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ITEM 2 PUBLIC EXHIBITION - DRAFT TOURISM ACCOMMODATION REVIEW - DISCUSSION PAPER

Wollongong currently has some 75 tourist accommodation establishments within the Wollongong LGA, providing an estimated 1766 rooms, 213 cabins and 547 powered and unpowered camping and caravanning sites each night, which can cater for over 6000 guests. There is also a fluctuating number of premises that offer Short-term Rental Accommodation.

The draft Tourism Accommodation Review – Discussion Paper has reviewed the planning controls that affect tourism accommodation. Tourism accommodation venues occur throughout the LGA, although are concentrated around the Wollongong City Centre. Different forms of Tourism accommodation are permissible in many zones under the Wollongong LEP 2009. The SP3 Tourist zone is partially used for tourism accommodation.

It is recommended that the draft Tourism Accommodation Review – Discussion Paper be exhibited for community and tourism industry input, to assist in the development of a Tourism Accommodation Strategy and any future amendments to planning controls.

RECOMMENDATION

The draft Tourism Accommodation Review – Discussion Paper be exhibition for a minimum period of six (6) weeks to enable community and tourism industry input, to assist in the development of a draft Tourism Accommodation Strategy.

REPORT AUTHORISATIONS

Report of: Chris Stewart, Manager City Strategy
Authorised by: Linda Davis, Director Planning + Environment - Future City + Neighbourhoods

ATTACHMENTS

1 Draft Tourism Accommodation Review Discussion Paper

BACKGROUND

Tourism is an important part of Council's *Economic Development Strategy (2019-2029).* Increased visitation, especially overnight visitors, has a positive benefit to the local economy through increased expenditure which supports local businesses and jobs.

An action in the Wollongong Local Strategic Planning Statement and the Operational Plan is the preparation and exhibition of the draft Tourism Accommodation Review. The draft document has been prepared for community and tourism industry input, prior to the finalisation and future implementation of any recommended actions.

PROPOSAL

The draft Tourism Accommodation Review – Discussion Paper (Attachment 1) is divided into the following chapters -

- Chapter 1 – Introduction
- Chapter 2 – NSW Tourism organisations, strategies and plans
- Chapter 3 – Land Use Controls
- Chapter 4 – Existing Tourist Accommodation Audit
- Chapter 5 – Demand for Accommodation
- Chapter 6 – Issues for discussion
- Chapter 7 – Recommendations

The draft Review is focused on planning issues associated with the supply and demand for tourism accommodation. The draft Review does not consider tourism uses, attractions or events.

The draft Review found that Wollongong has a wide range of accommodation establishments that are summarised in the following table -

Row Labels	Number of establishments	Number of rooms available	Guest Capacity	Number of Powered sites	Number of Unpowered sites	Number of Cabins	Cabin guest capacity
Backpackers Accommodation	2	33	82				
Bed and Breakfast Accommodation	10	25	62				
Holiday Letting	10	20	63				
Serviced Apartments	16	435	1269				
Tourist Parks	5			378	169	213	615
Hotels and Motels - Budget Motel	22	669	1973				
Hotels and Motels - Hotel 4-4.5 star	2	370	1007				
Hotels and Motels - Mid Market	3	87	262				
Hotels and Motels - Conference Centre	1	80	604				
Hotels and Motels - Student	1	24	76				
Hotels and Motels - Luxury Boutique	2	7	20				
Hotels and Motels - Boutique	1	16	64				
Grand Total	75	1766	5482	378	169	213	615

If fully occupied the establishments can host more than an estimated 6,000 guests each night.

Additionally, there is over 1,000 premises that offer Short-term Rental Accommodation, although the numbers fluctuate over the course of a year.

The establishments are spread across the LGA, although are concentrated in and around the Wollongong City Centre. Council owns three of the four tourist parks which provide cabins and powered and unpowered camping and caravan sites.

Council has approved development applications for three additional hotels, which are yet to be constructed, and is assessing a development application for another hotel. If all are constructed, an additional 493 rooms will become available.

The Wollongong Local Environmental Plan (LEP) 2009 permits the establishment of different forms for tourism accommodation in the different land use zones that apply to the LGA. Thirteen of the 75 existing establishments are located on zones, where the land use is currently not permitted (noting the use may have been permissible historically). For example hotel and motel accommodation is not permitted in the R1 General Residential or R2 Low Density Residential zones, and three establishments are on land zoned E2 Environmental Conservation.

A number of existing hotels and motels are ageing, have changed ownership and some are at risk of closure, through a combination of high maintenance costs, low returns, financing difficulties, COVID-19 impacts, and higher returns from residential development.

As the domestic tourism market grows, there is the demand for additional accommodation venues to be provided. The draft Tourism Accommodation Review – Discussion Paper found that there is demand for additional accommodation venues, although it is difficult to quantify the additional number of rooms required. Wollongong is primarily a domestic tourism market.

On 9 April 2021, the NSW Department of Planning, Industry and Environment published an amendment to SEPP Affordable Rental Housing, to introduce provisions for Short-term rental accommodation. From 30 November 2021, short-term rental accommodation will be permissible as exempt development. The use is defined as -

> ***short-term rental accommodation*** *means a dwelling used by the host to provide accommodation in the dwelling on a commercial basis for a temporary or short-term period.*

The use will be required to satisfy a number of requirements outlined in the policy, including -

- Dwelling must have been lawfully constructed
- Dwelling must be registered on the short-term rental accommodation register
- The use of the dwelling for the purposes of short-term rental accommodation must otherwise be lawful, (eg under building strata laws or conditions of development consent).

On 28 October 2020, NSW Fair Trading released the Code of Conduct for the Short-term Rental Accommodation Industry which commenced on 18 December 2020. The NSW Fair Trading have been given the responsibility to create a register of premises used for short-term rental accommodation, and to monitor complaints and compliance. Any complaints concerning the operation of premises are to be directed to NSW Fair Trading. Any issues requiring immediate attention, such as late night noise, should be directed to NSW Police.

To incentivise the retention or redevelopment of existing hotel and motel accommodation the draft Tourism Accommodation Review proposes consideration be given to -

- permitting Hotel and Motel Accommodation as a permissible land use in the R1 General Residential zone that surrounds the Wollongong City Centre
- permit an additional floor space ratio of 0.5:1 for Hotel and Motel Accommodation
- rezoning some sites where the existing Tourism Accommodation use is not currently permitted to another zone.

The draft Review also suggests that consideration be given to -

- Removing Farm-stay accommodation as a permitted use in the Rural and Environmental Management zones. The use has not been taken up, there is limited opportunity and the change will remove the attempts to make dwelling houses permitted on undersized lots, and the proposed short-stay camping initiatives proposed by the State.

The feedback received during the exhibition period will assist in determining whether any of the possible changes are progressed through the draft Tourism Accommodation Strategy and changes to planning controls.

The draft Tourism Accommodation Review also reviewed the SP3 Tourist zone which applies to 26 sites (127 lots or part lots) with a combined area of 116 hectares. The Review found that a range of land uses were occurring in the zone, including -

- 4 Tourist Parks
- 5 Escarpment Lookouts
- 3 Hotels
- 2 Motels
- 2 Pub Hotels
- 3 Licensed Clubs
- 2 Tourism Attractions - Symbio Wildlife Park at Helensburgh, The Win Entertainment Centre and Football Stadium
- Residential apartment buildings
- Retail premises
- Vacant land

The King Street, Warrawong SP3 Tourist area is the largest area zoned SP3, and provides the opportunity for tourism attractions and tourism accommodation adjacent to Lake Illawarra. This precinct is currently managed by Property NSW for the State Government.

The SP3 Tourist zone permits a range of uses, including tourism accommodation. As indicated in the list above, the zone is being used for a variety of uses, some inconsistent with the zone and there are some sites where an alternate zone maybe appropriate.

CONSULTATION AND COMMUNICATION

The draft Tourism Accommodation Review – Discussion Paper has been reviewed by Destination Wollongong, and their suggestions incorporated.

If endorsed for exhibition, the draft Tourism Accommodation Review is proposed to be exhibited for a minimum period of six (6) weeks to enable community and tourism industry input.

Following the exhibition and consideration of submissions, a draft Tourism Accommodation Strategy will be prepared for Council's consideration. A draft Planning Proposal and draft DCP amendments maybe prepared to implement the recommendations of the strategy. The draft Strategy, draft Planning Proposal and draft DCP amendments will be reported to Council for endorsement prior to exhibition.

PLANNING AND POLICY IMPACT

This report contributes to the delivery of Our Wollongong 2028 Goal 2 "We have an innovative and sustainable economy". It specifically delivers on the following -

Community Strategic Plan	Delivery Program 2018-2022	Operational Plan 2020-21
Strategy	**4 Year Action**	**Operational Plan Actions**
2.3.1 Build our city as a tourist destination of choice for conferences, events, and a place to live, learn, work and visit	2.3.1.1 Pursue initiatives that promote the region as a place to holiday to domestic and international markets	Undertake a review of the planning controls for Tourism Accommodation

CONCLUSION

The draft Tourism Accommodation Review – Discussion Paper has reviewed the planning controls that affect tourism accommodation. The draft Review found that there is a need to retain existing tourism accommodation and to incentivise the opportunity for new establishments.

It is recommended that the draft Tourism Accommodation Review – Discussion Paper be exhibited for community and tourism industry input. Following the review and consideration of submissions a draft Tourism Accommodation Strategy will be prepared and potentially a draft Planning Proposal and draft DCP amendments will also be prepared to implement any recommended changes.

Draft

Tourism Accommodation Review

A discussion paper identifying issues and opportunities for tourism accommodation across the Wollongong LGA.

June 2021

http://www.wollongong.nsw.gov.au

Contents

Figures

Tables

Executive Summary

Tourism is an important part of Council's *Economic Development Strategy (2019-2029)*. Increased visitation, especially over-night visitors, has a positive benefit to the local economy through increased expenditure which supports local businesses and jobs.

There is currently 75 tourist accommodation establishments within the Wollongong LGA, providing an estimated 1766 rooms, 213 cabins and 547 powered and unpowered camping and caravanning sites each night, which can cater for over 6000 guests. The permanent accommodation is supplemented by short-term rental accommodation being offered in dwelling houses and units by the owners.

Wollongong primarily serves the domestic tourism market (people travelling within Australia).

As the domestic tourism market grows, there is the demand for additional accommodation venues to be provided.

The Wollongong Local Environmental Plan 2009 permits a range of tourism accommodation types throughout the LGA. However the opportunities are not often taken up. The SP3 Tourist zone is uses for a range of uses, many not tourism related.

Tourism accommodation venues face increasing pressure to close and redevelop as residential developments, through a combination of high costs, better financial returns for residential development, and more recently the impact on travel due to the COVID-19 pandemic.

With the UCI World Road Cycling Championships being held in Wollongong in 2022, it is important that the current accommodation stock is maintained and if possible increased.

Longer term there is a need for more accommodation venues and to encourage the investment into existing facilities. This study proposes measures to encourage the retention of existing establishments and the development of new accommodation establishments, including:

- permitting Hotel and Motel Accommodation in the R1 General Residential zone, that surrounds the Wollongong City Centre
- increasing the floor space ratio for hotel and motel accommodation by 0.5:1
- reviewing the SP3 Tourist zone on some sites
- reviewing the zoning on particular sites.

The exhibition of the draft Tourism Accommodation review will enable community and tourism industry input into the preparation of the final document and draft strategy.

1. INTRODUCTION

Visitors come to Wollongong for a variety of reasons including, holidays, visiting friends and relatives, education, work, sporting and cultural events, beaches, the natural environment, medical appointments, conferences and weddings. There is a greater local economic benefit if visitors stay overnight or longer, rather than being a day visitor from Sydney.

Wollongong provides a range of accommodation including, hotels and motels of varying standard and age, serviced apartments, bed and breakfast establishments, backpacker accommodation, caravan parks, and more recently short-term holiday rentals. It is estimated that there are currently 1750 rooms available each night, plus 547 sites and 213 cabins in tourist parks.

In recent years, Wollongong has hosted a number of high profile events, which bring about significant media exposure for Wollongong and have economic benefits. In September 2022 Wollongong will be hosting the UCI Road World Championships, attracting 300,000 spectators, and to be broadcast to 250 million people across 150 countries.

To assist the attraction of these major events, Wollongong also needs to ensure it has sufficient supply of accommodation for visitors. Wollongong has not had any new supply into the hotel accommodation sector in many years, although three new hotels have recently been approved to be constructed. Some older motels are likely to close, as the land is more valuable for residential development.

This study reviews the planning controls that guide tourism accommodation. Tourism accommodation is permitted in many land use planning zones across the LGA, often in locations not specifically zoned SP3 Tourist. Conversely, land zoned SP3 Tourist can contain tourism relates uses, or tourism accommodation, but often contains other uses.

The objectives of this study are to:

- Identify the intensity and distribution of tourist accommodation in the Wollongong LGA.
- Identify shortfalls in the provision of tourist accommodation in the Wollongong LGA.
- Identify any constraints to attracting/developing tourist accommodation activities that are present in land use planning zones and controls.

This review does not address tourism uses, attractions and events.

1.1 Covid-19

The Covid-19 pandemic has had a dramatic impact on the hospitality sector and accommodation.

During 2020 and now 2021 there has been a significant decrease in overseas visitors to Australia, as a consequence of closed international boarders and limited flights. This is evident in the hotel accommodation data. Fortunately, the Wollongong is not as dependent upon international visitors as other locations in Australia.

International students have not returned to Wollongong to study, reducing the demand on University of Wollongong Student and Post-Graduate accommodation.

The closing of State boarders at various times during 2020-21 has resulted in a decrease in domestic interstate visitors to NSW, as evident in the data.

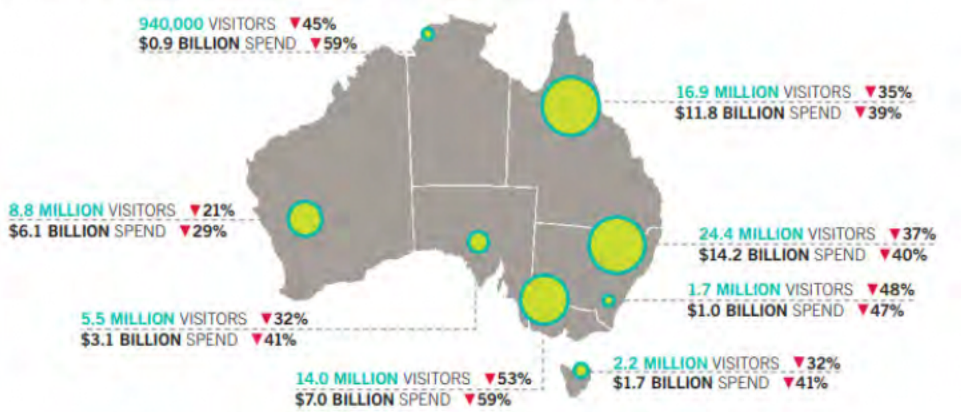
Conference were cancelled / postponed or moved to on-line formats, which has resulted in a decrease demand for weekday accommodation.

Similarly, weekend sporting and cultural events have been cancelled / postponed reducing the demand for weekend accommodation.

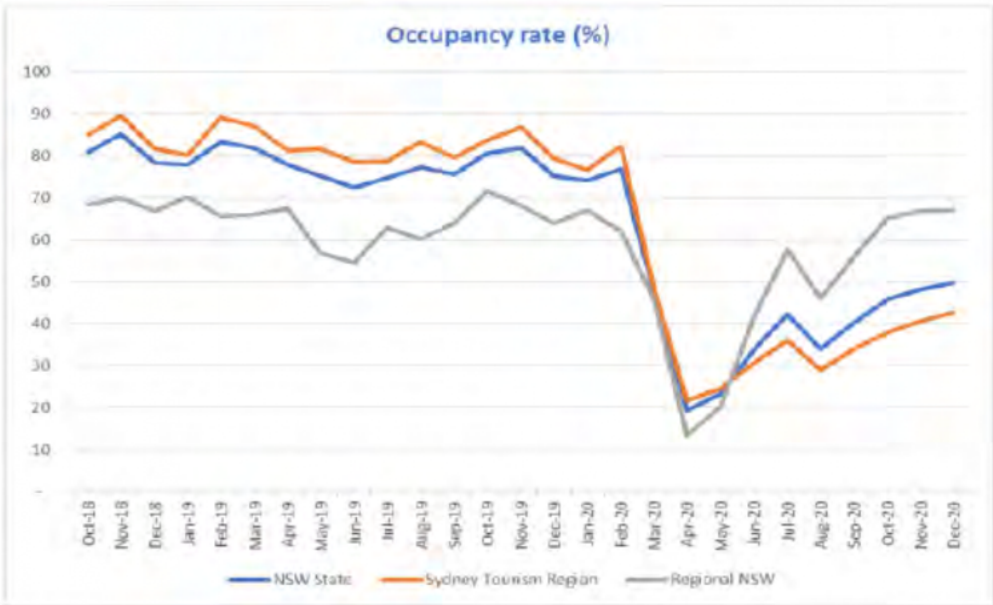
Tourism Research Australia's Travel by Australians report for the year ending December 2020, notes that:

- The overall losses for tourism during 2020 was $78.3 billion for the year, comprising:
  - domestic overnight trips fell 38% to 72.5 million, resulting in a decline in spend of 43% or $35.1 billion to $45.6 billion.
  - domestic day travel had a loss of $8.9 billion
  - international travel observed losses of 76% or $34.3 billion
- Nationally visitor nights fell by 34% (down 142 million nights), with:
  - nights in hotels, motels and resorts falling by 49% (down 49.5 million),
  - nights in rented apartments and units were down 29% (down 10.3 million nights),
  - nights in caravan parks and commercial camping grounds were down of 30% (down 10.9 million nights)
  - nights spent at a friend or relatives property were also down 32% or 45.6 million nights.
- The following graphic summarises the reduction in overnight and spend for each State and Territory.

FIGURE 4: OVENIGHT TRIPS AND SPEND BY STATE, YE DECEMBER 2020[2]



Similarly, time series charts in the NSW Tourism Accommodation Snapshot published by Destination NSW for the December quarter 2020 show the dramatic impact COVID-19 has had on occupancy rates in NSW. The following graphic shows the decrease in occupancy rates, and how Regional NSW has led the recovery.



The National and State boarder closures have meant travel within NSW has become more popular. Anecdotally, some accommodation venues have had high occupancy rates during the holiday periods and weekends, serving the Sydney-siders discovering NSW. The Tourism Research Australia notes that Nationally, the share of overnight intrastate trips increased from 67% to 81% for overnight trips and 44% to 67% for spend (TRA Dec 2020).

To remove the COVID effect from the analysis, much of the tourism data used in this study is pre-2020.

2 NSW Tourism Organisations, Strategies and Plans

There is a hierarchy of tourism organisations within NSW that guide and influence visitors to regions and destinations.

2.1 Destination NSW

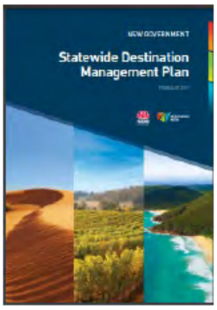
Destination NSW is the peak Tourism body in NSW with responsibility for devising and implementing strategies to grow the visitor economy. Destination NSW was established under the Destination NSW Act 2011 as the lead Government agency for the NSW tourism and major events sector, and is responsible for developing and implementing strategies to grow the NSW visitor economy. Its vision is to make Sydney and NSW among the world's most successful tourism and events destinations (Destination NSW 2019).

Destination NSW's eight key strategic objectives are:

1. Position Sydney and NSW as world leading tourism and events destinations.
2. Attract and secure high value major events.
3. Build a sustainable events calendar for NSW.
4. Increase industry stakeholder and customer engagement.
5. Deliver value in partnership cooperative programs.
6. Develop and sustain a high performance organisation.
7. Maximise yield and dispersal from the visitor economy.
8. Implement the Visitor Economy Industry Action Plan. (Destination NSW 2019)

Destination NSW provides funding for the tourism regions, and prepares state-wide tourism strategies.

NSW Statewide Destination Management Plan



The Statewide Destination Management Plan (Destination NSW 2019) provides a high level framework to achieve alignment across NSW and assist coordinated delivery of the vision and goals for the NSW visitor economy. It identifies local and state strengths and unique points of difference, as well as areas of commonality across the regions.

The report notes that in 2016-17 tourism contributed $34.2 billion to the NSW economy and overnight visitor accommodation was $29.1 billion.

The report notes the following future trends and insights:

- Experiential Travel – more and more travellers will search for immersive, authentic, educational, local experiences.
- Holidays with a purpose – volunteering, conservation and the like will play a bigger part in travel and destination choice.
- Sustainable Travel – sustainable and conscious travel will gain momentum, and the concept of excessive visitor arrivals known as 'over tourism' will be topical.
- Caravanning and Camping – the desire for authentic experiences will drive demand for exploring destinations on caravanning and camping holidays.
- Wellness Travel – travel for the purpose of wellness, both spiritual and physical, will continue to gain momentum.

- Food and Drink – local produce and food and drink experiences will continue to play a role in destination choice, as a central part of the travel experience, and this space will become crowded.
- Business Events – conventions, corporate meetings, AGMs, corporate retreats, workshops, seminars and sales incentive rewards trips all hold promise for growth in regional NSW.
- Personalisation – digital and mobile technology have empowered visitors to take more control of their travel experiences, and increased their expectations. As a result, the expectation of personalised and tailor made experiences is likely to grow.
- Multigenerational Travel – the trend in multigenerational travel will continue, as families use their holiday time to bond and create memories together, and this will influence the type of customer experience they are looking for.
- Sharing Economy – the sharing economy, e.g. Airbnb, will continue to transform travel experiences, giving the customer more choice and greater flexibility.
- Digital – digital technology will continue to advance, facilitating all stages of the customer journey and experience, e.g. search, booking, payments, augmented reality, real time translations etc.
- Mobile – mobile will be the preference of travellers throughout their customer journey, so mobile optimisation of the customer experience will be key.
- Social Media – social media and user generated content will continue to be key, and can present opportunities for destinations that optimise them well.

The report lists a number of "hero" destinations, which are world class, iconic and unique. They have high brand awareness themselves, and also define the essence of the country they are located in. For example, Sydney and the Blue Mountains. The NSW South Coast is included in the list. The report also identifies future hero destinations, which does not include Wollongong.

The report does not include any specific actions relevant to this accommodation review.

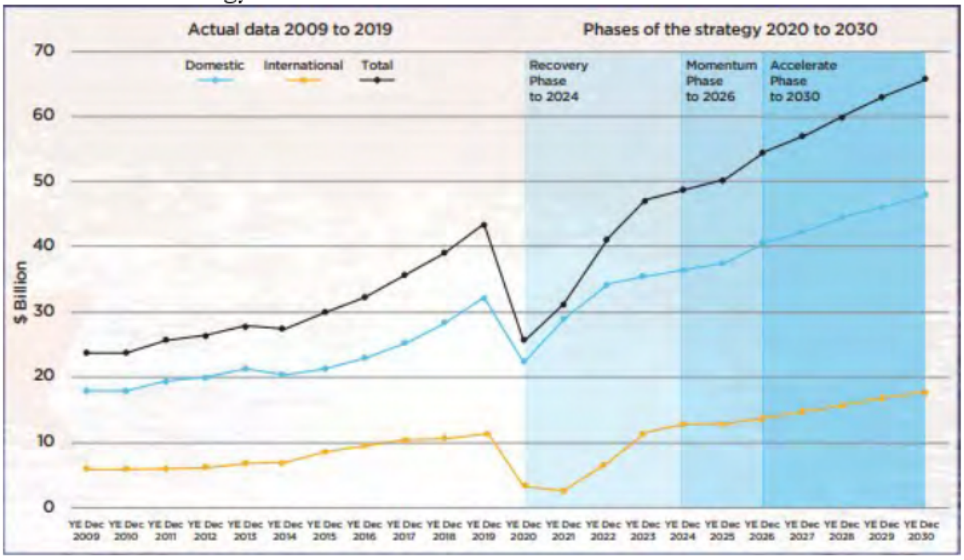
NSW Visitor Economy Strategy 2030

The NSW Visitor Economy Strategy 2030 (Destination NSW 2021) updates the Visitor Economy Industry Action Plan 2020 (2018) to include a post 2019-2020 bushfire and post-COVID response.

The NSW Government's vision is to be the premier visitor economy in the Asia Pacific contributing $65 billion in total visitor expenditure by 2030, with $25 billion in regional expenditure. The strategy includes 3 phases:

1. Recovery phase to 2024 - assist businesses and the industry to rebuild. The goal is to return total visitor expenditure to pre-COVID levels ($43 billion in 2019).
2. Momentum phase to 2026 - A number of major infrastructure projects will be completed during this period, including the new Western Sydney Airport in 2026. This will provide a major stimulus to grow and expand the visitor economy in NSW. Visitor expenditure is expected to grow strongly during this time to reach over $50 billion by 2026.
3. Accelerate phase to 2030 - By 2030, the momentum gained through the increased capacity and investment in the visitor economy over the previous phases will accelerate growth, with visitor expenditure targeted to reach $65 billion.

The following graphic from the report show the COVID impact and the proposed recovery outlined in the strategy.



The strategy includes 5 guiding principles:

1. Put the visitor first
2. Accelerate digital innovation
3. Lead with our strengths
4. Move fast, be responsive and agile, while taking a longer term view
5. Collaboration between the industry and government

The strategy also include 5 strategic pillars:

1. Road to recovery
2. Build the brand
3. Showcase our strengths
4. Invest in world-class events
5. Facilitate growth

The strategy has a focus on regional NSW, and notes "*ironically, the COVID-19 pandemic is creating a positive legacy for the visitor economies of regional NSW by encouraging Sydneysiders and NSW residents to explore their own backyard and return time and again".*

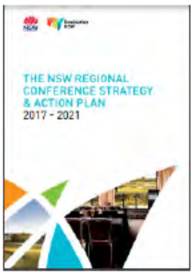
Strategic investments by the NSW Government, local councils and the private sector in visitor infrastructure, transport and destination marketing now and into the future will further enhance the appeal of regional NSW, aid its recovery in the near term and lay the foundation for richer economic and social benefits for decades to come.

The strategy proposes that the State attract 10 World Class events to NSW. The successful bid to host the 2022 UCI World Road Racing championship in September 2022, is one of the events, and will be held in Wollongong. The strategy notes events make a significant contribution to the NSW economy and support thousands of jobs.

Actions relevant to this accommodation review include:

- 1.05 - Secure new festivals, sporting events, blockbuster musicals, exhibitions and business events for Sydney and regional NSW to accelerate the sector's recovery, visitor numbers and expenditure.
- 1.09 - Deliver the NSW Government's 24-Hour Economy Strategy to grow the night-time economy.
- 1.16 - Invest in road networks, wayfinding and cruise and maritime infrastructure to deliver a quality visitor experience and encourage regional dispersal.
- 1.21 - Accelerate reform of planning processes, planning instruments and simplify licensing and regulatory processes to make it easier for investors and businesses to establish or expand their operations in NSW.
- 3.05 - Collaborate with the cruise sector to develop new opportunities for Sydney and regional NSW outlined in the Cruise Development Plan
- 3.06 - Grow NSW's share of international students and their visiting family and friends through collaboration and coordination with stakeholders in government, industry and the education sector.
- 4.02 - Secure and retain a calendar of world-class arts, entertainment, sport and business events to cement the state's position as the event capital of Australia.
- 4.03 - Create vibrant places and drive visitation by activating government-owned assets such as stadia, cultural institutions, parks and public spaces with compelling new event content.
- 4.04 - Invest in new sporting, arts, cultural and event infrastructure and facilities and new event content to optimise their utilisation.
- 4.08 - Incentivise domestic and international conference organisers to undertake delegate pre- and post-touring to destinations outside Sydney and hold satellite meetings in regional NSW.
- 4.09 - Secure and support conferences, incentive programs and corporate events for regional NSW to distribute the benefits of high yield business visitors across the state.
- 5.04 - Invest in new road and rail infrastructure to improve access to regional cities and towns.
- 5.05 - Ensure that visitor economy infrastructure needs are reflected in strategic land use plans and regional plans, for example, to ensure hotel supply meets future market demand.

The NSW Regional Conference Strategy and Action Plan 2017-2021



The NSW Regional Conferencing Strategy and Action Plan 2017 – 2021 (Destination NSW 2017) notes the NSW Regional Conferencing sector is a key part of the broader NSW Visitor Economy, and has the potential to bring significant economic and employment benefits to regional NSW. The business events sector generates $290 million in delegate expenditure, additional visitor expenditure of $11.6 million from pre and post conference touring and the employment of more than 2,300 people.

The Plan notes that in the last decade the number of visitor nights generated for regional NSW by business events has declined. Regional NSW's market share of the eastern seaboard (NSW, Victoria and Queensland) has been in decline, down from 13.1% in year end March 2007 to 11.5% in year end March 2017.

The Plan notes that some of the challenges to conferences occurring in regions include:

- Identifying potential business conference opportunities
- Lack of conference facilities that are equipped to cater for large conferences

- Lack of adequate, quality accommodation facilities
- Marketing conferences to build delegate numbers
- Major regions lacking qualified staff and/or a Convention Bureau to manage sales and bid activities

The Plan aims to address the challenges facing the NSW regional conferencing market and maximise the growth opportunities. The Plan aims to build capability, improve NSW's competitive position, stimulate demand and return the sector to growth.

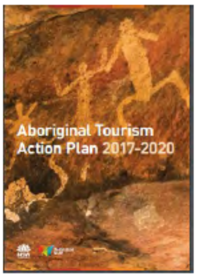
In terms of Wollongong, the Plan notes:

> *Wollongong has existing conference facilities and venues (e.g. Novotel Wollongong, North Beach Hotel and Sage Hotel) to attract conferences of up to 6,000 delegates, though the largest facility is the WIN Entertainment Centre which is in need of refurbishment. Services to the venue are rated highly due to its success in staging major sporting, arts and entertainment events. It has been proposed that a purpose-built conference centre will be built by upgrading the WIN Entertainment Centre or developing a new facility. Branded 4-5 star accommodation to support a facility of this type may also need to be considered to support delegations of 6000, depending on the market segment and target events to the facility.*
>
> *The University of Wollongong has new state-of-the art facilities that can cater for up to 1000 delegates; they also have off-season (educational period) capacity.*
>
> *There are also a number of branded properties in the region that can cater for events ranging from 100-200 people and 300-500 delegates.* (page 34)

Actions relevant to this accommodation review include:

- 13 - Support the NSW Government's Accommodation Supply Plan to ensure that Regional NSW has sufficient capacity to meet future demand for overnight visitor accommodation.

Aboriginal Tourism Action Plan 2017-2020



The Aboriginal Tourism Action Plan (Destination NSW 2017) is designed to provide NSW Aboriginal tourism operators and the wider tourism industry with a practical guide to Destination NSW's vision to support the development of Aboriginal tourism experiences and businesses in NSW.

The Action Plan 2017-2020 has a strong focus on trade and consumer promotion of NSW as a destination where Aboriginal culture is strong, vibrant and diverse. Goal to develop a sustainable Aboriginal tourism sector.

The Action Plan contains 24 actions to be completed under four major goals:

1. Continue to build consumer awareness of Sydney and Regional NSW as destinations where Aboriginal culture is strong, vibrant and diverse
2. Increase the inclusion of export-ready experiences in travel trade distribution networks and marketing programs
3. Develop new sustainable market-ready and export-ready Aboriginal cultural tourism products and events
4. Build on the success of cross-cultural exchange between NSW Aboriginal cultural tourism, Government and Destination Networks.

The Plan does not include any specific actions relevant to this accommodation review.

China Tourism Strategy 2012-20

The China Tourism Strategy 2012-20 report notes that China has been much heralded as a tourism source market for Australia, and NSW has had an active and successful presence in China for many years.

The report notes that changes in competition and market dynamics, and the NSW Government's goal to double the value of overnight visitor expenditure to NSW by the year 2020, have highlighted the need for expanded activities and new strategies.

Destination NSW intends to capitalise on the diverse opportunities on offer in China. Destination NSW intends to build new markets, support new products and services and develop our industry partnerships to ensure that NSW secures substantial market share and harnesses the potential of the China market.

The Plan does not include any specific actions relevant to this accommodation review.

NSW Cruise Development Plan

On 30 October 2016 Royal Caribbean's Radiance of the Seas was the first cruise ship to visit Wollongong's Port Kembla Harbour. Subsequently 5 cruise ships have visited Port Kembla for the day. The Norwegian Jewel was proposed to be the first cruise ship to start a voyage from Port Kembla on 13 January 2021, however cruising has been cancelled due to the COVID restrictions.

The development of the NSW Cruise Development Plan (NSW Department of Industry 2018) is an action recommended by the Visitor Economy Industry Action Plan (2018). According to the report, Australia has the world's highest cruise market penetration rate of 5.3 per cent, with 1.3 million Australians enjoying a cruise in 2016. In 2017, Sydney Harbour hosted 367 ship visit days by 50 different ships. By 2040 the number of passengers cruising through Sydney is expected to double.

The report notes that around 80 per cent of domestic passengers and 11 per cent of international passengers begin their cruise in Sydney before travelling to other locations, with passengers on average visiting 1.4 states across Australia during their stay. Additionally, 79 per cent of domestic and 33 per cent of international passengers end their cruise in Sydney, with 84 per cent of international visitors staying up to four nights in the city before or after their cruise.

The report is largely focused on Sydney. In terms of Port Kembla the report notes:

- The regional ports of Newcastle, Eden and more recently Port Kembla are increasingly being added to cruise itineraries. To further increase patronage to Port Kembla, consideration of enhanced onshore multi-purpose passenger facilities is required to provide better cruise operational requirements.
- Port Kembla can be used as a transit port, but would benefit from infrastructure to support cruise visit calls to welcome and process passengers
- Ensure cruise infrastructure is fit-for-purpose in Sydney and at major transit ports in Newcastle, Port Kembla, Eden and other potential locations along the NSW coast

- Local ambassador programs see hundreds of dedicated volunteers warmly greeting international and domestic passengers who arrive in Sydney, Newcastle, Eden and Port Kembla.

The Plan does not include any specific actions relevant to this accommodation review.

If Port Kembla is approved to transform from a "transit" port to a turn-around port (where some passengers alight to sight-see then return to the ship which then departs for its next destination), there would be a number of local benefits, including:

- Before and after cruise accommodation for passengers
- Provision of supplies and other consumables. Cruise ships require large volumes of produce at a consistent quality and competitive cost.
- Increased passenger visits to a port are more likely when visitors have a good port and destination experience.

Cruise Sydney and New South Wales – along the Blue highway

Released by Destination NSW and the Port Authority of NSW, the Cruise Sydney and New South Wales report (2019) describes NSW's nine cruise ports and their attractions. Port Kembla is listed as a major port capable of handling vessels over 300m in length and 10m in depth (draft). Kiama is listed as a minor port (vessels 200m in length).

The Plan does not include any specific actions relevant to this accommodation review.

2.2 Destination Sydney Surrounds South

Destination Sydney Surrounds South is one of 6 destination networks in NSW. Destination Networks work with Destination NSW and a range of stakeholders to facilitate visitor economy growth at the local level by representing and co-ordinating the region's tourism industry.

The Destination Sydney Surrounds South zone encompasses 6 local government areas including; Kiama Shellharbour, Shoalhaven, Wingecarribee, Wollondilly and Wollongong. 11.3 million people visit the Destination Sydney Surrounds South zone each year, these being a blend of domestic and international day and overnight visitors.

Destination Sydney Surrounds South mission is to achieve $2 billion in overnight visitor expenditure in the Destination Sydney Surrounds South zone by 2022, in collaboration with industry. This requires 5% year-on-year growth between 2017 and 2022.

Destination Management Plan 2018

The Destination Management Plan prepared by Destination Sydney Surrounds South aims to achieve the organisation's mission to achieve increased overnight visitor expenditure. Destination Management Plan provides a coordinating framework for LGA Destination Management Plans and focuses on the actions required at the regional level to encourage and facilitate product, infrastructure and market development that will deliver sustainable growth

The Plan includes that following guiding principles:

- Protecting the region's environmental, cultural and community values to deliver authentic experiences;
- Growing the value and levels of shoulder/off-peak travel over a focus on volume alone;
- Encouraging dispersal across the destination geographically and across the year;
- Encouraging public and private sector investment in quality experiences; and
- Evidence-based decision making (evaluation and data).

The report notes that business events and conferences from large to small have the ability to drive visitation, particularly mid-week and out of peak season and;

- Are generally high yield
- Fill mid-week accommodation vacancies
- Encourage repeat visitation
- Enable packaging of experiences for attendees to extend stays pre and post event

The continued growth of the business events market in the zone requires a considered approach to targeting events that match supply, and developing infrastructure that supports growth, in particular the development of the Wollongong Convention Centre and surrounding accommodation

Actions relevant to this accommodation review include:

- 4.1 - Advocate for State and Local Government Planning Schemes to provide certainty for tourism investment.
- 4.6 - Work with NPWS and Councils to develop a 'pop-up' accommodation policy for on and near park locations.
- 5.3 - Support the development of local events into high profile signature events for the region.

NSW South Coast Marine Tourism Strategy

The NSW South Coast Marine Tourism Strategy (State of NSW 2019) outlines a 20-year vision to realise the economic benefits of marine tourism in the region. It describes how government and industry can work together to develop, market and leverage marine tourism opportunities.

The reports notes that the majority of visitors to the South Coast are domestic overnight (38%), or daytrip visitors (60%), with few international overnight visitors (2%). Wollongong accounts for the region's largest proportion of visitors (34%), and 23.3% of the expenditure. The report notes that visitation to the region is expected to grow to 14 million visitors by 2030, a 2.7% average increase per year. Day visits and peak season visitation will continue to be key area for growth.

The strategy aims to grow tourism yield through the delivery of its action plan. Actions contained within the strategy include regional marketing campaigns, online information resources, targeted harbour activation, and the development of marine-based tourism experiences along the NSW South Coast.

Actions relevant to this accommodation review include:

- 1.3 - Continue to prioritise the development of mid-week and shoulder season events and experiences, including regattas and arts and culture based events, in areas within close proximity to the Canberra and Sydney visitor markets.
- 3.3 - Establish a strategy to drive incremental increases in cruise ship arrivals along the South Coast over five years.
- 4.3 – Explore opportunities to enhance coastal touring experiences by: identifying infrastructure upgrades required to enhance the touring experience, including improving accessibility, lookouts, parking, signage, telecommunications and interactive technologies.
- 4.7 - Explore opportunities to establish new eco-accommodation in National Parks along the South Coast.

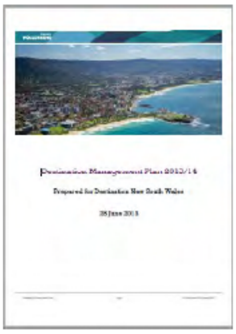
2.3 Destination Wollongong

Destination Wollongong (previously Tourism Wollongong) has delivered tourism services on behalf of Wollongong City Council since 1979. Council has provided financial assistance for tourism services, both in the form of direct monetary assistance and in-kind assistance.

On 20 April 2021 Council resolved to enter into a new 5 year funding arrangement with Destination Wollongong, until 30 June 2026. The funding agreement will specify the activities to be delivered by Destination Wollongong, including:

- Destination Marketing
- Major Events
- Business Visitor Economy
- Support growth in tourist related infrastructure/new product development
- Cycling.

Destination Management Plan 2013/14



Prepared under the NSW Visitor Economy Industry Action Plan 2020 and South Coast Destination Management Plan, the Destination Management Plan provided 7 short term priorities for 2013/14:

1. Grow Asian inbound visitation to Wollongong – particularly China
2. Focused marketing of the Grand Pacific Drive in key markets
3. Expand scope of Visitor Information Services to increase length of stay across the South Coast region.
4. Target grown in high yield business event markets
5. Drive visitation through a vibrant event program
6. Establish the foundations for a destination relaunch
7. Identify key infrastructure and investment required for destination enhancement.

As the document was prepared for 2013/14 many of the goals and activities are no longer current. Similarly, the tourism visitation and accommodation data used in the report is now dated and is not quoted.

Destination Development Plan 2014

Prepared by consultants for Destination Wollongong, Destination Development Plan is intended to be an overtly 'outward looking' or aspirational document

The Plan notes that Wollongong is ideally placed to capture the opportunities presented by a range of global trends such as Asian Century, Seniors Market, Nature based tourism and eco-tourism, Surf tourism Cultural and heritage tourism. Wollongong has an array of assets that have appeal to an equally diverse range of market segments and special interest groups. The key strengths of the region are:

- Unique and differing landscapes
- Proximity to Sydney International Airport and to Canberra
- Grand Pacific Way
- Wollongong's beaches
- South Coast Rail line connects most of the region together and
- The region has a diverse cultural community.

The Plan divides the LGA into 8 distinct tourism precincts, and notes attractions, rates accommodation and nominates key projects within each. These are from north to south:

1 Helensburgh and the Royal National Park
2 Northern Villages
3 Coastal Beaches
4 Education Precinct
5 Wollongong City, Wollongong Harbour and the Blue Mile
6 Lake Illawarra
7 Industry
8 Rural Landscape

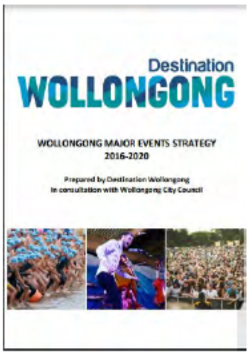
As the document was prepared in 2014, the tourism visitation and accommodation data used in the report is now dated and is not quoted.

Actions relevant to this accommodation review include:

- Sites should be set aside within Wollongong for tourism projects (or a mixed-use that includes tourism) and regulatory and planning approvals should be cleared for tourism projects at those sites. These sites should include both private and public lands.
- Development incentives such as increased floor space and building height and reduced parking should be provide for *bona-fide* tourism operations that are proposed in accordance with this plan. Similarly, tourism land uses should be permissible in most zones especially zones applying to the foreshore and the Illawarra Escarpment.
- Consider the opportunity to facilitate short term visitor accommodation on Crown land and pursue appropriate investigation and planning for identified sites with a view to attracting joint venture or project partners.

- Adopt a site specific approach to allow additional permissible uses over SP3 Tourist zoned sites in keeping with the surrounding and desired development mix. Council should also consider adopting a limited mix of residential and commercial permissibility into the SP3 Tourist zoning.
- Acknowledge that competing land use is a major risk to an ongoing tourism industry and that a role exists to protect such lands.
- Consider specific planning proposals as they arise for developments containing genuine short term visitor accommodation where its use is considered sensible, but where zoning precludes such elements.
- Consider offering rebates on council rates and on any ongoing council levies for new developments containing genuine short term visitor accommodation.
- Consider specific incentives for new developments containing genuine short term visitor accommodation.
- Support the State government in the preparation of the NSW Visitor Accommodation Supply Plan.
- Consider Council owned sites for more detailed planning processes with a view to advancing the business case and master plan, suitable for attracting joint venture partners.
- Review holdings of government land and buildings to identify sites that could be appropriate for tourism investment. The merit of converting identified sites to tourism use should be assessed based on the costs and benefits of this strategy compared with unchanged use.
- When using government land for tourism development, lease holdings should be offered over a very long term (99 years) at a cost that may be less than the rate that would be achievable for a non-tourism use.

Wollongong Major Events Strategy 2016-2020



The Wollongong Major Events Strategy 2016-2020 (Destination Wollongong 2016) notes that major events acquisition is aa core pillar in driving the visitor economy. Events are immediate and economic, providing instant return and opportunities for unskilled labour. Furthermore, they provide a mechanism for attracting visitors without the need for expensive infrastructure.

The mission is "*to host major events that showcase the region's strengths, deliver strong economic return and enhance Wollongong's reputation*".

The aims are:

1. To achieve staged growth as a core pillar of the visitor economy
2. Deliver on reputational reward that complements Wollongong's brand values
3. Align with the city's strategic imperatives and product development aspirations
4. Secure staged investment to rival comparable regional cities
5. Demonstrate the most "user-friendly" application process of any Council in Australia

An 'Events Pyramid' provides strategic direction on the number, scale and type of events to be acquired, retained and/or developed.

Priority event sectors identified are:

- Adventure
- The Arts
- Innovation
- Sport
- Food and Beverage
- Motoring

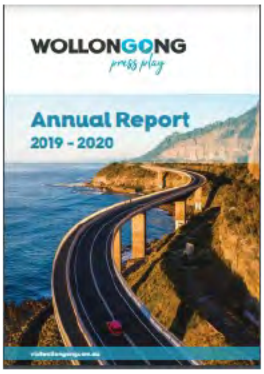
The 2022 UCI World Road Riding Championships will be a signature event.

The report notes that while coastal cities are generally at capacity during the summer school holidays, Wollongong has about 1800 additional beds in the market place with the university accommodation becoming available.

Actions relevant to this accommodation review include:

- Flatten the summer spike by targeting shoulder and low season events, so as to avoid accommodation bottlenecks and provide sustained income for local businesses
- Use major events to convert the engaged and growing daytripper market of 3.6 million visits annually to help boost overnight visitation
- Prioritise multi-day events, given objectives for overnight visitation, with exhibitions and long-form festivals and tournaments to be targeted. Events that can illustrate a minimum threshold of 400 bed nights to be targeted, unless significant reputational reward or winter scheduling is achieved
- Align with the city's economic development goals, strategic development and potential tourism product/infrastructure development to identify and undertake legacy projects

Annual Report 2019-2020



Destination Wollongong's Annual Report 2019-2020 notes the challenges of 2019-20 with Bushfires, floods and the COVID-19 pandemic.

In November 2019 Destination Wollongong launched its Wollongong *Press Play* new Brand for Wollongong. The brand was supported by a suite of seven video assets addressing different industry sectors, a new website, dedicated social media campaign, Illawarra Mercury wrap and a logo. The COVID shutdown of the tourism industry resulting in the brand pivoting to 'Press Pause' messaging across social media and television advertisements.

The Annual Reports notes that Wollongong hosted a number of events, prior to the COVID shutdown, including the Australian Motorcycle Festival, Australian Supercross Championships, Super Rugby Match and Tribal Clash. Destination Wollongong worked closely with Cycling Australia in preparation for the 2022 UCI Road World Championships.

2.4 COUNCIL DOCUMENTS

Our Wollongong 2028: Community Strategic Plan (2019)

The Our Wollongong 2028: Community Strategic Plan (2019), is a whole of community plan, in which all levels of government, business, educational institutions, community groups and individuals have an important role. The Community Strategic Plan outlines the community's main priorities and aspirations for the future and includes strategies for how we will achieve them. While Council has a custodial role in initiating, preparing and maintaining the Community Strategic Plan on behalf of the Local Government Area, it is not wholly responsible for its implementation. Other partners, such as state agencies and community groups may also be engaged in delivering the long-term objectives of the Community Strategic Plan.

The Plan includes the following overall Community Vision for the LGA:

> *From the mountains to the sea, we value and protect our natural environment and we will be leaders in building an educated, creative and connected community.*

The Plan indicates that to support the achievement of our community vision, collaborative efforts will focus on six interconnected goals:

1. *We value and protect our environment*
2. *We have an innovative and sustainable economy*
3. *We have a creative, vibrant city*
4. *We are a connected and engaged community*
5. *We have a healthy community in a liveable city*
6. *We have affordable and accessible transport*

Under each Goal, the Plan contains objectives, strategies and specific actions to be undertaken by Council, the State and community groups.

The following graphic shows Council's Strategic Planning Framework - how actions in the Community Strategic Plan result in the preparation of studies and strategies (informing and supporting documents – as listed above), that then guide Council's Delivery Program and then implementation.

The preparation of the Tourism Accommodation Review is a project listed in the Delivery Program and Operational Plan.

Economic Development Strategy 2019-29

On 23 September 2019 Council adopted the Economic Development Strategy 2019-2029. This is the key document that will drive a prosperous region.

The *Economic Development Strategy 2019-29* includes a number of 'potential game changers' – significant projects or activities that could have a major impact on Wollongong's labour market if delivered. One of these includes attracting more major events and tourism infrastructure to Wollongong. Hosting more and higher profile events would deliver both short and long term benefits to Wollongong, including supporting those in the accommodation, food and beverage and transport sectors.

The Strategy notes that Wollongong currently has around 2000 beds available each night (within 30 minutes of the CBD). The Strategy notes that Destination Wollongong is concerned about the immediate loss of 150 beds and the loss of up to 400 beds over the next 5 years.

Actions relevant to this accommodation review include:

- Undertake a Tourism Lands Review in order to investigate the use of tourism-specific zoning on key coastal sites to ensure the provision of sufficient beds in Wollongong to support a growing visitor economy

3. LAND USE CONTROLS

3.1 Land Use Definitions and Development Standards

Wollongong Local Environmental Plan (LEP) 2009 includes a series of definitions for tourist accommodation which are derived from the Standard LEP Instrument. The Local Environmental Plan (LEP) is a legal document which sets out development controls and zoning provisions for a local government area.

The *Wollongong LEP 2009* defines 'tourist and visitor accommodation' as:

> ***tourist and visitor accommodation*** *means a building or place that provides temporary or short-term accommodation on a commercial basis, and includes any of the following:*
> *(a) backpackers' accommodation,*
> *(b) bed and breakfast accommodation,*
> *(c) farm stay accommodation,*
> *(d) hotel or motel accommodation,*
> *(e) serviced apartments,*
> *but does not include:*
> *(f) camping grounds,*
> *(g) caravan parks, or*
> *(h) eco-tourist facilities.*

Land uses that are included within the 'tourist and visitor accommodation' definition are each defined separately as follows:

> ***backpackers' accommodation*** *means a building or place that:*
> *(a) provides temporary or short-term accommodation on a commercial basis, and*
> *(b) as shared facilities, such as a communal bathroom, kitchen or laundry, and*
> *(c) provides accommodation on a bed or dormitory-style basis (rather than by room).*

> ***bed and breakfast accommodation*** *means an existing dwelling in which temporary or short-term accommodation is provided on a commercial basis by the permanent residents of the dwelling and where:*
> *(a) meals are provided for guests only, and*
> *(b) cooking facilities for the preparation of meals are not provided within guests' rooms, and*
> *(c) dormitory-style accommodation is not provided.*

> ***hotel or motel accommodation*** *means a building or place (whether or not licensed premises under the* Liquor Act 2007*) that provides temporary or short-term accommodation on a commercial basis and that:*
> *(a) comprises rooms or self-contained suites, and*
> *(b) may provide meals to guests or the general public and facilities for the parking of guests' vehicles,*
> *but does not include backpackers' accommodation, a boarding house, bed and breakfast accommodation or farm stay accommodation.*

> ***serviced apartment*** *means a building (or part of a building) providing self-contained accommodation to tourists or visitors on a commercial basis and that is regularly serviced or cleaned by the owner or manager of the building or part of the building or the owner's or manager's agents.*

Other tourism accommodation land uses that are defined in Wollongong LEP 2009, that are not part of 'tourist and visitor accommodation' definition are:

> ***camping ground*** *means an area of land that has access to communal amenities and on which campervans or tents, annexes or other similar portable and lightweight temporary shelters are, or are to be, installed, erected or placed for short term use, but does not include a caravan park.*
>
> ***caravan park*** *means land (including a camping ground) on which caravans (or caravans and other moveable dwellings) are, or are to be, installed or placed.*
>
> ***eco-tourist facility*** *means a building or place that:*
> *(a) provides temporary or short-term accommodation to visitors on a commercial basis, and*
> *(b) is located in or adjacent to an area with special ecological or cultural features, and*
> *(c) is sensitively designed and located so as to minimise bulk, scale and overall physical footprint and any ecological or visual impact.*
> *It may include facilities that are used to provide information or education to visitors and to exhibit or display items.*
>
> ***farm stay accommodation*** *means a building or place that provides temporary or short-term accommodation to paying guests on a working farm as a secondary business to primary production.*

Note – camping grounds and eco-tourist facilities were not included as tourism definitions when the Wollongong LEP 2009 was notified in 2010. The uses were introduced into the LEPs through the amendments to the Standard LEP Instrument in June 2011. At that time camping grounds became a permissible use in the RE1 Public Recreation, RE2 Private Recreation and SP3 Tourism zone. Eco-tourism facilities is not permissible in any zone. Council will need to determine in which zones (if any) the use should be permissible.

Clause 5.4 of *Wollongong LEP 2009* contains the following development standards that relate to some of the tourism accommodation uses:

> ***5.4 Controls relating to miscellaneous permissible uses***
>
> ***(1) Bed and breakfast accommodation***
>
> *If development for the purposes of bed and breakfast accommodation is permitted under this Plan, the accommodation that is provided to guests must consist of no more than 3 bedrooms.*
>
> ….
>
> ***(5) Farm stay accommodation***
>
> *If development for the purposes of farm stay accommodation is permitted under this Plan, the accommodation that is provided to guests must consist of no more than 3 bedrooms.*

The amended Standard Instrument contains the Clause 5.13 for Eco-tourist facilities which is required to be included in an LEP if eco-tourist facilities are permitted.

> ***5.13 Eco-tourist facilities***
> *(1) The objectives of this clause are as follows:*
> *(a) to maintain the environmental and cultural values of land on which development for the purposes of eco-tourist facilities is carried out,*

(b) to provide for sensitively designed and managed eco-tourist facilities that have minimal impact on the environment both on and off-site.

(2) This clause applies if development for the purposes of an eco-tourist facility is permitted with development consent under this Plan.

(3) The consent authority must not grant consent under this Plan to carry out development for the purposes of an eco-tourist facility unless the consent authority is satisfied that:

(a) there is a demonstrated connection between the development and the ecological, environmental and cultural values of the site or area, and

(b) the development will be located, constructed, managed and maintained so as to minimise any impact on, and to conserve, the natural environment, and

(c) the development will enhance an appreciation of the environmental and cultural values of the site or area, and

(d) the development will promote positive environmental outcomes and any impact on watercourses, soil quality, heritage and indigenous flora and fauna will be minimal, and

(e) the site will be maintained (or regenerated where necessary) to ensure the continued protection of natural resources and enhancement of the natural environment, and

(f) waste generation during construction and operation will be avoided and that any waste will be appropriately removed, and

(g) the development will be located to avoid visibility above ridgelines and against escarpments and from watercourses and that any visual intrusion will be minimised through the choice of design, colours materials and landscaping with local indigenous flora, and

(h) any infrastructure services to the site will be provided without significant modification to the environment, and

(i) any power and water to the site will, where possible, be provided through the use of passive heating and cooling, renewable energy sources and water efficient design, and

(j) the development will not adversely affect the agricultural productivity of adjoining land, and

(k) the following matters are addressed or provided for in a management strategy for minimising any impact on the natural environment:

(i) measures to remove any threat of serious or irreversible environmental damage,

(ii) the maintenance (or regeneration where necessary) of habitats,

(iii) efficient and minimal energy and water use and waste output,

(iv) mechanisms for monitoring and reviewing the effect of the development on the natural environment,

(v) maintaining improvements on an on-going basis in accordance with relevant ISO 14000 standards relating to management and quality control.

The issues associated with Eco-tourism are discussed later in this report.

On 9 April 2021, the NSW Department of Planning, Industry and Environment published an amendment to SEPP Affordable Rental Housing, to introduce provisions for Short-term rental accommodation.

The use is defined as:

> ***short-term rental accommodation*** *means a dwelling used by the host to provide accommodation in the dwelling on a commercial basis for a temporary or short-term period.*

The SEPP also defines hosted and non-hosted short-term rental accommodation as:

> ***hosted short-term rental accommodation*** *means short-term rental accommodation provided where the host resides on the premises during the provision of the accommodation.*

> ***non-hosted short-term rental accommodation*** *means short-term rental accommodation provided where the host does not reside on the premises during the provision of the accommodation.*

From 30 November 2021, short-term rental accommodation will be permissible as exempt development, as either hosted or non-hosted, subject to the following requirements listed in the SEPP:

(a) *the* ***dwelling must have been lawfully constructed*** *to be used for the purpose of residential accommodation, and*
(b) *the dwelling must comprise, or be part of, residential accommodation other than the following—*
  (i) *a boarding house,*
  (ii) *a group home,*
  (iii) *a hostel,*
  (iv) *a rural workers' dwelling,*
  (v) *seniors housing, and*
(c) *the type of residential accommodation that the dwelling comprises, or is part of, must be permitted with or without development consent on the land on which the dwelling is located, and*
(d) *the* ***dwelling must be registered*** *on the register established under clause 186X of the Environmental Planning and Assessment Regulation 2000, and*
(e) *the dwelling must not be, or be part of, refuge or crisis accommodation provided by—*
  (i) *a public or local authority, including the Department of Communities and Justice, the New South Wales Land and Housing Corporation or the Aboriginal Housing Office, or*
  (ii) *any other body funded wholly or partly by the Commonwealth or the State, and*
(f) *if the dwelling is classified under the Building Code of Australia as class 1b or class 2–9—*
  (i) *the dwelling must have a current fire safety certificate or fire safety statement, or*
  (ii) *no fire safety measures are currently implemented, required or proposed for the dwelling, and*
(g) *the use of the dwelling for the purposes of short-term rental accommodation must otherwise be lawful, (eg under building strata laws or conditions of development consent) and*
(h) *the dwelling must not be a moveable dwelling within the meaning of the Local Government Act 1993.*

The issues associated with short-term rental accommodation are discussed later in this report.

3.2 SP3 Tourist Zone

The *Wollongong Local Environmental Plan (LEP) 2009* includes the SP3 Tourist zone. The objective of the SP3 Tourist zone is, "*To provide for a variety of tourist-oriented development and related uses*".

There are 26 areas (127 lots) zoned SP3 Tourist within the Wollongong LGA, covering an area of 116 hectares (Figure 3.2, Table 3.1 and Appendix 1). The individual lots range in size from 3.4m^2 to 15 hectares and have an average area of 0.9 hectares. Many tourism areas contain multiple lots, that create a larger site area. Figure 3.1 shows the lot size distribution. Table 3.1 shows the distribution of the SP3 Tourist zone by suburb. Appendix 1 includes an air photo, address, lot size, current use and ownership of each site.

A land use survey has been completed to identify land uses current land uses that are occurring within sites zoned SP3 Tourist. It was found that in many locations, sites zoned for tourism purposes were not occupied by tourist-related uses. Only a very limited number of sites were being utilised for tourist accommodation purposes. This indicates a relatively small number of sites zoned SP3 - Tourist are being utilised for tourist accommodation development catering for the holiday/leisure market and overnight visitors to the region.

The land uses include:

- 4 Tourist Parks:
  - owned by Council, Bulli, Corrimal and Windang
  - privately owned Surf Leisure Resort at Towradgi
- 5 Escarpment Lookouts –
  - Panorama house (private),
  - Sublime Point (Crown land)
  - Cliff hanger (Crown land)
  - Gateway Visitor centre (Crown land) and
  - part of Mt Keira Summit Park (Council land).
- 3 Hotels:
  - the Novotel at North Wollongong
  - Headlands Hotel at Austinmer
  - Quality Suites at Fairy Meadow
- 2 Motels
  - Solomon Inn at Figtree
  - Fairways at Primbee
- 3 Licensed Clubs
  - Hellenic Centre at Figtree
  - Western Suburbs leagues Club at Unanderra
  - Woonona-Bulli RSL club at Woonona
- 2 Pub Hotels
  - Dapto Dandaloo Hotel at Brownsville
  - Lake Illawarra Hotel at Windang
- 2 Tourism Attractions
  - Symbio Wildlife Park at Helensburgh
  - The Win Entertainment Centre and Football Stadium
- Residential apartment buildings
- Retail premises
- Vacant land

Figure 3.1 Lot size distribution

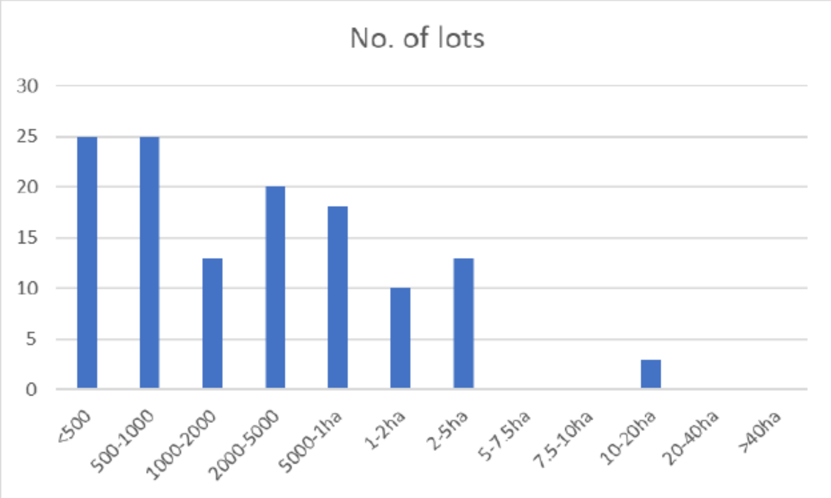
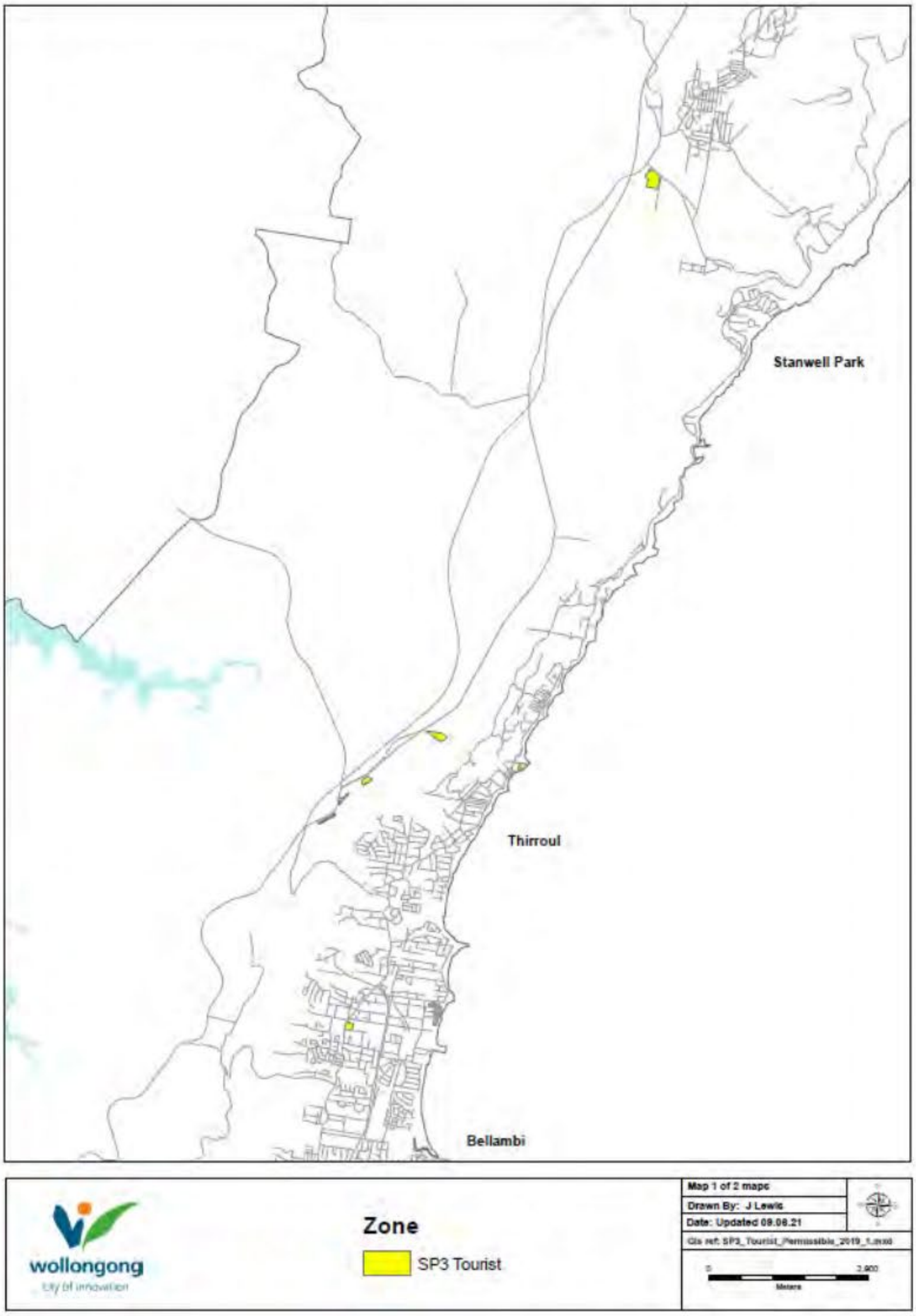


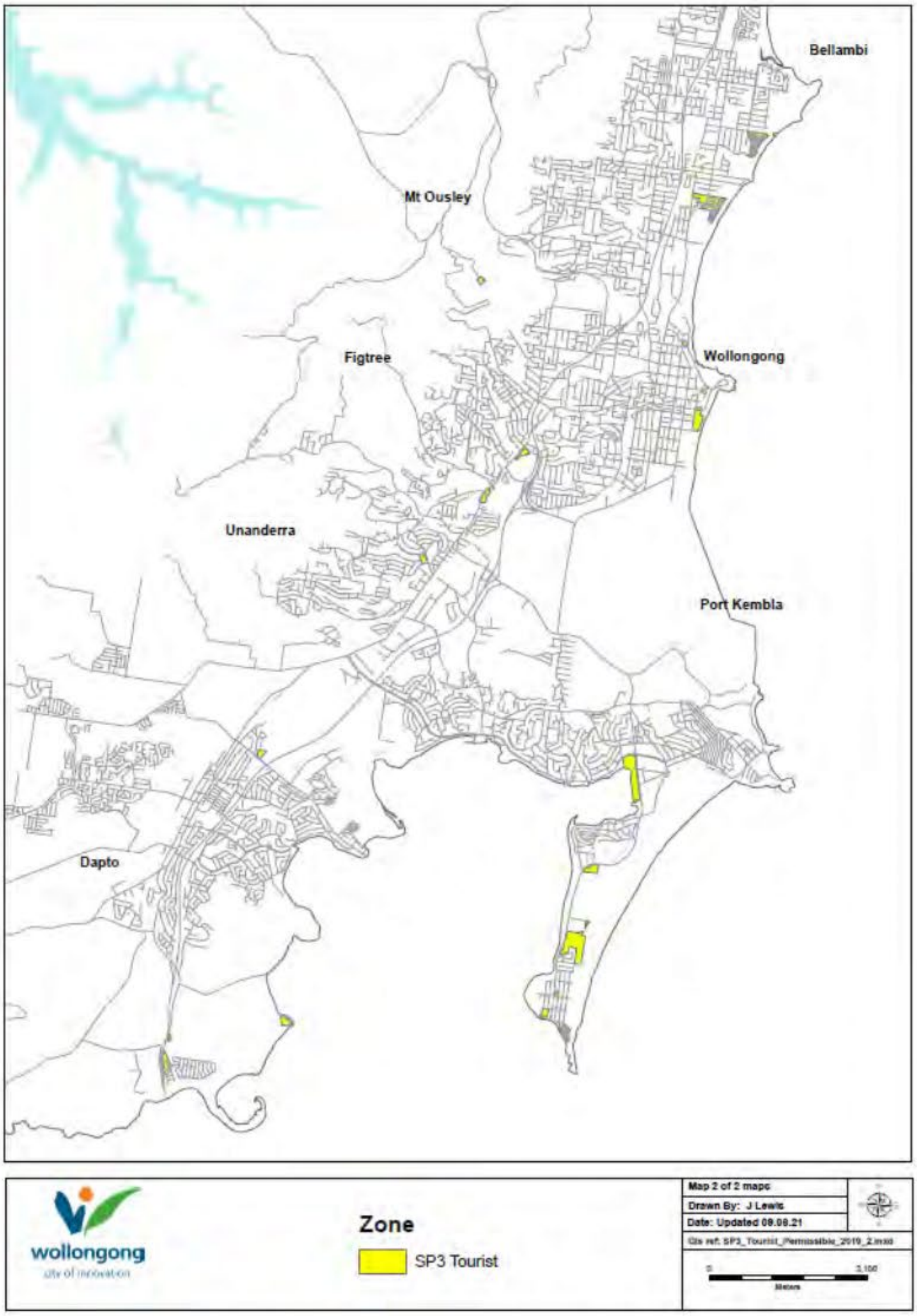
Table 3.1 Distribution of SP3 Tourist Zone by suburb

Suburb	No of lots	Area (ha)
AUSTINMER	2	1
BROWNSVILLE	1	2
BULLI	1	3
EAST CORRIMAL	1	10
FAIRY MEADOW	5	15
FIGTREE	5	3
HAYWARDS BAY	9	3
HELENSBURGH	4	7
MADDENS PLAINS	7	7
MOUNT KEIRA	1	1
NORTH WOLLONGONG	1	1
PRIMBEE	9	3
UNANDERRA	19	2
WARRAWONG	5	16
WEST WOLLONGONG	6	2
WINDANG	28	24
WOLLONGONG	14	6
WOONONA	7	9
YALLAH	2	3
Total	**127**	**116**

The largest area zoned for tourism occur along the Lake Illawarra at Kully Bay / Griffiths Bay at Warrawong. At Windang there are 4 areas zoned SP3 Tourism. In the northern coastal villages, the Headlands Hotel site at Austinmer, is the only site zoned SP3 Tourist located close to the foreshore.

Figure 3.2 SP3 Tourist zone locations




Bellambi
Mt Ousley
Wollongong
Figtree
Unanderra
Port Kembla
Dapto
wollongong
city of innovation
Zone
SP3 Tourist
Map 2 of 2 maps
Drawn By: J Lewis
Date: Updated 09.06.21
0
3,100
Meters

The SP3 Tourist zone permits Tourist and Visitor Accommodation, as well as facilities/uses which support the tourism industry (Table 3.2). The SP3 Tourist zones offer protection to existing tourist developments by restricting the permissible land uses. The zoning of land SP3 Tourist ensures that land identified as having strategic potential for tourist development is not utilised to provide housing; and as such residential development is prohibited.

Table 3.2 SP3 Tourist zone land use table

	Land use
Development Permitted without consent:	Building identification signs; Business identification signs
Development Permitted with consent:	Advertising structures; Amusement centres; Aquaculture; Boat building and repair facilities; Boat sheds; Camping grounds; Caravan parks; Cellar door premises; Charter and tourism boating facilities; Centre-based child care facilities; Community facilities; Entertainment facilities; Food and drink premises, Function centres; Information and education facilities; Kiosks; Marinas; Markets; Moorings pens; Moorings; Neighbourhood shops; Recreation areas; Recreation facilities (indoor); Recreation facilities (major); Recreation facilities (outdoor); Registered clubs; Respite day care centres; Roads; **Tourist and visitor accommodation**; Water recreation structures
Prohibited:	All other land uses

Tourism accommodation uses are also permissible in a number of other land use zones as shown in Table 3.4.

2.3 Permissibility of Tourism Accommodation Uses

Tourist developments and tourist-related development are permissible uses within a number of land use zones. Table 3.3 indicates the permissibility of tourism accommodation in each land use zone. The following maps (Figure 3.3 – 3.9) illustrate this data graphically, showing areas where each tourism accommodation land use is permissible (subject to development approval).

The Land Use summary table (Table 3.3) and the following Figures highlight that tourism accommodation uses are permitted throughout multiple land use zones in the LGA, and not just restricted to the SP3 Tourist zone.

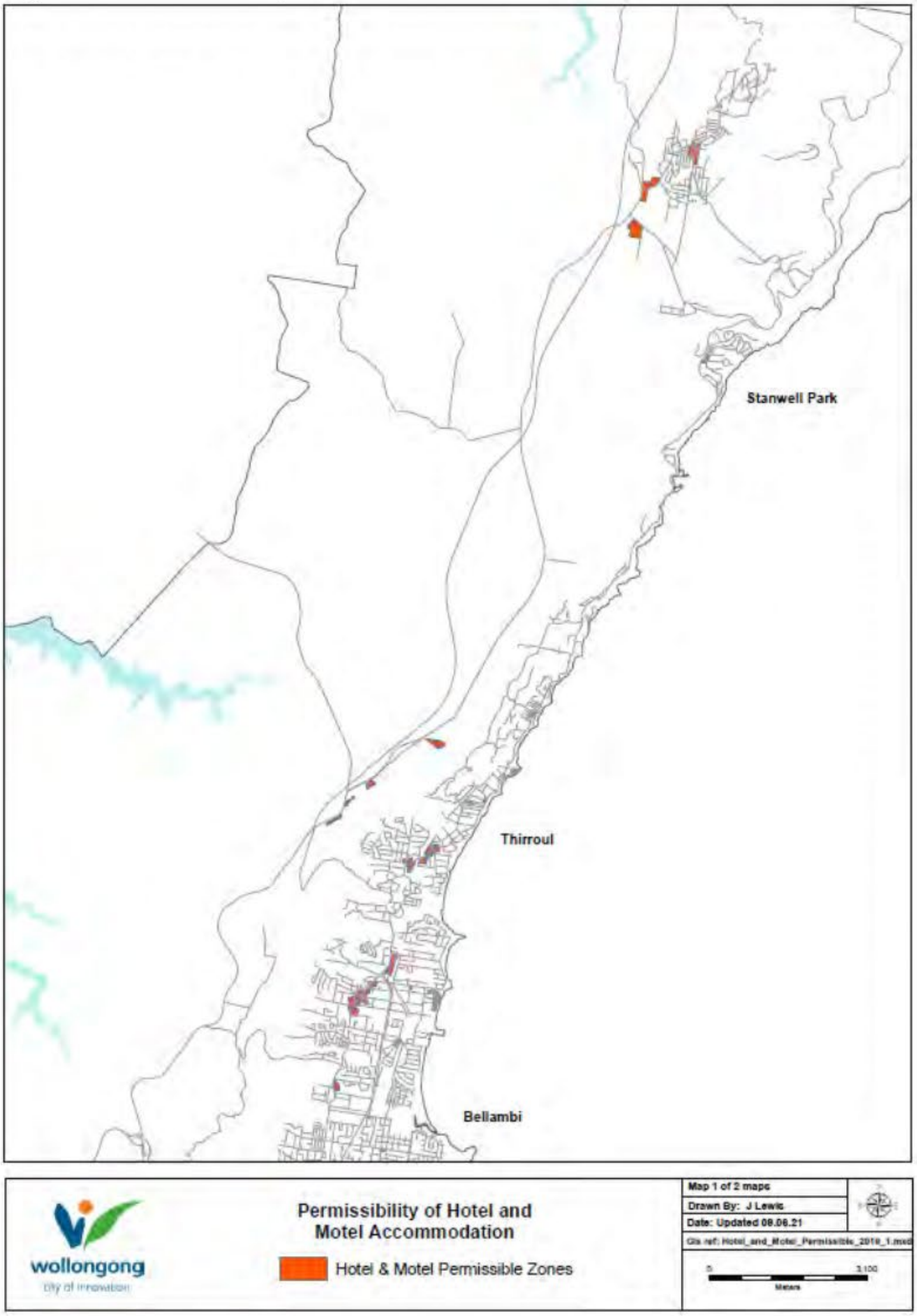
The table and maps excludes the E1 National Parks and Nature Reserves zone, which applies to land managed by the NSW National Parks and Wildlife Service (NPWS), such as the Royal National Park, Heathcote National Park, Dharawal National Park, Garrawarra State Conservation Area, and Illawarra Escarpment State Conservation Area. Land uses and development, including visitor accommodation, within National Parks and Nature Reserves is subject to the NSW National Parks and Wildlife Act 1974 and needs to be consistent with a NPWS Plan of Management for the Reserve. Camping is permitted at nominated locations within some reserves.

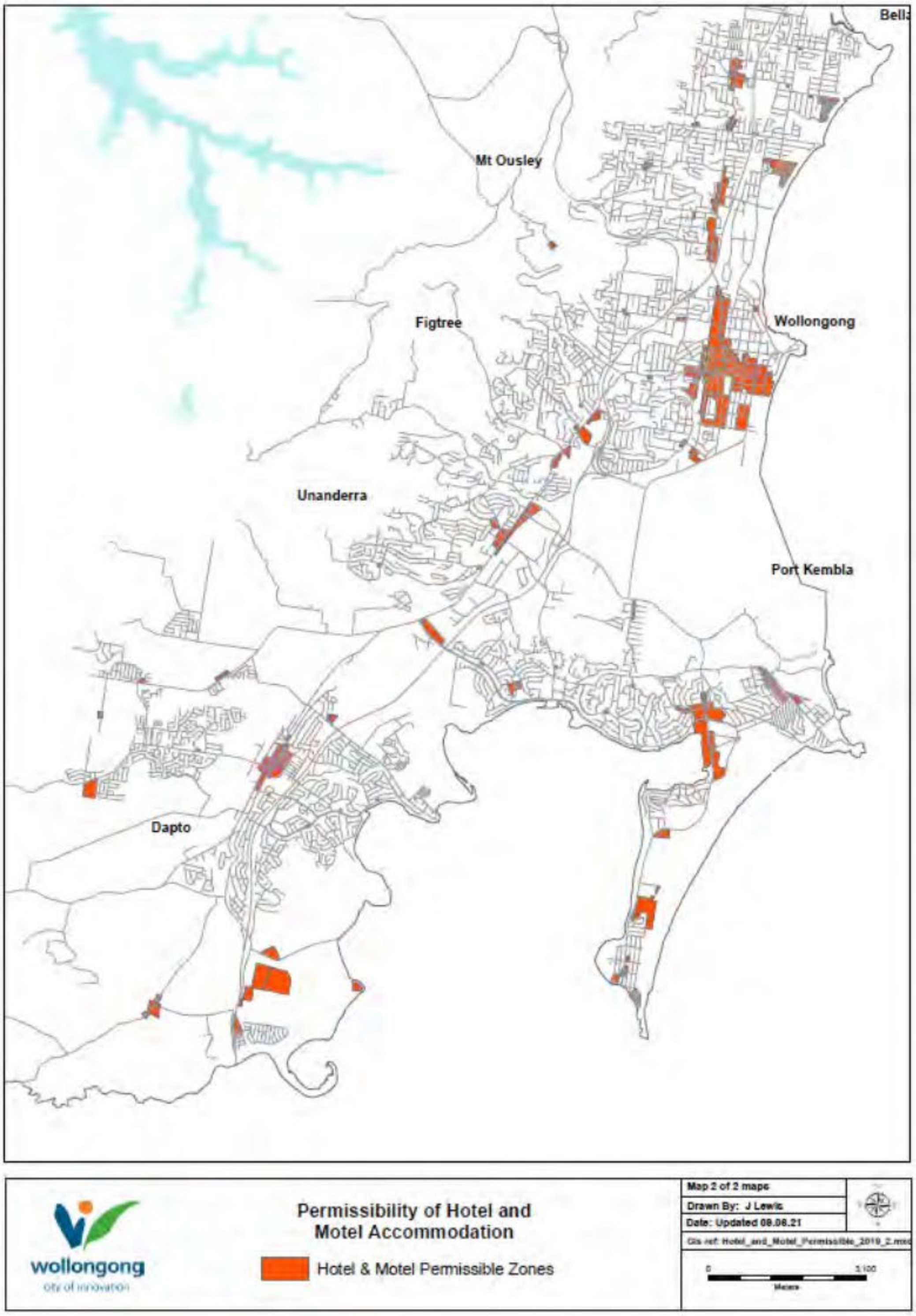
Table 3.3 Permissibility of Tourist Accommodation across Land Use Zones

	Rural			Residential					Business						Industrial				SP			Recr'n		Env Prot'n			Waterways		
	Primary Production	Rural Landscape	Primary Production Small Lots	General Residential	Low Density Residential	Medium Density Residential	High Density Residential	Large Lot Residential	Neighbourhood centre	Local centre	Commercial Core	Mixed Use	Enterprise corridor	Business Park	General Industrial	Light Industrial	Heavy Industrial	Working Waterfront	Special Activities	Infrastructure	Tourist	Public Recreation	Private Recreation	Environmental conservation	Environmental Management	Environmental Living	Natural Waterways	Recreational Waterways	Working Waterways
	RU1	**RU2**	**RU4**	**R1**	**R2**	**R3**	**R4**	**R5**	**B1**	**B2**	**B3**	**B4**	**B6**	**B7**	**IN1**	**IN2**	**IN3**	**IN4**	**SP1**	**SP2**	**SP3**	**RE1**	**RE2**	**E2**	**E3**	**E4**	**W1**	**W2**	**W3**
Tourist and Visitor Accommodation	x	x	x	x	x	x	x	x	x	c	c	c	x	x	x	x	x	x	x	x	c	x	x	x	x	x	x	x	x
Hotel or Motel accommodation	x	x	x	x	x	x	x	x	c	c	c	c	c	c	x	x	x	x	x	x	c	x	x	x	x	x	x	x	x
Serviced apartments	x	x	x	c	x	c	c	x	x	c	c	c	c	x	x	x	x	x	x	x	c	x	x	x	x	x	x	x	x
Bed & Breakfast accommodation	x	c,E	c,E	c,E	c,E	c,E	c,E	c,E	c, E	c,E	c,E	c,E	x	x	x	x	x	x	x	x	c,E	x	x	x	c,E	c,E	x	x	x
Backpackers' accommodation	x	x	x	x	x	c	c	x	c	c	c	c	x	x	x	x	x	x	x	x	c	x	x	x	x	x	x	x	x
Caravan parks	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	c	c	c	x	x	x	x	x	x
Camping ground	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	c	c	c	x	x	x	x	x	x
Eco-tourist facility	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
Farm-stay accommodation	x	c	c	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	c	x	x	x	x

c permitted with consent
x prohibited
E = maybe Exempt Development under SEPP (Exempt & Complying Development Codes) 2008

Figure 3.3 Permissibility of Hotel and Motel Accommodation

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Figtree
Wollongong
Unanderra
Port Kembla
Dapto
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city of innovation
Permissibility of Hotel and Motel Accommodation
Hotel & Motel Permissible Zones
Map 2 of 2 maps
Drawn By: J Lewis
Date: Updated 09.06.21
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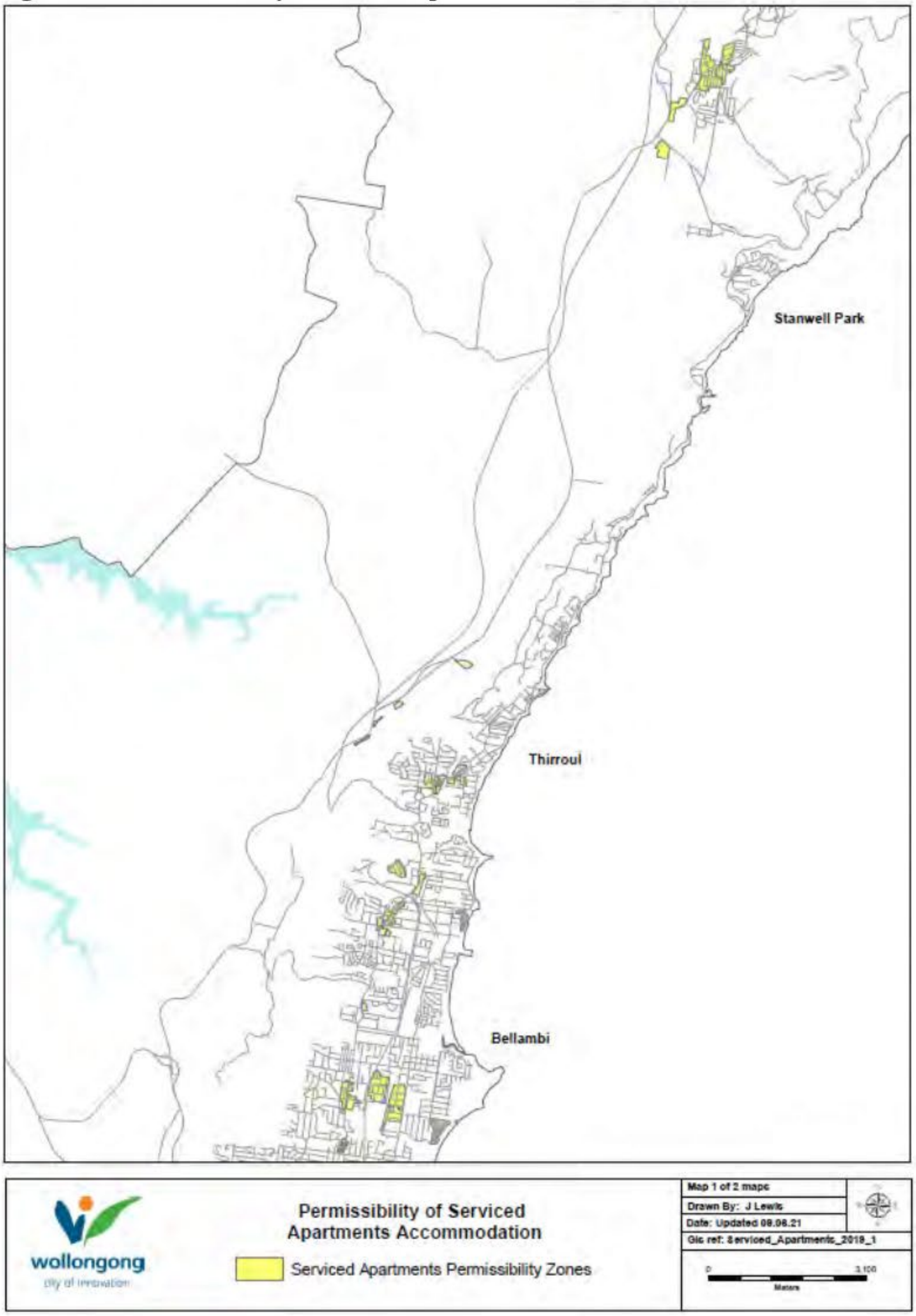
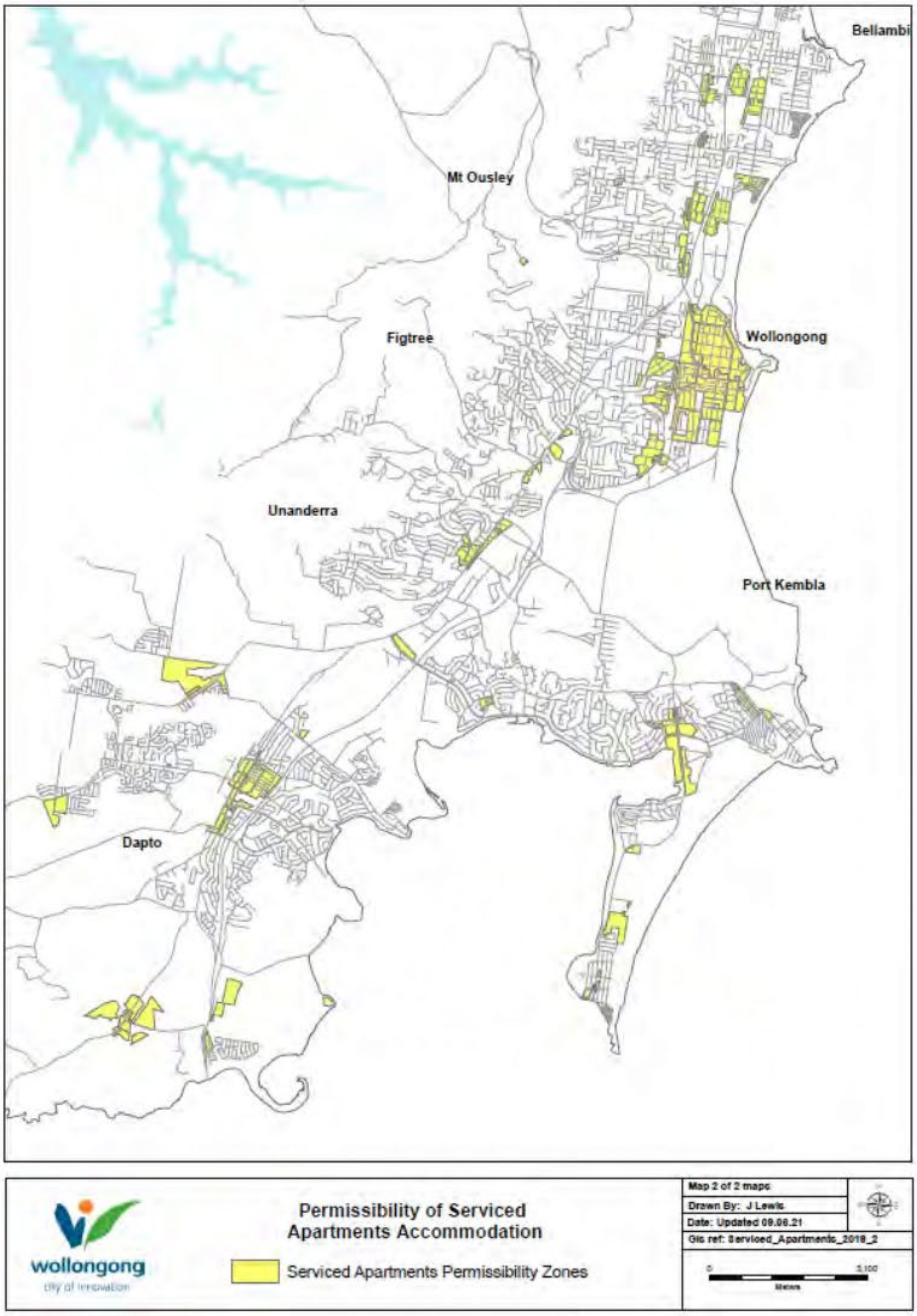
Figure 3.4 Permissibility of Serviced Apartments




Bellambi
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Figtree
Wollongong
Unanderra
Port Kembla
Dapto
Permissibility of Serviced Apartments Accommodation
Serviced Apartments Permissibility Zones
wollongong
Map 2 of 2 maps
Drawn By: J Lewis
Date: Updated 09.06.21
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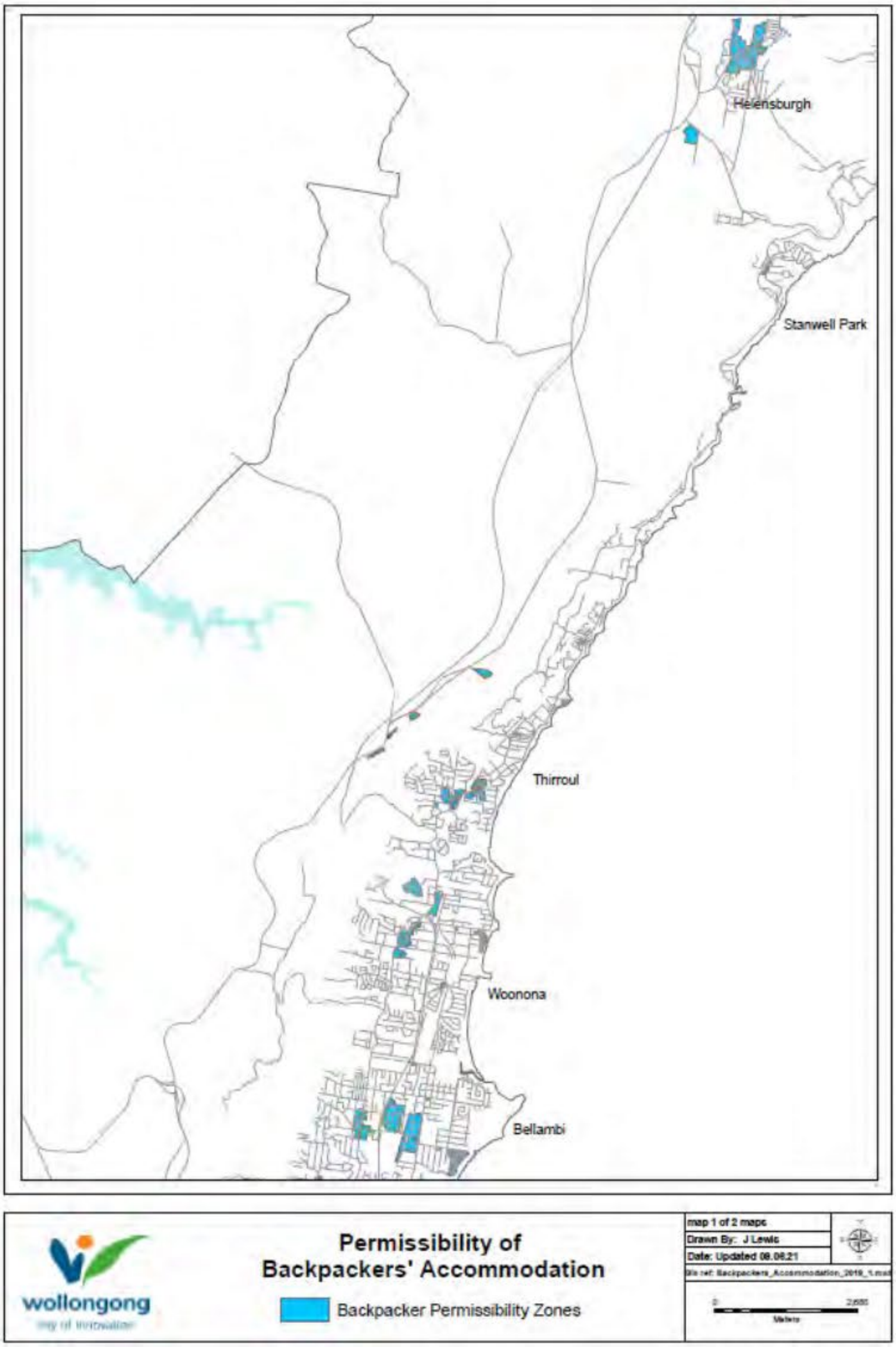
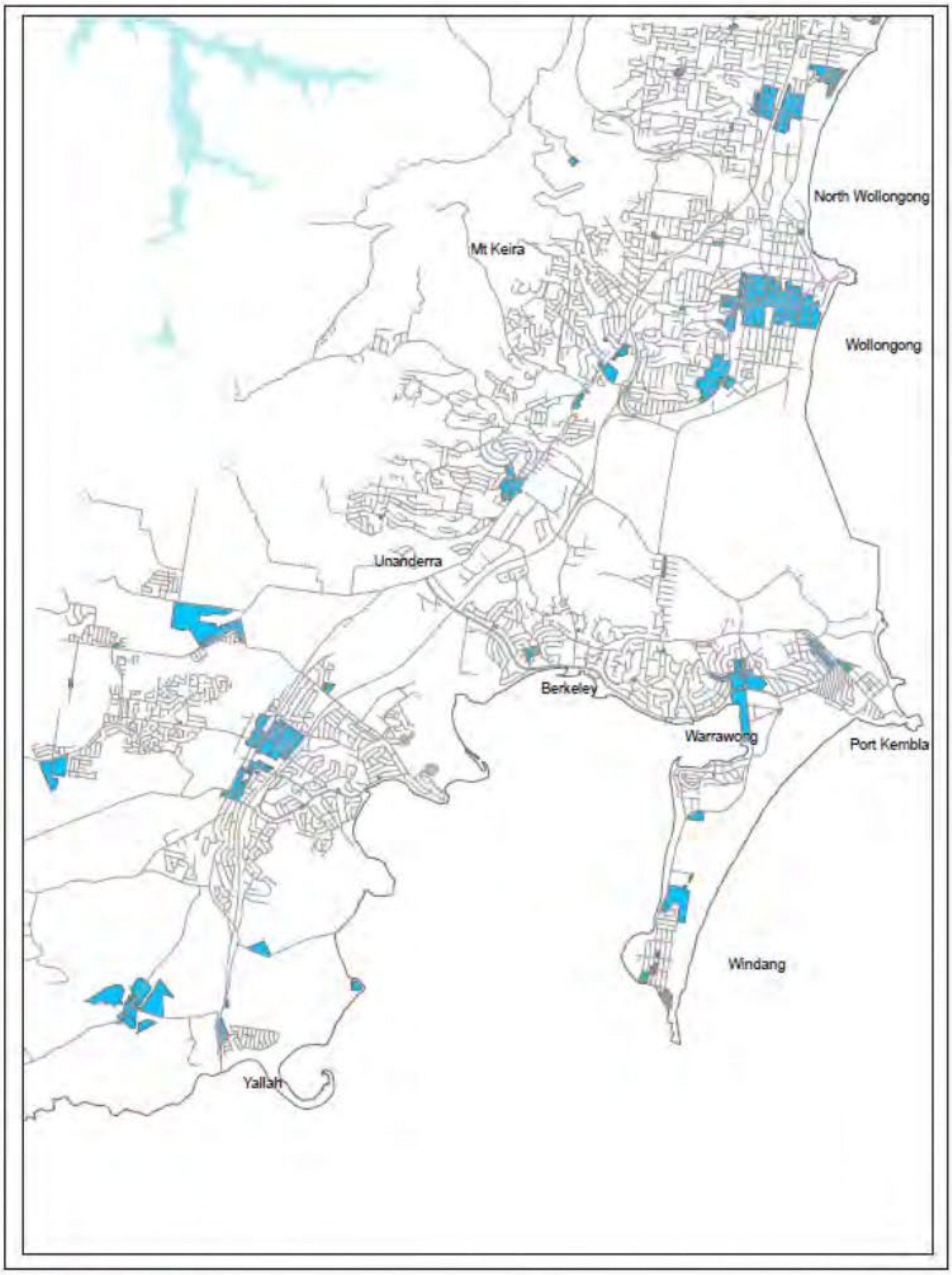
Figure 3.5 Permissibility of Backpacker Accommodation



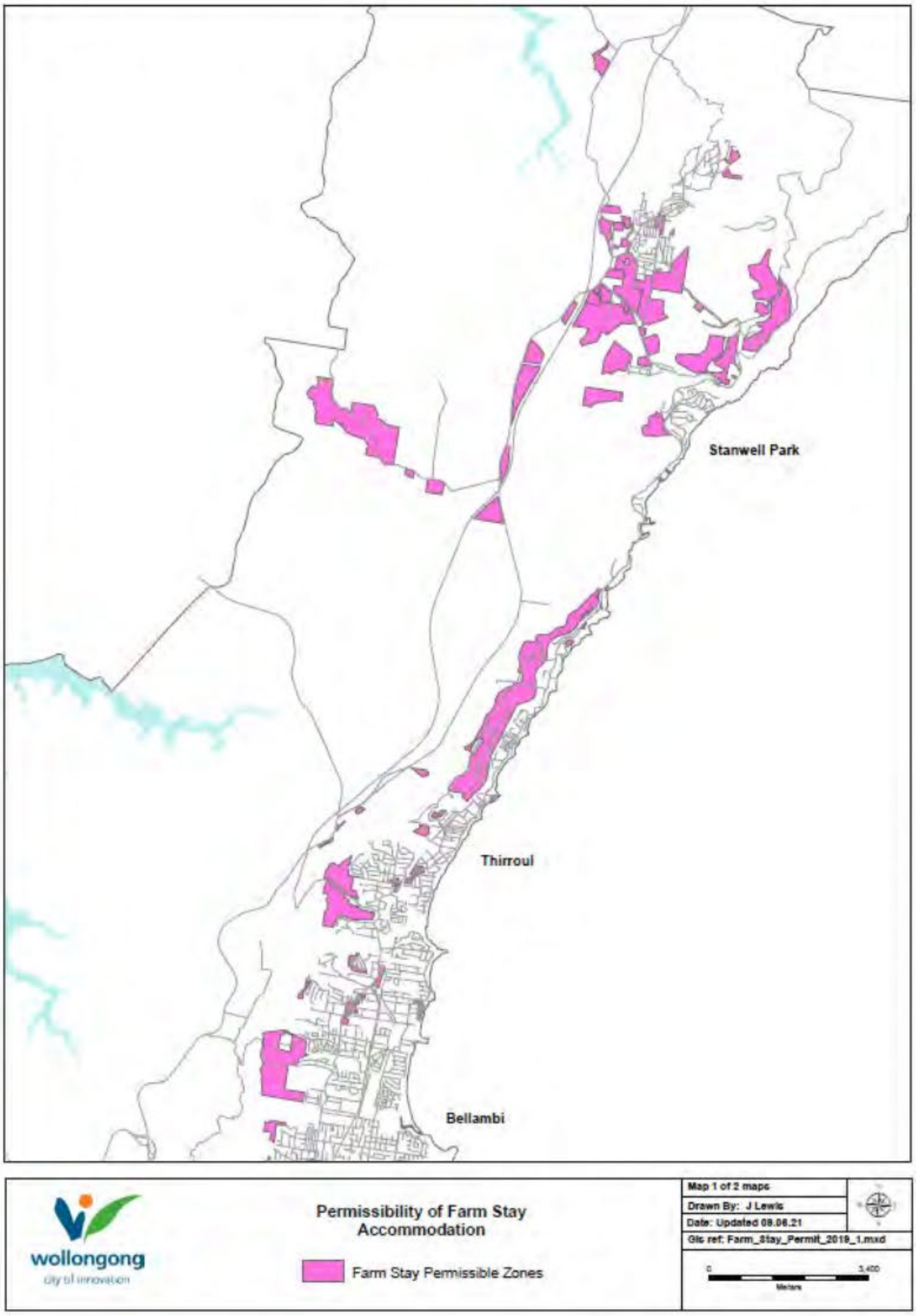


Permissibility of Backpackers' Accommodation

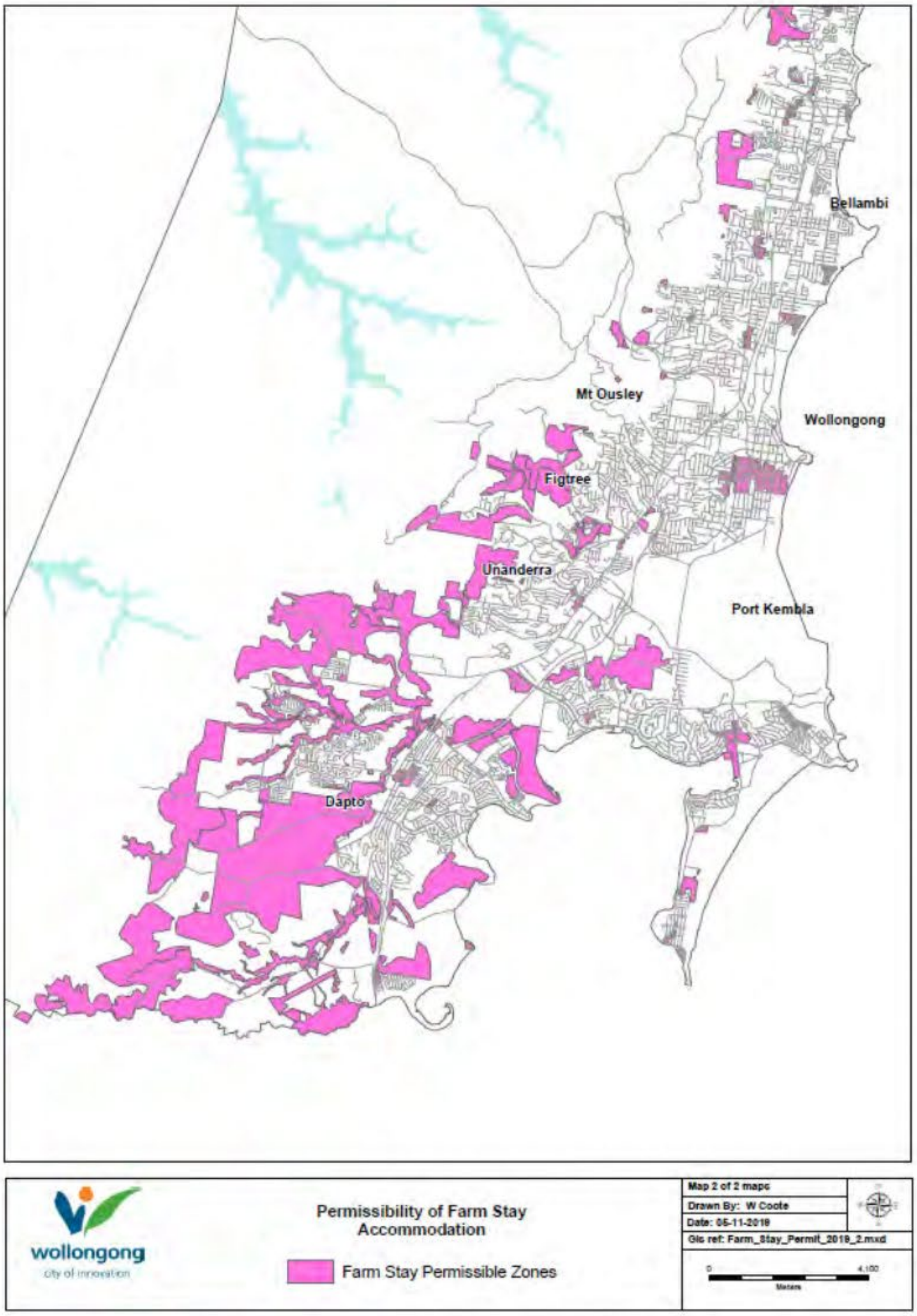
Backpacker Permissibility Zones

map 2 of 2 maps
Drawn By: J Lewis
Date: Updated 09.08.21

Figure 3.6 Permissibility of Farm Stay Accommodation

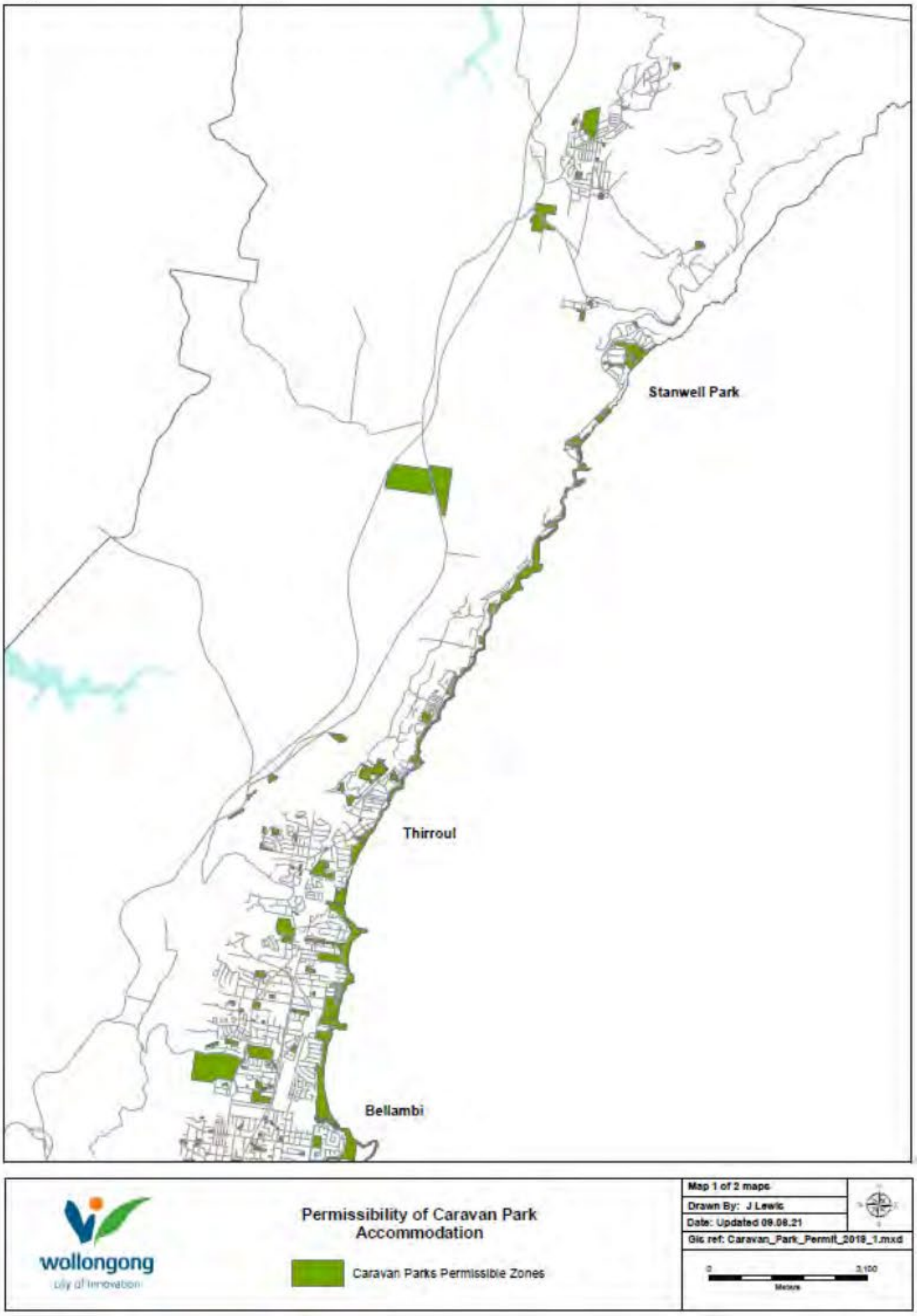


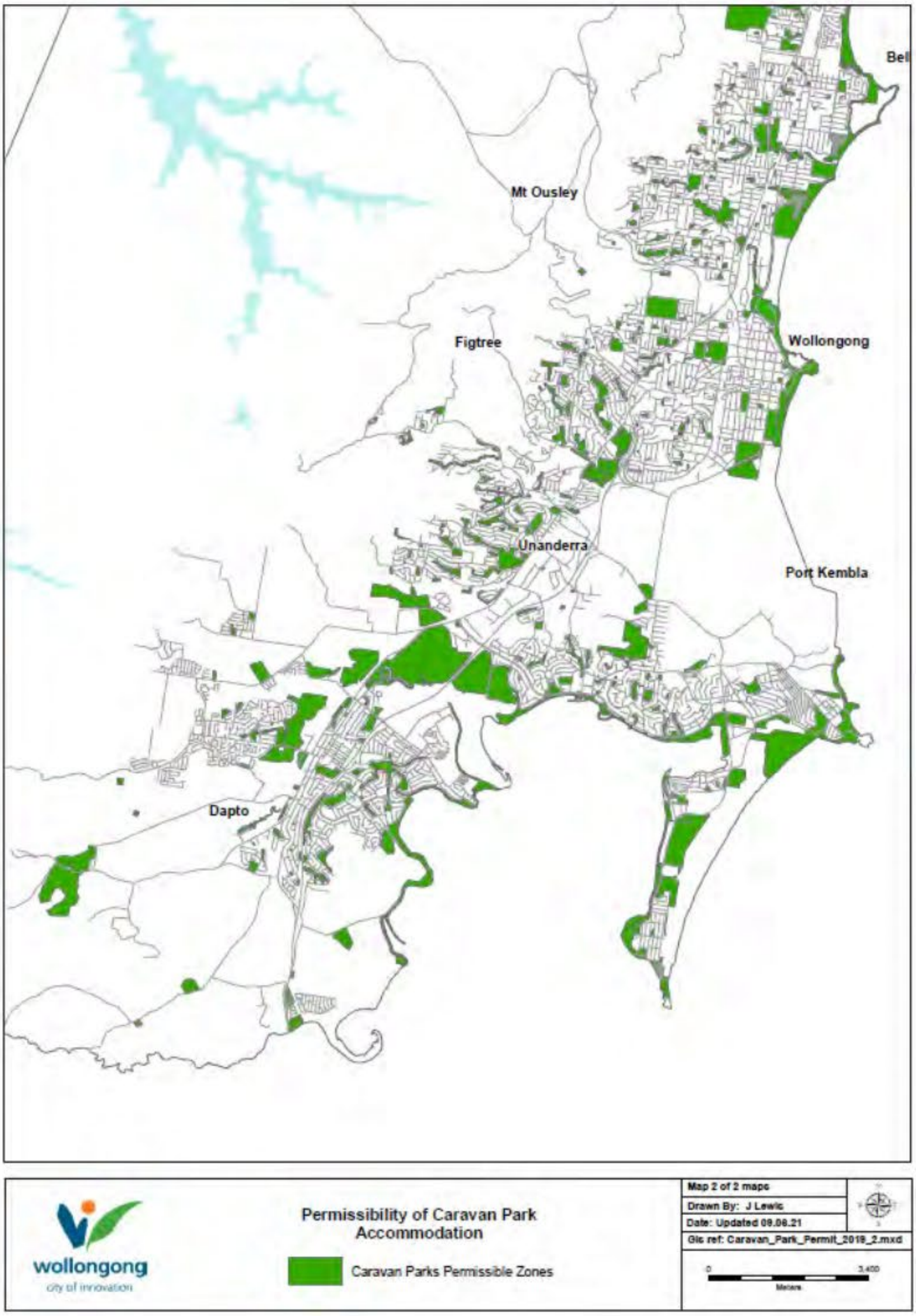
Note: Farm stay accommodation is only permissible as a secondary business to primary production



Note: Farm stay accommodation is only permissible as a secondary business to primary production

Figure 3.7 Permissibility of Caravan Parks

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Unanderra
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wollongong
city of innovation
Permissibility of Caravan Park Accommodation
Caravan Parks Permissible Zones
Map 2 of 2 maps
Drawn By: J Lewis
Date: Updated 09.06.21
Gis ref: Caravan_Park_Permit_2019_2.mxd
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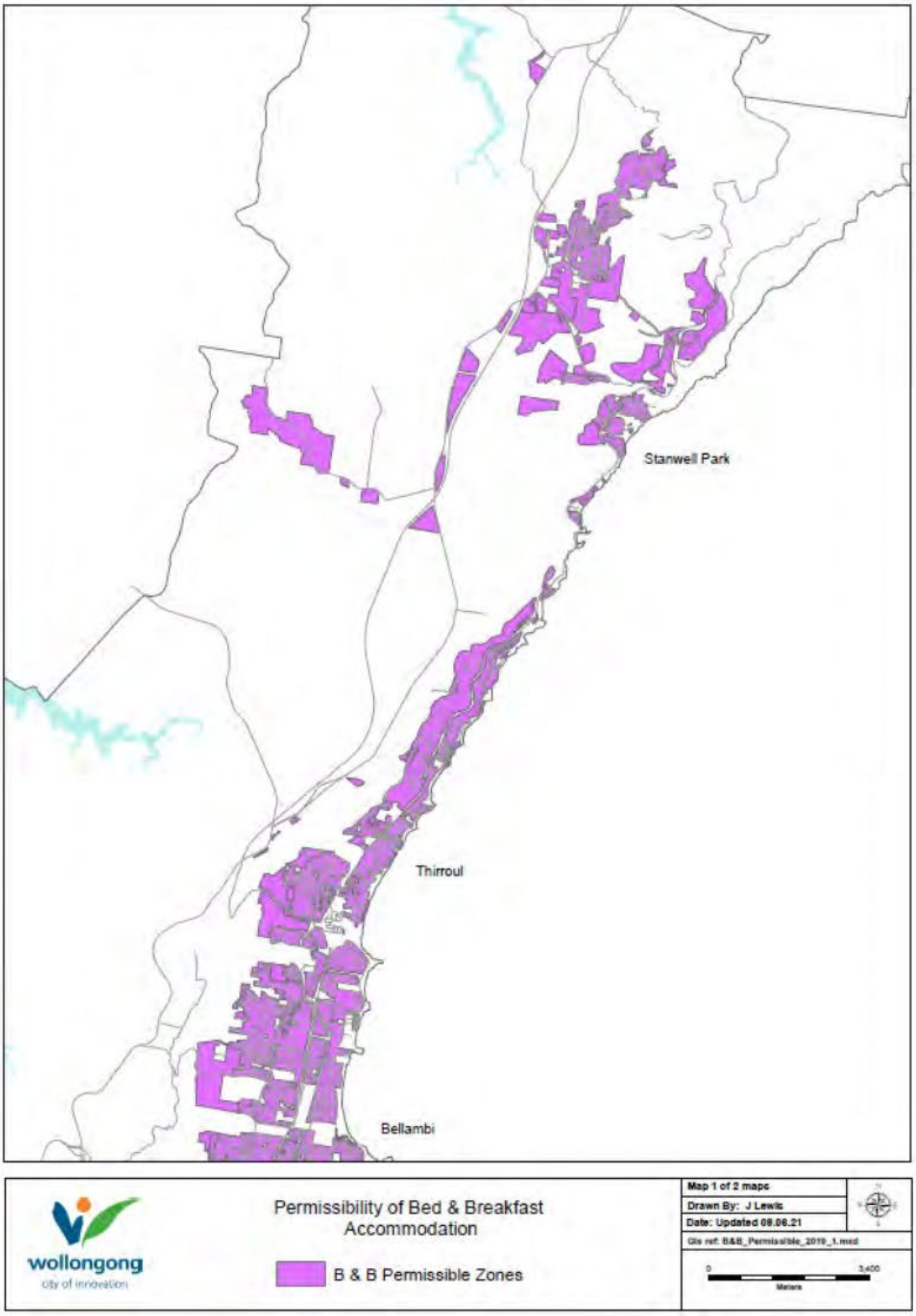
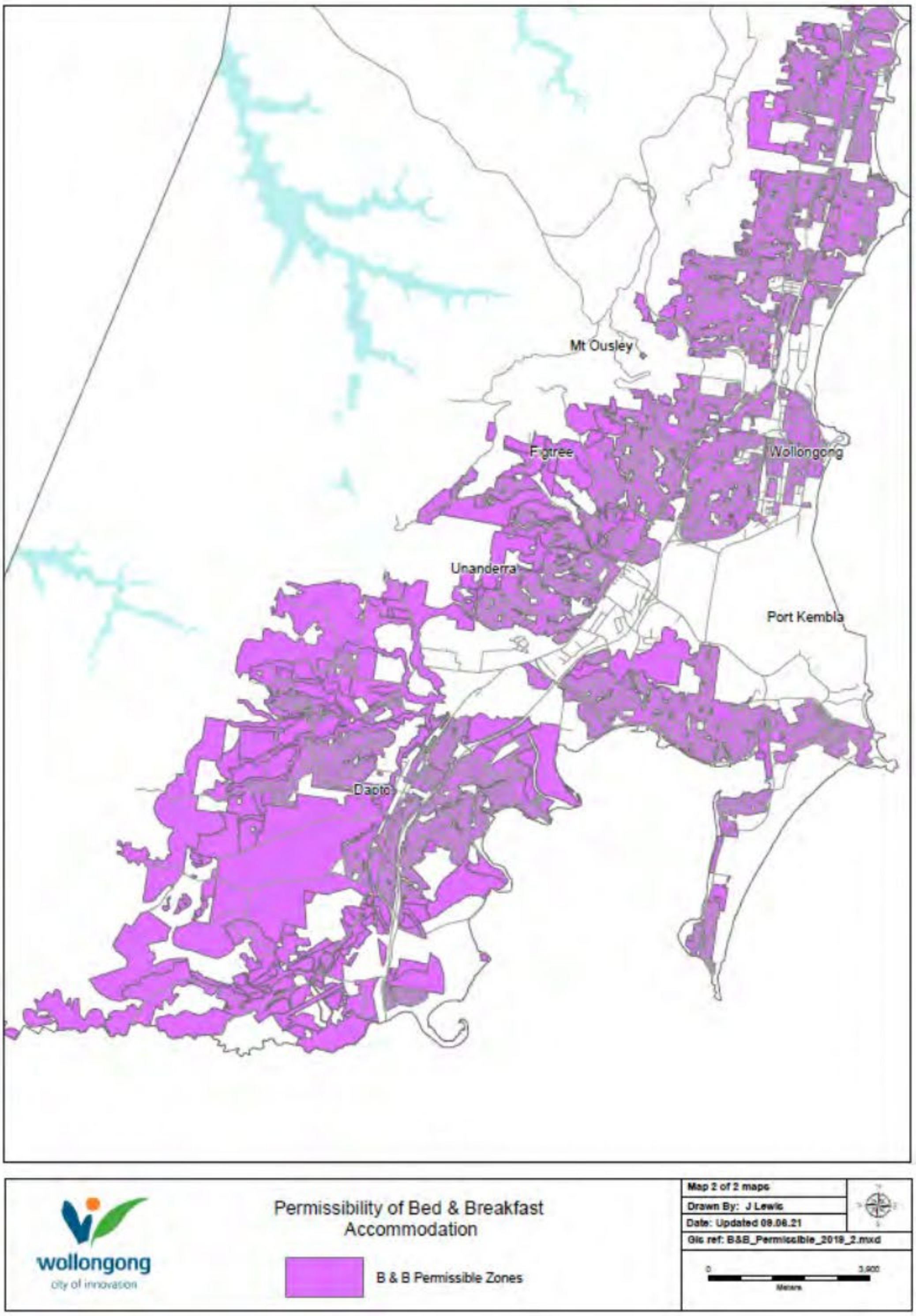
Figure 3.8 Permissibility of Bed and Breakfast Accommodation

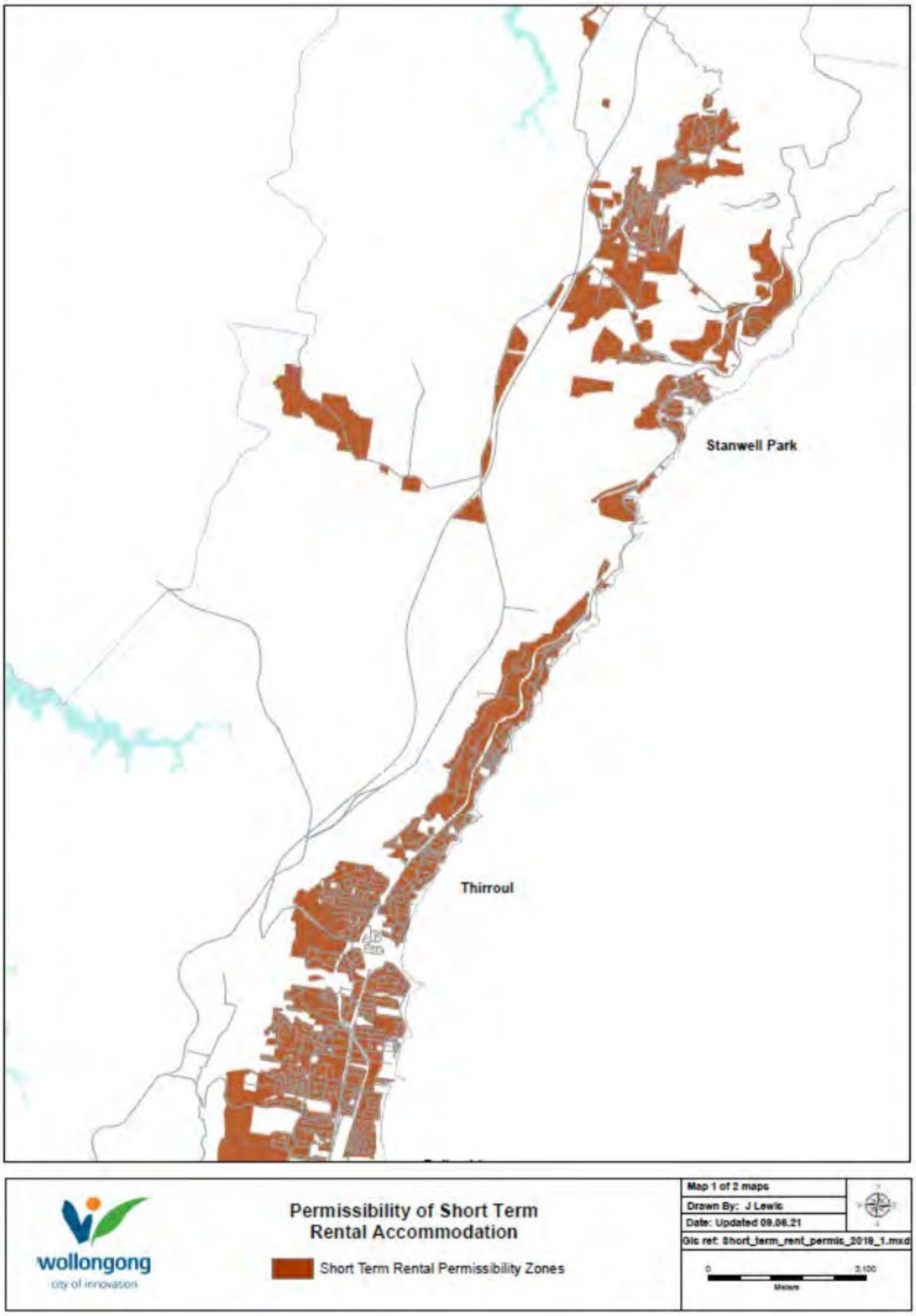


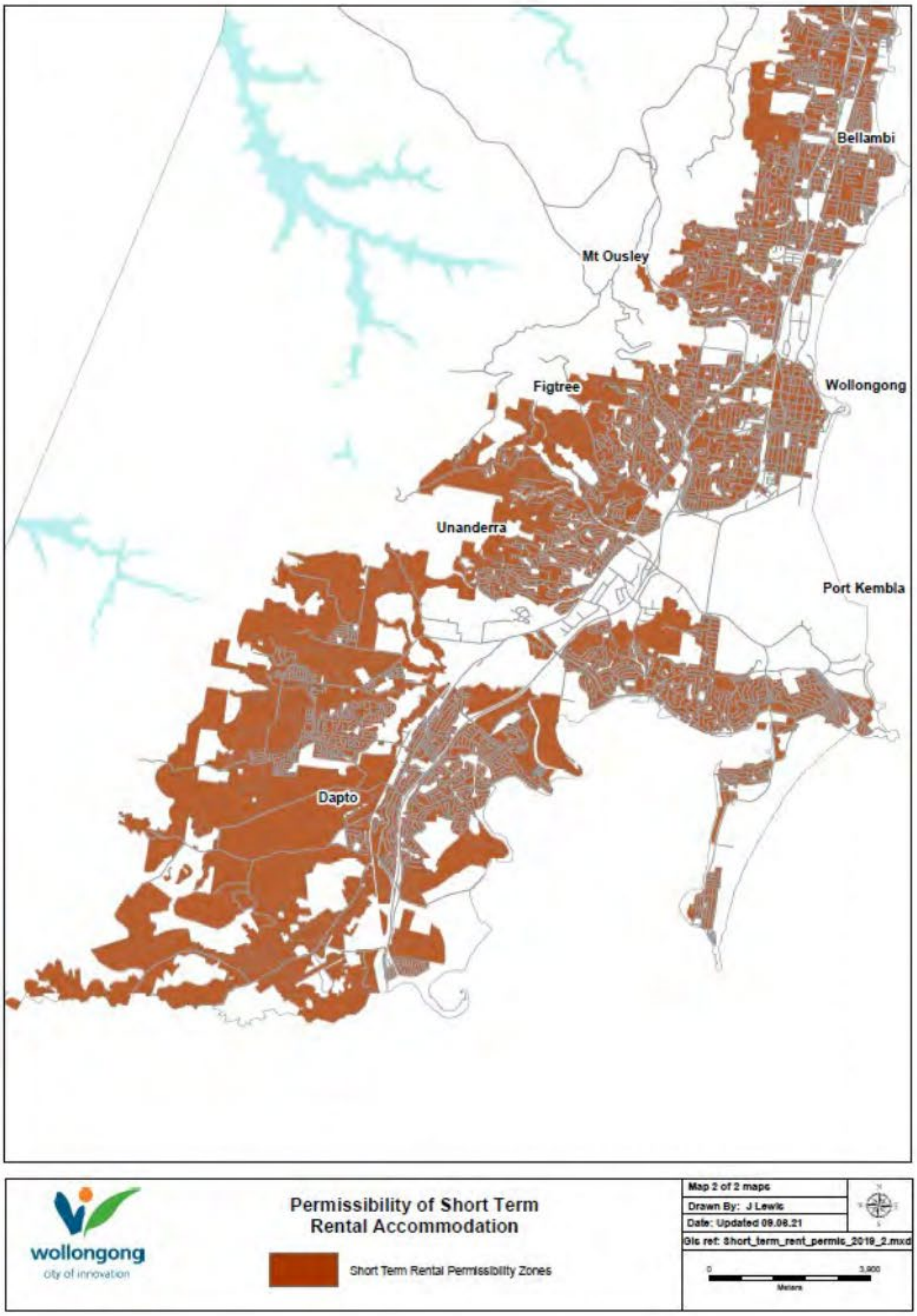
Note: In some circumstances B&B Accommodation may be exempt development under the SEPP (Exempt and Complying Development Codes) 2008.



Note: In some circumstances B&B Accommodation may be exempt development under the SEPP (Exempt and Complying Development Codes) 2008.

Figure 3.9 Permissibility of Short-term rental accommodation

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Port Kembla
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Permissibility of Short Term Rental Accommodation
Short Term Rental Permissibility Zones
Map 2 of 2 maps
Drawn By: J Lewis
Date: Updated 09.06.21
Gis ref: Short_term_rent_permis_2019_2.mxd
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3.4 Relevant Planning Strategies, Policies and Plans

There are a number of State and Regional planning policies and plans that affect tourism accommodation.

3.4.1 LEP Practice Note – PN 09-006

In 2009, the NSW Department of Planning issued an LEP Practice Note – PN 09-006 Providing for tourism in Standard Instrument LEPs. The Practice Note guides Council on providing tourism opportunities in their Local Environmental Plans. The Practice note was used in the preparation of the draft Wollongong LEP 2009.

The Practice Note suggests that the following accommodation types are appropriate in the following zones:

Tourism Land Uses	Suggested Zones
ACCOMMODATION	
Tourist and visitor accommodation (group term)	R1, B2, B4, SP3, E4
Backpackers' accommodation	RU5, R1, R3, B2, B3, B4, SP3, E4
Bed and breakfast accommodation	RU4, RU5, all R zones, B1, B2, B4, SP3, E2–E4
Camping ground [13]	RU1, RU2, RU4, RU5, R5, SP3, RE1, RE2, E2, E3
Caravan park	RU5, R1, R2, R5, SP3, RE1, RE2, E4
Eco-tourism[11]	RU1, RU2, RU4, R5, SP3, RE1, RE2, E2, E3
Farm stay accommodation	RU1, RU2, RU4, E2, E3
Hotel or motel accommodation	RU5, R1, R3, R4, R5, B2–B4, SP3, E4
Serviced apartment	R1, R3, R4, B2–B4, SP3, E4

Table 3.4 indicates the current permissibility of tourism accommodation uses under the Wollongong LEP 2009. The main difference is that eco-tourism is not currently permissible under the LEP.

3.4.2 Illawarra Shoalhaven Regional Plan 2041

On 1 June 2021 the Minister for Planning and Public Spaces released the Illawarra Shoalhaven Regional Plan 2041.

In early November 2020, the NSW Department of Planning, Industry and Environment exhibited the draft Illawarra Shoalhaven Regional Plan 2041. On 7 December 2020 Council endorsed a draft submission and forwarded it to the Department of Planning, Infrastructure and Environment.

The Illawarra Shoalhaven Regional Plan, sets out the strategic framework for the region, aiming to protect and enhance the region's assets and plan for a sustainable future.

The Regional Plan identifies 15 regionally significant precincts that will drive jobs creation, housing diversity, and vibrant communities. The draft Regional Plan includes 30 objectives detailed under the 4 themes of:

- A productive and innovative region
- A sustainable and resilient region

- A region that values its people and places
- A smart and connected region

To implement the objectives of the draft Plan, there are numerous actions, strategies and activities.

The Plan does not include any specific actions or strategies relevant to this accommodation review.

3.4.3 Future Transport 2056 – Tourism and Transport Plan

In 2018, Transport for NSW released Future Transport Strategy 2056 a series of transport strategy documents, the most relevant for Wollongong and this study being the Regional NSW Services and Infrastructure Plan and the Tourism and Transportation Plan.

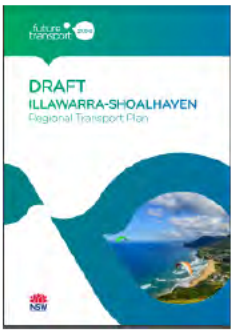
The Future Transport Strategy 2056 and its supporting documents are focused on six outcomes:

1. Customer Focused
2. Successful Places
3. Growing the Economy
4. Safety and Performance
5. Accessible Services
6. Sustainability

Regional NSW Services and Infrastructure Plan (2018) provides a 40 year vision for transport in regional NSW to support communities and productive economies. Transport for NSW is seeking to provide a safe, efficient and reliable network of transport services and infrastructure that recognises and reinforces the vital role of regional cities. The Plan outlines measure to improve transportation within and between regions. The Plan indicates a number of infrastructure improvements for the Wollongong LGA and the Illawarra Shoalhaven Region. The Plan does not include any specific actions or strategies relevant to this accommodation review.

Tourism and Transportation Plan (2018) notes that the transport needs of visitors and people who work in tourism differ from weekday commuters. Visitors may be unfamiliar with the transport system and may be travelling at different times and maybe carrying luggage. The Plan seeks to improve the visitor experience by improving the road network, public transport services and infrastructure, growing transport as a tourism activity. The Plan does not include any specific actions or strategies relevant to this accommodation review.

3.4.4 Draft Illawarra Shoalhaven Regional Transport Plan



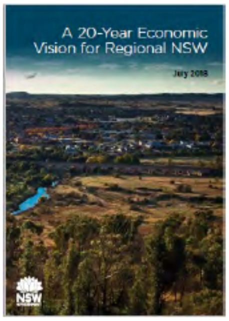
In late November 2020, the Transport for NSW released the draft Illawarra Shoalhaven Regional Transport Plan which outlines the strategic framework for how Transport for NSW will respond to changes in land use, population and travel demand across the region over the next 20 years.

On 22 February 2021 Council endorsed a draft submission and forwarded it to Transport for NSW.

The draft Plan details proposed infrastructure works that will assist residents and visitors moving around the region.

The draft Plan does not include any specific actions relevant to this accommodation review.

3.4.5 A 20-year Economic Vision for Regional NSW



In 2018 the State Government published a 20 year economic vision for Regional NSW. Within this report, Wollongong is regarded as part of Sydney, rather than Regional NSW. However, the report is relevant as it indicates that the following 10 industry sectors will drive regional NSW economies over the next 20 years.

Agribusiness and forestry, Resources and Mining, Tourism, Tertiary Education, Health and Residential Care, Freight and Logistics, Defence, Advance Manufacturing, Renewable Energy, Technology – enabled Primary Industries.

Many of these industries occur within Wollongong, and form part of Council's Economic Development Strategy (2019).

The draft Plan does not include any specific actions relevant to this accommodation review.

4. EXISTING TOURIST ACCOMMODATION AUDIT

To able to inform a way forward and to assess the supply and demand for Tourism accommodation within the LGA, is it important to first understand how much tourism accommodation we currently have and where it is located. An audit of existing establishments has been completed.

4.1 Distribution and intensity of accommodation establishments

There are 75 tourist accommodation establishments within the Wollongong LGA, providing an estimated 1766 rooms, 213 cabins and 547 powered and unpowered camping and caravanning sites each night, which can cater for over 6000 guests.

A summary of tourist accommodation in the Wollongong LGA is provided in Table 4.1.

Table 4.1 Summary of formal Tourist Accommodation

Row Labels	Number of establishments	Number of rooms available	Guest Capacity	Number of Powered sites	Number of Unpowered sites	Number of Cabins	Cabin guest capacity
Backpackers Accommodation	2	33	82				
Bed and Breakfast Accommodation	10	25	62				
Holiday Letting	10	20	63				
Serviced Apartments	16	435	1269				
Tourist Parks	5			378	169	213	615
Hotels and Motels - Budget Motel	22	669	1973				
Hotels and Motels - Hotel 4-4.5 star	2	370	1007				
Hotels and Motels - Mid Market	3	87	262				
Hotels and Motels - Conference Centre	1	80	604				
Hotels and Motels - Student	1	24	76				
Hotels and Motels - Luxury Boutique	2	7	20				
Hotels and Motels - Boutique	1	16	64				
Grand Total	75	1766	5482	378	169	213	615

A list of tourist accommodation sites is provided in Appendix 2.

The establishments are distributed across the LGA, with the most establishment and the number of rooms being available in the Wollongong suburb and Ward 2. Table 4.2 and Figure 4.1 illustrates the distribution of tourist accommodation by type, and Figure 4.2 the intensity of tourist accommodation (by number of beds), across the LGA.

There are also numerous short-term holiday rental premises which can be managed by real estate agents or the owner and are advertised on various websites. Some premises are owner occupied / hosted, (e.g. a room available within a house), others are leased to visitors and guests / non-hosted (e.g. whole house).

In January 2019, Airbnb reported that during 2018 they had 910 active listings on their platform with 43,000 nights booked (The Advertiser 30/1/19). As there are a number of other accommodation platforms, the number of establishments would likely be over 1,000. Although some properties may be listed on multiple platforms. However the number of premises available varies depending on current bookings, seasonal demand and local events. The peak demand periods for domestic travellers are likely to be school holidays and long weekends. The reduction in overseas visitors due to COVID-19 boarder closures, may have resulted in a reduction in demand.

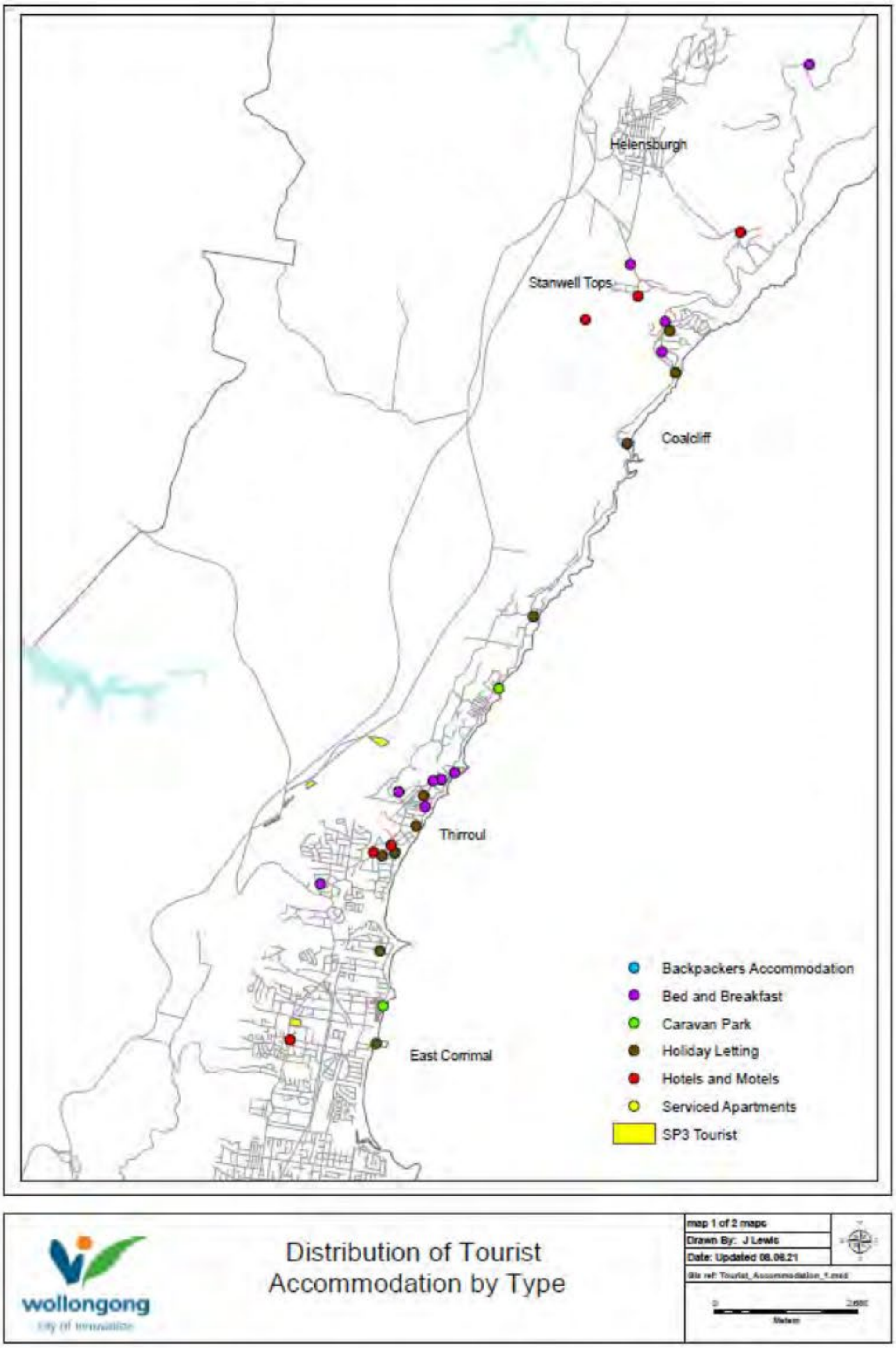
Table 4.2 Accommodation type and numbers by suburb

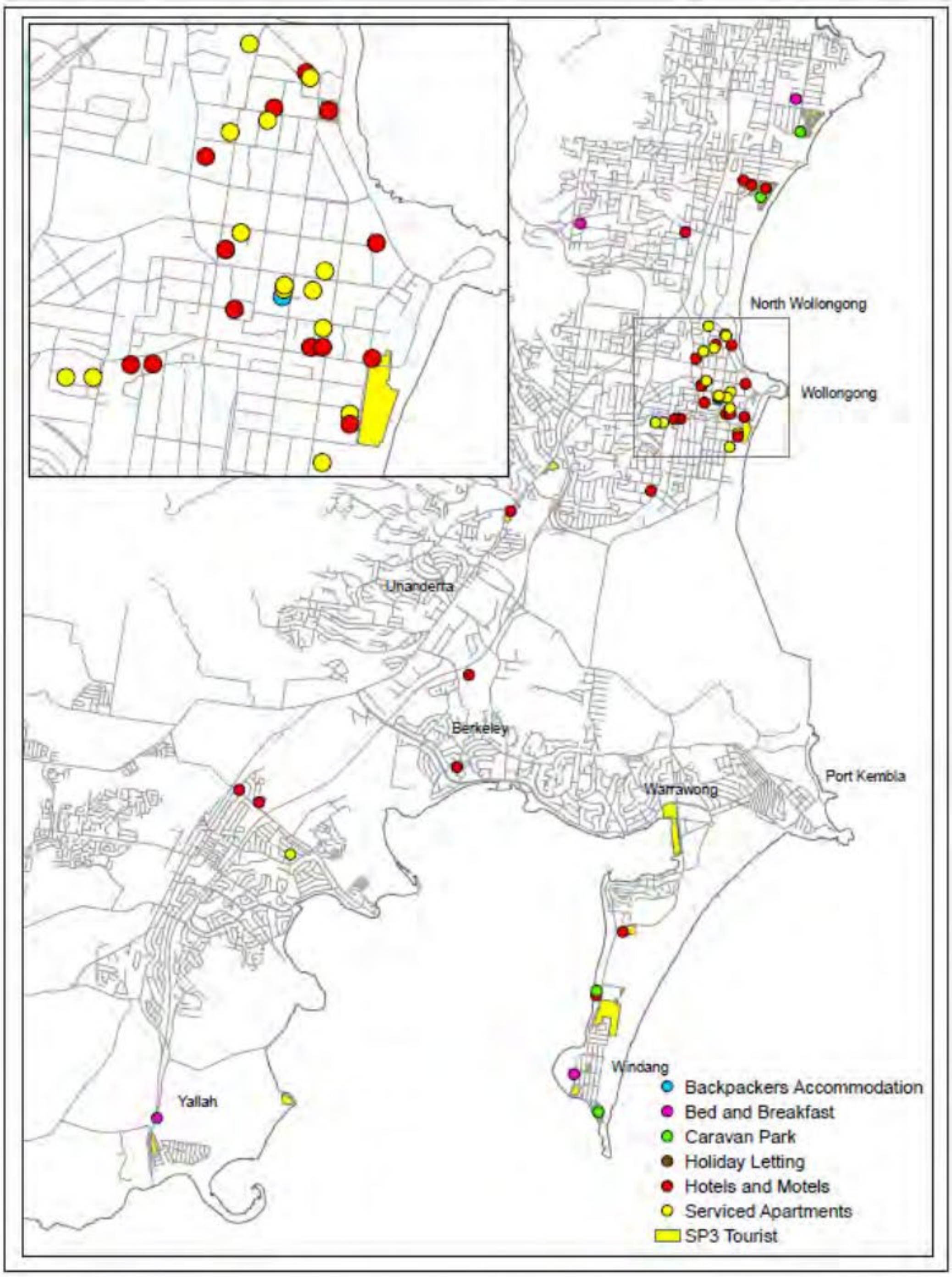
Row Labels	Number of establishments	Number of rooms available	Guest Capacity	Number of Powered sites	Number of Unpowered sites	Number of Cabins	Cabin guest capacity
Ward 1	**31**	**328**	**1222**	**160**	**97**	**74**	**470**
AUSTINMER	**7**	**76**	**28**				
Bed and Breakfast Accommodation	4	4	14				
Holiday Letting	2	3	14				
Serviced Apartments	1	69					
BULLI	**2**	**2**	**4**	**54**	**5**	**30**	**175**
Holiday Letting	1	2	4				
Tourist Parks	1			54	5	30	175
COALCLIFF	**1**	**1**	**6**				
Holiday Letting	1	1	6				
COLEDALE	**1**			**5**	**44**		
Tourist Parks	1			5	44		
CORRIMAL EAST	**1**	**3**	**6**				
Bed and Breakfast Accommodation	1	3	6				
EAST CORRIMAL	**1**			**101**	**48**	**44**	**295**
Tourist Parks	1			101	48	44	295
FAIRY MEADOW	**3**	**58**	**181**				
Hotels and Motels - Budget Motel	3	58	181				
OTFORD	**1**	**16**	**64**				
Hotels and Motels - Boutique	1	16	64				
STANWELL PARK	**3**	**11**	**25**				
Bed and Breakfast Accommodation	1	5	12				
Holiday Letting	2	6	13				
STANWELL TOPS	**3**	**89**	**624**				
Bed and Breakfast Accommodation	1	4	10				
Hotels and Motels - Conference Centre	1	80	604				
Hotels and Motels - Luxury Boutique	1	5	10				
THIRROUL	**5**	**39**	**184**				
Bed and Breakfast Accommodation	1	1	4				
Holiday Letting	2	6	16				
Hotels and Motels - Budget Motel	2	32	164				
WOMBARRA	**1**	**1**	**6**				
Holiday Letting	1	1	6				
WOONONA	**2**	**32**	**94**				
Holiday Letting	1	1	4				
Hotels and Motels - Budget Motel	1	31	90				
Ward 2	**32**	**1092**	**3097**	**145**	**72**	**110**	
CONISTON	**1**	**20**	**40**				
Hotels and Motels - Mid Market	1	20	40				
FAIRY MEADOW	**1**			**145**	**72**	**110**	
Tourist Parks	1			145	72	110	
MOUNT PLEASANT	**1**	**3**	**6**				
Bed and Breakfast Accommodation	1	3	6				
NORTH WOLLONGONG	**3**	**44**	**157**				
Serviced Apartments	1	9	72				
Hotels and Motels - Budget Motel	2	35	85				
WOLLONGONG	**26**	**1025**	**2894**				
Backpackers Accommodation	2	33	82				
Serviced Apartments	13	356	1193				
Hotels and Motels - Budget Motel	7	220	452				
Hotels and Motels - Hotel 4-4.5 star	2	370	1007				
Hotels and Motels - Mid Market	1	22	84				
Hotels and Motels - Student	1	24	76				
Ward 3	**10**	**299**	**1015**	**73**	**0**	**29**	**145**
BERKELEY	**2**	**114**	**564**				
Hotels and Motels - Budget Motel	2	114	564				
BROWNSVILLE	**2**	**53**	**168**				
Hotels and Motels - Budget Motel	2	53	168				
FIGTREE	**1**	**55**	**132**				
Hotels and Motels - Budget Motel	1	55	132				
KANAHOOKA	**1**	**1**	**4**				
Serviced Apartments	1	1	4				
PRIMBEE	**1**	**41**	**137**				
Hotels and Motels - Budget Motel	1	41	137				
WINDANG	**3**	**35**	**10**	**73**	**0**	**29**	**145**
Bed and Breakfast Accommodation	1	5	10				
Tourist Parks	1			73	0	29	145
Hotels and Motels - Budget Motel	1	30					
Grand Total	**73**	**1719**	**5334**	**378**	**169**	**213**	**615**

The following findings were identified from the accommodation audit.

- A large proportion of accommodation is available within the Wollongong City Centre. Hotel and motel accommodation and serviced apartments are substantially located within the Wollongong City Centre however there are also smaller motels situated in other suburban centres. As a result the intensity of available beds is highly concentrated with 50% of all hotel/motel accommodation in the City Centre.
- The major contributors to accommodation outside the City Centre are the Pilgrim Lodge at the Nan Tien Temple (100 rooms, 540 guest capacity), Surf Leisure Resort at Fairy Meadow (500 beds) and The Tops Conference Centre at Stanwell Tops (80 rooms, 600 guest capacity).
- There are multiple budget accommodation offers available across the LGA.
- There is an absence of visitor accommodation in the suburbs of Lake Heights, Warrawong, Port Kembla, Unanderra, West Wollongong, Mt Keira and Helensburgh areas. This may reflect the lack of demand, lack of tourist attractions, predominantly residential character or high land values of these areas.
- There are only two backpacker hostels which are centrally located in the City Centre. There are also several other cheap accommodation options at pubs/taverns throughout the City. A comparison was made with other Cities of a similar scale and context to obtain a guide as to whether this is proportionate with the scale of the City. Newcastle has four 'backpacker hostels' and Geelong has one.
- The majority of Bed and breakfast accommodation are located in the Northern Suburbs (Ward 1) at Thirroul, Austinmer and Stanwell Park. This type of accommodation suits the 'tourer' and the 'romantic getaway' tourists and it is not surprising to see the predominance of this accommodation in the northern villages given that it exhibits a high scenic amenity and is in close proximity to Sydney, the Seacliff Bridge, beaches and the Royal National Park.
- Short-term rental accommodation and holiday letting properties are focused on the Northern Suburbs. The full extent of holiday letting is likely to be underestimated due to the difficulty in gathering data on this type of accommodation and no development applications are required..

Figure 4.1 Distribution of Tourist Accommodation





wollongong
city of innovation

Distribution of Tourist Accommodation by Type

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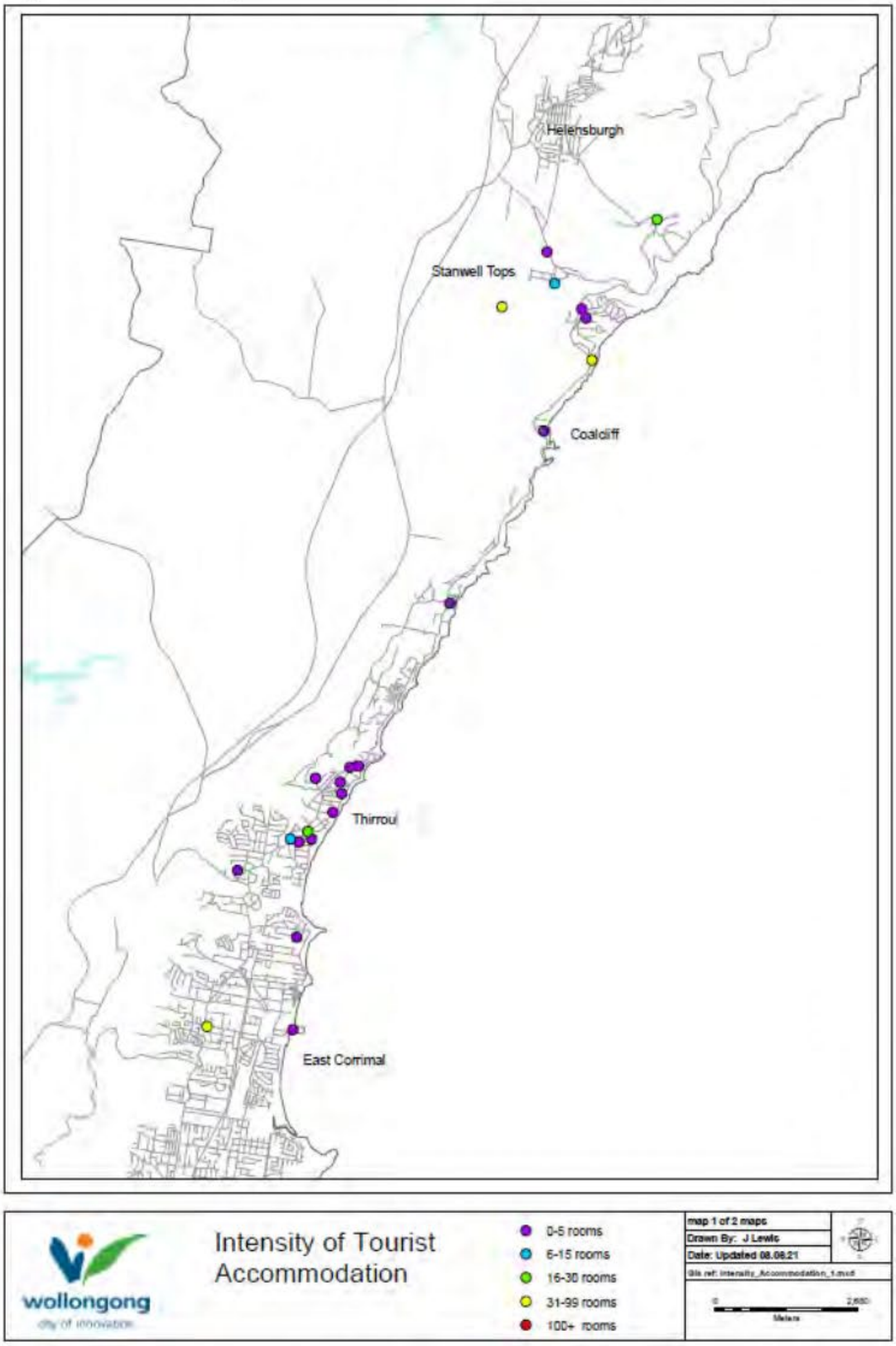
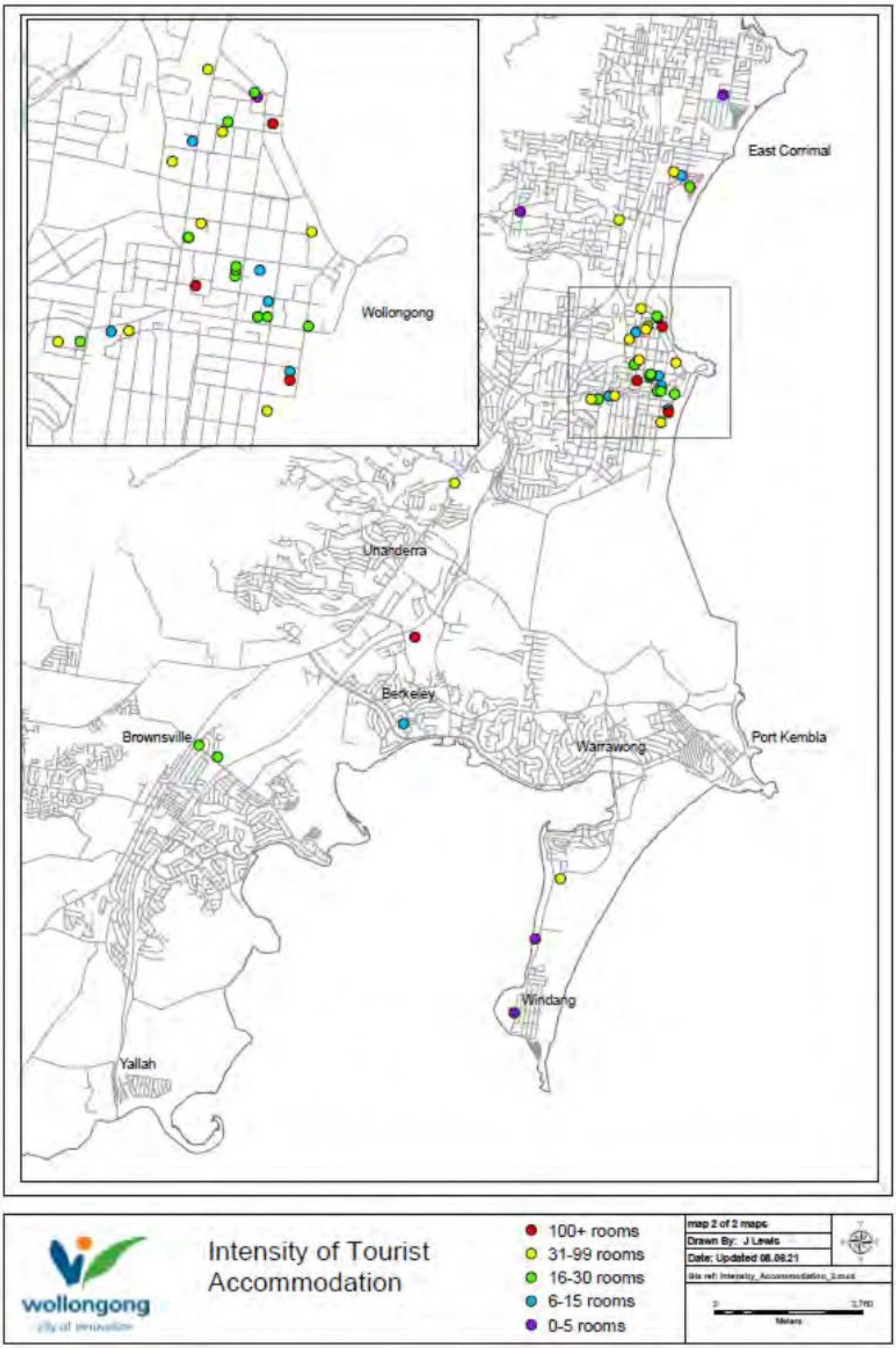
Drawn By: J Lewis
Date: Updated 080621

Figure 4.2 Intensity of Tourist Accommodation




East Corrimal
Wollongong
Unanderra
Berkeley
Brownsville
Warrawong
Port Kembla
Windang
Yallah
wollongong
Intensity of Tourist Accommodation
100+ rooms
31-99 rooms
16-30 rooms
6-15 rooms
0-5 rooms
map 2 of 2 maps
Drawn By: J Lewis
Date: Updated 08.06.21
Metars

In addition to the existing accommodation, there have been 3 Development Applications approved for new establishments which have not been constructed and 1 Development Application under assessment (Table 4.3). These proposed developments for tourism accommodation are located within the Wollongong City Centre, and if all are approved and constructed an additional 493 rooms will become available.

Table 4.3 Recent tourist accommodation development applications:

DA No.	**Address**	**Accommodation type**	**No. rooms**	**Status**
DA-2016/1061	32 Young Street & 29-31 Belmore Street Wollongong	Mixed use development including 87 hotel rooms (serviced apartments).	87	Approved 2017. Under construction
DA-2016/1557/A	385A Crown Street, Wollongong	8 Storey hotel	45	Approved 2017, amendment approved 2018. Not constructed
DA-2020/528	357-359 Crown Street, Wollongong (corner Gladstone Ave)	20 storey Hotel construction value $41 million	120	Approved 2020. Not constructed
DA-2020/1490	37-39 Burelli Street, Wollongong	14 storey Hotel construction value $42 million	241	Under assessment
Total			**493**	

We know over the past few years that a number of tourism accommodation establishments within the LGA have transferred ownership. The *Economic Development Strategy 2019-2029* notes Destination Wollongong concerned about the immediate loss of 150 beds and the loss of up to 400 beds over the next 5 years. While the new owners may wish to continue to provide accommodation, it is likely that some establishments will be closed, and development applications lodged to redevelop the site for other uses. Although no development applications have come in for those sites, it is anticipated that we will overall see a reduction of rooms available in the LGA over the next 5 years.

In many instances the planning controls permit larger residential development (residential apartment buildings), which offer higher and more immediate financial returns. There is limited investment in tourist accommodation, especially hotels and motels, due to difficulties getting finance, higher returns for other uses and on-going maintenance and running costs.

5. DEMAND FOR ACCOMMODATION

A review of literature indicates that there are various methods used to work out the demand for tourism accommodation. These include:

- Occupancy rates
- Gap Analysis
- Trends Analysis
- Setting Targets
- Sector targets
- Demand Targets/ Policy shifts

Each of these methods are outlined below.

5.1 Occupancy Rates

The occupancy rate refers to the number of occupied or rented units at a given time compared to the total number of available rental units. The occupancy rate of existing facilities provides an indication of demand for additional accommodation facilities. The higher the rate, the more demand for additional facilities.

Specific accommodation occupancy data for the Wollongong LGA is not available. Published National and State data includes Wollongong as part of the South Coast Regional of NSW which extends to the Victorian boarder. The Australian Accommodation Monitor report for the 2018-19 financial year (STR 2019) (pre COVID) indicates that the tourism accommodation facilities on the South Coast were operating at 65.9% occupancy rate. For comparison Sydney was at 83.4% occupancy rate. A year later the 2019-20 report (STR 2020) indicates tourism accommodation facilities on the South Coast were operating at 55% occupancy rate (down 10.9%) and Sydney at 65.3% occupancy rate (down 18.1%). The time series graphic in the NSW Tourism Accommodation Snapshot published by Destination NSW for the December quarter 2020 (page 7 of this report) shows the effect COVID had on occupancy rates and the domestic market recovery.

Anecdotal data suggests that some local facilities were operating at 80% occupancy (pre-COVID), noting occupancy varies from weekday-weekend, summer-winter, school holidays and when events are occurring.

The submission of Development Applications for new accommodation venues also indicates that there is demand for more rooms. As noted, Council has approved three development applications for hotels, and is currently assessing another development applications for a combined 493 rooms.

The number of Short-term Rental Accommodation establishments can also provide an indication of demand. While Short-term Rental Accommodation compete with traditional accommodation establishments, they also provide an indication of where people want to stay and visit. If there is no demand in particular locations, they will stop advertising and close.

5.2 Gap Analysis

A subset of the existing occupancy rates is to undertake a gap analysis of accommodation types. A gap analysis looks at the existing supply of Tourism accommodations to identify whether any types of accommodation are absent or there are not many establishments providing that form of accommodation.

The existing supply analysis, shows:

- There are no 5 star accommodation in the LGA
- There are no Farm-stay accommodation venues in the rural parts of the LGA. It is acknowledged that rural land uses activities are limited to Darkes Forest and West Dapto (future residential land).
- There is 1 approved Eco-tourism accommodation establishments
- There are 2 boutique / luxury establishments
- Camping is only permitted at Coledale Beach Reserve, excluding camping in the public and privately run tourist parks, and the Royal National Park.

5.3 Trend Analysis

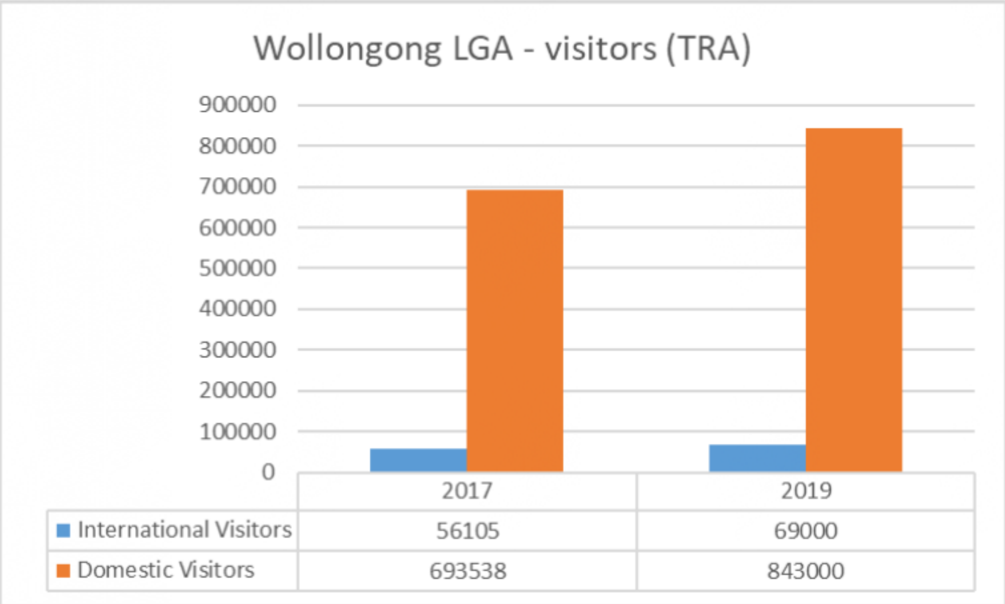
Trends analysis is a technique that uses historical data – generally over multiple consecutive years – to understand patterns of growth or decline. This data is used to try and determine (or assume) future movements based on what's happened in the past.

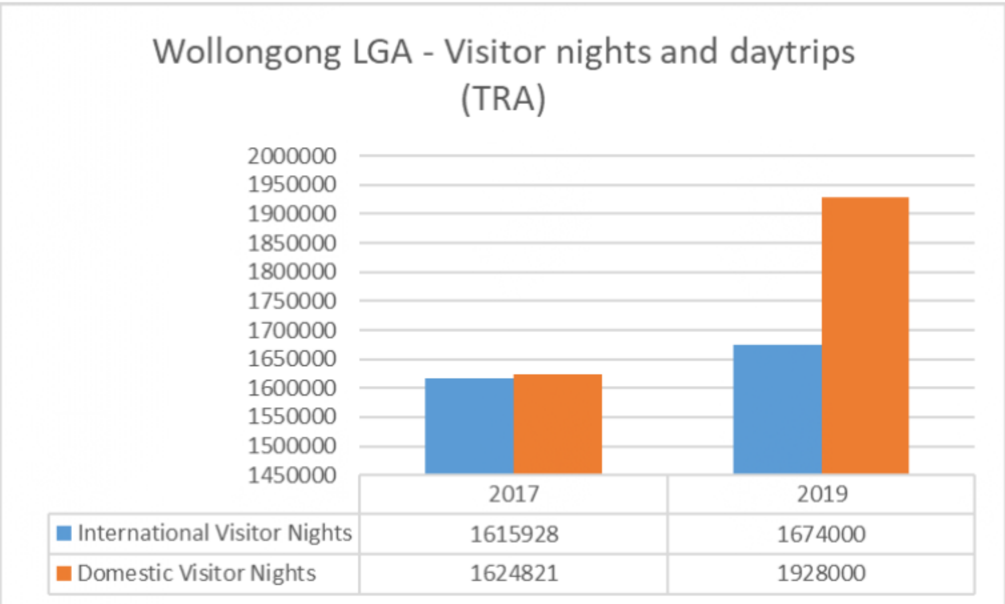
Many tourism sector documents use trend analysis to highlight the demand for additional accommodation. The assumption is that the current average growth will continue, as the number of visitors to Wollongong continues to increase. An assessment is made as to whether existing accommodation can satisfy that growth, or how many extra rooms are required.

The Tourism Research Australia's 2017 and 2019 Local Government profiles for the Wollongong LGA show:

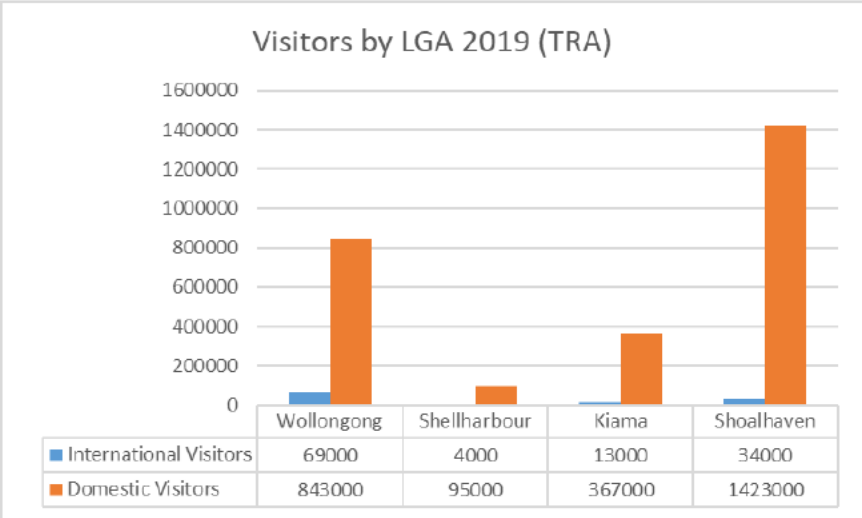
- International visitors increased from 56,105 to 69,000 persons (23%) and visitor nights increased from 1,615,928 to 1,674,000 (3.6%)
- Domestic visitors increased from 693,538 to 843,000 persons (21.6%) and visitor nights and daytrips increased from 1,624,821 to 1,928,000 (18.7%)

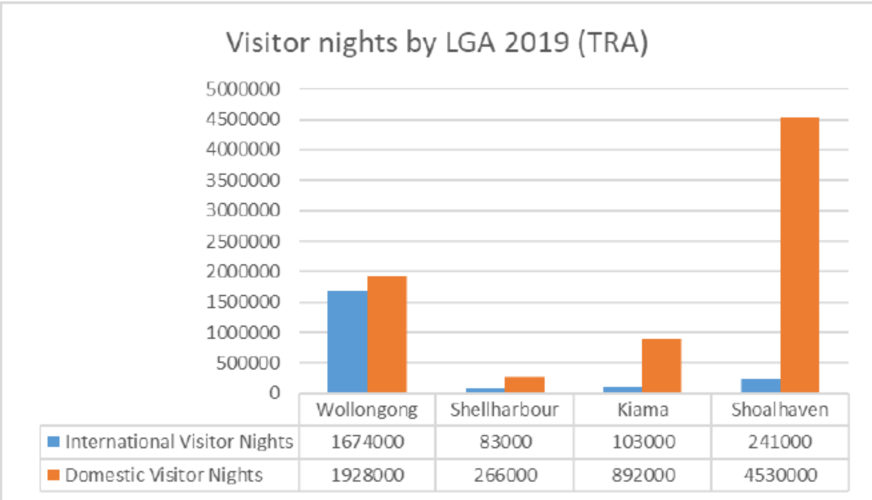
Visitors nights is a multiplication of the number of visitors and average length of stay.





Tourism Research Australia (TRA) Local Government Profiles enables a comparison of visitation to Wollongong with the other LGAs in the Region, which shows that Wollongong has the largest number of international visitors and international visitor night. The Shoalhaven LGA has the highest number of domestic visitors and domestic visitor nights.



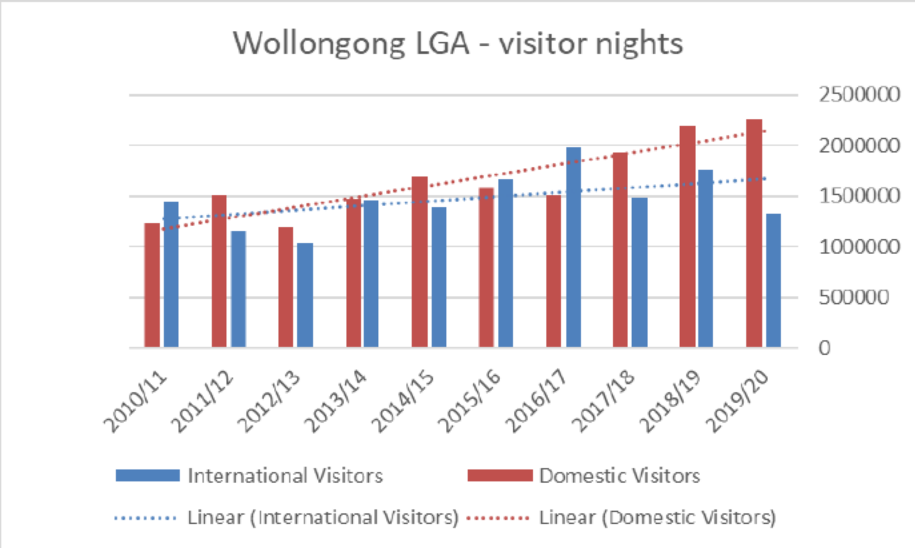


Tourism Research Australia website does not contain specific data for Wollongong prior to 2017, as Wollongong was classified as part of the South Coast region. This limitation on data available, only allows us to see the change between those years and does not allow the interpretation of a trend.

Council's Economic id profile contains tourism accommodation data for 10 years. The website indicates that the data comes from Tourism Research Australia, however the numbers do vary from those above. The data over a 10 year period shows more fluctuations than the 2017 and 2019 data sets, although there is an overall increase trend.

Over the 10 years, international visitor nights numbers decreased by 8% from 1,454,978 visitors nights in 2010-11 to 1,334,854 (2019-20), although peaked in 2016-17 at 1,982,013 and had a low of 1,041,035 in 2012-13. Despite the variations, overall there was an average annual 1.4% growth in international visitor nights.

Over the same period, domestic visitor nights numbers increased by 84% from 1,230,135 visitors (2010-11) to a peak of 2,263,553 (2019-20), although there was a low of 1,201,866 in 2012-13. Overall there was an average annual 8.1% growth in domestic visitor numbers.

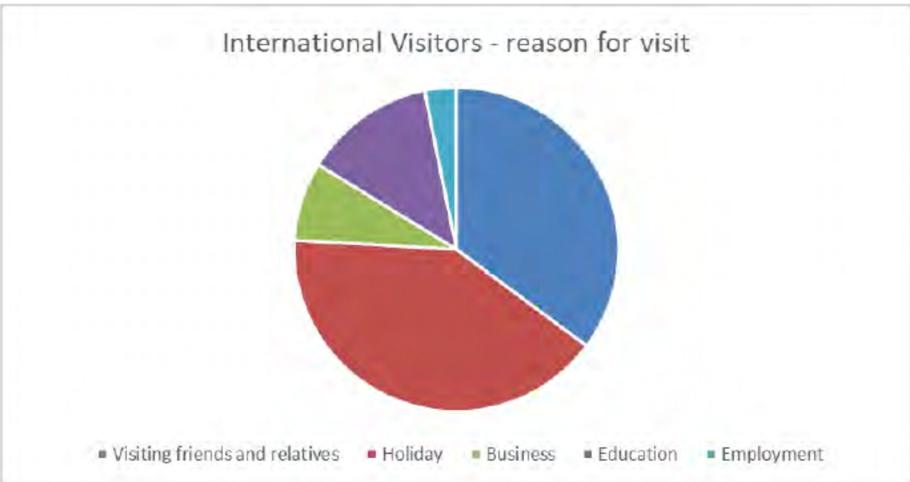


Extrapolating the 10 year average data gives a suggestion of possible trends (ignoring the effect of the COVID shutdown). It suggests that domestic visitor nights could increase by 1.17m nights over the 10 years (2019-29), which is similar to the 1.03m increase over the 2010-2019 period. The trend data shows that international visitor nights will grow more slowly by 284,000 nights.

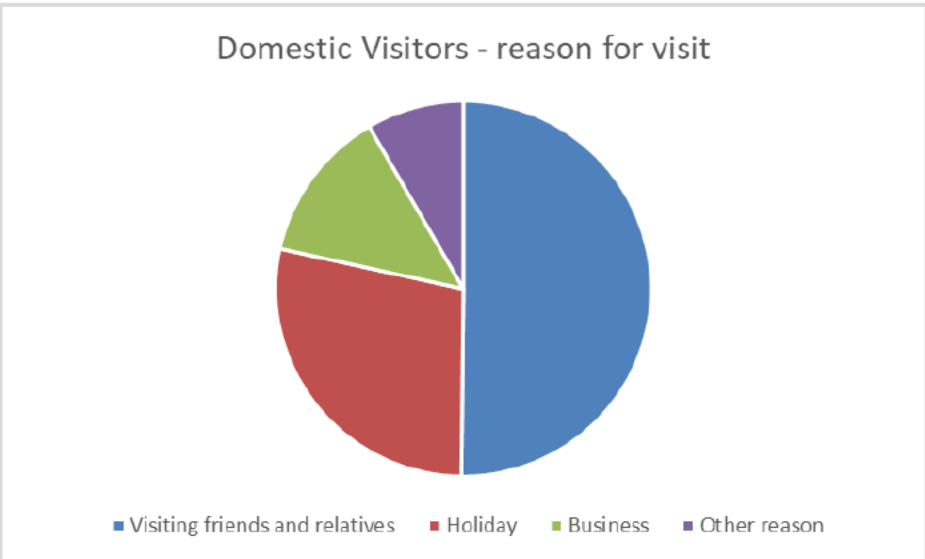
Based on this trend there is demand for additional tourism accommodation rooms to serve the additional demand from domestic visitors.

Over the 10 year period, on average international visitors stay 27.4 nights in Wollongong, with the annual rate varying from 21.6 to 32.2 nights. For comparison, international visitors stay on average 6.9 nights in the Shoalhaven. Domestic visitors stay on average 2.3 nights (ie the weekend or a mid-week conference).

Many international and domestic visitors come to Wollongong for holidays, or to visit friends and relatives. The international visitor data is strongly influenced by students coming to Wollongong for education, and visits from their relatives. The students stay longer and tend to be staying at University student accommodation venues, rather than at privately operated hotels or serviced apartments.



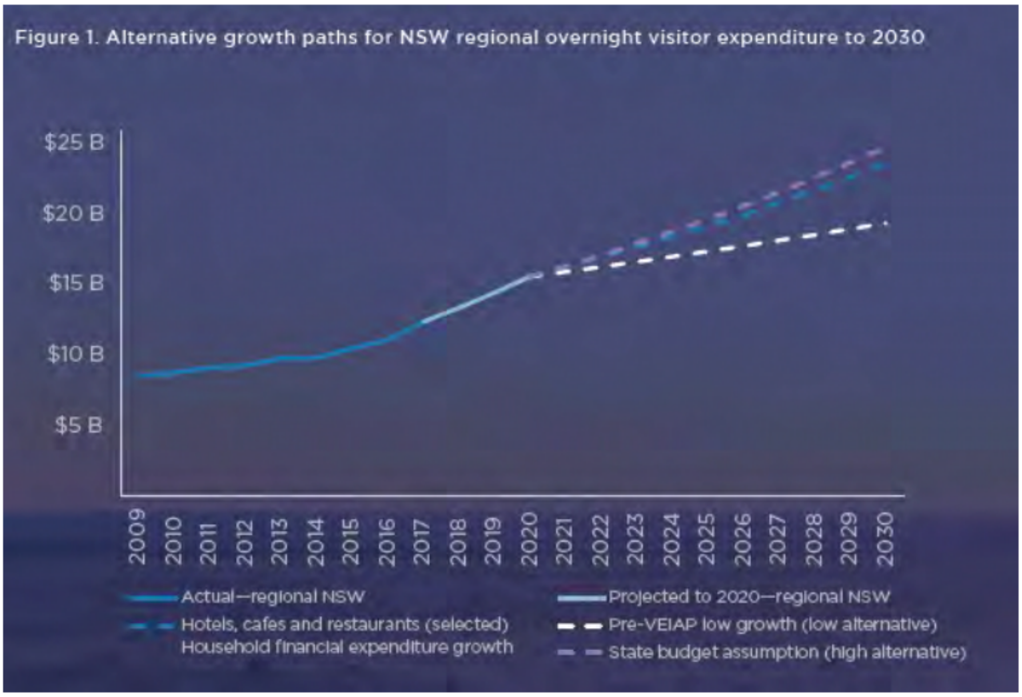
Domestic visitors stay on average 2.3 nights with a narrower range of 2.1 to 2.6 nights, with the majority visiting friends and relatives.



5.4 Setting Targets

Similar to trend analysis, some tourism strategy documents include an aim or forecast for a "X%" increase in growth, which is usually higher than the trend analysis. An assessment is made as to whether existing accommodation can satisfy that growth, and if not, how many extra rooms are required. Often, this target is based on expenditure ($) rather than visitor numbers. When people stay overnight rather than day trips, how much they spend (their expenditure) increases significantly due to the inclusions of overnight accommodations, more meals and activities at a location.

The *NSW Visitor Economy Industry Action Plan 2030* (2018) aims to triple 2009 NSW overnight visitor expenditure to 2030, by aiming to achieve: $45 billion by 2025 and $55 billion by 2030. The Plan also includes a Regional NSW target for overnight visitor expenditure of $20 billion by 2025 and $25 billion by 2030. The report includes the following graphic to show the possible growth paths (report prepared in 2018 pre-COVID).



Destination Sydney Surrounds South zone has adopted a target to double 2012 overnight visitor expenditure to $2.01 billion in 2022, which will require a 5% year-on-year growth target for the period 2017 and 2022,

Destination Sydney Surrounds South Destination Management Plan also includes the following market segment targets for the region:

Market Segment	Current Share	Target Share	2022 Value	Increase in Value
100km - 200km drive market families, couples and young singles	19.19%	19.49%	$4.3B	$67.4M
International visitors to Sydney* (inc. touring)	5.2%	5.5%	$427M	$30M
Travel for a purpose (self-drive):				
Leisure Events	14.6%	15%	$1.37B	$13.1M
Business Events (with a Convention Centre)	6.3%	8%	$2.4B	$9.2M
Cultural visitors	8.6%	9%	$196M	$11.9M
Cruise	0.6%	2%	$2.21M	$633K

The documents do not indicate how many extra rooms are required to meet the increased visitation.

5.5 Sector Targets

Similar to broad targets, some tourism strategy documents aim for an "X%" increase in growth in particular tourism sectors.

For example, the *Chinese Tourism Strategy* (2012) aimed to double Chinese visitation to NSW by 2020. The Strategy did not indicate how many extra rooms would be required to meet this extra demand in the regions.

Destination Sydney Surrounds South Destination Management Plan includes the following targets for international markets (visitors from specific countries or continents) for the region:

Market Segment	Current Share	Target Share	2022 Value	Increase in Value
Asian (Collective)	3.2%	3.5%	$225M	$15.4M
China	2.6%	3%	$115M	$12M
UK	7.7%	8.1%	$51M	$3M
USA	4%	4.5%	$45M	$19M
Korea	6.2%	6.8%	$27B	$2.5M
New Zealand	3.9%	4.5%	$18M	$2.3M
Total				**$54M**

The Plan did not include any specific targets for the Wollongong LGA or the Illawarra-Shoalhaven Region

5.6 Demand targets / policy shifts

Similar to targeting tourism sectors, there could be policy shifts to target specific events.

The *Wollongong Major Events Strategy 2016-2020* aims to target 1-2 signature events per year, plus 3-5 major events, 10-15 key regional events and unlimited community events. The strategy seeks to flatten the summer spike in accommodation demand by targeting shoulder and low season events, so as to avoid accommodation bottlenecks and provide sustained income for local businesses throughout the year. The strategy aims to use major events to convert the engaged and growing day-tripper market into overnight visitation. The strategy also seeks to prioritise multi-day events, to increase overnight visitation, with exhibitions and festivals and tournaments to be targeted.

A spread of events across the year is important to support the amount of accommodation and services required for one-off events, such as the 2022 UCI World Road Riding Championships Sufficient accommodation cannot be provided locally or within the region to service large one-off events. It is anticipated that the international teams will stay in Sydney and be transferred daily to Wollongong for the events.

The hosting of State and National sporting or cultural events increases demand for weekend accommodation. It is understood that the NSW Tip Football competition outgrew Wollongong, and the event was then moved to another region where more accommodation was available.

Prior to COVID-19, Cruise ships were stopping at Port Kembla for day visits to the region. If cruise ships were able to start or end their cruise at Port Kembla, there may be increased demand for accommodation on the night before a cruise departs, or upon return. Although the size of the cruise ships varies, a small cruise ship carries upto 2,250 passenger, and large cruise ships carry upto 5,000 passengers.

One option to increase weekday visitation to Wollongong, would be encourage more conferences. For a conference of 1000 people, some 1000 beds in 4 star accommodation venues would be required. Currently there are 370 rooms available in 4+ star accommodation. A suitable conference venue is also required, however that issue is outside the scope of this review.

A new major tourism or recreation attraction, such as the Cringila Hills Recreation Park, may increase demand for local accommodation.

6. ISSUES FOR DISCUSSION

The previous analysis identifies several issues for review. These issues are themed and further defined in this chapter.

6.1 Retention of Existing Establishments

The *Economic Development Strategy 2019-2029* notes Destination Wollongong concerned about the immediate loss of 150 beds and the loss of up to 400 beds over the next 5 years. As noted in Chapters 3 and 4, many existing hotel and motel accommodation establishments are on land zoned for residential use or commercial uses. The viability of some establishments is influenced by a combination of factors, including:

- Increased running costs,
- Increase maintenance costs for older building,
- Decrease visitor demand therefore occupancy rates (especially during COVID) and the end of the COVID response payment programs of Job Keeper and Job Seeker
- The high land value, especially large sites that could achieve higher residential outcomes due to FSR or height controls. This is especially the case in the R1 General Residential zone that surrounds the Wollongong CBD. The combination of large sites, an FSR of 1.5:1, height limits of 16m, 24m or 32m and coastal views makes residential apartment buildings an attractive development option.
- Residential developments are generally strata'd and sold off. Therefore, a return on investment (profit) is realised quickly for a residential developer. Tourism accommodation, although sometimes strata'd, is a per rental situation whereby it takes time to recoup the costs of development, and with the uncertainty around visitation numbers, this can be seen as high-risk and can take a long time.

To incentivise the retention and upgrading of existing facilities, measures such as zoning, floor space bonuses, parking rates, and/or developer contributions could be reviewed.

6.2 Encouragement for New Establishments

As well as retaining existing accommodation, new accommodation venues are also required to meet projected demand. As noted in chapter 5, the domestic tourism market is likely to continue to increase. The implementation of initiatives in the Economic Development Strategy and various tourism strategies will further increase visitation. Domestic day visitors need to be encouraged to stay longer, for a night or two or more. As noted, overnight visitors have a higher spend and therefore greater benefit to the local economy.

Council has approved 3 new hotels and 1 development application is under assessment. If all are constructed an additional 450 beds will be available in the Wollongong City Centre.

To incentivise the establishment of new facilities, measures such as zoning, floor space bonuses, parking rates, and/or developer contributions could be considered. Land could be zoned SP3 Tourist to flag a site as being suitable for a new Hotel or Motel development.

6.3 PERMISSIBILITY OF LAND USES

The *Wollongong LEP 2009* permits a variety of tourism accommodation styles across the LGA. The majority of existing accommodation facilities are outside the SP3 Tourist zone on land zoned for other priorities, such as business or residential. Although tourism accommodation may also permitted, generally the other uses permitted in these zones are more economically attractive. The SP3 Tourist zone contains a variety of uses, the majority of which are not for tourism or tourism accommodation.

The following issues were identified with the permissibility of tourist accommodation uses.

1. The land use zoning pattern in the Northern Suburbs is dominated by R2 Low Density Residential, E3 Environmental Conservation and E4 Environmental Living. These zones do not permit a range of tourist accommodation such as backpackers' accommodation, hotel and motel accommodation or serviced apartments. The land therefore cannot support tourist attractions in this area, in proximity to the Tourist (Seacliff Bridge, Grand Pacific Drive, beaches, villages, escarpment) and the potential luxury and romantic tourism markets that have been identified. The only areas that do permit this type of development are the small business zoned areas and the SP3 Tourist zoned site at Headlands Avenue.

   In order to address this problem consideration has been given to:

   - Making 'hotel and motel accommodation' and 'backpackers' accommodation' permissible in the R1 General Residential, R2 Low Density and R3 Medium-Density Residential zones and including additional controls in Wollongong DCP 2009. Amenity, traffic and neighbourhood character impacts are likely to be the major concern. Site suitability criteria could be imposed such as a minimum site area control and requiring proximity to main roads.
   - Increasing the number of bedrooms permitted in clause 5.4(1) of the LEP for bed and breakfast accommodation. This would be undesirable as it is a clumsy means of achieving greater permissibility for small scale hotels. Also this action would lead to unintended amenity impacts and increase the scale of development beyond what is suitable and capable on most residential properties.
   - Including a new land use definition of 'Guest House' which would be based on the definition of hotel and motel accommodation but have a capacity set in clause 5.4 of Wollongong LEP 2009. The Standard LEP Instrument hinders the ability to undertake this option.

2. The existing supply of caravan parks is very limited and there are unlikely to be other suitable caravan park sites in the LGA. This is due to the large site area required and the cost of land in areas with high scenic/amenity value. In order to maintain a range of accommodation options (in particular for families) it is critical that existing sites continue to be protected by inclusion within the SP3 Tourist, RE1 Public Recreation or RE2 Private Recreation zones.

6.4 Short-Term Rental Accommodation

Short-term Rental Accommodation is not defined by the Standard LEP Instrument and is therefore not included in the *Wollongong Local Environmental Plan 2009*. From 1 November 2021, short-term rental accommodation will be permissible under SEPP Affordable Rental Housing (as indicated in section 3.1 of this report).

Short-term holiday rentals are evident primarily in Wollongong's Northern Suburbs however the quantity and extent of this type of accommodation has not been determined, as it varies greatly with stock coming on and off the market daily. The full extent of short-term holiday letting has not been determined in this discussion paper. Further data collection is required in order to obtain a more complete understanding of the significance of this form of accommodation to the tourist industry.

Other coastal council areas have experienced significant growth in the short term lettings of residential dwellings and there has been pressure placed on Council's to address associated amenity conflicts with planning controls. Adverse amenity impacts (by way of garbage, car parking, traffic, noise, parties, anti-social behaviour etc) are sometimes attributed to short term holiday rentals due in part to the transient nature of occupants. As some properties are non-hosted, it is difficult to complain to the owner who could live in another region.

Short-term rental accommodation contribute positively to the tourism industry of a region, by providing accommodation, increasing tourist numbers, awareness and expenditure, and therefore benefit the local economy. However, they also compete with traditional forms of accommodation such as hotel and motel rooms.

On 28 October 2020 the *Fair Trading Amendment (Code of Conduct for Short-term Rental Accommodation Industry) Regulation (No 2) 2020* was published. Also on 28 October 2020 NSW Fair Trading released the Code of Conduct for the Short-term Rental Accommodation Industry which commenced on 18 December 2020. The NSW Fair Trading have been given the responsibility to create a register of premises used for short-term rental accommodation, and to monitor complaints and compliance.

On 9 April 2021, the NSW Department of Planning, Industry and Environment published an amendment to SEPP Affordable Rental Housing, to introduce provisions for Short-term rental accommodation.

The use is defined as:

> ***short-term rental accommodation*** *means a dwelling used by the host to provide accommodation in the dwelling on a commercial basis for a temporary or short-term period.*

From 1 November 2021, short-term rental accommodation will be permissible as exempt development, as either hosted or non-hosted, subject to the requirements listed in the SEPP:

Any complaints concerning the operation of premises are to be directed to NSW Fair Trading. Any issues requiring immediate attention, such as late night noise, should be directed to NSW Police.

As the State has enacted a State-wide approach to short-term rental accommodation there is no requirement for Council to amend or review its local planning controls.

6.5 Eco-tourist facilities

Eco-Tourism is ecologically sustainable tourism that fosters environmental and cultural understanding, appreciation and conservation. With our unique natural environment and strong tourism sector, Eco-tourism presents opportunities for Wollongong. Eco-tourism includes both attractions / activities and accommodation. This report only considers accommodation.

As noted in section 4.1 of this report, the Standard LEP Instrument now includes a definition of eco-tourist facilities and a mandatory clause if the use is permitted. As the use was not permissible under the Wollongong LEPs prior to the amendment to the Standard Instrument, it remains prohibited. Council is required to prepare and exhibit a draft Planning Proposal to make the use permissible and introduce standard clause 5.13.

In 2006, Ecotourism facilities was introduced as a use permissible with development consent in the Non urban, Residential, Business, Tourism and Environmental Protection zones of the Wollongong LEP 1990 by Amendment 235. The use was defined as:

> ***ecotourism facility*** *means any nature-based tourism, educational or interpretative facility that is constructed and managed so as to be ecologically sustainable and without detrimental impact on the ecology of the locality. It may include some form of guest accommodation (but not a caravan park), facilities for provision of meals and a manager's residence.*

The definition was aimed at providing eco-tourism activities and experiences, not ecotourism accommodation.

In 2007, Council approved DA-2007/360 for an ecotourism development at 98-100 Lawrence Hargrave Drive Stanwell Park, which contained 5 self-contained cabins, managers residence, multipurpose room and swimming pool. The land was zoned 7(b) Environmental Protection Conservation and is now zoned E3 Environmental Management. The development has not been constructed and has now lapsed.

In 2008, the Land and Environment Court approved DA-2007/1799 for an ecotourism facility at 2 Morrison Avenue, Coledale, which contained a manager residence, facility centre and two accommodation cabins. The land was zoned 7(b) Environmental Protection Conservation and is now zoned E2 Environmental Conservation. The facility was constructed and is known as Coledale Rainforest Retreat.

There was some also criticism that the LEP definition was too loose and the use was being used as a means to get a dwelling house approved on a 7(b) Environmental Protection zoned land, where the minimum lot size for an ecotourism facility was less than the minimum lot size required for a dwelling house.

Council needs to determine whether the use should become a permissible under the current Wollongong LEP 2009, and in which zones.

The current standard instrument definition is:
eco-tourist facility *means a building or place that—*

- *(a) provides temporary or short-term accommodation to visitors on a commercial basis, and*
- *(b) is located in or adjacent to an area with special ecological or cultural features, and*
- *(c) is sensitively designed and located so as to minimise bulk, scale and overall physical footprint and any ecological or visual impact.*

It may include facilities that are used to provide information or education to visitors and to exhibit or display items.

Note—

See clause 5.13 for requirements in relation to the granting of development consent for eco-tourist facilities.

Eco-tourist facilities are not a type of ***tourist and visitor accommodation***—see the definition of that term in this Dictionary.

Unlike the former Wollongong LEP 1990 definition, the Standard Instrument definition is focused on providing accommodation rather than experiences. As the majority of the Wollongong LGA has been developed and serviced, there are few locations where an eco-tourist facility could establish without damaging its setting.

Clause 5.13 of the Standard LEP Instrument states:

5.13 Eco-tourist facilities

(1) The objectives of this clause are as follows—

(a) to maintain the environmental and cultural values of land on which development for the purposes of eco-tourist facilities is carried out,

(b) to provide for sensitively designed and managed eco-tourist facilities that have minimal impact on the environment both on and off-site.

(2) This clause applies if development for the purposes of an eco-tourist facility is permitted with development consent under this Plan.

(3) The consent authority must not grant consent under this Plan to carry out development for the purposes of an eco-tourist facility unless the consent authority is satisfied that—

(a) there is a demonstrated connection between the development and the ecological, environmental and cultural values of the site or area, and

(b) the development will be located, constructed, managed and maintained so as to minimise any impact on, and to conserve, the natural environment, and

(c) the development will enhance an appreciation of the environmental and cultural values of the site or area, and

(d) the development will promote positive environmental outcomes and any impact on watercourses, soil quality, heritage and native flora and fauna will be minimal, and

(e) the site will be maintained (or regenerated where necessary) to ensure the continued protection of natural resources and enhancement of the natural environment, and

(f) waste generation during construction and operation will be avoided and that any waste will be appropriately removed, and

(g) the development will be located to avoid visibility above ridgelines and against escarpments and from watercourses and that any visual intrusion will be minimised through the choice of design, colours, materials and landscaping with local native flora, and

(h) any infrastructure services to the site will be provided without significant modification to the environment, and

(i) any power and water to the site will, where possible, be provided through the use of passive heating and cooling, renewable energy sources and water efficient design, and

(j) the development will not adversely affect the agricultural productivity of adjoining land, and

(k) the following matters are addressed or provided for in a management strategy for minimising any impact on the natural environment—

(i) measures to remove any threat of serious or irreversible environmental damage,

(ii) the maintenance (or regeneration where necessary) of habitats,

(iii) efficient and minimal energy and water use and waste output,

(iv) mechanisms for monitoring and reviewing the effect of the development on the natural environment,

(v) maintaining improvements on an on-going basis in accordance with relevant ISO 14000 standards relating to management and quality control.

The definition and standard clause do not provide any guidance on the scale (size) of an eco-tourism facility meaning it could apply to anything ranging from a single building to a large resort.

It may be appropriate that the land use tables not be amended to permit the use with development consent in any zone. Rather the definition and clause remain available for consideration as part of any site specific proposal.

6.6 Guest Houses

Historically there were many guest houses in the LGA, often close to railway stations, including Seaview Guest House at Bulli (demolished) and Railway Guest House at Bulli (now a licenced venue – Resin Brewery).

Some places called *Guest houses* provide shared accommodation or are boarding houses, and don't provide accommodation for visitors.

Guest houses are not defined in the Standard LEP instrument and therefore not listed in Council's LEP. It is considered that a "guest house" definition would be beneficial to provide a use that is larger than a Bed and Breakfast (3 bedrooms) and smaller than hotel or motel accommodation. There are numerous guest houses in locations such as the Southern Highlands and Blue Mountains, the majority of which would have been established prior to the Standard LEP Instrument. Under the current LEP they would need to be defined as hotel or motel accommodation.

An internet search comes up with a variety of guest house definitions and explanations:

- A small hotel, or a small house in the grounds of a large house, where visitors/guests can stay (Collins dictionary and Oxford dictionary)
- A small hotel or private home where people can pay to spend the night (Macmillian dictionary)
- A guesthouse is traditionally a small, privately owned homestead that rents out its rooms at a daily rate. A guesthouse will also have fewer rooms than a hotel, usually anything from 4-10 rooms. A hotel is often a larger establishment that is corporately owned. (Evertsdal guest house – South Africa) (https://evertsdal.com/what-is-the-difference-between-a-hotel-and-a-guesthouse/)
- A guesthouse is generally a larger property with more than 5 bedrooms. It's basically a small hotel and are usually owner-operated. The host might live on the premises. A bed and breakfast is generally smaller than a guest house, and normally accommodate no more than 6 guests. (https://cheaphotels4uk.com/bb/difference-breakfast-guesthouse.html)

As noted in section 6.1, the Wollongong LEP 2009 could be amended to include a new land use definition of 'guest house' which would be based on the definition of hotel and motel accommodation but have a capacity set in clause 5.4 of Wollongong LEP 2009. However, the Standard LEP Instrument hinders the ability to undertake this option.

6.7 Farm Stay Accommodation

Farm stay accommodation is permitted in the rural zones. In March 2021, the NSW Department of Planning, Industry and Environment published a draft Explanation of Intended Effect (EIE) on Agritourism and small-scale agriculture development, part of which seeks input on whether the definition should be amended to:

- *remove the references to working farm and secondary business as these requirements are restrictive for farms that operate on a seasonal basis and are not typically planning considerations*
- *replace these references with a requirement that the existing principal use of the land must be the production of agricultural/primary production goods for commercial purposes to ensure a farm stay supplements an existing commercial farming business*
- *enable farm stay accommodation on a farm that is currently not producing goods because of drought or similar events outside the landowner's control*
- *include accommodation in a building and camping (camping is currently not included under farm stay accommodation). This is intended to facilitate small-scale camping being undertaken on a farm as exempt development.* (DPIE 2021)

The first three reasons are not that relevant for Wollongong which does not suffer the impacts of drought as much as other parts of NSW, and Wollongong is predominately an urban area with a variety of accommodation choices available.

The draft EIE also proposes that the approval pathway could change from requiring a Development Application for all proposals to a combination of exempt development, complying development and development applications, as summarised in the following table.

Table 1 - Summary of proposed approval pathways for farm stay accommodation

Approval pathway	Proposed development	Approval required
Exempt development	• Change of use of an existing dwelling or part of a dwelling • Use of land for farm stay accommodation in tents, caravans or similar	No planning or building approval required if specified development standards are met
Complying development	• Change of use of an existing building or manufactured home • Erection, alteration or addition to a building or manufactured home	A fast-tracked approval can be issued by the local council or a registered certifier if specified development standards are met
Development application	• Any proposal that does not satisfy the requirements for exempt and complying development	The local council will undertake a merit assessment of the proposal and issue a development consent if approved

(DPIE 2021)

The draft EIE also included some possible development standards.

The proposal to allow camping as a form of Farm stay accommodation, on rural and environmental management properties may have greater consequences. The draft EIE proposes that up to 20 persons in tents, caravans, campervans or other similar portable and light weight temporary shelters would be permissible, at any one time on the landholding for up to 14 days, as exempt development (ie no approval required).

It is considered that the proposal is different to family hosting on their property, relatives and friends visiting for a weekend or during the holiday periods, with their caravan or tent. The difference being one is for commercial gain, and the other is to host family or friends.

It could mean that 10 tents or caravans could be placed on a property to offer year round short-term rental accommodation. No approval from Council would be required. Adjoining landowners would not be notified. Council does not have the resources to check on whether a tent/caravan is being occupied and for how long someone is staying. It also doesn't address how is waste managed in unsewered locations.

These concerns were outlined in a submission from Council on the draft EIE.

Following the exhibition period, the Department will review the feedback received, and then decide whether to progress any of the changes through draft legislation (draft SEPP and draft Standard LEP Instrument amendments) later this year.

Since 2014 Council has considered 2 Development Applications for Farm stay accommodation:

- in 2014, Council approved the use of an existing dwelling on a property zoned E3 Environmental Management at Stanwell Tops
- in 2019, an application was withdrawn for the construction of a farm stay accommodation on a property zoned E3 Environmental Management at Wombarra, where there was no existing dwelling house or agricultural activity.

There has been no DAs for farm stay accommodation on rural zoned land.

To avoid further instances of the farm stay accommodation use, being a means to get a dwelling house approved on an E3 Environmental Management property, it may be appropriate that the use be removed from the land use table.

6.8 Council and Crown land

Council owns 2,244 lots which cover an area of 3,066 hectares of land within the Wollongong LGA. This represents 4% of the LGA. The majority of Council land is parks, sportsfields, drainage reserves and bushland. Council also owns community buildings, libraries, works depots, and the waste depot.

In terms of land zoned SP3 Tourist, Council owns the Mt Keira Summit Park (zoned SP3 and E2).

Within the Wollongong LGA there is also some land owned by the State Government that is zoned for tourism. The Crown Reserves of Bulli Tops Gateway Centre, Cliffhanger and Sublime Point at Bulli Tops are zoned SP3 Tourist and part E2 Environmental Conservation. The SP3 Tourist zone permits camping at these locations, however the Reserve purpose does not currently permit the use. Council is in the process of preparing Plans of Management for the three Crown Land Reserves.

The three Council run Tourist Parks (Windang, Corrimal and Bulli) are located on Crown Reserves. The three Tourist Parks are an important component of the available tourism accommodation, providing powdered and unpowered camping and caravan sites.

In addition to planning controls under the *Environmental Planning and Assessment Act 1979*, Council land and Crown Reserves (where Council is the Crown land manager) has an extra layer of control that governs land uses, activities, management, leases and licences.

Council and Crown land (where Council is the Crown land manager) is required to be classified as either Community Land or Operational Land under the *Local Government Act 1993* and *Crown Land Management Act 2016*, respectively. Community land is required to be categorised as either Park, Sportsground, General Community Use, Area of Cultural Significance, or Natural Area.

Any Council and Crown Community land that is classified as Community Land is also required to be subject to a Plan of Management. Council has prepared a number of Plans of Management for Council land. The draft Community Land Plan of Management for Council land does proposed to enable temporary camping on Council land, to support events and festivals.

Council is in the process of preparing Plans of Management for Crown Land Reserves, where Council is the Crown Land Manager.

The large area of SP3 Tourist land on the foreshore of Lake Illawarra at Kully Bay, Warrawong, previously managed by the Lake Illawarra Authority, is currently managed by Property NSW. It is not a Crown Reserve or Council land which means it is not managed under the *Crowns Lands Management Act 2016* or *Local Government Act 1993*.

6.9 DCP CONTROLS

The Wollongong DCP 2009 does not provide many specific land use development controls for tourism accommodation. Chapter C4 applies to development applications for Caravan Parks, Camping Grounds and Manufactured Home Estates. Provisions in other chapters would apply depending on the land zoning (eg chapter B4 Development in Business Zones) or the locality (eg Chapter D13 Wollongong City Centre). Additionally, provisions in a number of City wide chapters would be relevant, eg E1 Access for People with a Disability, E3 Car parking and Access, E6 Landscaping, E7 Waste Management and others may be relevant depending on the location eg E10 Aboriginal heritage, E11 heritage Conservation, E13 Floodplain management and E16 Bush Fire management.

In terms of car parking, Chapter E3 specifies the following rates:

Land Use	Car Parking Requirements	Bicycle Parking Requirements	Motorcycle Parking Requirement	Delivery / Service Truck Requirement
Backpackers accommodation	*City wide:* 1 car parking space per 2 staff plus 1 car parking space per 5 beds	1 bicycle space per 5 beds plus 1 car parking space per staff member	1 motor cycle space per 25 car parking spaces	NA
Bed and breakfast accommodation	*City wide:* As per dwelling house plus 1 car parking space per guest bedroom	NA	1 motor cycle space per 10 guest bedrooms	NA
Tourist and visitor accommodation	*City wide:* 1 car parking space per 2 staff members plus 1 car parking space per apartment / unit	NA	1 motor cycle space per 10 apartments / units	Small Rigid Vehicle

Hotel or motel accommodation	*City wide:* 1 car parking space per 2 staff members plus 1 car parking space per unit / apartment *Wollongong City Centre:* 1 car parking space per 4 staff plus 1 car parking space per motel unit or 0.5 car parking space per hotel unit / apartment *Zones B3 Commercial Core and B4Mixed Use in Wollongong city centre (as per WLEP):* 1 car parking space per 40m² GFA, where the hotel or motel accommodation is not strata subdivided	NA	1 motor cycle space per 25 car parking spaces	>15 units/ apartments – Large Rigid Vehicle
Caravan park	*City wide:* 1 car parking space per site Note: In accordance with Local Government (Manufactured Home Estates, Caravan Parks, Camping Grounds and Moveable Dwellings) Regulation 2005	NA	NA	Large Rigid Vehicle (Waste collection trucks and Coaches)

Car parking can add to the cost of the development. Although the Illawarra Rail line services the Wollongong LGA, the train service is not fully utilised due to the hourly servicing timetable, and the lack of other modes of transport to connect visitors from stations to your accommodation especially in the northern suburbs. Accordingly, there is a reliance on travel by car and therefore the need for parking.

A review of the recent Development Applications approvals for hotels in the City Centre found that the car parking rate was complied with and variations not sort.

Within the Wollongong City Centre the cost of excavating basement car parking is expensive and can affect the feasibility of a development.

Conversely, many visitors drive to Wollongong and want parking at or close to where they are staying. A lower car parking rate in locations close to rail stations (with frequent train services) could be considered.

6.10 Attractions

The attractions that drive people to visit a location are varied and changing. People go to destinations for a specific activity e.g.. the beach, bushwalks, conferences, shopping, events, festivals and then look for somewhere to stay.

Conversely, we are seeing a rise in boutique and destination accommodation offers within Australia and NSW such as The Calile Hotel in Brisbane, Paramount Hotel in Surry Hills and Paperbark Camp in Jervis Bay where people are seeking out that particular accommodation experience, which is further supported by surrounding restaurants, bars and cultural venues.

Some of the main attractions in the Wollongong LGA include
Natural attractions:

- Beaches
- Lake Illawarra
- Natural bushland of the Illawarra Escarpment and National Parks
- Illawarra Escarpment lookouts
- Rockpools
- Wollongong Botanic Gardens

Things to do and see:

- Symbio Wildlife Park
- Sky Dive the Beach
- Australian Motorlife Museum at Kembla Grange
- Nan Tien Temple
- Sri Venkateswara Temple
- Sea Cliff Bridge
- Grand Pacific Walk
- Events at WIN Stadium and Wollongong Entertainment Centre
- Kembla Grange Racetrack
- Dapto Dogs
- Wollongong lighthouses
- Small bars, cafes and restaurants
- Music festivals and venues

Popular attractions in nearby LGAs, include the Jamberoo Action Park, Historical Aircraft Restoration Society (HARS) at Shellharbour Airport and the Illawarra Fly Treetop Walk.

Wollongong does not have an international / bucket list attraction like the Great Barrier Reef, Uluru or the Sydney Opera House. Although post-COVID that may not be a bad thing. Destinations that have relied on international visitors, such as Far North Queensland, have been hit hard by the COVID boarder closures. Whereas, the variety of attractions in Wollongong, proximity to Sydney and predominately a domestic tourism market the COVID impacts, while significant, have not been as great as other regions.

The on-going promotion of existing attractions will increase visitor numbers and the length of stay. Tourism attraction uses also require planning approval through the lodgement and assessment of development applications. The permissibility will depend on the proposed use and the zoning and other planning controls and constraints applying to the land.

7. RECOMMENDATIONS

A summary of the findings of this review is presented below:

1. Wollongong has strong day visit appeal, due to its close proximity to Sydney, relying heavily on beaches and scenic drives/lookouts.
2. Most overnight visitors to the Illawarra domestic visitors.
3. The main purposes of travel to Wollongong are 'visit relatives/friends' and 'holiday/leisure'. Education is also a major reason for travel to Wollongong.
4. The choice and usage of hotel and motel accommodation is significantly lower than State and National averages.
5. The Backpacker market is negligible, however other budget offers are available.
6. Intensity of accommodation is concentrated in and around the Wollongong City Centre.
7. There is an absence of accommodation in the southern suburbs. Accommodation in the northern suburbs comprises of mainly bed and breakfast establishments.
8. There is a need to attract more domestic and international overnight visitors to Wollongong throughout the year, to make additional accommodation feasible.

7.1 LAND USE TABLE

This review highlighted a number of zoning and permissibility issues. A number of these issues require further consideration and may be of sufficient merit to justify the preparation of a draft Planning Proposal to amend the Wollongong Local Environmental Plan 2009:

1. Make *hotel and motel accommodation* permissible in the R1 General Residential zone. This land use zone is located around the Wollongong City Centre, in Wollongong and North Wollongong and would provide for greater permissibility of hotels and motels in the City Centre; close to major services, attractions (such as restaurants, city beaches/parks, the harbour and nightlife) and transport. This action could assist in stimulating investment in the city centre and support the local tourism industry, fostering competition and addressing supply. This change would also ensure that should existing tourist accommodation developments located in the R1 zone wish to redevelop or intensify their use this would be permissible (subject to development consent).

   The additional permissible use within the R1 zone will not however address a shortage of accommodation developments in the southern and northern suburbs and may further concentrate accommodation developments in the City Centre.

2. Remove Farm-stay accommodation as a permissible use from the Rural and Environmental Management zones. This will remove the attempts to make dwelling houses permitted on undersized lots, and the proposed short-stay camping initiatives proposed by the State.

7.2 FLOOR SPACE RATIOS

To incentivise the retention of existing hotel and motel accommodation and to encourage the construction of new hotel and motel accommodation, it may be appropriate to introduce a floor space ratio (FSR) bonus of 0.5:1 in the following zones:

- R1 General Residential zone - an additional 0.5:1 for existing and proposed hotel and motel accommodation, which would increase FSR to 2:1.
- R2 Low Density Residential zone - an additional 0.5:1 for existing and proposed hotel and motel accommodation, which would increase FSR to 1:1.
- B3 Commercial Core - an additional 0.5:1 for existing and proposed hotel and motel accommodation, and backpacker accommodation.
- B4 Mixed Use - an additional 0.5:1 for existing and proposed hotel and motel accommodation, and backpacker accommodation.
- SP3 Tourist – refer to maps in section 7.4

7.3 Zoning (Existing facilities on non-SP3 sites)

The Review found that 13 of the 73 existing tourism establishments are located in land use zones which do not permit the current accommodation use. These establishments would have been approved under older planning legislation, when the use was permitted. The

- A number of motels across the city are located in R2 Low Density Residential zones including: Thirroul Beach Motel, Elsinor Motel (Brownsville) and the Windmill Motel (Woonona). These motels are older developments approved between the 1960s and 1980s. The current residential zoning is appropriate for these sites given surrounding land uses are primarily detached housing. The proposed bonus FSR provision is aimed to encourage the retention and expansion of existing premises and allow investment. Alternatively, consideration could be given to rezoning the sites to another zone such as SP3 Tourist.

- Tumbling Waters retreat is a luxury accommodation provider located at Lot 1 DP 213308 (Stonehaven Road) Stanwell Tops. It has been operating since 2002 and offers conference/function facilities and a licensed restaurant/private dining facility. A number of development applications relating to this use on the site have been approved. The site is currently zoned E2 Environmental Conservation. The E2 zoning does not permit accommodation uses. The site is also listed as containing a local heritage item.

- The Tops Conference Centre and Accommodation (Lot 3 DP 541421) has a split zoning of E2 Environmental Conservation and E3 Environmental Management. The site caters for groups of up to 600 persons, and has a range of educational and recreational (outdoor) facilities. The current zoning does not permit the accommodation development.

- The Govinda Valley Spiritual Retreat and accommodation in Otford falls is zoned part E2 and part E3. The zoning was reviewed as part of the Review of former 7(d) land in Helensburgh, Otford and Stanwell Tops over a number of years, which recommended the retention of the E3 zone.

The rezoning of sensitive bushland sites in the Illawarra Escarpment, Escarpment Plateau, Sydney Drinking Water Catchment or the Hacking River catchment to SP3 Tourism or to permit new tourist accommodation facilities, including eco-tourism, is not supported. The escarpment and bushland are part of the attraction of Wollongong and should be protected to ensure it can be enjoyed by future generations. The potential economic and employment benefits of tourist accommodation, shouldn't override the existing conservation values.

7.4 Zoning – SP3 Tourist zone

The Review found that land zoned SP3 Tourism sites was being undertaken for a variety of uses, some related to tourism. Some sites have uses inconsistent with the SP3 zone and other sites where an alternate zone maybe more appropriate. For example:

- Sites used for residential uses
- Sites used for retail uses
- Sites used for recreational uses
- The Woodrow Place, Figtree road reserve
- Sites containing significant bushland

REFERENCES

Destination NSW (2017) Aboriginal Tourism Action Plan

Destination NSW (2017) NSW Regional Conference Strategy and Action Plan 2017-2021

Destination Sydney Surrounds South (2018) Destination Management Plan 2018

Destination NSW (2019) Statewide Destination Management Plan

Destination NSW (2019) Cruise Sydney and NSW – along the Blue Highway

Destination Wollongong (2014) Destination Development Plan

Destination Wollongong (2014) Destination Management Plan

Destination Wollongong (2020) Annual Report

Destination Wollongong (2021) Wollongong Press Play – Visitor Information Guide

NSW Department of Industry (2021) Visitor Economy Industry Action Plan 2030

NSW Department of Industry (2020) NSW Cruise Development Plan

NSW Department of Planning (2009) *LEP practice note – PN 09-006*

NSW Department of Planning and Environment (2018) Short-term Rental Accommodation Planning Framework - Explanation of Intended Effect

NSW Department of Planning, Industry and Environment (2021) Illawarra Shoalhaven Regional Plan

State of NSW (2020) NSW South Coast Marine Tourism Strategy

STR (2019) Australian Accommodation Monitor – Summary for the year July 2018-June 2019

STR (2020) Australian Accommodation Monitor – Summary for the year July 2019-June 2020

Transport for NSW (2018) Future Transport Strategy 2056

Transport for NSW (2018) Regional NSW Services Infrastructure Plan

Transport for NSW (2018) Tourism and Transport Plan

Transport for NSW (2021) Illawarra Shoalhaven Regional Transport Plan

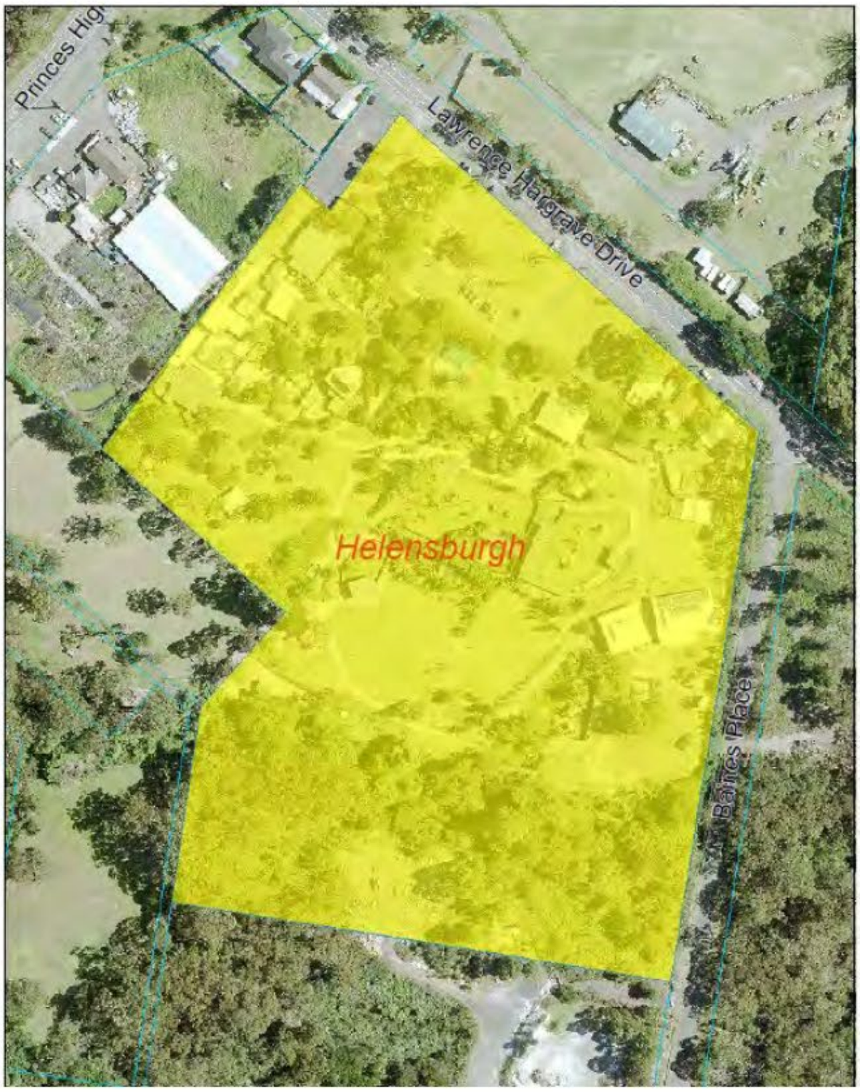
Wollongong City Council (2010) Wollongong Local Environmental Plan 2009

Wollongong City Council (2019) Economic Development Strategy 2019-2029

APPENDICIES

APPENDIX 1 - SUMMARY OF SP3 TOURIST ZONES SITES

Symbio Wildlife Park, Helensburgh



Site	Approximate Area	Max Building height	Floor Space Ratio	Land Use/s	Ownership
Lots 1000, 1001, 1002, 1003 DP 870352 7-15 Lawrence Hargrave Drive, **HELENSBURGH**	66168.1m^2	9m	Not mapped	Symbio Wildlife Park 2 dwelling houses	Private ownership

Sublime Point, Maddens Plains

Site	Approximate Area	Max Building height	Floor Space Ratio	Land Use/s	Ownership
Lot 31 DP 1083116 Lot 32 DP 1083116 **MADDENS PLAINS (Sublime Point)**	33403 m²	9m	0.5:1	Sublime Point Lookout and amenities - picnic shelters, BBQs, bathrooms Sublime Point restaurant and café - single storey brick structure including manager's residence Telecommunications facility	Lot 31 - Wollongong City Council (WCC) Lot 32 - The State of NSW – Crown Land managed by Wollongong City Council - Bulli Pass Scenic Reserve Trust

Panorama House, Maddens Plains

Site	Approximate Area	Max Building height	Floor Space Ratio	Land Use/s	Ownership
Lot 1s & 2 DP 538828 **MADDENS PLAINS (Panorama House)**	16767m²	9m	0.5:1	Panorama House Restaurant and Function Centre Motel Telecommunications tower	Private ownership

Cliffhanger Café/Restaurant and Lookout, Maddens Plains

Site	Approximate Area	Max Building height	Floor Space Ratio	Land Use/s	Ownership
Lot 7004 DP 92952 **Princes Highway** **MADDENS PLAINS**	$7905m^2$	9m	05:1	Cliffhanger café/restaurant and function centre, car park, lookout and amenities (bathrooms, picnic area)	The State of NSW – Crown Land managed by Wollongong City Council

Gateway Centre and Bulli Pass Scenic Reserve, Bulli Tops

Site	Approximate Area	Max Building height	Floor Space Ratio	Land Use/s	Ownership
Lots 1 & 2 DP 1083121 **Princes Highway BULLI TOPS (Gateway Centre and Bulli Pass Scenic Reserve)**	$10847m^2$	9m	Lot 1 0.5:1 Lot 2 no mapped maximum height	Gateway Tourist Office Restaurant Lookout	The State of NSW – Crown Land managed by Wollongong City Council

Headlands Hotel site, Austinmer

Site	Approximate Area	Max Building height	Floor Space Ratio	Land Use/s	Ownership
Lots 100 & 101 DP 1212173, Not Formed road and part Headland Avenue **Headlands Avenue AUSTINMER (Headlands Hotel site)**	6844m² (Lot 100 & 101) 9970.8 m² Including not formed road and part Headland Avenue	Lot 100 9 m & 15 m Lot 101 9 m & 3 m	1.5:1	Headlands Hotel - pub and bistro/restaurant. Accommodation	Private ownership

Bulli Tourist Park Farrell Road, Bulli

Site	Approximate Area	Max Building height	Floor Space Ratio	Land Use/s	Ownership
Lot 173 DP 728053 Part of Lots 1 & 3 DP 197758 Part of Lots 4 & 5 DP 1129987 **Farrell Road** **BULLI (Bulli Tourist Park)**	43064m² (approximately)	9m	0.5:1	Bulli Tourist park, caravans, camping and cabin accommodation and associated facilities including, function/conference room	The State of NSW – Crown Land managed by Wollongong City Council

Princes Highway, Woonona

Site	Approximate Area	Max Building height	Floor Space Ratio	Land Use/s	Ownership
Lot 1 DP 830398 **429-431 Princes Highway WOONONA**	2263m²	11m	1.5:1	Vacant	Private ownership
Part of Lot 1 DP 1172253 **417-421 Princes Highway WOONONA**	330.5m²	11m	1.5:1	Two storey commercial development – under ground parking and out building	Private ownership
Part of Lot 2 DP 830398 **455-459 Princes Highway WOONONA (RSL Club)**	15034m²	11m	1.5:1	Woonona Bulli Memorial RSL & carpark & Youth Centre	Woonona Bulli RSL Memorial Club Limited

Corrimal Tourist Park Murray Road, East Corrimal

Site	Approximate Area	Max Building height	Floor Space Ratio	Land Use/s	Ownership
Part of Lot 174 DP 728054 **Murray Road** **EAST CORRIMAL**	101141m²	9m	0.5:1	Corrimal Tourist Park: Caravan, camping and cabin accommodation and BBQ areas and kiosk	The State of NSW – Crown Land managed by Wollongong City Council

Pioneer Road, Fairy Meadow

Site	Approximate Area	Max Building height	Floor Space Ratio	Land Use/s	Ownership
Lot 2001 DP 1102607 **170 Pioneer Road** **FAIRY MEADOW** **(Towradgi Beach Hotel)**	17340m²	9m	1.5:1	Towradgi Beach Hotel: pub & beer garden, playground, restaurant, function room Waves Nightclub Motel	Private ownership

Site	Approximate Area	Max Building height	Floor Space Ratio	Land Use/s	Ownership
Lot 107 DP 613634 **Pioneer Road** **FAIRY MEADOW**	3800m²	9m	1.5:1	Drive-through bottle-shop and car park	Private ownership
Lot 1 DP1150670 **19-27 Carters Lane** **FAIRY MEADOW (Leisure Coast Motel site)**	4540m²	9m	1.5:1	Motel - Pioneer Sands and associated commercial facilities (approved DA-2006/151) Residential apartments (approved as part of DA-2004/857)	Private ownership
Lot 2 DP1150670 **19-27 Carters Lane** **FAIRY MEADOW (Leisure Coast Motel site)**	6081m²	9m	1.5:1	Motel - Pioneer Sands and associated commercial facilities (approved DA-2006/151) - near completion Residential apartments (approved as part of DA-2004/857) - near completion	Private ownership
Lot 2 DP 863756 **201 Pioneer Road** **FAIRY MEADOW (Surf Leisure Resort)**	121700m²	9m	0.5:1	Wollongong Surf leisure Resort - cabins, caravan and camping sites and associated facilities: Function/conference room Breakers Restaurant McKeons Swim School Over 50's residential development along eastern edge of resort	Wollongong City Council

Mount Keira Summit Park, Mount Keira

Site	Approximate Area	Max Building height	Floor Space Ratio	Land Use/s	Ownership
Part of Lot 1 DP 875991 **Queen Elizabeth Drive MOUNT KEIRA (Mt Keira Summit Park)**	13289m²	9m	0.3:1	Container kiosk Lookout Telecommunication tower	Wollongong City Council

47-59 Princes Highway, West Wollongong and 1-9 Princes Highway, Figtree

Site	Approximate Area	Max Building height	Floor Space Ratio	Land Use/s	Ownership
Lot 1 DP 839750 Lot 2 DP 839750 Lot 3 DP 788652 Lot 4 DP 788652 Lot 5 DP 788652 Lot 6 DP 788652 Part of Lot 45 DP 847121 Part of Lot 6 DP 1136414 Part of Lot 5 DP 1136414 **47-59 Princes Highway WEST WOLLONGONG** **1-9 Princes Highway FIGTREE**	9159 m² 1877 m² 1842 m² 1903 m² 1780 m² 2234 m² 1890 m² 1580 m² 732 m²	11m	1.5:1	Hellenic club food and drink premises Figtree Cellars Medical Practice Apartments - Residential housing Community health centre	Wollongong Hellenic Club Limited Private ownership Private ownership Wollongong City Council

131 and 111 Princes Highway, Figtree

Site	Approximate Area	Max Building height	Floor Space Ratio	Land Use/s	Ownership
Lot 1 DP 782774 **131 Princes Highway** **FIGTREE**	10225m²	9m	1.5:1	Bus depot	Private ownership
Lot 1 DP 227479 Lot 1 DP 782774 **111 Princes Highway** **FIGTREE** **Woodrow Place**	11550m² 10370 m²	9m	1.5:1	Motel - Sovereign Inn Light industrial Road	Private ownership Private ownership Wollongong City Council

Central Road, Unanderra

Site	Approximate Area	Max Building height	Floor Space Ratio	Land Use/s	Ownership
Lot 494 DP 31905 **80 Central Road** **UNANDERRA**	613m²	15m	1.5:1	Unanderra Fire and Rescue Station	NSW Fire and Rescue
Lot 1 DP 720922 Lot 206 DP 521643 Lot 1 DP 241842 Lot 1 DP 729171 Lot 1 DP 205003 Lot 1 DP 657222 Lots 1-9 DP 203572 Lot 1 DP 244201 Lot 493 DP 31905 **Central Road** **UNANDERRA**	15074m²	15m	1.5:1	Western Suburbs Leagues Club (Wests Illawarra) (2 -3 storey structure)	Wests Illawarra Leagues Club

Kully Bay, Northcliffe Drive and King Street Warrawong

Site	Approximate Area	Max Building height	Floor Space Ratio	Land Use/s	Ownership
Part Lot 7 DP 241845 **Northcliffe Drive WARRAWONG (Kully Bay Park)**	4168 m²	20m	1.5:1	Kully Bay Oval (football field) Cycleway Wetlands Open space Car park	Property NSW
Part Lot 3 DP 1154074	137109 m2	20m	1.5:1		Property NSW
Part Lot 8 DP 218305 **King Street** **WARRAWONG**	691 m²	20m	1.5:1	Very small parcel of land zoned SP3. Vegetated, split zone - E2	Property NSW
Lot 1 DP 438328 Lot 1 DP 439900 **King Street** **WARRAWONG**	708 m² 37.9 m²	20m	1.5:1	Small parcel of land on corner of King Street and Northcliffe Drive. Infrastructure. Fenced.	Sydney Water

Golf Place and Windang Road, Primbee

Site	Approximate Area	Max Building height	Floor Space Ratio	Land Use/s	Ownership
Pt Lot 72 DP 14502 Pt Lot 73 DP 14502 **43-45 Windang Road PRIMBEE**	$1391m^2$ 1720	9m	1.5:1	Accommodation forming part of Comfort Inn Fairways Resort	Private ownership

Site	Approximate Area	Max Building height	Floor Space Ratio	Land Use/s	Ownership
Lot 47 DP 14502 **22 Golf Place** **PRIMBEE**	910.5m²	9m	1.5:1	Residence 1 storey	Private ownership
Lot 1 DP 771907 **24 Golf Place** **PRIMBEE**	6423.3m²	9m	1.5:1	Comfort Inn Motel - 2 storey brick structures Conference room	Private ownership
Lot 46 DP 14502 **20 Golf Place** **PRIMBEE**	746m²	9m	1.5:1	Residence 1 storey	Private ownership
Lot 45 DP 14502 **18 Golf Place** **PRIMBEE**	525m²	9m	1.5:1	Residence 1 storey	Private ownership
Lot 1 DP 1093756 **Windang Road** **PRIMBEE**	8615m²	9m	1.5:1	Vacant land	Illawarra Retirement Trust
Lot 2 DP 1093756 **Port Kembla Golf Club** **30 Golf Place PRIMBEE**	14087m²	9m	1.5:1	Golf course	Private ownership
Lot 106 DP579950 **Corner Windang Road and Golf Place** **PRIMBEE**	427m²	9m	1.5:1	Vacant land	Wollongong City Council

Windang Road, Windang

Site	Approximate Area	Max Building height	Floor Space Ratio	Land Use/s	Ownership
Lot 301 DP 774061 **Unnamed Road 4 (access road for CDEP nursery)**	5189m²	9m	1.5:1	Vegetated, mapped as containing EEC.	Wollongong City Council

Site	Approximate Area	Max Building height	Floor Space Ratio	Land Use/s	Ownership
WINDANG (land opposite south-east corner of Golf Course)					
Lot 140 DP 726746 Lot 303 DP 774061 **Windang Road** **WINDANG (land behind Driving Range)**	9046 m² 10400 m²	9m	1.5:1	Cleared land as well as vegetation to east	Lot 140 - Illawarra Local Aboriginal Land Council Lot 303 - Wollongong City Council
Lot 75 DP 233101 Lot 74 DP 233101 **71-81 Windang Road , 83-91 Windang Road** **WINDANG (Driving Range)**	30900 m² 37530 m²	9m	1.5:1	Port Kembla Driving Range, including front office, 1 storey structure Mini golf	Wollongong City Council
Lot 157 DP 823249 **Windang Road** **WINDANG (unformed Boundary Road, behind Driving Range)**	9180m²	9m	1.5:1	Cleared, pockets of vegetation	The State of NSW – Crown Land managed by Wollongong City Council
Lot 135 DP 726745 Lot 156 DP 823249 **Windang Road** **WINDANG (land behind Boundary Road)**	24080 m² 25750 m²	9m	1.5:1	Vacant land, some parts vegetated	Illawarra Local Aboriginal Land Council
Lot 501 DP 809609 **Kruger Avenue** **WINDANG**	18300m²	9m	1.5:1	Cleared land/swamp.	Private ownership

Lake Illawarra Hotel site, Windang Road, Windang

Site	Approximate Area	Max Building height	Floor Space Ratio	Land Use/s	Ownership
Lot 1 DP 657240 **193-197 Windang Road WINDANG**	5749m²	9m	1.5:1	Lake Illawarra Hotel Bottle shop	Private ownership

Cedar Avenue and Judbooley Parade, Windang

Site	Approximate Area	Max Building height	Floor Space Ratio	Land Use/s	Ownership
Lot 1 DP 19359 **15 Cedar Avenue WINDANG**	474m²	9m	1.5:1	Brick 1 storey residence	Windang Bowls Club Limited

Site	Approximate Area	Max Building height	Floor Space Ratio	Land Use/s	Ownership
Lot 2 Sec 1 DP 19359 **13 Cedar Avenue WINDANG**	474m²	9m	1.5:1	Brick 1 storey residence.	Windang Bowls Club Limited
Lot 3 Sec 1 DP 19359 **11 Cedar Avenue WINDANG**	474m²	9m	1.5:1	Weatherboard 1 storey residence	Windang Bowls Club
Lot 4 Sec 1 DP 19359 **9 Cedar Avenue WINDANG**	474m²	9m	1.5:1	Brick 1 storey residence.	Windang Bowls Club
Lot 5 Sec 1 DP 19359 **7 Cedar Avenue WINDANG**	474m²	9m	1.5:1	Appears to be vacant lot.	Windang Bowls Club
Lot 6 Sec 1 DP 19359 **5 Cedar Avenue WINDANG**	474m²	9m	1.5:1	Fibro 1 storey residence.	Private ownership
Lot 7 Sec 1 DP 19359 **3 Cedar Avenue WINDANG**	474m²	9m	1.5:1	Fibro 1 storey residence.	Windang Bowls Club
Lot 8 Sec 1 DP 19359 **1 Cedar Avenue WINDANG**	474m²	9m	1.5:1	Vacant/informal parking	Private
Lot 2 DP 9944 **15 Judbooley Parade WINDANG**	746m²	9m	1.5:1	Vacant lot.	Wollongong City Council
Lot 101 DP 1195639 **17 Judbooley Parade WINDANG**	555m²	9m	1.5:1	2 storey brick units	NSW Trade & Investment Crown Lands
Lot 102 DP 1195639 **17a Judbooley Parade WINDANG**	134 m²	9m	1.5:1	Vacant	NSW Trade & Investment Crown Lands

Windang Tourist Park Fern Street, Windang

Site	Approximate Area	Max Building height	Floor Space Ratio	Land Use/s	Ownership
Lot 133 DP 728047 **Fern Street** **WINDANG**	38490m²	9m	0.5:1	Windang Tourist Park - cabins, caravan and camping accommodation	The State of NSW – Crown Land managed by Wollongong City Council

Dandaloo Hotel/Motel Kanahooka Road, Brownsville

Site	Approximate Area	Max Building height	Floor Space Ratio	Land Use/s	Ownership
Lot 8 DP 560853 **336 Kanahooka Road** **BROWNSVILLE**	19360m²	9m	0.5:1	Dandaloo Hotel/Motel. Drive-through bottle shop, function room, playing field behind. Car park	Private ownership

Yallah Roadhouse Princes Highway, Yallah

Site	Approximate Area	Max Building height	Floor Space Ratio	Land Use/s	Ownership
Lot 1 DP 156657 **Princes Highway YALLAH (Yallah Roadhouse)**	5968m²	9m	0.5:1	1 storey structure – Place of Worship and café (former Yallah Woolshed). 1 storey residence - Yallah House bed and breakfast	Private ownership

Macquarie Place Haywards Bay

Site	Approximate Area	Max Building height	Floor Space Ratio	Land Use/s	Ownership
Lot 101 DP 1070495 **2 Macquarie Place HAYWARDS BAY**	3530m²	9m	0.5:1	Service Station	Private ownership
Lot 102 DP 1070495 **6 Macquarie Place HAYWARDS BAY**	2517m²	9m	0.5:1	Food and drink premises	Private ownership

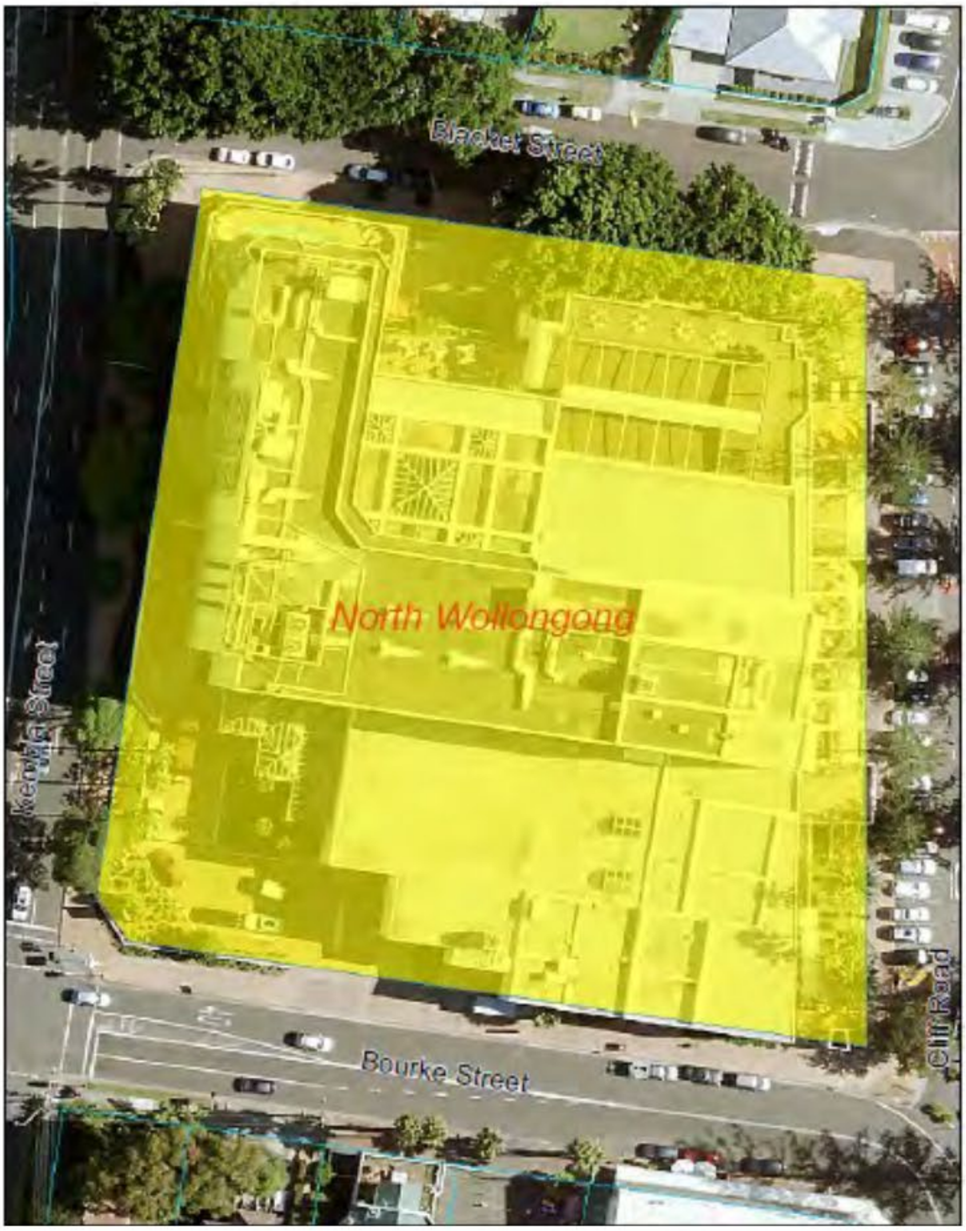
Site	Approximate Area	Max Building height	Floor Space Ratio	Land Use/s	Ownership
Lot 1103 DP 1138959 **10 Macquarie Place** **HAYWARDS BAY**	$3455m^2$	9m	0.5:1	Hungry Jacks	Private ownership
Lot 1104 DP 1138959 **14 Macquarie Place** **HAYWARDS BAY**	$2728m^2$	9m	0.5:1	Vacant Land	Private ownership
Lot 1105 DP 1138959 **18 Macquarie Place** **HAYWARDS BAY**	$2775m^2$	9m	0.5:1	Vacant Land	Private ownership
Lot 108 DP 1070495 **1 Macquarie Place** **HAYWARDS BAY**	$1639m^2$	9m	0.5:1	Vacant Land	Private ownership
Lot 107 DP 1070495 **1 Macquarie Place** **HAYWARDS BAY**	$2958m^2$	9m	0.5:1	Childcare Centre	Private ownership
Lot 106 DP 1070495 **11 Macquarie Place** **HAYWARDS BAY**	$2130m^2$	9m	0.5:1	Vacant Land Approved child care DA-2015/1661	Private ownership
Lot 1106 DP 1138959 **22 Macquarie Place** **HAYWARDS BAY**	$7812m^2$	9m	0.5:1	As above.	Private ownership

Crown and Harbour Streets, Wollongong

Site	Approximate Area	Max Building height	Floor Space Ratio	Land Use/s	Ownership
Lot 143 DP 786508 Lot 101 DP 872951 Lot 1 DP 1091530	8693m² 43800 m² 701 m²	24/32m 24/32/ no height 24m/no height	No mapped FSR	WIN Entertainment Centre and WIN Stadium	Illawarra Venues Authority

Site	Approximate Area	Max Building height	Floor Space Ratio	Land Use/s	Ownership
Lot 7 DP 1091530 Lot 6 DP 1091530 **9-11 Crown Street WOLLONGONG (WIN Entertainment Centre/WIN Stadium)**	198 m² 5 m²	No height No height		Five Islands Brewery and restaurant/bar	
Pt1 Lot 2 DP 1178194 Lot 2 DP 1178194 **Lot 2 Harbour Street WOLLONGONG**	3.49 m² 1016	48m	1.5:1	WIN Entertainment Centre and WIN Stadium	WCC
Lot 96 DP 751299 **9-11 Crown Street WOLLONGONG (Marine Drive Reserve)**	500m²	No mapped height	No mapped FSR	Small triangular parcel of Crown land adjacent to stadium containing cycleway	The State of NSW – Crown Land managed by Wollongong City Council
Lot 90 DP 1024782 **10 Crown Street WOLLONGONG**	715m²	32m	No FSR	Block of flats, heritage item of local significance under WLEP 2009	Private ownership
Lot 10 DP 8952 Lot 11 DP 8952 Lot 1 DP 19434 Lot 2 DP 19434 **12-16 Crown Street WOLLONGONG**	715 m² 715 m² 449 m² 436 m²	32m 32m 24m 24m	No FSR	3 unit blocks, 3 storeys. John Curtin flats.	NSW Land and Housing Corporation
Lot 8 DP 8952 **22 Crown Street WOLLONGONG**	715m²	32m	No FSR	City Beach Motel (2 storeys)	Private ownership
Lot 106 DP 751299 **Harbour Street WOLLONGONG**	25m²	32m	No FSR	Substation	Endeavour Energy Australia

Novotel Northbeach hotel, Cliff Road North Wollongong



Site	Approximate Area	Max Building height	Floor Space Ratio	Land Use/s	Ownership
Lot 1 DP 793327 **2-14 Cliff Road NORTH WOLLONGONG**	7784m²	24m	3:1	Novotel Northbeach hotel	Private ownership

Pt Lot 501 DP 112361, Tallawarra

Site	Approximate Area	Max Building height	Floor Space Ratio	Land Use/s	Ownership
Pt Lot 501 DP 1129361 **TALLAWARRA**	24835m²	9m	0.5:1/no mapped FSR	The land is currently vacant but its future is subject to a determination of a Major Project applying to the land (MP-2009/131 - new subdivision incorporating residential, commercial, retail, industrial, public open space and environmental management precincts).	Energy Australia

APPENDIX 2 – LIST OF TOURIST ACCOMMODATION FACILITIES

Where current land uses are not consistent with their land use (they may have been approved/permissible under previous environmental planning instruments), redevelopment for the same purpose may be permissible under existing use rights however development potential and intensification will be strictly limited.

Style	Name	Suburb	Zone	Number of rooms	Guest Capacity	Powered sites	Unpowered sites	No Cabins	Total cabin capacity
Hotels and Motels - Budget Motel	Beach Park Motel	NORTH WOLLONGONG	R1	18	51				
Hotels and Motels - Budget Motel	Berkeley Hotel	BERKELEY	B2	14	24				
Hotels and Motels - Budget Motel	Boat Harbour Motel	WOLLONGONG	R1	42	120				
Hotels and Motels - Budget Motel	Nightcap at The Charles Hotel	FAIRY MEADOW	B2	13	26				
Hotels and Motels - Budget Motel	Cabbage Tree Motel	FAIRY MEADOW	B6	36	120				
Hotels and Motels - Budget Motel	Golf Place Inn (formerly Comfort Inn Fairways)	PRIMBEE	SP3	41	137				
Hotels and Motels - Budget Motel	Downtown Motel	WOLLONGONG	B3	30	60				
Hotels and Motels - Student	Keiraview Accommodation	WOLLONGONG	B6	24	76				
Hotels and Motels - Budget Motel	Nan Tien Temple Pilgrim Lodge	BERKELEY	SP2	100	540				
Hotels and Motels - Budget Motel	Normandie Inn	NORTH WOLLONGONG	R1	17	34				
Hotels and Motels - Hotel 4-4.5 star	Novotel Wollongong Northbeach	WOLLONGONG	SP3	204	671				
Hotels and Motels - Budget Motel	Soloman Inn (formerly Sovereign Motel)	FIGTREE	SP3	55	132				

Style	Name	Suburb	Zone	Number of rooms	Guest Capacity	Powered sites	Unpowered sites	No Cabins	Total cabin capacity
Hotels and Motels - Budget Motel	Thirroul Beach Motel	THIRROUL	R2	16	132				
Hotels and Motels - Budget Motel	Comfort Inn - Towradgi Beach Hotel	FAIRY MEADOW	SP3	9	35				
Hotels and Motels - Budget Motel	Elsinor Motor Inn	BROWNSVILLE	R2	25	70				
Hotels and Motels - Budget Motel	The Windmill Motel	WOONONA	R2	31	90				
Hotels and Motels - Mid Market	Quality Suites Pioneer Sands	TOWRADGI	SP3	45	138				
Hotels and Motels - Budget Motel	Dandaloo Hotel Motel	BROWNSVILLE	SP3	28	98				
Hotels and Motels - Budget Motel	City Beach Motel	WOLLONGONG	SP3	16	61				
Hotels and Motels - Budget Motel	Harp Hotel	WOLLONGONG	B3	21	46				
Hotels and Motels - Budget Motel	Flinders Motel	WOLLONGONG	B6	63	141				
Hotels and Motels - Mid Market	Coniston Hotel	CONISTON	B1, R3	20	40				
Hotels and Motels - Budget Motel	Dicey Riley's Hotel	WOLLONGONG	B3	15	24				
Hotels and Motels - Budget Motel	Piccadilly Motor Inn	WOLLONGONG	B3	33					
Hotels and Motels - Hotel 4-4.5 star	Sage (formerly Chifley)	WOLLONGONG	B4	166	336				
Hotels and Motels - Mid Market	Best Western City Sands - Wollongong Golf Club	WOLLONGONG	RE2	22	84				
Hotels and Motels - Budget Motel	The Beaches Hotel	THIRROUL	B2	16	32				

Style	Name	Suburb	Zone	Number of rooms	Guest Capacity	Powered sites	Unpowered sites	No Cabins	Total cabin capacity
Hotels and Motels - Luxury Boutique	Tumbling Waters Retreat	STANWELL TOPS	E2	5	10				
Hotels and Motels - Luxury Boutique	Coledale Rainforest Retreat	COLEDALE	E2	2	10				
Hotels and Motels - Boutique	Heart and Soul Retreat (Govinda Valley Spiritual Centre)	OTFORD	E3	16	64				
Hotels and Motels - Conference Centre	The Tops Conference Centre	STANWELL TOPS	E2	80	604				
Hotels and Motels - Budget Motel	Lakeside Inn at Oasis Resort	WINDANG	RE2	30					
		TOTAL		**1253**	**4006**				
Serviced Apartments	Headlands Hotel	AUSTINMER	SP3	69					
Serviced Apartments	Argo Serviced Apartments	WOLLONGONG	R1	34					
Serviced Apartments	Smith Street Apartments	WOLLONGONG	R1	10	42				
Serviced Apartments	Bel Mondo Apartements	WOLLONGONG	R1	8	20				
Serviced Apartments	Belmore All Suite Hotel	WOLLONGONG	R1	34	102				
Serviced Apartments	Mantra (formerly Best Western) Wollongong	WOLLONGONG	B4	52	256				
Serviced Apartments	Jenny Court Apartments	NORTH WOLLONGONG	R1	9	72				
Serviced Apartments	Adina Apartment Hotel Wollongong (formerly Medina Executive Apartments	WOLLONGONG	B3	71	177				
Serviced Apartments	Park Street Serviced Appartments	WOLLONGONG	R1	17	59				
Serviced Apartments	Quest Wollongong	WOLLONGONG	B3	42	273				

Style	Name	Suburb	Zone	Number of rooms	Guest Capacity	Powered sites	Unpowered sites	No Cabins	Total cabin capacity
Serviced Apartments	Sky Accomodation	WOLLONGONG	R1	14	28				
Serviced Apartments	Hillside View Apartments	KANAHOOKA	R1	1	4				
Serviced Apartments	NorthPoint - Apartments	WOLLONGONG	R2	6	28				
Serviced Apartments	Salt Serviced Apartments	WOLLONGONG	B4	24	140				
Serviced Apartments	Sage (formerly Chifley)	WOLLONGONG	B4	10					
Serviced Apartments	Wollongong Serviced Appartments	WOLLONGONG	B4	34	68				
		TOTAL		**435**	**1269**				
Backpackers Accommodation	Keiraleagh - Wollongong Backpackers	WOLLONGONG	B4	20	50				
Backpackers Accommodation	Wollongong YHA	WOLLONGONG	B6	13	32				
		TOTAL		**33**	**82**				
Bed and Breakfast Accommodation	Austinmer Gardens	AUSTINMER	R2	1	4				
Bed and Breakfast Accommodation	Austinmer Sur La Mer	AUSTINMER	R2	1	4				
Bed and Breakfast Accommodation	Corrimal Beach	CORRIMAL EAST	R2	3	6				
Bed and Breakfast Accommodation	Glastonbury	AUSTINMER	R2	1	4				
Bed and Breakfast Accommodation	Stanwell Park Tutor Lodge	STANWELL PARK	E4	5	12				
Bed and Breakfast Accommodation	Lake Illawarra	WINDANG	R2	5	10				
Bed and Breakfast Accommodation	Austinmer Rainforest Room	AUSTINMER	R2	1	2				

Style	Name	Suburb	Zone	Number of rooms	Guest Capacity	Powered sites	Unpowered sites	No Cabins	Total cabin capacity
Bed and Breakfast Accommodation	Pass and Pause B&B Cottage	THIRROUL	R2	1	4				
Bed and Breakfast Accommodation	Topstay Accommodation	STANWELL TOPS	E3	4	10				
Bed and Breakfast Accommodation	Above Wollongong at Pleasant Heights B&B	MOUNT PLEASANT	R2	3	6				
		TOTAL		**25**	**62**				
Holiday Letting	Blue Oyster Beach House	WOMBARRA	R2	1	6				
Holiday Letting	Coastal Cottage	COALCLIFF	R2	1	6				
Holiday Letting	Obsessed by the Sea	WOONONA	R2	1	4				
Holiday Letting	Beach Break House	THIRROUL	R2	4	12				
Holiday Letting	Seascape House	AUSTINMER	R2	1	6				
Holiday Letting	Southview Boutique Guest House	BULLI	R2	2	4				
Holiday Letting	Stanwell Park Beach Cottage	STANWELL PARK	R2	3	7				
Holiday Letting	Watergum Grove	STANWELL PARK	R2	3	6				
Holiday Letting	Sea Breeze Holiday Apartment	THIRROUL	R2	2	4				
Holiday Letting	Austinmer Beach House	AUSTINMER	R2	2	8				
		TOTAL		**20**	**63**				
Tourist Parks	Wollongong Surf Leisure Resort	FAIRY MEADOW	SP3			145	72	110	
Tourist Parks	Bulli Beach Tourist Park	BULLI	SP3, RE1			54	5	30	175
Tourist Parks	Corrimal Beach Tourist Park	EAST CORRIMAL	SP3, E2			101	48	44	295

Style	Name	Suburb	Zone	Number of rooms	Guest Capacity	Powered sites	Unpowered sites	No Cabins	Total cabin capacity
Tourist Parks	Windang Beach Tourist Park	WINDANG	SP3			73	0	29	145
Tourist Parks	Coledale Camping Reserve	COLEDALE	RE1			5	44		
		TOTAL		**0**	**0**	**378**	**169**	**213**	**615**
		GRAND TOTAL		**1766**	**5482**	**378**	**169**	**213**	**615**

(Note: there maybe additional establishments not listed, or some establishments may have closed. Any updates or corrections are welcome).