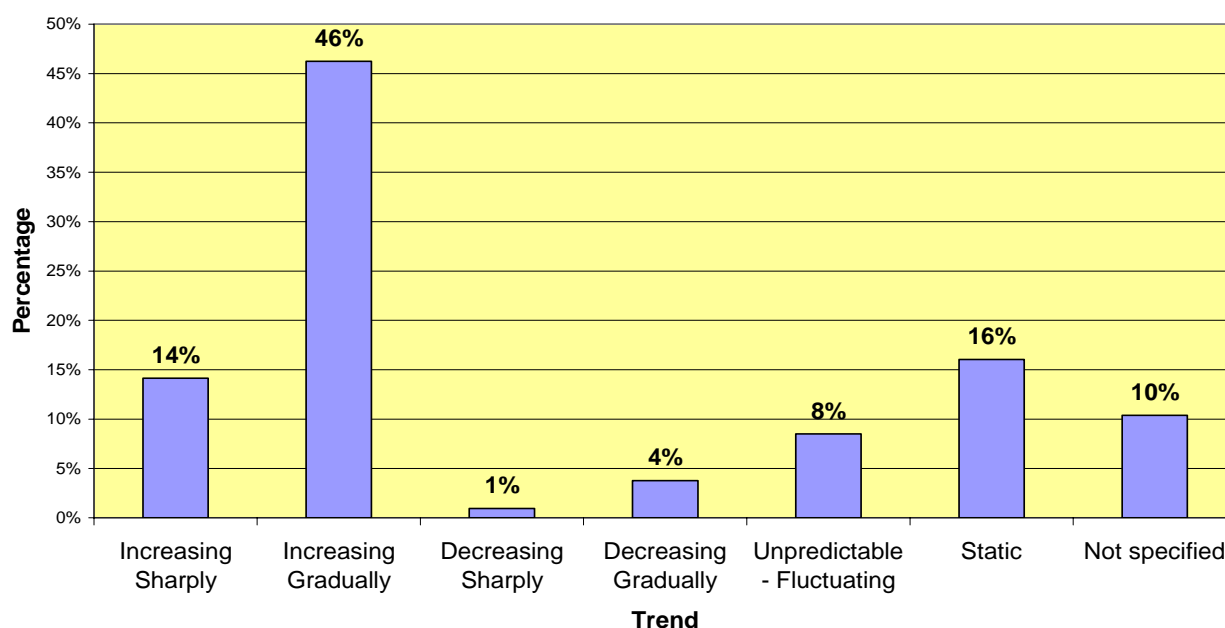
**TABLE 3
OCCUPANCY RATE IN PEAK SEASON BY ACCOMMODATION TYPE**

Peak Season Occupancy Rate	75% to 100%	50% to 75%	25% to 50%	0 to 25%	Not Specified
Caravan Park	1				
Timeshare	1				
Hotel	2				
Backpackers	2	1	1		
Guest House	2	1	2		1
Lodge	3	2			
Motel	5				1
Resort	5	1			1
Apartments	6	1	2		
Holiday Village	12		2		
B&B	10	6	5	2	
Cottage/Villa/chalet	19	4	2		1

6.3 Occupancy Trends

The trend in occupancy rates in the Shire seem to indicate that 14% of accommodation operators reported occupancy rates increasing dramatically, 46% reported occupancy rates increasing gradually and 16% reported occupancy rates as being static (see Figure 11).

**FIGURE 11
Occupancy Trends**



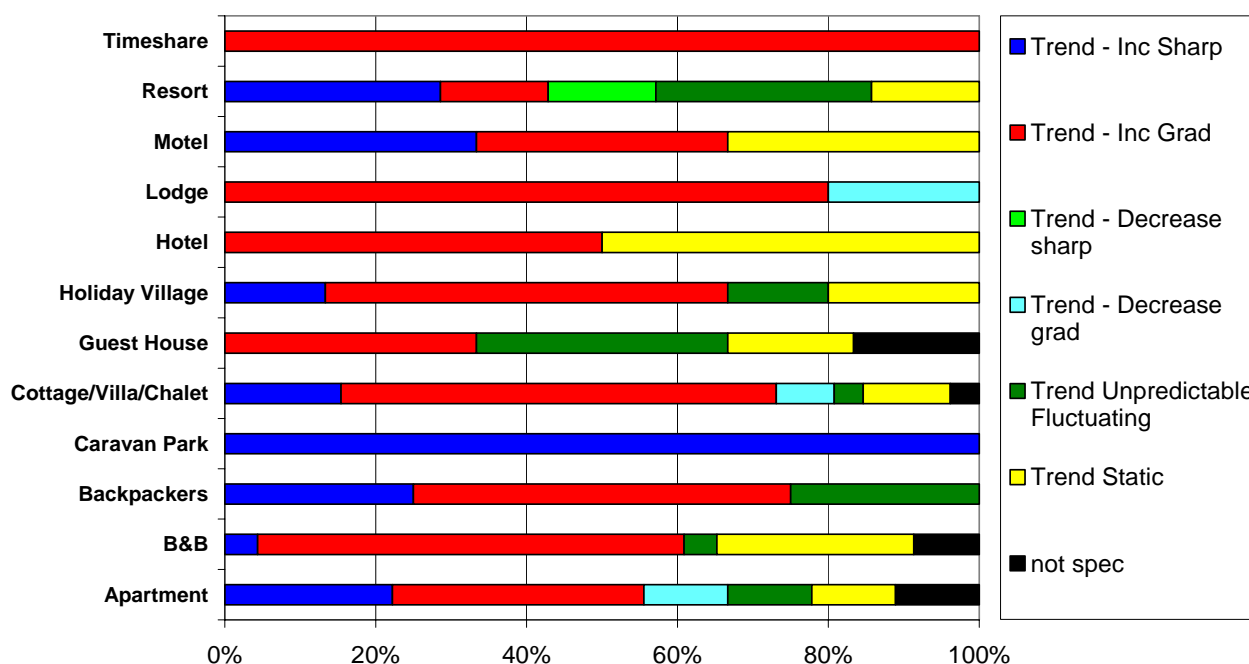
It should be noted that several of the accommodation providers reporting a static occupancy, had reached a preferred level of operation and did not have an intention to increase occupancy above current levels. Furthermore, those occupancy rates were, in some cases,

well below 100% occupancy due to the proprietors wishing to retain non-busy periods for their own quality of life. A further 8% reported occupancy rates as being continually unpredictable or fluctuating. These were often newer operators who had not yet gained a sense of the pattern of occupancy for their businesses in accommodation types such as resorts and guesthouses (see Figure 12). Four percent of respondents reported that occupancy rates were decreasing gradually and 1% reported that occupancy rates were decreasing dramatically.

The audit results indicate that a number of accommodation providers across all types of accommodation were experiencing a gradual increase in occupancy rate. Accommodation providers reporting a decrease in occupancy rates were from the resort, apartment, cottage/villa/chalet and lodge type accommodation types. The operators reported reasons such as competition from unofficial holiday homes and difficulties in business operations. Several businesses mentioned difficulty in identifying and retaining staff as a barrier to increasing occupancy rates.

FIGURE 12

Occupancy Trend by Accommodation Type



Note: N = 1 for Caravan Park and Timeshare

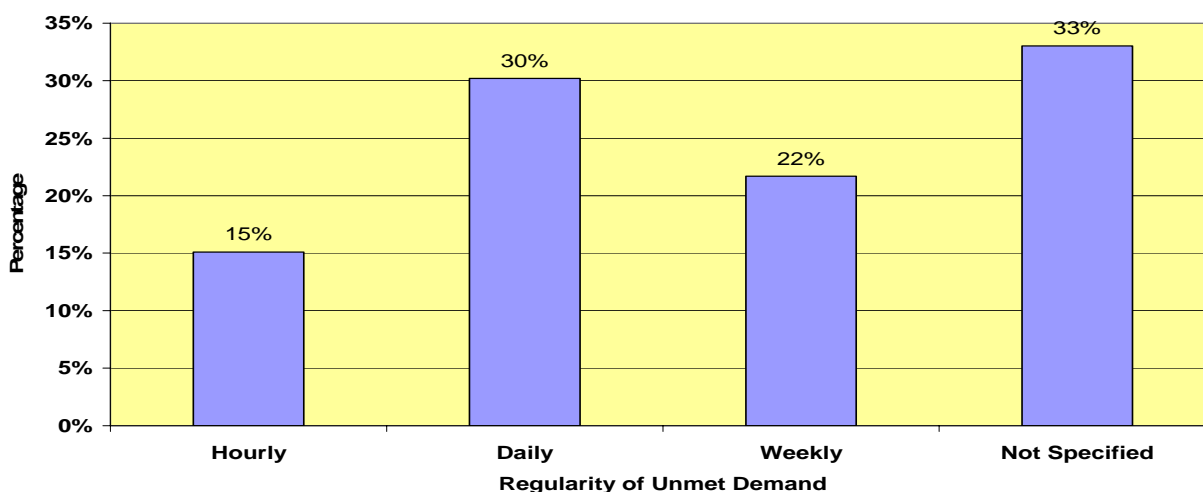
6.4 Accommodation Demand across the Shire

Accommodation demand in peak season within the Shire was measured by asking accommodation providers, "How often, when fully booked, did they receive enquiries for

accommodation: hourly – daily or weekly?” The results show that 30% of the accommodation providers within the Shire receive enquiries for accommodation in the peak season on a daily basis that they cannot accommodate. A further 22% receive unmet demand enquiries on a weekly basis and 15% receive unmet demand enquiries on an hourly basis. Most of the 33% of those that did not specify an answer to this question were not often put in a position where they could not accommodate the callers (see Figure 13).

The Geographe Bay Tourism Association confirmed that they struggle to provide people with the type of accommodation they are looking for on a regular basis during the peak seasons, although last minute cancellations can sometimes accommodate some of the hourly requests received by GBTA during the busiest 4 weeks of the year.

FIGURE 13
Accommodation Demand in Peak Season



As indicated in Figure 13, there were a significant proportion of accommodation providers that did not specify the rate of demand of request for accommodation during the peak season. This is broken down by locality in Table 4 and indicates that a high percentage of accommodation providers in Dunsborough (42%) did not specify a rate of demand, followed by 35% in Yallingup and 24% in Busselton. Those that responded in the Dunsborough locality indicated the lowest off peak season occupancy rates and this may be why so many accommodation providers in this area chose not to respond to the demand question.

TABLE 4

Locality	Demand Not Specified
Busselton	24%
Dunsborough	42%
Yallingup	35%
Vasse	0%
Quindalup	0%
Abbey	0%

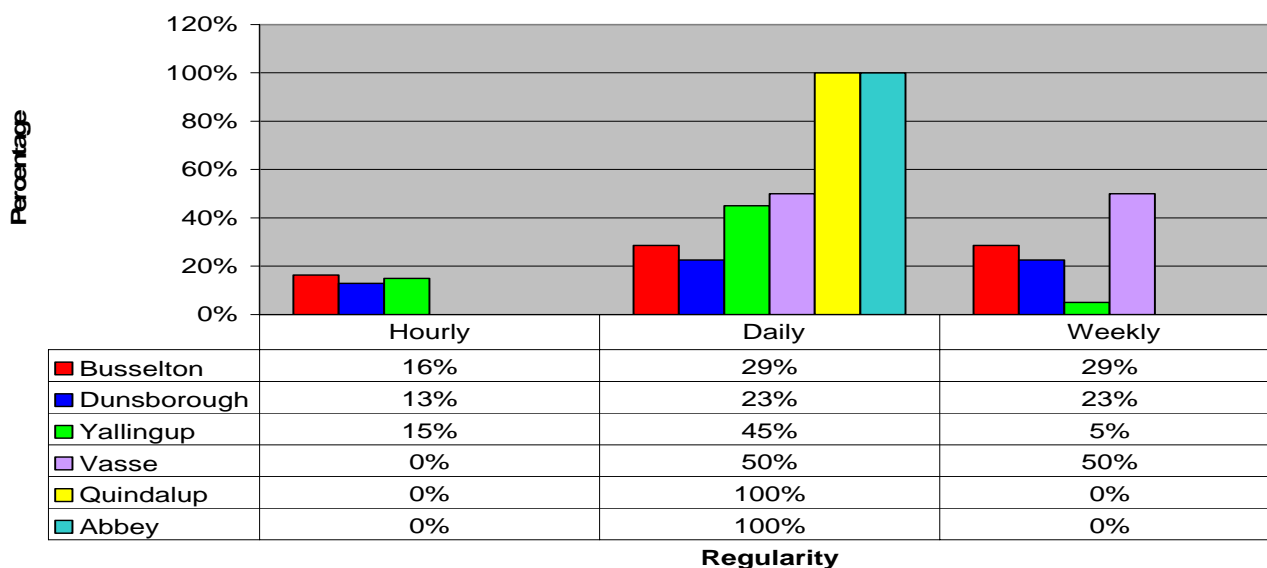
6.5 Accommodation Demand by Locality

During the peak season 29% of accommodation providers in the locality of Busselton receive requests for accommodation that they cannot accommodate on a daily basis and a further 29% receive requests that they cannot accommodate on a weekly basis. Whereas during the same season, 23% of accommodation providers in Dunsborough receive requests that they cannot accommodate on a daily basis and a further 23% receive requests that they cannot accommodate on a weekly basis (see Figure 14). The lesser figure from Busselton may be impacted by the large number of accommodation providers surveyed that did not respond to this question.

Fourty five percent of Yallingup accommodation providers indicated that they receive requests for accommodation daily during the peak season that they cannot accommodation. Of the two accommodation providers who indicated that their locality was Vasse, one receives calls daily during the peak season that they cannot accommodate and one receives calls weekly that they cannot accommodate. Both accommodation providers in Quindalup and Abbey receive calls daily during the peak season that they cannot accommodate.

FIGURE 14

Unmet Demand by Locality



N=1 for Quindalup and Abbey

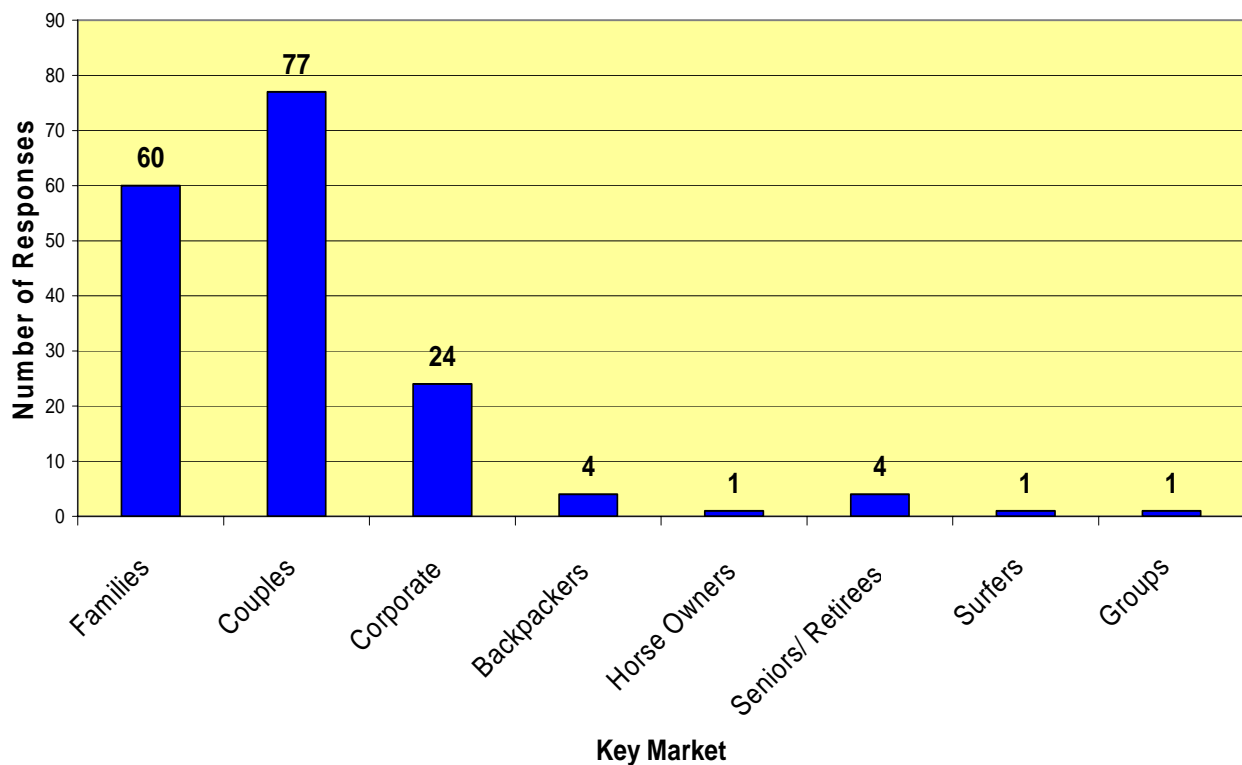
Fifty nine (57%) of respondents indicated that they refer accommodation requests to other providers or organisations if they cannot accommodate them. Of these, 35 (57%) refer callers to the Georgrape Bay Tourism Association. Others refer to sister properties, other B&B's or properties providing similar accommodation style to themselves. Often they will seek availability of the property that they are referring the caller to as a courtesy.

7 Key Markets

Of the 104 accommodation providers surveyed, 58% indicated that they predominantly attract families, 73% aim to attract couples and 24% specifically target corporate markets. Backpackers, seniors, groups, horse owners and surfers were also specific target markets (see Figure 15).

FIGURE 15

Accommodation Key Markets



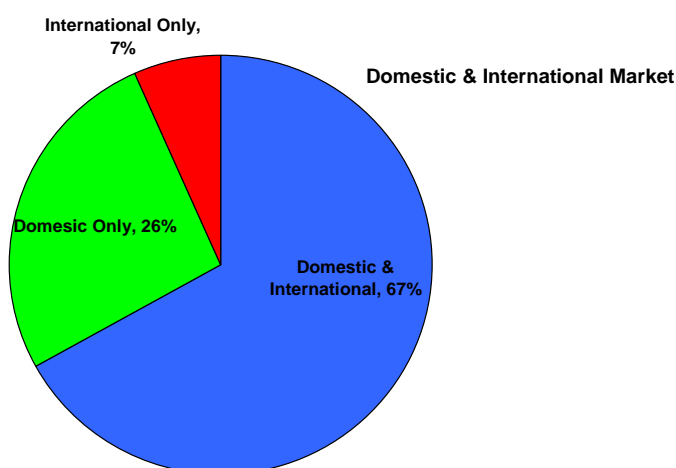
Analysis of the key markets attracted by different accommodation types indicate that caravan parks attract both families and couples equally and do not focus on the corporate sector, while hotels in the Shire attract all market sectors equally. B&B's and lodges attract couples almost exclusively but a small percentage does cater for families or the corporate sector. The cottage/villa/chalet providers attract families and couples equally while not relying heavily upon corporate guests. Resorts are attracting couples and families and a small percentage of corporate visitors, while holiday villages are predominately attracting families a small number of couples and a very small percentage of corporate visitors (see Table 5).

**TABLE 5
ACCOMMODATION PROVIDERS MARKET BY ACCOMMODATION TYPE**

Accommodation Type	Families	Couples	Corporate
Caravan park	✓	✓	-
Hotel	✓	✓	✓
Guest House	✓	✓	✓
Lodge	✓	✓	-
B&B	✓	✓	✓
Cottage/Villa/Chalet	✓	✓	✓
Motel	✓	✓	✓
Resort	✓	✓	✓
Apartments	✓	✓	✓
Holiday Village	✓	✓	✓
Timeshare	✓	-	-

Of those surveyed, 67% indicated that they attract both domestic and international visitors, 26% indicated that they attract domestic visitors only and 7% indicated that they attract international visitors only (see Figure 16). This equates to 99 of the 106 accommodation suppliers within the Shire indicated that they attract a portion of domestic visitors and 79 accommodation suppliers indicated that they attract a portion of international visitors. This shows that there is a mix of international and domestic visitors. While there are some operators that do not attract international visitors, most types of accommodation operators do see international tourists as a current and potential market. Please refer to Appendix four for definition of a holiday village.

**FIGURE 16
DOMESTIC & INTERNATIONAL MARKET**



8 Years of Operation by Accommodation Type

Table 4 shows the average length of operation by accommodation type within the Shire. The average operation time by B&B's indicates that there are either new B&B's being built or many have changed hands in the last 5 years (see Table 6). The average length of operation of the Resorts, holiday villages, motels, Caravan Park and the timeshare resort indicate that this type of accommodation has been available within the Shire for the longest period.

TABLE 6
AVERAGE LENGTH OF OPERATION BY ACCOMMODATION TYPE

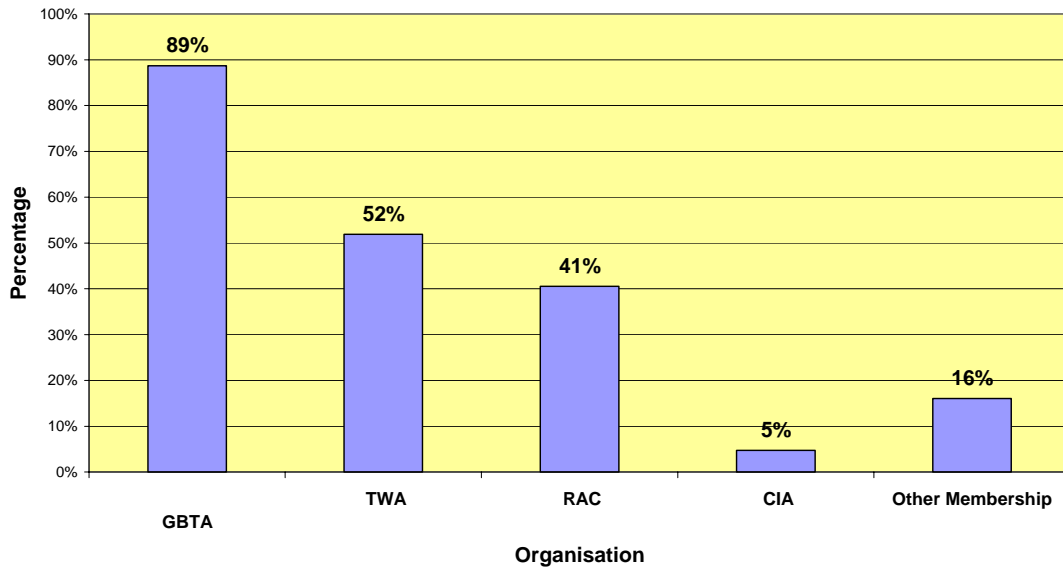
Accommodation Type	Number Surveyed	Average Length of Operation (years)
B&B	23	5
Apartments	9	9
Cottage/Villa/chalet	26	10
Lodge	5	10
Guest House	6	12
Backpackers	4	14
Hotel	2	16
Resort	7	22
Holiday Village	14	22
Motel	6	22
Caravan park	1	23
Timeshare	1	23

9 Tourism & Associated Membership

The Geographe Bay Tourism Association (GBTA) has attracted the membership of 89% of accommodation suppliers within the Shire and 52% indicated they were also a member of Tourism WA (TWA). Forty-one percent indicated that they were members of RAC. Only 5% of accommodation suppliers indicated that they were members of Caravan Industry Association (CIA). Additional organisations that those surveyed indicated that they were members of were; Discover West, Augusta Margaret River Tourism Association, AAA, Qantas, Big 4, Youth Hostels Australia, Stayz and Take a Break (See Figure 17).

FIGURE 17
TOURISM & ASSOCIATED ORGANISATIONS

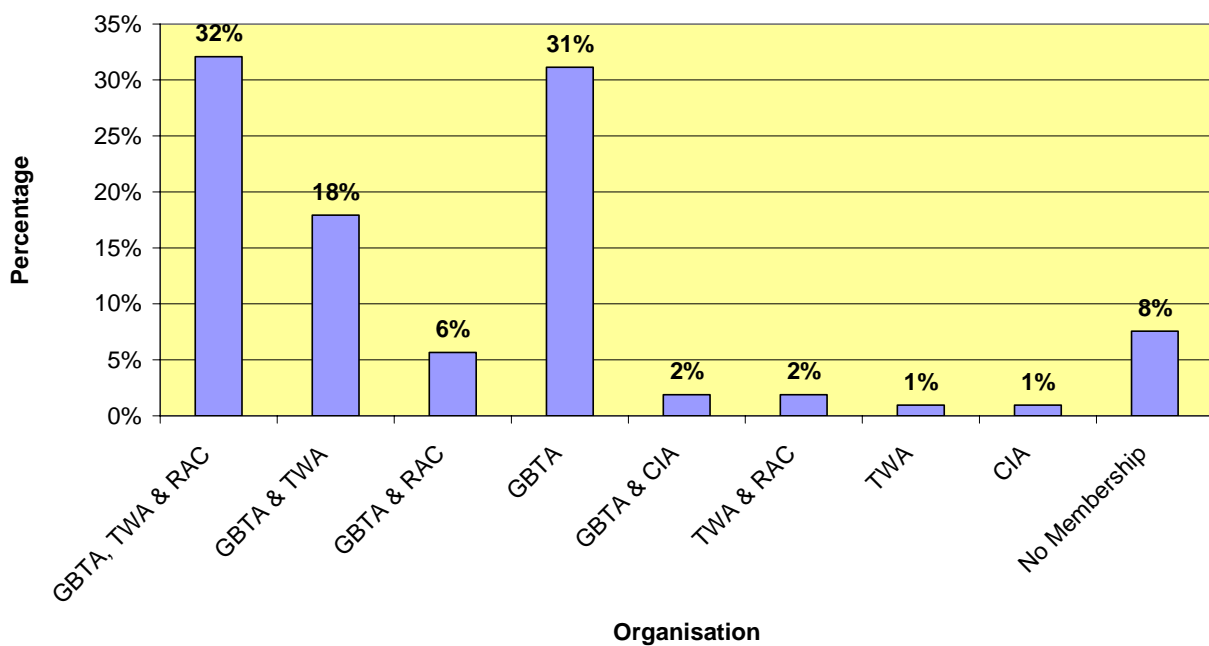
Memberships



Further analysis of where operators hold multiple memberships shows that 32% of those surveyed indicated that they are members of GBTA, TWA and RAC. A further 10% are members of both GBTA and TWA and 6% are members of GBTA and RAC. Thirty-one percent are members of GBTA only, 2% each are members of GBTA/CIA and TWA/RAC and 1% each is members of TWA and CIA alone. Only 8% of accommodation suppliers within the Shire did not indicate membership to any tourism or associated organisation (see Figure 18).

FIGURE 18

Membership Breakdown



10 Conclusions

The Accommodation Audit demonstrates that the tourism sector in the Busselton Shire is mature and relatively stable. In general, a gradual increase in demand *across certain accommodation types* is being experienced as indicated in Section 6.3 and Figure 8. The traditional market is still families but there is an increasing slide in trend towards attracting couples, which has now overtaken the focus on families, and some focus on corporate visitors.

During the peak season, visitors are flocking to Busselton and most formal tourism accommodation operators are largely at capacity. Nevertheless, occupancy rates overall are below optimal levels⁷ for most accommodation providers. There are several reasons that were identified as contributory factors, particularly seasonal fluctuations in visitor numbers and the lack of activities to attract potential visitors during the off-season periods. Location does have a bearing on occupancy rates with Dunsborough experiencing similar occupancy rates to other areas during the peak season but lower average occupancy during the off season. This may be due to the higher number of B&Bs within Dunsborough compared to other areas.

The discrepancy between the requirements for establishment and operation of a B&B and the lack of regulations and requirements for holiday homes was raised by several respondents as an issue. This aspect is being covered in more detail by the State Holiday Homes Working Group. At the same time, several B&Bs reported difficulty in marketing themselves and found that they were not achieving desired results. Given that B&B operators are also, on average, the newest operators, there is potential to support the operators through more technical business support.

Events were reported as having a positive effect on attracting new and returning visitors but the events also tend to be clustered in, or close to, peak season. Still the potential in events and activities is good and the initiatives received positive feedback.

The high proportion of operators connected to various organisations highlights the strong connection of tourism operators across the Shire to industry bodies and the need for this Study to contact key organisations to assist in assessing current market trends.

The data generated through this Audit is a separate direct output of the Survey and provided to the Shire electronically. However, the data will be further analysed in the context of other background research that is occurring concurrently during the Shire of Busselton Local Tourism Planning Strategy, in relation to National, State and Regional tourism current statistics, trends and potential.

⁷ Tourism WA are assisting with locating any studies on benchmark optimal rates and if located this data will be included in the Local Tourism Planning Strategy.

APPENDIX ONE

**SHIRE OF BUSSELTON - LOCAL TOURISM PLANNING STRATEGY
ACCOMMODATION SURVEY – February 2007**

Name of business.....

Date Contact Name

Telephone Fax email

Category	Strata titled?	Total sites/units/rooms	Sites available for tourism	Total keys	Keys available for tourism

Total Pax	**rating	Key markets Families Couples Corporate Internat. Domestic	How long in operation	Organisations GBTA TWA RAC Caravan Industry As	Locality	Post Code

What is your approximate occupancy rate?

	Peak season	Off season
10-25%	<input type="checkbox"/>	<input type="checkbox"/>
25-50%	<input type="checkbox"/>	<input type="checkbox"/>
50-75%	<input type="checkbox"/>	<input type="checkbox"/>
75% - 100%	<input type="checkbox"/>	<input type="checkbox"/>

Demand – peak season -

Refer to -

What is the trend in your occupancy rates?

- Increasing sharply
- Increasing gradually
- Decreasing sharply
- Decreasing gradually
- Continually fluctuating/unpredictable
- Static

Other comments

.....

APPENDIX TWO – ACCOMMODATION PROVIDERS

Name of Business	Accommodation Category
Abbey Beach Resort	Apartments
Abundance@ Eagle Bay	B&B
Acacia Caravan Park	Holiday Village
Amalfi Resort	Cottage/Villa/Chalet
Amaroo Motor Lodge	Motel
Amblin Caravan Park	Holiday Village
Bayshore Resort	Cottage/Villa/Chalet
Bayview Georgraphe Resort	Resort
Beachlands Holiday Park	Holiday Village
Best Western Dunsborough Motel	Motel
Birchfield Homestead	B&B
Blue Bay Apartments	Apartments
Brandywine Lodge (Rivendell)	Guest House
Broadwater Beach Resort	Apartments
Broadwater Bed and Breakfast	B&B
Broadwater Bungalows Resort	Resort
Broadwater Resort & Spa	Resort
Busselton Backpackers	Backpackers
Busselton Beach Resort	Timeshare
Busselton Holiday Village	Holiday Village
Busselton Jetty Chalets	Cottage/Villa/Chalet
Busselton Luxury Apartments	Apartments
Busselton Observation Guesthouse	B&B
Busselton River Resort	Resort
Busselton Travellers Rest Guest House	B&B
Busselton Villas & Caravan Park	Holiday Village
Cairnhill Homestead	B&B
Canal Rocks Beach Front Apartments	Cottage/Villa/Chalet
Cape Lodge	Lodge
Caves Caravan Park	Holiday Village
Chandlers Smith Beach Villas	Cottage/Villa/Chalet
Chapman Hill cottage	Cottage/Villa/Chalet
Churchill Park Guest House	Guest House
CWA Busselton Holiday Units	Apartments
Dunsborough Beach Cottages	Cottage/Villa/Chalet
Dunsborough Beach House YHA	Backpackers
Dunsborough Beach Lodge Backpackers	Backpackers
Dunsborough Lakes Holiday Resort	Holiday Village
Dunsborough Rail Carriages & Farm Cottages	Cottage/Villa/Chalet
Dunsborough Yungarra Cottages	Cottage/Villa/Chalet
Empire Retreat	B&B
Erravilla Country Estate	B&B
Esplanade Hotel	Hotel
Forte Capeview Apartments	Apartments
Four Seasons Holiday Resort	Holiday Village
Gale Street Motel & Villas	Motel
Georgraphe Bay Holiday Park	Holiday Village
Georgraphe Cove Resort	Cottage/Villa/Chalet
Georgraphe Guest House	Guest House
Glasslodge	B&B
Grevillea Cove B&B	B&B
Halcyon Bay	Cottage/Villa/Chalet
Hidden Valley Eco Retreat	Cottage/Villa/Chalet

Jacaranda Guest House	Guest House
Jemelup Chalets	Cottage/Villa/Chalet
Karlinda B&B	B&B
Kerriley Park Forest & Farm Stay	Cottage/Villa/Chalet
Kinvarra Park Lodge	B&B
Kookaburra Caravan Park	Holiday Village
Laughing Clown Lodge	Lodge
Lazy Days Caravan Park	Holiday Village
Mandalay Resort & Tourist Park	Holiday Village
Martin Fields Country Retreat	Guest House
Maslins	Cottage/Villa/Chalet
Moondance Lodge	Cottage/Villa/Chalet
Morgans Retreat Holiday Apartment	Apartments
Motel Busselton	Motel
Newberry Manor	B&B
Newtown House Restaurant & Accommodation	Apartments
Ocean Green B&B	B&B
Ocean View Villas	Cottage/Villa/Chalet
Paradise Motor Inn	Motel
Peppermint Park Eco Village	Holiday Village
Possum Lodge	Lodge
Quay West Resort Bunker Bay	Resort
Quindal B&B	B&B
Restawile Motel	Motel
Sandy Bay Holiday Resort	Holiday Village
Sea Shanty B&B	B&B
Seahorse Equine Centre	B&B
Seascapes Holiday Apartments	Apartments
Seashells Caves House	Hotel
Sienna Estate	Lodge
Siesta Park Holiday Resort	Resort
Stewarts on Gale	B&B
Stonebrook Estate	Cottage/Villa/Chalet
The Dunsbrough Inn	Backpackers
The Ship Resort	Resort
Toby Inlet B&B	B&B
Tuscan Villa Guest House	B&B
Views of the Bay B&B	B&B
Villa Carlotta Hotel	Guest House
Waterside Villas Port Geographe	Cottage/Villa/Chalet
Whalers Cove Villas	Cottage/Villa/Chalet
White Sands Holiday Villas	Cottage/Villa/Chalet
Wild Fig Jam	B&B
Wildwood Chalets	Cottage/Villa/Chalet
Wildwood Valley Villa & Cottages	Cottage/Villa/Chalet
Windance Estate	Cottage/Villa/Chalet
Wyadup Brook Cottages	Cottage/Villa/Chalet
Yallingup Beach Holiday Park	Caravan Park
Yallingup Forest Resort	Cottage/Villa/Chalet
Yallingup Lodge	Lodge
Yallingup Strawbale Retreat	B&B

APPENDIX THREE : ADDITIONAL COMMENTS FROM ACCOMMODATION SUPPLIERS

INDEPENDENT COMMENTS MADE BY TOURISM OPERATORS

Not prepared to share demand information. Don't need another hotel on foreshore. Restaurants should stay open to cater for tourists; guests have nowhere to eat on a weeknight except drive through takeaway.
A lot of big projects are on the burner for accommodation in the area that are owned and managed by overseas or interstate bodies – they offer big discounts in Feb and March, if approved they are only needed for peak season. Council need to examine demand before approval of any new developments.
Amblin and Acacia holiday villages are facing closing - So we are almost fully booked for Dec, Jan Feb through 2008.2009, 2010.
Better bus service required throughout the Shire.
Better signage on bypass required as to accommodation available within the Shire. Bypass has had a negative effect on business.
Accommodation promote themselves as being in the MR Region although located within the Shire of Busselton because of brand awareness. Air flights to Busselton and Margaret River would help business.
Caravan Sites 38% annual for all 150 sites. 55% for park homes
BB - close down during June, July, August
BB - close in June, July August. Not happy that Shire will not allow further development on their property as it has been re-zoned conservation.
Closing after March long weekend to refurbish - adding more rooms some will be Strata title
Council need to be more open to tourism based activities such as adventure based activities to attract a more diverse visitor.
Decreasing occupancy trend because of way Tourist Associations advertise the South West – Margaret River are getting all the wine business. More bin pick ups are required during peak season. More toilet facilities are required in the beaches.
Disappointed with GBTA - no referrals from them - more from Margaret River.com
Please don't do anything on Signal Park or the foreshore - no commercial or residential - No Gold Coast for Busselton. Market to cafes etc to stay open to cater for tourists in evenings as later on weekends. No where to eat.
Don't need any more accommodation in the Shire
Don't take water from the Yaragadee
Dunsborough should advertise more as wine region rather than Margaret River - Brand awareness.
Events are major bonus to tourism – spread them over the year not just in peak and summer season.
Finding new market in short- medium term stay while people are looking for houses to rent as all houses are being used as short term holiday rentals – impacting on people wanting to rent a house in the Shire for work and living.
Foreshore preserve as is – do not change a good thing. The beach line in the Shire will be lost if nothing is done now to save and preserve it. The Marina has had huge detrimental effect on the Beaches.
B&B happy with what their occupancy is – they go away a lot.
Increase activities for youth required, more transport and facilities.
International backpackers say there is not much to do in Busselton and public transport not good.
Seems to be a flood of new units and apartments around the town that will effect business negatively if advertised for short term tourism accommodation.
Land Tax and Shire Rates too high for accommodation providers. Not allowed enough bins in peak season and this creates a major problem.
Are now a lot quieter in off peak period due to increased accommodation through privately let homes. Noticing increase in off season vacancy – off season increased from normally just August now starts in July and goes through to September.
More and more accommodation is now available and its having a negative effect. Privately let houses should be regulated.

More Control needed over Quindalup Strip - use of Bay - no control over what happens, Deterioration of beach, rubbish, possum population gone, ruined pathways.
More infrastructure for youth needed in Dunsborough as well as transport.
More picnic and seating areas and shade required along beaches and throughout Shire. Eating places are full during peak season and need to stay open longer hours to cater to tourists.
Need more focus on winter months for festivals and need to advertise and promote locally.
Need more restaurants in the Shire and they need to stay open longer hours to cater for tourists.
Need to organise events to be more spread out not only just in summer months or long weekends – winter events required.
Not enough accommodation available in summer but quiet for everyone in winter.
Off season picking up due to winter breaks. Busselton Jetty should go - its dangerous - too much money spent on promoting it.
Only have 3.5 star rating because we don't have campers kitchen or drive through sites.
Only owned it for 6 months - closed June, July and August - B&B
only owned it for a week and a half B&B
Our own increasing marketing and awareness has tripled our income. Trouble getting approval to make changes to property.
People are now staying in Busselton to do Margaret River area.
People in the industry have to value add. Hope and pray that tourism industry is aware of environment and will take this into account through planning. Too much resort development is happening in the Shire. Please monitor amount and position of B&B's in the Shire.
Plenty of accommodation around – but still shortage at peak times. Need another caravan park at Quindalup – a nice up market style one.
Preserve Native Bush.
Private House holiday rentals are negatively affecting authorised accommodation providers throughout the Shire.
Private let properties negatively effects peak period for authorised accommodation providers - too many private rentals. Police say 85% of call outs are to private rentals.
Private let properties having negative impact on business. Many B&B up for sale in Dunsborough.
Private let properties should be regulated as having negative effect on authorised accommodation providers.
Private properties are having a negative impact on business. There are no houses to rent long term if you need to live here. Some purpose built houses have 3 keys and beds for up to 20 people. Why do B&B have to get permission from Shire and neighbours and private rentals don't.
Protect the natural environment.
Rates are too high. Non commercial taxes - why are people allowed to camp at Yacht club on long weekend. Golden Mile only charge \$5 per night for people to camp. This all effects business negatively.
Rates should not be based on what is done on property – that's why so many caravan parks are selling.
Restaurants and cafes should stay open to cater for locals and tourists for longer hours during week and weekends.
Restaurants should open during the week to cater to tourists – no where for visitors to go out and eat.
Scaling Down - no longer have tent sites. Only take in what they can manage on their own.
Second apartment being built - new business. GBTA don't forward many clients. Dunsborough Visitors centre does not appear to be functioning well.
Shire is doing a good job with promotions and festivals to attract people but more in off peak season would be welcome.
Short Stay in private let houses is killing the business. Private let houses contribute nothing to the community GBTA etc.
Should Preserve Caravan Parks
Southbound should not be in January when accommodation is all fully booked – move it to a time when its not peak season – people will still come.

Too many managed units that don't pay GST etc - unfair advantage. Not good for Busselton as they don't keep the standard up. Promote good quality and monitor standards needed.
Trends still being established - owners can spend 30 days per year in strata titled villas - 10 days peak, 10 days shoulder, 10 days low season.
Unpredictable demand - interest rate scare caused cancellations - More people just popping in - not doing advanced bookings.
Upgrade Beach front - repair shade sails required.
Visitors Centre and Tourism Association are doing a good job.

APPENDIX 4 – CALCULATIONS AND DEFINITIONS

CALCULATION FOR TOTAL NIGHTS MINUS VFR VASSE TOURISM PERSPECTIVE 2003 (TOURISM WESTERN AUSTRALIA, 2004)

Domestic

465,500 Total visitors stayed overnight

233,000 VFR (50%)

232,500 Total domestic overnight visitors

International

14,800 Total visitors stayed overnight

5,300 VFR (36%)

9,500 Total International overnight visitors

Average annual total nights stayed

232,500 x 2.3 = 534,750

9,500 x 8.1 = 76,950

611,700

ACCOMMODATION DESCRIBED AS SELF CONTAINED

1. Villas
2. Cottages
3. Houses, homes
4. Houseboats
5. Units
6. Apartments (single, multiple)
7. Chalets
8. Train Carriages
9. Town Houses

ACCOMMODATION DESCRIBED AS HOLIDAY VILLAGE

Providing a mix any of the following:

Tent sites

Van sites

On site chalets

On site cottages

Park homes

On site vans