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Workforce Accommodation Study

BYLONG COAL PROJECT

WORKFORCE ACCOMMODATION STUDY

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1 INTRODUCTION

1.1 BACKGROUND

The Environmental Impact Statement (EIS) for the Bylong Coal Project (Project) proposes that the Project's workforce be accommodated through a combination of purpose-built workforce accommodation facility (WAF) (for the construction phases of the Project) and longer-term housing rentals / purchases in the Local Area during operations. In particular, the following has been assessed for the Project:

- The construction and operation of a 650-bed WAF comprising of 300 medium-term beds and 350 short-term beds (to be decommissioned at the end of Project Year 2) and will be operational for the first six years of the Project. The WAF will be suitable of accommodating all non-local hires (NLHs) for the Project construction phase;
- Use of existing KEPCO-owned housing in the Bylong Valley during Phase 1 Construction and the Operations Phase;
- Use of private housing in local towns situated within a one-hour commute of the Project site (herein defined as the Local Area); and
- Use of short-term accommodation at hotels / motels / caravan parks etc. within the Local Area as required (e.g. for short-term contractors and consultants, or where overflow capacity is required).

Consultation during the EIS process, and throughout the public exhibition phase, revealed some stakeholder concern about the requirement for a WAF – even one that is only present for the construction phase of the Project. In particular, the MWRC submission asserts that the local area has capacity to fully accommodate the workforce for the Project, while local business owners are advocating a local housing model so that they can capitalise on opportunities associated with a local workforce (e.g. increased retail spend). The MWRC also commented that the Social Impact Assessment (SIA) for the Project did not assess a no WAF scenario and that this was required to justify the need for this component of the Project.

1.2 REPORT PURPOSE

This report presents the findings of a supplementary Workforce Accommodation Study (the Study) completed for the Bylong Coal Project (Project) in response to submissions received from Mid-Western Regional Council (MWRC) and other stakeholders during the public exhibition of the Environmental Impact Statement (EIS).

As part of the Response to Submissions (RTS), Hansen Bailey has conducted an assessment of the impacts associated with a scenario whereby there is no Workforce Accommodation Facility (WAF) included in the Project. The outcome of the assessment of the no WAF scenario is provided in a separate report to be included within the RTS.

1.3 STRUCTURE

This report is structured as follows:

- **Section 1** – Introduction (this section) – provides the relevant background to the Study and describes the purpose and structure of this report;
- **Section 2** – Scope and Methodology – presents the scope and methodology for the Study;
- **Section 3** – Key Findings - presents the results of the Study, including updated housing and accommodation data for the Local Area; and
- **Section 4** – Conclusion - Summarises the availability of accommodation in the Local Area for the Project workforce.

2 WORKFORCE ACCOMMODATION STUDY

2.1 OVERVIEW

In light of the submissions received on the Project, Hansen Bailey completed additional survey and reconnaissance work in late 2015 to gain an updated understanding of the accommodation available within the local area for the Project workforce to validate and reinforce the following key EIS assertions:

- The short-term nature of the construction phase combined with the size of the construction workforce has the potential to adversely affect the Mudgee housing market in the absence of a WAF; and
- A WAF provides an appropriate risk management strategy to ensure suitable accommodation is available for the workers through the two critical construction phases of the Project.

2.2 SCOPE

The scope of the Study included:

- Survey of tourism accommodation providers within the Local Area;
- Survey of real estate agents in communities within the Local Area;
- Targeted consultation with the MWRC; and
- Review of relevant housing market data for the Local Area.

2.3 DEFINITION OF LOCAL AREA

As explained within the Social Impact Assessment (Appendix AC of the EIS), KEPCO has determined that the maximum permissible daily commute time from the Project site to a workers place of residence is no more than one hour for fatigue management reasons. During Construction Phase 1 and Construction Phase 2 workers will be employed on long shifts (between 10 and 12 hours). There are likely to be significant health and safety implications, notably driver fatigue issues, if workers are spending more than 12 hours a day at work, in addition to spending two hours commuting to and from their place of residence.

The Local Area is therefore defined as the geographical area within a one hour commute of the Project site. A key assumption in defining the Local Area is that the remaining section of Wollar Road (which is currently gravel seal) will be upgraded to bitumen seal by the commencement of Project Year 1. This upgrade is currently in the process of being completed by MWRC in accordance with Resources for Regions funding. With this upgrade being completed, commute time between Mudgee and the Project is estimated to be approximately 55 minutes.

The centres of Mudgee, Rylstone, Kandos, Denman and Sandy Hollow have been noted to be located within the Local Area. KEPCO has confirmed that the town of Gulgong remains outside the Local Area despite proposed upgrades to Wollar Road. This is consistent with the assumptions in the EIS.

2.4 METHODOLOGY

2.4.1 Survey of Accommodation Providers

The majority of tourist accommodation establishments located within the MWRC Local Government Area (LGA) consist of establishments of less than 15 rooms. Regional tourism accommodation statistics recorded quarterly by the Australia Bureau of Statistics (ABS) relate only to establishments of 15 or more rooms e.g. motels. Accurate statistical data that describes the size and availability of the full breadth of tourism accommodation options across the MWRC LGA is limited. The EIS reported only tourism statistics available through the ABS.

In response to these data limitations Hansen Bailey conducted a survey of accommodation providers located within the Local Area. The purpose of the survey was to understand the availability and suitability of accommodation options within the Local Area for the Project workforce. The survey was conducted via telephone calls to the various accommodation providers in November and December 2015.

Table 1 presents the key geographic areas and component settlements analysed for the accommodation survey. These towns are estimated to be within an approximate one-hour commute from the Project site following the completion of the upgrade to Wollar Road. It should be noted that Gulgong remains outside the Local Area, however for completeness the accommodation survey did include Gulgong.

Table 1
Geographic Area Surveyed

Location	Current Commute Time ¹	Estimated Commute Time with Wollar Road Upgrade ¹	Route
Mudgee	1hr 05 mins - 1hr 15 mins depending on time of travel	55 mins	Wollar Road and Bylong Valley Way
Ulan	55 mins	50 mins	Ulan Road, Ulan-Wollar Road, Wollar Road and Bylong Valley Way
Rylstone	38 mins	38 mins	Bylong Valley Way
Kandos	44 mins	44 mins	Bylong Valley Way
Lue	48 mins	48 mins	Bylong Valley Way and Lue Road
Ilford	58 mins	58 mins	Bylong Valley Way and Castlereagh Highway
Denman	53 mins	53 mins	Bylong Valley Way and Yarawa Road
Sandy Hollow	47 mins	47 mins	Bylong Valley Way
Merriwa	1hr 04 mins	1hr 04 mins	Bylong Valley Way, Wollar Road, Ringwood Road and Golden Highway
Gulgong	1hr 8 mins - 1hr 15 mins depending on time of travel	1hr 05 mins	Wollar Road, Ulan-Wollar Road, Ulan Road and Cope Road

Source: Google Maps accessed 2 March 2016 at 2pm

Notes:

1. All distances measured from Bylong General Store

Accommodation options present within the rural areas between these communities were also considered.

Accommodation establishments were identified through desktop research using a combination of:

- Internet searches including:
 - Accommodation websites e.g. AirBNB and booking.com;
 - Tourism websites; and
 - MWRC, Muswellbrook Shire Council (MSC) and Upper Hunter Shire Council (UHSC) local government websites;
- Discussions with MWRC representatives; and
- Local knowledge.

A total of 148 accommodation establishments were identified within the Local Area, a further 13 were identified in Gulgong and a further three in Merriwa (refer **Appendix A**).

A brief questionnaire was developed and administered via telephone with each identified accommodation establishment. The questionnaire was conducted across a two week period between late November and early December 2015.

The questionnaire sought the following key information from each establishment:

- Size of the establishment (number of rooms and beds);
- Type of accommodation e.g. luxury, self contained, motel or hotel;
- Target market e.g. country escapes, weddings;
- Services provided e.g. meals, laundry, internet;
- Current occupancy rates;
- Historical occupancy rates; and
- Willingness to accommodate the Project construction workforce.

Accommodation establishments were classified into the following categories:

- Motels;
- Hotels;
- Guesthouses;
- Serviced apartments;
- Holiday Houses/Units;
- Caravan Parks; and
- Visitor hostels.

Each accommodation category is defined in **Table 2**.

Table 2
Accommodation Categories

Category	Definition
Hotels	Establishments licensed to operate a public bar and which provide accommodation on a room/suite basis, with a bath/shower and toilet in most guest rooms, but which do not have full cooking facilities (i.e. hot plates and oven/microwave) in most guest rooms.
Motels, private hotels and guest houses (B&Bs) with facilities	Establishments not licensed to operate a public bar, and which provide accommodation on a room/suite basis, with a bath/shower and toilet in most guest rooms, but which do not have full cooking facilities (i.e. hot plates and oven/microwave) in most guest rooms.
Serviced apartments (including Luxury)	Establishments which provide short-term, non-residential accommodation which mostly comprises self-contained units at the same location, and which are available on a unit/apartment basis to the general public. The units should be available for a minimum of one night, have full cooking facilities (i.e. hot plates and oven/microwave), refrigerator and bath/shower and toilet facilities. All bed linen and towels should be provided. Daily servicing (i.e. cleaning and bed making) must be available through the on-site management, although this service may not necessarily be utilised.
Holiday flats and units	Self-contained units which are available for short-term non-residential letting to the general public and which are operated by owners, managers or real estate agents who have sole letting rights. These units are self-contained in terms of cooking (i.e. hot plates and oven/microwave) and bath/shower and toilet facilities, but do not satisfy all the criteria required for serviced apartments (i.e. they do not have one or more of the following: a minimum of one night availability, refrigerator, daily servicing available through the on-site management, or they are not at the same location).
Caravan parks	Provide short-term non-residential accommodation to the general public, with on site villa's, powered sites for caravans and toilet, shower and laundry facilities for guests.
Visitor hostels	Provide short-term non-residential accommodation to the general public on a bed basis (rather than by the room).

2.4.2 Survey of Real Estate Agents

Hansen Bailey conducted a survey of real estate agents located within Mudgee, Rylstone, Kandos and Gulgong. The purpose of the survey was to gain relevant information to inform an assessment of current housing market conditions in key localities within the MWRC LGA.

A brief questionnaire was developed and administered via telephone with eight real estate agencies across the MWRC LGA (**Table 3**). The survey was conducted in early December 2015.

The questionnaire sought the following key information from each real estate agency:

- Size of rental portfolio;
- Types of rental properties in each portfolio e.g. two bedroom houses, units;

- Rental properties currently in demand;
- Supply of furnished rental properties;
- Current rental vacancy rate and comparison with previous years;
- Availability of properties for short-term rentals e.g. 3 months; and
- Willingness of landlords to accept mining related professionals as tenants.

Table 3
Survey Participants - Real Estate Agents

Agency	Location
The Property Shop	Mudgee
First National	Mudgee
Signature Properties	Mudgee
CRT Gulgong	Gulgong
First National	Rylstone
Campbells Real Estate	Kandos
Inglis Realty	Gulgong
Raine and Horne	Gulgong

2.4.3 Targeted Consultation

Consultation was conducted with Alison Shumack of the MWRC in January 2016 to obtain the following information:

- Up-to-date land release and building and development approval data for the communities of Mudgee, Kandos and Rylstone; and
- Recent development approval data for short-term accommodation across the MWRC LGA and in particular hotels, motels or caravan parks.

2.4.4 Analysis of Housing Data

To supplement and validate the outcomes of the accommodation survey and associated consultation, further desktop analysis was undertaken of housing market characteristics in the Local Area. The following desktop information sources were analysed:

- ABS tourist accommodation data for the MWRC LGA;
- Data from www.realestate.com.au to determine trends (e.g. from suburb profiles);
- NSW Government (Housing) data around rental rates (by postcode); and
- Core Logic RP Data.

3 KEY FINDINGS

This section presents the key findings of the Study, in particular the findings of the Accommodation Survey.

3.1 ACCOMMODATION SURVEY

3.1.1 Summary of Participants

Table 4 provides a summary of survey participation and includes Gulgong and Merriwa participants.

Table 5 presents the geographical distribution of survey participants, including participants from Gulgong and Merriwa. The majority of accommodation establishments identified and surveyed were located in Mudgee. This is consistent with the role of Mudgee as the major service centre for the MWRC LGA.

Table 4
Summary of Survey Participation²

	Number
Establishments Identified (Total)	161
Establishments Surveyed (Total)	116
Number of Survey Participants (Total)	109 ²
Establishments where owners did not want to participate in the survey	7
Establishments that could not be contacted	18
Establishments that are no longer operating as commercial accommodation establishments	11
Establishments that do not provide accommodation	3
Businesses where owners advised the property was located outside the Local Area.	6

Source: Workforce accommodation survey conducted in 2015.

Notes:

1. Including Gulgong and Merriwa.
2. Seven survey participants owned two establishments and completed separate surveys for each establishment.

Table 5
Geographical Distribution of Businesses and Survey Respondents

Location	Businesses Identified	Businesses Surveyed	Total Participants
Mudgee	107	71	64 ¹
Gulgong	13	11	11
Kandos	4	3	3
Rylstone	12	11	11
Denman	7	6	6
Sandy Hollow	4	3	3
Merriwa	3	3	3
Bylong Valley	1	0	0
Lue	3	3	3
Ulan	2	2	2
Ilford	2	0	0
Cooyal	1	1	1
Charbon	1	1	1
Bogee	1	1	1
Total	161	116	109

Source: Workforce accommodation survey conducted by Hansen Bailey in 2015.

Notes:

1. Seven survey participants owned two establishments and completed separate surveys for each establishment.

A total of 116 establishments were surveyed, 102 of which were located within the Local Area (excluding those surveyed in Gulgong and Merriwa).

Table 6 describes the type of accommodation establishments surveyed, by geographic location.

Table 6
Surveyed Accommodation Establishments by Type and Location

Location	Motel	Hotel	Caravan Park	Guest House	Holiday Houses	Serviced Apartments
Mudgee	8	8	3	14	33	5
Gulgong	3	2	1	2	1	2
Kandos	2	0	0	0	0	1
Rylstone	0	2	2	1	6	0
Lue	0	1	0	0	2	0
Ulan	0	1	0	0	1	0
Charbon	0	0	1	0	0	0
Bogee	0	0	0	1	0	0
Cooyal	0	1	0	0	0	0
Denman	2	2	1	0	0	1
Sandy Hollow	0	0	1	2	0	0
Merriwa	1	0	0	1	0	1
Total	16	17	9	21	43	10

Source: Workforce accommodation survey conducted by Hansen Bailey in 2015.

Of the 116 establishments surveyed the majority (46% or 54 establishments) provide short-term accommodation with limited cooking facilities. The remaining 53% (62 properties) offer self contained accommodation suitable for longer stays.

3.1.2 Number of Rooms of Accommodation

Survey participants were asked to identify the number and type of rooms available in each accommodation establishment, as well as the bedding arrangements (single, double etc) in each room. Approximately 1,169 rooms were identified within the 116 accommodation establishments surveyed. There are a total of 1,004 rooms located within the Local Area.

The majority of rooms (63% or 740) are located in the town of Mudgee. There are approximately 145 rooms (12%) located in Gulgong and 20 rooms located in Merriwa just outside the Local Area.

Table 7 shows the geographical distribution of survey respondents.

Table 7
Geographical Distribution of Survey Respondents

Location	Local Government Area	Number of Rooms
Mudgee	MWRC LGA	740
Gulgong	MWRC LGA	145
Kandos	MWRC LGA	31
Rylstone	MWRC LGA	70
Lue	MWRC LGA	28
Ulan	MWRC LGA	10
Charbon	MWRC LGA	10
Bogee	MWRC LGA	3
Cooyal	MWRC LGA	9
Denman	Muswellbrook Shire Council (MSC)	83
Sandy Hollow	MSC	20
Merriwa	Upper Hunter Shire (UHS)	20
Total Rooms		1169

Source: Workforce accommodation survey conducted by Hansen Bailey in 2015.

Table 8 presents the number of rooms in each location by accommodation type based on the findings of the survey. Of the 1,169 rooms identified, the majority (55%) are located in motels or hotels where visitors generally have access to basic kitchen facilities e.g. microwave and fridge. Approximately 194 rooms of accommodation are located within holiday houses or units which provide self contained accommodation, including in most cases a laundry. A total of 210 rooms are located in caravan parks, the majority of which are located in Mudgee. Rooms in caravan parks generally take the form of one or two bedroom self contained units. In some cases, rooms have shared facilities.

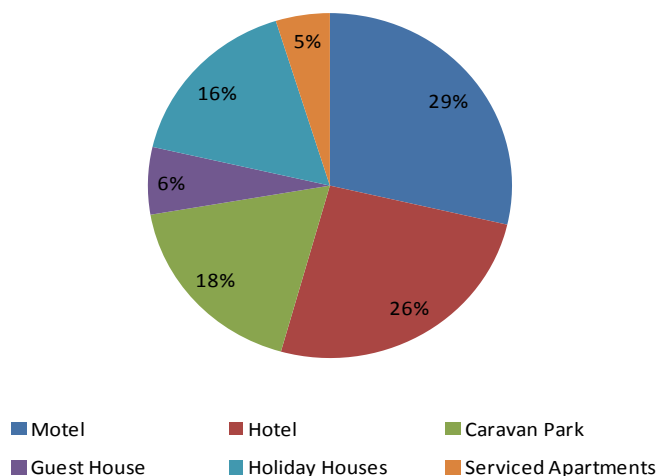
Table 8
Surveyed Accommodation Establishments by Rooms and Location

Location	Number of Rooms	Motel	Hotel (inc Luxury Hotel)	Caravan Park	Guest House	Holiday Houses	Serviced Apartments
Mudgee	740	194	208	99	55	153	31
Gulgong	145	70	26	32	3	2	12
Kandos	31	26	0	0	0	0	5
Rylstone	70	0	26	19	5	20	0
Lue	28	0	13	0	0	15	0
Ulan	10	0	6	0	0	4	0
Charbon	10	0	0	10	0	0	0
Bogee	3	0	0	0	3	0	0
Cooyal	9	0	9	0	0	0	0
Denman	83	33	12	33	0	0	5
Sandy Hollow	20	0	0	17	3	0	0
Merriwa	20	12	0	0	5	0	3
Total Rooms	1169	335	300	210	74	194	56

Source: Workforce accommodation survey conducted by Hansen Bailey in 2015.

Graph 1 shows the proportion of total rooms by accommodation type for all surveyed establishments.

Graph 1
Surveyed Establishments by Rooms and Accommodation Type



3.1.3 Occupancy Rates

Survey participants were asked:

- What the average occupancy rate (%) for their establishment was in 2015?
- How occupancy rates in 2015 compared to occupancy rates in 2014 and earlier years?
and
- What key factors may have influenced occupancy rates in 2015?

In the majority of cases, respondents were unable to provide a specific occupancy rate for 2015. However, the majority of respondents did provide a qualitative discussion on occupancy rates. A summary of the key findings in relation to occupancy rates in the key settlements of Mudgee, Gulgong, Kandos, Rylstone, Denman and Sandy Hollow are presented in **Table 9**.

Table 9
2015 Occupancy Rates

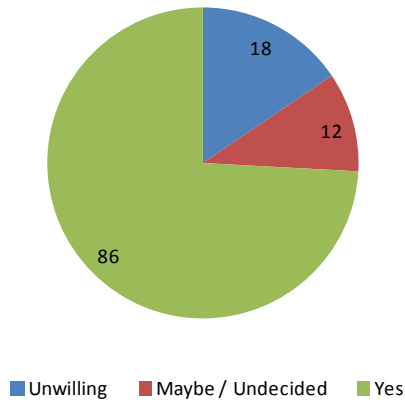
Key Locations	Summary of Respondent Comments	Factors Affecting Occupancy Rates
Mudgee	<ul style="list-style-type: none"> • Occupancy rates cited by respondents range from 50%-100%. • Many respondents indicated that their establishments were generally 100% booked on weekends throughout the year. • Occupancy rates are seasonal with winter months busier than summer. • Almost all respondents indicated they were booked out, or expected to be booked out for key regional events e.g. "Day on the Green". Bookings for these events are taken 12 months in advance. • A number of establishments cater for weddings or key family events and are booked up many months in advance. • Mixed feedback regarding comparison with previous years. Some respondents feel occupancy rates are lower than 2014, however others believe rates are higher. 	<ul style="list-style-type: none"> • The mining downturn and the associated reduction in the number of contractors seeking accommodation were the primary reasons cited for lower occupancy rates. • Increased visitor numbers. A number of respondents suggested that the regional tourism marketing campaign has increased the number of visitors to the region. • More competition - some respondents noted that a number of new accommodation establishments have opened in the last few years.
Gulgong	<ul style="list-style-type: none"> • Occupancy rates cited range from 50%-90% • Rates have decreased on previous years. • Occupancy rates are seasonal with winter busier than summer. 	<ul style="list-style-type: none"> • The mining downturn and the associated reduction in the number of contractors seeking accommodation were the primary reasons cited for lower occupancy rates.

Key Locations	Summary of Respondent Comments	Factors Affecting Occupancy Rates
Kandos	<ul style="list-style-type: none"> Two of the three establishments cited an annual occupancy rate of between 60% and 80%. Occupancy rates were described as being lower than 2014. 	<ul style="list-style-type: none"> Closure of cement works and Charbon Mine has impacted occupancy rates.
Rylstone	<ul style="list-style-type: none"> Majority of respondents noted high occupancy rates on weekends, largely due to tourists (up to 100% occupancy across the year). Four establishments indicated an 80% occupancy rate across the year. 	<ul style="list-style-type: none"> The mining downturn and the associated reduction in the number of contractors seeking accommodation were the primary reasons cited for lower occupancy rates. Increased visitor numbers. A number of respondents suggested that the regional tourism marketing campaign has increased the number of visitors to the region.
Denman	<ul style="list-style-type: none"> Five of the six survey respondents provided 2015 occupancy rates. Two respondents suggested occupancy rates of around 30% and three around 60%. 	<ul style="list-style-type: none"> The mining downturn and the associated reduction in the number of contractors seeking accommodation were the primary reasons cited for lower occupancy rates. Some respondents were concerned that occupancy rates would continue to decline with the potential closure of Drayton Mine.
Sandy Hollow	<ul style="list-style-type: none"> Two of the three survey respondents indicated that occupancy rates were very low. 	<ul style="list-style-type: none"> None identified

3.1.4 Interest in Servicing the Project

All survey participants were asked whether they were interested in providing accommodation to workers associated with the Project. The results are presented in **(Graph 2)**.

Graph 2
Willingness to Provide Accommodation to the Workforce



Of the 116 establishments surveyed:

- 18 were not willing to provide accommodation;
- 12 were undecided; and
- 86 were willing.

Of the 71 establishments surveyed in Mudgee, 13 were unwilling to provide accommodation and seven were undecided. In Kandos, all three establishments were willing. In Rylstone one of the 11 establishments surveyed was unwilling and one was undecided.

Table 10 shows the total number of rooms within establishments where owners identified they were willing to accommodate Project employees.

Table 10
Respondents Interested in Servicing Project

Location	Yes	Total Rooms
Mudgee	51	667
Gulgong	8	106
Kandos	3	31
Rylstone	9	67
Lue	1	10
Ulan	1	6
Charbon	1	10
Cooyal	1	9
Denman	6	83
Sandy Hollow	2	18
Merriwa	3	20
Total	86	1027

Notes:

1. The number of respondents does not equal 109 as respondents who owned more than 1 property provided either multiple answers or one answer for both properties.

Within the Local Area, there are approximately 900 rooms within 75 establishments where the owners are willing to provide accommodation to the workforce. The majority of respondents who indicated they were unwilling to provide accommodation for the Project owned/managed holiday houses or units, or luxury serviced apartments.

The following key concerns were raised by respondents who indicated some reservations in relation to providing accommodation for Project employees:

- Incompatibility of tourism and mining visitors. There is concern that the hours of employment for mine employees detract from the tourism experience desired by non-mining visitors. For example some respondents indicated that vehicle movements in the early hours of the morning disrupted the sleep of other visitors. Other respondents indicated that the need for shift workers to sleep during the day made it difficult to service accommodation and also placed restrictions on activities that non-mining visitors could undertake in proximity to accommodation.

Further some respondents indicated that their parking arrangements did not suite the accommodation of mining related vehicles (e.g. heights for vehicles with roll bars and lights);

- Cleaning costs - Concern was raised by a number of respondents in relation to the expense involved in cleaning black coal dust from carpets and other soft furnishings;
- The perceived potential for mine employees to engage in anti-social behaviour whilst staying at the accommodation, and the resulting impact this may have on the tourist experience afforded other non-mining guests; and
- The perceived lack of respect for private property exhibited by mine employees. This was of particular concern to respondents who owned luxury accommodation establishments.

3.1.5 Limitations on Accommodation Availability

Of the 86 respondents who indicated a willingness to provide accommodation, many identified limitations on the number of rooms that could be made available to the workforce at any one time. Owners of establishments with multiple rooms or multiple separate units indicated they were only willing to make a portion of the total rooms available for the Project workforce as they would like to keep some of the rooms available for tourists or regular visitors. A number of respondents also indicated that some of the rooms contained luxury furnishings and fittings and they would prefer that these rooms were not made available to the Project workforce.

Some respondents indicated that they would prefer to take three to six month tenants rather than short-term tenants, and other respondents preferred short-term tenants e.g. one or two weeks. A few respondents indicated a preference for Monday to Friday workers only, leaving weekends available for tourists and visiting regulars.

Almost all respondents indicated that pre-existing bookings and potential return bookings particularly for regional vents such as “Day on the Green” would limit the number of consecutive nights workers could be accommodated at an establishment.

Several respondents indicated a preference for workers who filled senior managerial level roles rather than technical and trades workers or machinery operators. There is a perception amongst these respondents that people in senior managerial roles tend to be better behaved than contractors. In addition managerial roles tend to require Monday to Friday accommodation rather than a full week of accommodation, leaving weekend rooms available for tourists and regular visitors.

3.1.6 Limitations of the Accommodation Survey

The following survey limitations should be recognised:

- Multiple phone calls across various times of the day were made by Hansen Bailey in an effort to contact identified accommodation providers. Despite these efforts a number of accommodation providers were unable to be contacted during the survey period;
- Only those accommodation providers with up-to-date electronic listings were identified in the scoping of the accommodation survey. It is possible that new accommodation establishments not yet listed electronically may have been missed in the scoping of the survey;
- Accommodation establishments were identified to be 'no longer in operation' where phone numbers were found to be not connected or other accommodation providers indicated the operations had ceased; and
- Accommodation availability and occupancy rates have been analysed based on the data collected at a particular point in time (November/December 2015). Occupancy rates in tourist accommodation are known to be highly fluctuating.

3.2 ANALYSIS OF HOUSING BASELINE

The following section presents an up-to-date analysis of the rental property market within the Local Area. Statistical data presented is supported by the findings of a survey of real-estate agents and discussions with representatives of the MWRC.

3.2.1 Rental Accommodation

Availability of Long-term Rental Accommodation

Table 11 shows the number of rental properties available within the Local Area as at 27 November 2015. A total of 111 properties were available for long-term rental within the Local Area. A further 20 properties were available in Gulgong and six in Merriwa, immediately outside the Local Area.

Of note is the number of rental properties currently available in Mudgee: less than half of that available in April 2015 (refer Table 61, page 125 of Appendix AC of the EIS). The smaller settlements of Rylstone, Kandos, Denman and Sandy Hollow currently offer a limited supply of rental properties. There are very few furnished properties available for rent in the Local Area.

Table 11
Snapshot of Rental Availability – November 2015

Property Type	No. Properties available	Highest Rent (\$p/w)	Lowest Rent (\$p/w)
Mudgee (postcode (pc) 2850)			
All unfurnished properties	62	900	150
1 bedroom unit/house	7	430	150
2 bedroom unit/house	11	500	170
3 bedroom house	26	750	225
4+ bedroom house	18	900	300
Furnished Properties	7	900	160
Rylstone/Kandos (pc 2849/2848)			
All unfurnished properties	26 ¹	300	200
1 bedroom unit/house	2	170	120
2 bedroom unit/house	8	250	220
3 bedroom house	11	275	180
4+ bedroom house	5	300	200
Furnished Properties	0	0	0
Denman (pc 2328)			
All unfurnished properties	15	340	145
1 bedroom unit/house	1	150	150
2 bedroom unit/house	9	250	145
3 bedroom house	4	340	205
4+ bedroom house	1	320	320
Furnished Properties	1	130	130
Merriwa (pc 2329),Gungal & Sandy Hollow (pc 2333)²			
All unfurnished properties	6	320	230
1 bedroom unit/house	0	0	0
2 bedroom unit/house	1	230	230
3 bedroom house	5	320	230
4+ bedroom house	0	0	0
Furnished Properties	0	0	0
Gulgong (pc 2852)			
All unfurnished properties	20	380	180
1 bedroom unit/house	2	285	285
2 bedroom unit/house	5	250	180
3 bedroom house	7	290	220
4+ bedroom house	6	380	290

Property Type	No. Properties available	Highest Rent (\$p/w)	Lowest Rent (\$p/w)
Furnished Properties	0	0	0

Source: REA Group Ltd 2016

Notes:

1. Majority in Kandos (n=20)

2. All in Merriwa

The findings of consultation conducted with real-estate agents across the MWRC LGA in December 2015 identified:

- Steady and strong demand for rental properties in Mudgee and Rylstone and to a lesser extent Gulgong;
- Sustained demand for furnished properties in key centres such as Mudgee, Rylstone, and Gulgong;
- Ongoing demand from families for larger homes e.g. four bedrooms; and
- Low vacancy rates across rental properties in Mudgee and Rylstone.

Real estate agents were asked to describe the current rental market in Mudgee. Responses included:

- *“Property demand is high. Lots of enquiries for stock that is not available. Market is not as tight as 2012 but heading towards it”;*
- *“Strong and steady. Demand is high but there is supply to meet demand at the moment. Rents are cheaper due to workforce reductions 12 months ago”;*
- *“Things are moving, driven by Moolarben. Demand is high as people come into Christmas. [Properties only on the market] for two weeks at the moment.”*

Several real-estate agents attribute the limited availability of rental stock in Mudgee to demand generated by expansion work at Moolarben Coal Mine.

The findings of consultation with Kandos and Rylstone real-estate agents suggest a high demand for properties in Rylstone but significantly smaller demand in Kandos. According to one real-estate agent, there are *“never enough properties in Rylstone to meet demand”*. The market in Kandos has been heavily affected by the closure of Charbon mine. Rental rates have dropped significantly over the past 12 months and the area is attracting lower socio-economic groups due to the favourable housing conditions.

Gulgong real-estate agents indicated that the Gulgong housing market is very different to Mudgee. There is less tenancy turnover in the Gulgong housing market. The majority of tenants in Gulgong are seeking long-term rentals. The Gulgong housing market was described by one survey respondent as *“quite flat with rents reduced in the last 12 months to attract tenants”*.

Rental Vacancy Rates

Table 12 presents rental vacancy rates for key locations (by postcode) for October 2015. This information is drawn from SQM Research.

Table 12
Rental Vacancy Rates – November 2015

Location and Postcode	Vacancy Rate Oct 2015	Number of Vacant Properties Oct 2015	Trend
Mudgee 2850	4.20%	81	Vacancy rate has reduced from a high of almost 9% in January 2015 to a low of 4.2% in October 2015. The number of properties vacant and the vacancy rate remains significantly lower than rates in October 2014 and October 2013 but higher than October 2012. Whilst the number of vacant properties fluctuated during 2015 both the vacancy rate and the number of vacant properties show a steady reduction.
Rylstone 2849	1.20%	2	Similar trend to Mudgee. Vacancy rates and the number of properties vacant have reduced significantly since November 2014. Across the past four years vacancy rates and the number of vacant properties reached a peak in November 2014 at approximately 10% (~20 properties).
Kandos 2848	5.00%	14	Across the last 4 years vacancy rates and the number of vacant properties has fluctuated. There has been a steady increase from a low of less than 3% in March 2014 to a peak in September 2015 of approximately 9% (22 properties). This is likely attributable to the closure of nearby Charbon Mine.
Gulgong 2852	7.40%	27	Relatively high vacancy rate in comparison to past 4 years. Very low vacancy rates occurred during July/August 2012 in parallel with growth in the mining industry. Vacancy rates have increased since 2012 peaking in April 2015 (~11% and 36 vacant properties).

Location and Postcode	Vacancy Rate Oct 2015	Number of Vacant Properties Oct 2015	Trend
Denman 2328	6.10%	22	Vacancy rates in Denman experienced a steady increase from 2012-2015 with a low of ~3%/7 properties in February 2012 to a peak of 10%/33 properties in August 2013 and a further peak of ~10%/33 properties in March 2014. Vacancy rates in Denman are likely to be adversely further affected by the slow-down in the mining industry and more recently reduced employment at Drayton Mine.
Merriwa 2329	0.60%	2	Very low vacancy rates at present. Peak vacancy rate of approx 4% in Jan 2014 with ~ 14 vacant properties

Source: SQM Research 2015

The SQM data is consistent with the findings of discussions with real-estate agents. Real-estate agents who participated in the survey were asked what the current vacancy rate was across rental properties in each community of interest. Few real-estate agents could provide exact figures. However, in relation to the current rental vacancy rate in Mudgee, real-estate agent responses included:

- “Less and less”;
- “Vacancy rates are generally stable until demand is generated by mining activity”; and
- “Maybe 4% vacancy rate”.

Rental Costs

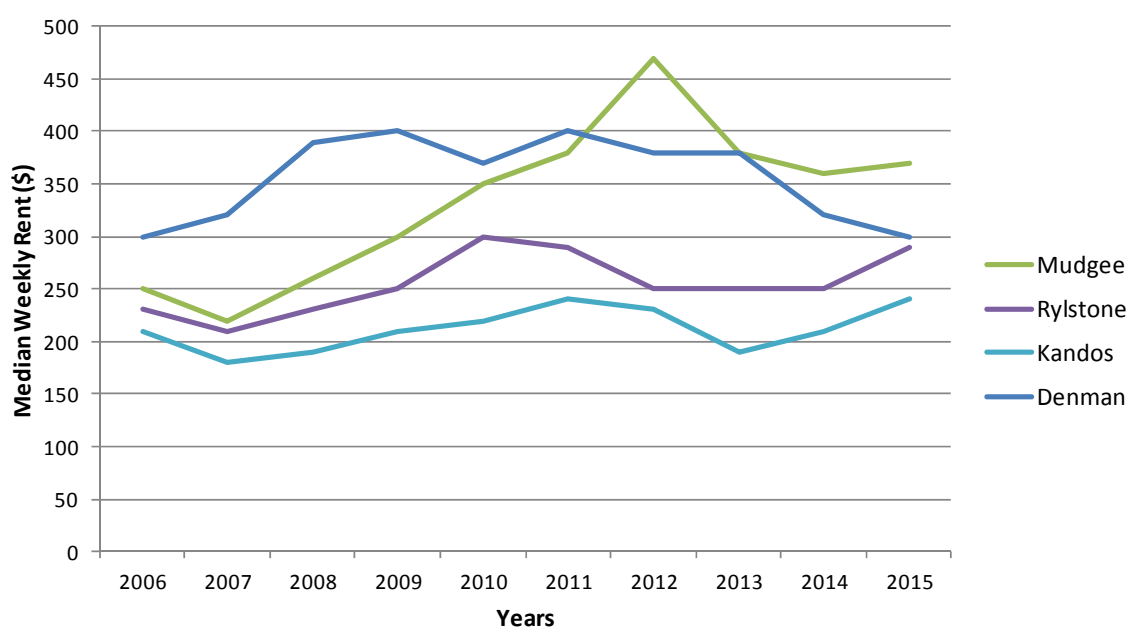
Table 13 and **Graph 3** present trends in median weekly rent for houses in the Local Area for the period 2006-2015 in the month of December (based on Non-ABS suburb areas).

Table 13
Trends in Median Weekly House Rent - December 2006 to December 2015

Year	Median Weekly Rent - House (\$)			
	Mudgee	Rylstone	Kandos	Denman
2006	250	230	210	300
2007	220	210	180	320
2008	260	230	190	390
2009	300	250	210	400
2010	350	300	220	370
2011	380	290	240	400
2012	470	250	230	380
2013	380	250	190	380
2014	360	250	210	320
2015	370	290	240	300

Source: RESIDEX 2016a,b,c and d

Graph 3
Median Weekly House Rent - Local Area



Median weekly house rents in Mudgee peaked at \$470 in 2012 in line with significant growth in the mining sector. With the recent contraction in the mining sector, the median weekly rent has reduced to \$370 in December 2015. Denman has also experienced a decline in median weekly rent from a peak of \$400 in 2011 to the current low of \$300. The December 2015 figure is equivalent to the pre mining boom figure of \$300 experienced in 2006.

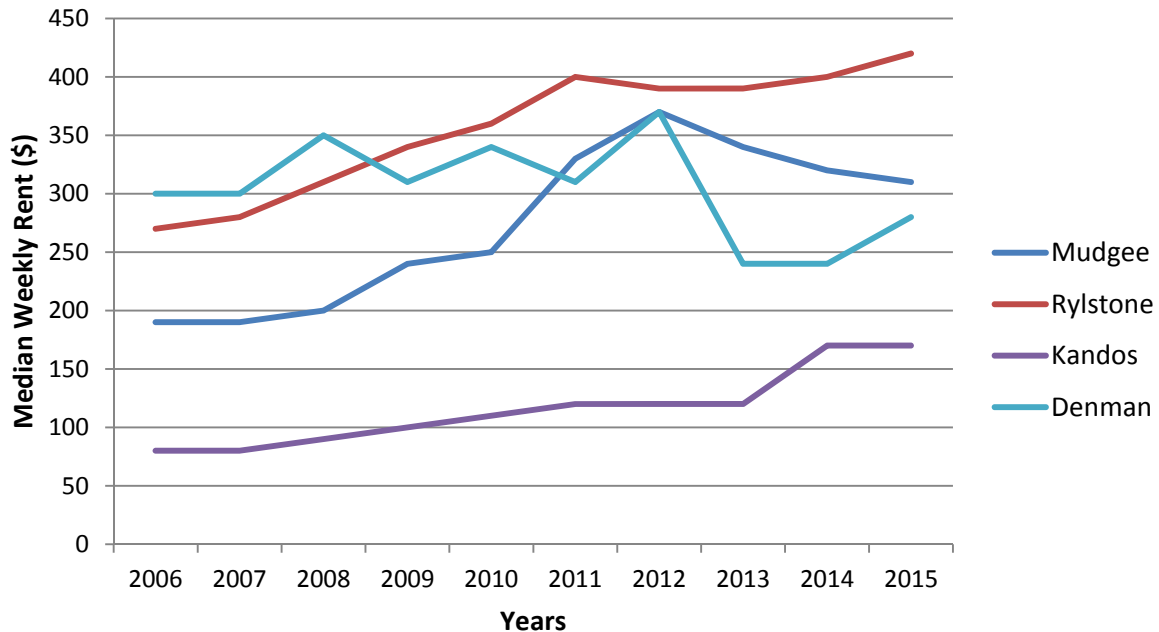
Table 14 present trends in median weekly rent for units in the Local Area for the period 2006-2015 in the month of December (based on Non-ABS suburb areas).

Table 14
Trends in Weekly Unit Rent - December 2006 to December 2015

Year	Median Weekly Rent - Unit (\$)			
	Mudgee	Rylstone	Kandos	Denman
2006	190	270	80	300
2007	190	280	80	300
2008	200	310	90	350
2009	240	340	100	310
2010	250	360	110	340
2011	330	400	120	310
2012	370	390	120	370
2013	340	390	120	240
2014	320	400	170	240
2015	310	420	170	280

Source: RESIDEX 2016a,b,c and d

Graph 4
Median Weekly House Rent - Local Area



Median weekly rent for a unit in Rylstone has almost doubled over the last 10 years from \$270 in 2006 to \$420 in 2015. Kandos also experienced a sharp increase in median weekly rent between 2013 and 2014. The unit market in Kandos is very small. The jump in median price is likely attributable to a new and modern unit complex coming on to the rental market. Median weekly unit rent in Mudgee climbed to a peak of \$370 in 2012 at the height of the mining boom before dropping to \$310 in December 2015. Denman experienced a significant drop in median weekly unit between December 2012 and December 2013, likely a result of the completion of construction phases associated with Hunter Valley mines.

3.2.2 Tourism Statistics

The MWRC LGA is located within the Central NSW Tourism Region. Time series data from the International and National Visitors Surveys (Destination NSW, 2016) indicates a 7.9% increase in total visitors (including overnights stays and daytrips) to Central NSW between 2014 and 2015 compared to a 0.9% increase across NSW for the same period. Between 2014 and 2015, Central NSW experienced a 12.9% increase in total spend, compared to a 4.9% increase across NSW for the same period. It is notable that the number of domestic visitors to Central NSW declined by 3.9% between 2014 and 2015 and the number of overnight stays for business purposes declined by 6.5%. This can be attributed in part to the contraction in the mining industry as well as changes in servicing practices by government and non-government service providers e.g. health.

Demand by domestic visitors for hotel, resort, motel or motor inn accommodation in Central NSW declined by 3.1% between 2014 and 2015, whilst the use of caravan park accommodation increased slightly. The reduction in demand for hotel, resort, motel or motor inn accommodation is associated with a corresponding reduction in the number of overnight stays for business purposes across the same period.

The growing number of visitors to the region is consistent with the feedback received from respondents to the accommodation survey.

Table 15 lists the accommodation statistics for establishments with 15 or more rooms in Mudgee and Mudgee West (MWRC LGA) for the period September 2014 to June 2015. As identified in the Accommodation Survey, there are also a number of smaller accommodation establishments in the MWRC LGA.

Table 15
Tourism Accommodation Statistics - Mudgee and Mudgee Region West

Qtr	No Of Establishments	No of Rooms	Bed Spaces	Room Occupancy Rate (%)	Room Nights Occupied
June 2015	10	276	801	63.9	16,047
March 2015	10	276	801	55.1	13,693
Dec 2014	10	276	801	64.7	16,434
Sept 2014	10	275	792	70.3	17,788

Source: ABS 2015a

The number of establishments, rooms and bed spaces has remained relatively stable over the past 18 months. Occupancy rates have fluctuated significantly with low rates experienced in the March quarter 2015. The number of bed spaces is more than the number of rooms in each establishment as rooms frequently contain multiple beds.

3.2.3 Cumulative Demands

There are a number of new mine expansions and projects proposed in the MWRC LGA, all of which have the potential to generate cumulative housing and accommodation impacts. The anticipated timing and personnel requirements for projects approved and projects in the advanced approval stages within the MWRC LGA is presented in **Table 16**.

Table 16
Proposed Timing of Mining Projects in the MWRC LGA

Mine	Development Type	Status	Estimated Start Date	Nearest Centre	Distance From Project	Peak Operations Workforce
Moolarben	Mine Expansion ¹	Under construction	2015	Ulan	53 km	450 ²
Wilpinjong	Coal mine Expansion ³	EIS on Exhibition	2017	Wollar	38 km	623 ⁴
Bowdens Silver Mine	New silver mine	Secretary's Environmental Assessment Requirements (SEARs) Issued	2016+	Lue	67 km	200
Bylong East Duplication	Rail network duplication and reconfiguration	(SEARs) Issued	2016+	Bylong	Adjacent	Unknown

Source: HillPDA 2014, NSW Department of Planning and Infrastructure (DP&I) 2014

Notes:

1. Moolarben Stage 2 which received State approval in February 2015.

2. Total of mine workforce (existing and additional).

3. Wilpinjong Expansion Project (WEP).

4. Peabody Energy (2015).

Construction of the Moolarben Mine expansion is nearing completion. Subject to approval, the construction phase of the Wilpinjong Expansion Project (WEP) is due to commence in 2017 with a peak construction workforce of 100 workers (Peabody Energy 2015). An average of 40 additional operational jobs would be available at Wilpinjong Mine between 2018 and 2023 following the completion of the WEP (Peabody Energy 2015). Based on these figures, both the Project and the WEP will be seeking accommodation for construction and operation workforces over similar timeframes.

It is understood that the workforce associated with the WEP will be accommodated in temporary accommodation and local housing stock in the MWRC LGA, most likely in Mudgee (Peabody Energy 2015). Peabody Energy (2015) predicts that 50% (N=50) of construction workers may require accommodation while on roster with 50% of these workers accommodated in hotels, motels or cabins and 50% accommodated in rental accommodation.

4 CONCLUSION

The findings of the accommodation survey and the assessment of rental accommodation suggest the following supply of accommodation within the Local Area:

- 901 rooms of accommodation within tourist accommodation, consisting of:
 - 565 rooms of short-term accommodation (hotels, motels and guesthouses); and
 - 336 rooms of long-term accommodation (holiday houses, caravan parks and apartments offering furnished and self contained accommodation); and
- 111 private rental properties including 8 furnished rental properties.

A further 126 rooms of tourist accommodation and 26 private rental properties are located in Gulgong and Merriwa, immediately outside the Local Area.

It should be noted that tourist accommodation in the MWRC LGA experience fluctuating occupancy rates. Not all of the recorded 901 rooms of accommodation are available at any point in time.

The supply of vacant private rental accommodation across the MWCR LGA also fluctuates on a month by month basis. The supply recorded in the Accommodation Study relates to November 2015 vacancy rates.

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Appendix A

List of Accommodation Establishments

Table 17
List of Accommodation Establishments

Business Name	Nearest Centre	Accommodation
Lansallos Bed and Breakfast	Bogee	Guest House
Hillview	Bylong Valley	Holiday Unit/House
Wollemi Adventure Resort	Charbon	Caravan Park
Old Cooyal Hotel	Cooyal	Hotel
Denman Hotel	Denman	Hotel
Denman Motel	Denman	Motel
Denman Motor Inn	Denman	Motel
Denman Royal Hotel	Denman	Hotel
Denman Serviced Apartments	Denman	Serviced Apartments
Denman Van Village	Denman	Caravan Park
Great Lakes Guesthouse and Hostel	Denman	Guest House
Centennial Hotel	Gulgong	Hotel/Pub
Cherry Lane Cottage	Gulgong	Guest House
Goldfields Motor Inn	Gulgong	Motel
Gulgong B&B	Gulgong	Guest House
Gulgong Motel by Aden	Gulgong	Motel
Gulgong Telegraph Station	Gulgong	Luxury Serviced Apartments
Henry Lawson Caravan Park	Gulgong	Caravan Park
Owl Head Lodge	Gulgong	Luxury Serviced Apartments
Post Office Hotel	Gulgong	Hotel
Prince of Wales Hotel	Gulgong	Hotel
Spring Creek Cottage	Gulgong	Holiday Unit/House
Ten Dollar Town Motel	Gulgong	Motel
The Stables Guesthouse	Gulgong	Guest House
Meadow House Getaway	Ilford	Guest House
Mungarry Lodge	Ilford	Caravan Park
Kando Fairways Motel	Kandos	Motel
Kandos Hotel	Kandos	Hotel
Kandos Motel	Kandos	Motel
Kandos Serviced Apartments	Kandos	Serviced Apartments
Elephant Mountain House	Lue	Holiday Unit/House
Lue Hotel	Lue	Hotel

Business Name	Nearest Centre	Accommodation
The Odd Frog Lodges	Lue	Holiday Unit/House
B&B on Bettington	Merriwa	Guest House
Eldorado Motel	Merriwa	Motel
Merriwa Serviced Apartments	Merriwa	Serviced Apartments
2 Red Doors	Mudgee	Holiday Unit/House
21 on Lawson	Mudgee	Holiday Unit/House
28 Rocky Waterhole Road	Mudgee	Holiday Unit/House
A Church in Mudgee	Mudgee	Holiday Unit/House
A Market Place Mugee	Mudgee	Holiday Unit/House
Affinity Guesthouse	Mudgee	Guest House
Afton House	Mudgee	Guest House
AJ's Guesthouse	Mudgee	Guest House
Allambie Cottage	Mudgee	Guest House
Almas	Mudgee	Holiday Unit/House
Annies at Woodlands B&B	Mudgee	Guest House
Applegum Homestead B&B	Mudgee	Guest House
Ardrossan B&B	Mudgee	Guest House
At Seventy Seven	Mudgee	Holiday Unit/House
Baidland Hill Cottage	Mudgee	Holiday Unit/House
Beaudesert Cottage	Mudgee	Holiday Unit/House
Beechworth Studio	Mudgee	Holiday Unit/House
Bella Nova Townhouses	Mudgee	Holiday Unit/House
Beverley House B&B	Mudgee	Luxury Serviced Apartments
Big 4 Mudgee	Mudgee	Caravan Park
Bliss & Primo Cottages	Mudgee	Holiday Unit/House
Blue Shed Retreat at Karrabool	Mudgee	Holiday Unit/House
Burnbrae Winemakers Cottage	Mudgee	Holiday Unit/House
Burns B&B	Mudgee	Holiday Unit/House
Byron Place Apartments	Mudgee	Holiday Unit/House
Camelia Cottage	Mudgee	Holiday Unit/House
Cawarra on the Park	Mudgee	Holiday Unit/House
Central Motel	Mudgee	Motel
Chabara Cottage	Mudgee	Holiday Unit/House
Clover Hill Farmstay	Mudgee	Guest House
Cobb & Co Court Boutique Hotel	Mudgee	Hotel
Collyers Cottage	Mudgee	Holiday Unit/House

Business Name	Nearest Centre	Accommodation
Colonial Court Villas Serviced Apartments	Mudgee	Serviced Apartments
Comfort Inn Aden Mudgee	Mudgee	Hotel
Court House Hotel	Mudgee	Hotel
Cudgegong Valley Motel	Mudgee	Motel
Douro Cottage	Mudgee	Holiday Unit/House
East End Cottages	Mudgee	Holiday Unit/House
Elouera Mudgee	Mudgee	Holiday Unit/House
Evanslea By the River	Mudgee	Luxury Serviced Apartments
Fairview Retreat	Mudgee	Guest House
Farmers Daughter Cottages	Mudgee	Holiday Unit/House
Federal Hotel	Mudgee	Hotel
Forgandenny House B&B	Mudgee	Guest House
Galsworthy House	Mudgee	Guest House
Gateway Apartments & Main Street Apartment	Mudgee	Serviced Apartments
Hangar House	Mudgee	Guest House
Harrowfield Homestead	Mudgee	Guest House
Horizon Mudgee	Mudgee	Holiday Unit/House
Ilkley Cottages	Mudgee	Holiday Unit/House
Jessica's Vineyard	Mudgee	Guest House
Kelly's Irish Pub	Mudgee	Hotel
Kenso Cottage	Mudgee	Holiday Unit/House
Kirima Cottages	Mudgee	Holiday Unit/House
Kirsten Serviced Accommodation	Mudgee	Luxury Serviced Apartments
Kurrara Cottages	Mudgee	Holiday Unit/House
Lauralla B&B	Mudgee	Guest House
Lawson Park Hotel	Mudgee	Hotel
Lawsons Creek Cottage	Mudgee	Holiday Unit/House
Lismar Lodge Cottage	Mudgee	Holiday Unit/House
Lowick Farm Cottage	Mudgee	Holiday Unit/House
Macleay Duff Apartment	Mudgee	Holiday Unit/House
Midgee Cottage	Mudgee	Holiday Unit/House
Montfarville Manor B&B	Mudgee	Guest House
Mudgee B&B	Mudgee	Guest House
Mudgee Homestead Guesthouse	Mudgee	Guest House
Mudgee Riverside Caravan Park	Mudgee	Caravan Park
Mudgee Valley Tourist Park	Mudgee	Caravan Park

Business Name	Nearest Centre	Accommodation
Mudgee's Getaway Cottages	Mudgee	Holiday Unit/House
Ningana Motel	Mudgee	Motel
Ningana Victorian Terrace Houses	Mudgee	Holiday Unit/House
Old Bara Guesthouse	Mudgee	Guest House
Old Post Office Cottage	Mudgee	Holiday Unit/House
Old School House B&B	Mudgee	Guest House
Oriental Hotel	Mudgee	Hotel
Paragon Hotel	Mudgee	Hotel
Parklands Resort	Mudgee	Luxury Hotel
Peppertree Hill	Mudgee	Holiday Unit/House
Perry St Hotel	Mudgee	Hotel
Pieter van Gent Vineyard	Mudgee	Holiday Unit/House
Pottiers Mudgee B&B	Mudgee	Guest House
Protea Farm Cottages	Mudgee	Holiday Unit/House
Putta Bucca B&B	Mudgee	Guest House
Redbank B&B	Mudgee	Guest House
Riverlane B&B	Mudgee	Guest House
Riverlea Cottage	Mudgee	Holiday Unit/House
Rosby Guesthouse and Studio	Mudgee	Guest House
Rowan Park Retreat	Mudgee	Holiday Unit/House
Ruwenzori Retreat	Mudgee	Guest House
Shortsheep Cottage	Mudgee	Holiday Unit/House
Soldiers Motel	Mudgee	Motel
Taranah Cottage	Mudgee	Holiday Unit/House
Thady Cottage	Mudgee	Guest House
The Horatio	Mudgee	Motel
The Tannery	Mudgee	Holiday Unit/House
Thistle Hill Cottage	Mudgee	Holiday Unit/House
Tierney House	Mudgee	Holiday Unit/House
Trelawney Farm	Mudgee	Holiday Unit/House
Valley View Cottage	Mudgee	Holiday Unit/House
Varykino	Mudgee	Guest House
Vineyard Motor Inn	Mudgee	Motel
Wanderlight Motor Inn	Mudgee	Motel
Wildwood guesthouse	Mudgee	Guest House
Winning Post Motor Inn	Mudgee	Motel

Business Name	Nearest Centre	Accommodation
Wombadah Guesthouse	Mudgee	Guest House
Woodward Farm B&B	Mudgee	Guest House
Woolpack Hotel	Mudgee	Hotel
Above the Clouds B&B	Rylstone	Holiday Unit/House
Baileys Run Cottage	Rylstone	Holiday Unit/House
Bridge View Inn Apartment	Rylstone	Holiday Unit/House
Cudgegong Waters Park	Rylstone	Caravan Park
Fermoy Cottage	Rylstone	Holiday Unit/House
Franks Breakaway	Rylstone	Holiday Unit/House
Globe Hotel	Rylstone	Hotel
Lucknow Retreat	Rylstone	Guest House
Peppercorn Cottages	Rylstone	Holiday Unit/House
Rylstone Caravan Park	Rylstone	Caravan Park
Rylstone Hotel	Rylstone	Hotel
Wollemi Retreat	Rylstone	Holiday Unit/House
Baerami Pines Hunter Valley Retreat	Sandy Hollow	Guest House
Sandy Hollow tourist park	Sandy Hollow	Caravan Park
Ellamarra	Sandy Hollow	Guest House
The Old Dairy at Baerami	Sandy Hollow	Guest House
Goulburn River Stone Cottages	Ulan	Holiday Unit/House
Post Office Hotel	Ulan	Hotel