



# NSW Department of Planning, Housing and Infrastructure

## Shelter NSW submission on the *“Short-term rental accommodation”* *Discussion Paper*

***A secure home for all***

15 March 2023



# About Shelter NSW

Shelter NSW has been operating since 1975 as the State’s peak housing policy and advocacy body. Our vision is to create a sustainable housing system that provides secure homes for all. We provide systemic advocacy and advice on policy and legislation for the whole NSW housing system to resolve housing inequality.

We are especially concerned for low-income households which struggle to afford good-quality and well-located housing in the private market. Our approach involves engaging, collaborating, and connecting with government, the private and not-for-profit sectors, stakeholders, and everyday citizens. Our membership base is broad and includes community organisations, public housing tenants, social workers, academics, not-for-profit housing providers, and fellow peak bodies.

We consider a sustainable housing system one that delivers what we call Triple-A housing and Triple-P outcomes.

|                                      |  |   |
|--------------------------------------|--|---|
| <b>Affordable and diverse homes</b>  | <b>Accessible and well-located housing</b> | <b>Appropriate and high-quality development</b> |
| Housing supply and demand            | Proximity to jobs and services             | Amenity and aesthetics                          |
| Tenure forms and rights              | Access to public transport                 | Energy and environment                          |
| Housing types and sizes              | Accessibility and adaptability             | Standards and maintenance                       |
| <b>Productive cities and regions</b> | <b>Poverty-free communities</b>            | <b>Protected neighbourhoods</b>                 |
| Access to jobs and services          | Housing stress and homelessness            | Energy use and consumption                      |
| Housing costs and consumption        | Physical and mental health                 | Urban heat                                      |
| Financial and economic stability     | Education access and attainment            | Climate resilience and adaptation               |

We maintain that the housing system should deliver safe, secure, and affordable living outcomes for all, regardless of tenure type. Prior to the 2023 State Election, our platform prioritised “getting the balance right between housing for tourists and housing for locals”:

**Shelter NSW**

**2023 - 2027**

**Priorities for NSW**

A secure home for all

- 1

**Restore the social housing safety net to 5% by 2027, 10% by 2040. Build/acquire 5,000 dwellings per year**

Includes maintenance, upgrades + 3 youth foyers
- 2

**Increase Specialist Homelessness annual funding by 20%**

Move beyond crisis. Focus on women, aged and First Nations
- 3

**Make the planning system deliver Affordable Rental Housing for lower income people**

Rezoning targets: 10 – 30/45%
- 4

**Build more accessible & climate ready dwellings**

Minimum standards set & met for rental dwellings
- 5

**Support Renters and Renting**

Remove No Grounds Evictions  
Create a Home at Last service  
Create a standing hardship fund & protocol for times of crisis  
Get the balance right between housing for tourists and housing for locals

## About our submission

Shelter NSW thanks the Department of Planning, Housing and Infrastructure (‘DPHI’) for the opportunity to comment on the “Short-term rental accommodation” (STRA) Discussion Paper.

Shelter NSW has made the decision **not** to use the terminology “short-term rental accommodation” or “STRA” where possible throughout this submission; rather we use language such as “non-hosted holiday accommodation” or “whole-home holiday accommodation”. This is a small way for us to acknowledge that for the most part, we are dealing with the issue of conversions of dwellings to the holiday listing market. **Classifying this use benignly as a form of housing diversity under the Housing SEPP as “short-term rental accommodation” does not do justice to the many local residents and actual renters across NSW** who are struggling with chronically low rental vacancy rates and facing no-grounds evictions in their lease agreements to make way for conversions of homes to the whole-home holiday market.

Shelter NSW has engaged previously with the NSW Independent Planning Commission (‘IPC’) in February/March 2023 on its investigation into the Byron Shire Planning Proposal case. Our written supplementary submission to that Public Hearing is available [here](#). That submission underpins many of the points in our current submission on the Discussion Paper. The [IPC’s Final Advice Report](#) provided recommendations more generally about the adequacy of “STRA” regulation in NSW. We support many of these recommendations, including the recommendation to Government to consider non-hosted holiday accommodation (over a certain number of days use per year) as a form of “tourist and visitor accommodation” in the land use planning framework.

Whilst there is a place for levies in the regulatory response to non-hosted “STRA”, levies alone will not solve the root issue at play: **many non-hosted holiday accommodation uses of homes are fundamentally a change in land use from residential to commercial**. Acknowledging this premise then allows for the logical development of place-based strategic planning responses to flow.

In compiling our submission, we spoke with many regional and metro Council planning officers, peak bodies such as Tenants Union, PIA NSW, LGNSW, and our membership base. We understand there are limited resources allocated to Councils to investigate the localised impacts of whole-home holiday conversions nor formulate intelligent planning responses that would be accepted by the State Government. Non-hosted “STRA” impacts and high proportions of underutilised properties are not experienced equally across the State. Recognising this will allow for greater collaboration and distribution of planning resources more equitably among local Councils and joint organisations of Councils.

Please contact Policy Officer, Kayla Clanchy ([kayla@shelternsw.org.au](mailto:kayla@shelternsw.org.au)) for any enquiries.

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# Framing and limitations of the Discussion Paper

Shelter NSW recognises the work that has gone into the Discussion Paper and the many competing interests DPHI needs to balance when considering policy options for regulating “STRA”. Furthermore, we applaud efforts in the Discussion Paper to flesh out how best to capture other forms of underutilised properties (vacant homes, holiday homes not used for “STRA”) in levies and land taxes.

Generally, however, we have heard from strategic planners in local Councils about the lack of transparency in how this Discussion Paper will feed into a broader review of the *Housing SEPP*. Many Councils lament how short a timeframe the Discussion Paper is on exhibition for, given the myriad other planning and housing reform packages on exhibition and announced by the State Government and the proximity of these various announcements to Council Meeting shutdown periods (December 2023/January 2024).

*“We don’t know what the overall consultation process is, or how many discussion papers or EIEs or public consultation SEPP drafts there will be... is this our only shot to have our say? Will there be targeted consultation with each Council that this topic is of interest to?” – Local Council planner, North Coast NSW*

Council Officers report feeling “underwhelmed” by the contents, scope, and evidence-base in the Discussion Paper. As the STRA Register is not publicly accessible, and Councils have limited access to the whole Register, there was an expectation that the Discussion Paper would include a lot more analysis on trends observed in the STRA Register since its inception in late 2021. Other groups we have spoken to have expressed frustration that data from the Register has not informed a publicly available analysis of trends in rental vacancy rates vs registrations vs number of days occupied vs new rental bonds lodged with the Bonds Board, and many other metrics that could feasibly have been drawn upon by the Department to add more data to the whole-home holiday market debate.

*“We don’t have a lot of evidence on the impact of non-hosted STRA, we don’t have the resources... we don’t really know the economic benefits or social costs... we need the State government to do regional investigations or give Councils resources to do this” – Local Council planner, South Coast NSW*

The Discussion Paper sets the framing for the need for the “STRA” review in light of the present housing affordability and availability crisis in NSW. The Paper then goes on to outline how housing supply in the long term is the only way to adequately address the housing crisis and seems to suggest that regulation of non-hosted “STRA” and vacant properties is a short term nice-to-have policy intervention. **We disagree with this framing for a few reasons:**

- a) The hyperinflated housing market is fed by many factors, including speculative property investment and the view in Australia of housing being a wealth-generating vehicle first and foremost, with ‘housing as shelter’ a secondary consideration

- b) **Increasing private housing supply alone in the long-term has not in the past<sup>1</sup> and will not in the future**, ease the structural issues in the Australian housing landscape and how investors speculate on property and land
- c) Curbing speculative property investment (including profit maximisation behaviours of converting dwellings to non-hosted “STRA”) is not a stop-gap policy intervention whilst we await housing supply to move through the construction pipeline. It is a core, strategic challenge in setting regulatory frameworks that smooth out current and future market peaks and troughs in housing/rental affordability and availability.

Further, the Discussion Paper frames non-hosted “STRA” as a ubiquitous economic positive for communities. Negative impacts are portrayed as mostly being constrained to housing inconveniences, when this is not the actual experience for many highly affected towns:

*“The Discussion Paper sort of discounts the value of the local dollar in praise of the visitor dollar... yes tourism money is important, but so is the local dollar being spent year-round at cafes and hairdressers and early childhood education centres... and when these workers in these industries can't afford to live locally, their dollars as well as their services to the community at large are gone...”* – Community member, Bellingen

*“Do we want local dollars 52 weeks of the year from a family in a long-term rental or tourist dollars less than half the year? And tourist dollars mostly going to one landowner, it's not like these tourists are spending \$500 per retail outlet or café they go into... but they do spend \$500 a pop per property investor per night... so is it good for local economies or just good for property investors?”* – Community service provider, Blue Mountains

We note that the Discussion Paper asserts “non-hosted STRA” as a distinct category rather than as a subset category of “vacant properties”. This is in contrast to ABS reporting on “long term unoccupied homes”, of which holiday rentals are considered key examples of long term unoccupied homes<sup>2</sup>. **The NSW Government should aim to be consistent with the ABS on this topic** and recognise that just because a property is being used for non-hosted “STRA”, it does not mean that property is considered a dwelling that is being occupied for residential purposes.

<sup>1</sup> (Pawson, Milligan, & Yates, 2020)

<sup>2</sup> ABS. (December 2020). *1504.0 Methodological News: Improving prediction of dwelling occupancy for Census 2021*. Retrieved from <https://www.abs.gov.au/ausstats/abs@.nsf/Previousproducts/1504.0Main%20Features3Dec%202020?opendocument&tabname=Summary&prodno=1504.0&issue=Dec%202020&num=&view=>

# The Housing Crisis

The Australian housing market has moved a long way from what many would say is its inherent and essential purpose – to provide secure, functional, and affordable shelter to all people at various stages of their lives. Since the 1990s, the renting cohort in Australia has grown and dove-tailed with a decrease in home ownership:

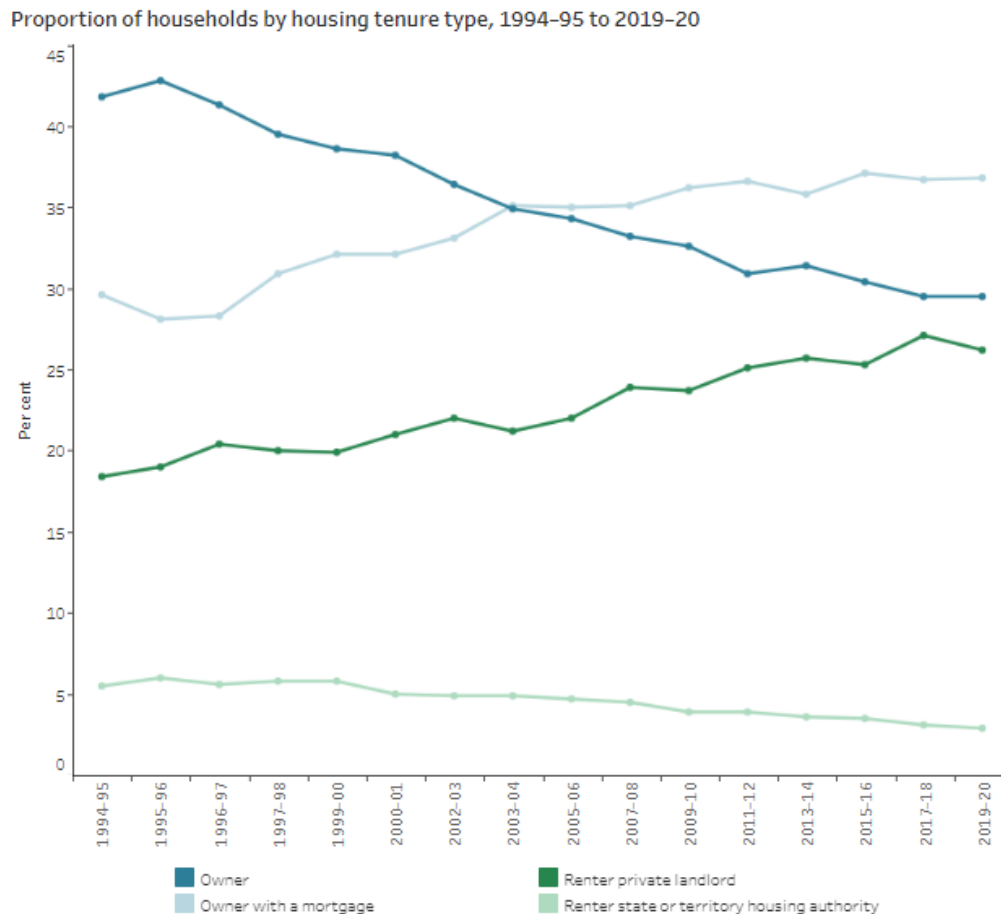


Fig 1. Extracted from [Australian Institute of Health & Welfare](#).

**Similarly, growth in social housing tenancies has taken a backseat** and as such, many households of varying incomes and life stages are surviving/struggling in the ‘wild west’ of the private rental market.

These changes in tenure dynamics are no accident; it is through Commonwealth and State tax settings, concessions, investments, policies, and legislation that ‘housing’ has become a financial product or a wealth-creation vehicle (for a few landholders).

Migration trends during the COVID-19 pandemic and the ability for Sydney-employed professionals to work remotely contributed to a deepening regional housing crisis for NSW<sup>3</sup>. Locals with lower incomes relative to Sydney-natives have seen rental asking

<sup>3</sup> Pawson, H., Martin, C., Thompson, S., & Aminpour, F. (2021, p. 45). *COVID-19: Rental housing and homelessness policy impacts*. ACOSS/UNSW Poverty and Inequality Partnership Report No. 12. Retrieved from [https://sheltersnsw.org.au/wp-content/uploads/2021/11/Covid-19\\_rental-housing-and-homelessness-impacts-in-Australia-24-Nov.pdf](https://sheltersnsw.org.au/wp-content/uploads/2021/11/Covid-19_rental-housing-and-homelessness-impacts-in-Australia-24-Nov.pdf)

prices skyrocket 20% or more, year on year<sup>4</sup>, and rental vacancy rates drop below 1% for extended periods of time<sup>5</sup>. Median house prices in Byron outstrip those of Sydney<sup>6</sup>. **In addition to COVID-induced migration trends outlined above, there has been the domestic tourism boom.**

## The rise of Airbnb and peer-to-peer accommodation

“Home sharing” platforms such as Airbnb have moved a long way from being incidental income makers for owner-occupiers in their primary place of residence. In many regional and high amenity locations, the types of homes available on such platforms now operate as quasi-hotels for property investors, being commercial in nature, and with an eroding effect on the total stock of housing able to be used as homes by local residents and renters<sup>7</sup>.

A 2020 study<sup>8</sup>, published in *Annals of Tourism Research* and summarising the various regulatory responses to the phenomena of online booking platforms such as Airbnb, stated that in:

*popular tourist destinations (San Francisco, New York, Amsterdam, London, Berlin, Paris, Barcelona, Reykjavick, Vienna, Tokyo, and Hobart) affected by the normalisation of peer-to-peer accommodation such as Airbnb... these destinations experienced reduced quality of life for residents, reduced housing availability, affordability, and changes in the character of neighbourhoods.*

Perhaps in contrast to some of the above listed global cities and housing markets, Australia is somewhat unique in our approach to embedding the housing market as a cornerstone feature of ‘growing’ our economy<sup>9</sup>. Our comfort in knowing that politicians are reluctant to stop the gravy-train of capital gains on land and property and that our tax system is infinitely skewed toward rewarding concessions to property investors no

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<sup>4</sup> Burke, K in Domain AU. (14 October 2022). *The NSW tree-change towns where rents have soared*. Retrieved from <https://www.domain.com.au/news/the-nsw-tree-change-towns-where-rents-have-soared-1174917/>; DCJ rent and sales quarterly reports (<https://www.facs.nsw.gov.au/resources/statistics/rent-and-sales/dashboard>)

<sup>5</sup> SQM Research. (n.d.). *Residential vacancy rates by postcode*. Retrieved from [https://sqmresearch.com.au/graph\\_vacancy.php](https://sqmresearch.com.au/graph_vacancy.php)

<sup>6</sup> Cornish, R in ABC News. (27 January 2022). *Sydney's median house price now just over \$1.6m, but massive growth expected to slow*. Retrieved from <https://www.abc.net.au/news/2022-01-27/sydney-median-house-price-increases-but-growth-expected-to-slow/100785706>

<sup>7</sup> Sigler, T. & Panczak, R. in The Conversation AU. (13 February 2020). *Ever wondered how many Airbnbs Australia has and where they all are? We have the answers*. Retrieved from <https://theconversation.com/ever-wondered-how-many-airbnbs-australia-has-and-where-they-all-are-we-have-the-answers-129003>

<sup>8</sup> von Briel, D. & Dolnicar, S. (2020). The evolution of Airbnb regulation – An international longitudinal investigation 2008-2020. *Annals of Tourism Research*, <https://doi.org/10.1016/j.annals.2020.102983>

<sup>9</sup> Maley, K. in the AFR. (8 May 2021). *How Australia's property obsession warps the economy*. Retrieved from <https://www.afr.com/companies/financial-services/how-australia-s-property-obsession-warps-the-economy-20210506-p57pbb>



matter their risk management strategies<sup>10</sup>, has naturally created a culture whereby reaping the most profits per unit of housing is not only normalised, but expected. With digital ‘disrupters’ such as Airbnb and the rising social pressure to perform lifestyle perfection on other platforms (such as Instagram), it was only a matter of time until Australians started conceptualising homes as boutique, commercial ventures – not only promising financial returns but online social capital<sup>11</sup>.

Although some of these commercial-style abodes tend to be located at the ‘luxury’ end of the housing market, they still would ordinarily add to total housing stock, meaning there is less competition between higher income households and lower income households for the same, stabilised pool of housing stock (either as owner-occupiers or renters):

*“Long-term rentals are increasingly grubby and too ugly to qualify as an Airbnb property, and that’s the only reason they are still available for local renters... then what houses are available are not even able to be rented by low-income families, because they are competing with higher income renters” – Community service provider, Blue Mountains*

Additionally, the proliferation of Airbnb-type properties in neighbourhoods tend to gentrify these areas and further drive-up property prices in Australia; in the period 2015-2017, a strong presence of whole-home Airbnb properties in a postcode accounted for a \$31,000 increase in house sale prices, and \$10 increase in weekly rents<sup>12</sup>.

The lure of higher-profits per week in converting a dwelling to non-hosted accommodation through easy-to-use platforms such as Airbnb has gone basically unchecked in NSW (see Table 1, full extract of all LGAs available in **Appendix A**):

**Table 1. Growth of whole-home Airbnbs in various locations**

| LGA (2016 boundaries) | Number of whole-house accomm listed on Airbnb - Nov 2018 <sup>13</sup> | Number of whole-house accomm listed on Airbnb - Nov 2023 <sup>14</sup> | Growth rate (%) |
|-----------------------|--|--|-----------------|
| Eurobodalla           | 569  | 1056   | 85.6            |
| Wyong                 | 505  | 892  | 76.6            |
| Snowy River           | 747  | 1296   | 73.5            |
| Cessnock              | 524  | 877  | 67.4            |
| Wingecarribee         | 444  | 742  | 67.1            |
| Ballina               | 448  | 774  | 66.1            |
| Port Stephens         | 959  | 1537   | 60.3            |
| Tweed                 | 967  | 1452   | 50.2            |
| Shoalhaven            | 2669   | 3864   | 44.8            |
| Coffs Harbour         | 583  | 843  | 44.6            |

A clear relationship between rental vacancy rates and COVID restrictions on tourism and travel demonstrate the extent to which homes have been leaching out from the long-term rental market (and the exceptional circumstances under which they will return):

<sup>10</sup> (Pawson, Milligan, & Yates, 2020)

<sup>11</sup> Sullivan, H. in The Guardian. (29 May 2021). *Hollywood and homelessness: the two sides of Byron Bay*. Retrieved from <https://www.theguardian.com/australia-news/2021/may/29/hollywood-and-homelessness-the-two-sides-of-byron-bay>

<sup>12</sup> Hodgson, L. (2023). *Accounting for Airbnb in the housing market*. PIA National Congress. Retrieved from <https://www.planning.org.au/documents/item/12420>

<sup>13</sup> Cox, M. (2021). *Inside Airbnb*. Retrieved from <http://insideairbnb.com/get-the-data.html> [spreadsheet avail on request]

<sup>14</sup> Cox, M. (2022). *Inside Airbnb*. Retrieved from <http://insideairbnb.com/get-the-data.html> [spreadsheet avail on request]

**Table 2. Rental vacancy rates, Rental Bond lodgements, pandemic restrictions on travel**

| Location (postcode) | Month year   | Residential rental vacancy rates <sup>15</sup> | Month year | Annual change (%) in new Rental Bond lodgements <sup>16</sup> |
|---------------------|--------------|--|------------|---|
| Byron 2481          | April 2019   | 4.5  | March 2019 | -16.46  |
|                     | January 2020 | 2.2  | March 2020 | 18.22   |
|                     | April 2020   | 7.5  |            |   |
|                     | January 2021 | 0.9  | March 2021 | -5.35   |
| Ballina 2478        | April 2019   | 0.8  | March 2019 | 0.57  |
|                     | January 2020 | 1.5  | March 2020 | 10.51   |
|                     | April 2020   | 2.4  |            |   |
|                     | January 2021 | 0.2  | March 2021 | -19.79  |
| Tweed 2485          | April 2019   | 0.7  | March 2019 | 2.17  |
|                     | January 2020 | 0.6  | March 2020 | 7.19  |
|                     | April 2020   | 1.6  |            |   |
|                     | January 2021 | 0.3  | March 2021 | -12.65  |
| Grafton 2460        | April 2019   | 1.4  | March 2019 | -13.63  |
|                     | January 2020 | 2.0  | March 2020 | 15.77   |
|                     | April 2020   | 2.4  |            |   |
|                     | January 2021 | 1.0  | March 2021 | -9.49   |

This finding accords with the Department’s own estimates from the NSW STRA Register and comparing rental bonds data that approximately 50% of non-hosted “STRA” were once available on the traditional long-term rental market<sup>17</sup>.

## NSW Planning System

Presently, the NSW Government is seemingly hyper-focussed on delivering accelerated dwelling supply where it is needed most. **Shelter NSW highlighted to the (former) Greater Cities Commission<sup>18</sup> the folly in setting housing supply targets if the Commission is not also monitoring the attrition rate of housing stock to the short-term holiday market.** Goals to increase housing supply may be scuppered by new and existing housing stock being diverted at fluctuating rates to the non-hosted holiday accommodation market. We are not aware of specific monitoring of this issue by the Department or Urban Development Programs (‘UDPs’). This concern was also echoed in the IPC Final Advice Report: “...prevent the subsequent conversion of new housing supply

<sup>15</sup> SQM Research. (n.d.). *Residential vacancy rates by postcode*. Retrieved from [https://sqmresearch.com.au/graph\\_vacancy.php](https://sqmresearch.com.au/graph_vacancy.php)

<sup>16</sup> NSW DCJ. (n.d.). *Previous rent and sales reports*. Retrieved from [https://www.facs.nsw.gov.au/resources/statistics/rent-and-sales/back-issues?result\\_536530\\_result\\_page=3](https://www.facs.nsw.gov.au/resources/statistics/rent-and-sales/back-issues?result_536530_result_page=3)

<sup>17</sup> Mentioned in conversation with the STHL Team, P McManus (13 March 2024)

<sup>18</sup> Shelter NSW. (27 October 2022). *Greater Cities Commission Six Cities Discussion Paper: Submission*. Retrieved from [https://sheltersnsw.org.au/wp-content/uploads/2022/10/221027\\_GCCSixCitiesDiscussionPaper\\_submission\\_final\\_KC.pdf](https://sheltersnsw.org.au/wp-content/uploads/2022/10/221027_GCCSixCitiesDiscussionPaper_submission_final_KC.pdf)

to non-hosted STRA by requiring relevant conditions on development consent for new housing developments”<sup>19</sup>.

Short-term letting platforms such as Airbnb are marketed toward tourists who can afford (or are willing) to pay a higher price for leisure accommodation than residents who are seeking temporary housing. This is evident in the NSW Department of Planning’s 2017 Options Paper<sup>20</sup> on regulating short term holiday letting, which went on to form the basis of the “STRA” provisions in the former *Affordable Rental Housing SEPP* and now the consolidated *Housing SEPP 2021*.

The existing land use definitions at the time (2017) adequately covered the concept of non-hosted short term holiday letting, under the term “serviced apartment” or umbrella category of “tourist and visitor accommodation”<sup>21</sup>:

***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.

*Note—Serviced apartments are a type of tourist and visitor accommodation—see the definition of that term in this Dictionary.*

***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, or
  - (g) caravan parks, or
  - (h) eco-tourist facilities.

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<sup>19</sup> NSW IPC. (24 April 2023, p. iii). Byron Shire Short-Term Rental Accommodation Planning Proposal: Final Advice Report. Retrieved from [https://www.ipcn.nsw.gov.au/resources/pac/media/files/pac/projects/2022/12/byron-shire-short-term-rental-pp/advice/230424\\_byron-stra-pp\\_advice-report\\_final.pdf](https://www.ipcn.nsw.gov.au/resources/pac/media/files/pac/projects/2022/12/byron-shire-short-term-rental-pp/advice/230424_byron-stra-pp_advice-report_final.pdf)

<sup>20</sup> NSW Government. (July 2017). Short-term holiday letting in NSW: Options paper. Retrieved from <https://www.planning.nsw.gov.au/~/-/media/Files/DPE/Other/short-term-holiday-letting-options-paper-20-July-2017.ashx>

<sup>21</sup> NSW Government. (historical version, 25 August 2017). *Standard Instrument – Principal LEP (2006)*. s. Dictionary. Retrieved from <https://legislation.nsw.gov.au/view/html/2017-08-25/epi-2006-155a#dict>

We note that many within the building regulation sector also viewed non-hosted, short stay holiday letting as “serviced apartments” requiring many (if not all) Class 3 building features<sup>22</sup>.

In boom-and-bust resource economies, short-term rental platforms such as Airbnb and Stayz impact the local rental market of regional and rural towns as mining operatives and key industry employers rely on short-term rentals to meet their workforce accommodation needs. **We believe greater scrutiny of DA proposals and Social Impact Assessments accompanying these projects is required** to ensure local markets can actually absorb DIDO/FIFO workforces (and where they cannot – require in-kind dedications for homes to offset the impacts). State-level infrastructure investments also need to be closely scrutinised for their housing impacts and proactive measures put in place to accommodate temporary workforces.

**On the whole, non-hosted holiday accommodation is not a form of housing diversity and regulations should not be couched in the *Housing SEPP*.** Commercialised non-hosted, whole-home holiday accommodation is “tourist and visitor accommodation” and not an ancillary use to a “dwelling house”<sup>23</sup>. Simplifying non-hosted, non principal place of residence holiday accommodation as “heads on beds = residential” belies the commercial nature of these quasi-hotels that operate for more than 30/60/90 nights per year, particularly as these accommodation arrangements are generally not underpinned by a standardised lease agreement within the meaning of the *NSW Residential Tenancies Act 2010*.

**We therefore maintain that whole-home, non principal place of residence, and unhosted holiday accommodation is a change of use** within the NSW planning framework when used for these purposes in excess of day-cap “norms” and that local Councils should be able to regulate these uses as they would any other change of use DA.

## Non-hosted “STRA”

The existing definitions of “hosted” and “non-hosted” accommodation are vague with references made to hosts residing “on the premises or off the premises”. **The definitions should be tightened** to ensure “hosted” captures spare room(s) within the host’s principal place of residence **and** the host is residing in the same dwelling for the duration of the booking. “Non-hosted” should capture all other scenarios.

The Discussion Paper poses questions about classifying secondary dwellings as “hosted STRA” or “non-hosted STRA”. It is useful to remember the origins of “secondary dwelling”

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<sup>22</sup> Chun, P. (20 February 2012). Report for the Australian Building Codes Board: Class 2 and 3 evaluation of options project. Retrieved from <https://www.abcb.gov.au/sites/default/files/resources/2022/Report-class-2-3-evaluation-of-options-project-Philip-Chun.pdf>

<sup>23</sup> *Dobrohotoff v Bennic* [2013] NSWLEC 61. Retrieved from <https://www.caselaw.nsw.gov.au/decision/54a6399b3004de94513da983>

approvals in NSW in order to ascertain whether they should be classified as “hosted” or “non-hosted” for the purposes of regulating (and levying) holiday accommodation uses.

Many secondary dwellings were granted permissibility by way of the former *Affordable Rental Housing SEPP 2009*. Reduced planning requirements for car parking and the like were offered up under the old SEPP for the purposes of recognising secondary dwellings as an informal way to bring low-rent housing to the market. Also, secondary dwellings were historically known as “granny flats” and their purpose was mostly to provide low or no cost accommodation for elderly family members (or family members more generally) to move into when perhaps their primary dwelling was no longer fit for purpose/too large to manage. It is antithetical to “secondary dwellings” original use-intent for them to now be used as profit maximisation accommodation for tourists, without some change of use process being invoked.

*“A lot of the diverse housing stock, namely secondary dwellings, are now Airbnbs, and we really need them back for young people and renters” – Community member, Bellingen*

Another part of the Discussion Paper ruminates on whether or not some properties (read: secondary dwellings) used as non-hosted “STRA” should face levy charges, as “some properties are not designed for long-term living (for example, they may lack a proper kitchen)”<sup>24</sup> and those properties would not otherwise be suitable for the traditional rental market”. We disagree, as non-hosted STRAs must be carried out in authorised “dwellings”:

*meaning a room or suite of rooms occupied or used or so constructed or adapted as to be capable of being occupied or used as a separate domicile.*<sup>25</sup>

And secondary dwellings in particular must be “self-contained dwellings” per the Standard Instrument LEP definition. Therefore, no need exists to exclude “dwellings that are not suitable for long-term living” as by their very nature, all authorised dwellings should be suitable for long-term living.

For the above reasons, **Shelter NSW views commercial accommodation use of secondary dwellings for “STRA” as a non-hosted use** (being a separate domicile from the primary dwelling). To preserve the intention of “secondary dwellings” within the NSW Planning framework, “secondary dwellings” should be exempt/complying when they will be used by traditional tenants as affordable housing, or used by family members with no/nominal rent charged. In this vein, any secondary dwellings not to be used for this purpose (e.g. as “non-hosted STRA” above a certain day cap threshold) should be subject to a Development Application and the merits of the secondary dwelling conversion to commercial accommodation assessed in that manner.

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<sup>24</sup> Discussion Paper, p. 41

<sup>25</sup> <https://legislation.nsw.gov.au/view/html/inforce/current/epi-2006-155a#dict>

## “STRA” day caps and change of use considerations

Generally, Shelter NSW has come to the position that the State Government needs to be flexible in working with and allowing Councils to set their own short-term holiday accommodation regulations and policies. We assert that in many instances, a DA change of use permit system informed by day-cap thresholds is a more appropriate approach to regulating non-hosted “STRA” than what is currently offered in the *Housing SEPP*.

### Day-cap and permit approaches: International and Australian examples

There are numerous international and Australian case studies that NSW can learn from when it comes to regulating and monitoring non-hosted holiday accommodation, particularly via day-caps and permits.

Barcelona has a licencing/permit system and the **total number of licences allocated to whole-home accommodation operators is limited in number**, subject to frequent reviews in light of broader housing stock trends and consultation with Industry<sup>26</sup>. The PEUAT Strategy by Barcelona City Council establishes a zero-growth plan for whole-home holiday accommodation across the city, with the City declaring “no type of tourist accommodation may replace a dwelling” and new licences generally only come about when existing holiday listings lapse. The PEUAT Strategy includes the central guarantee of “a right to housing for local residents”.

Shelter Tasmania have done considerable work<sup>27</sup> investigating the impact of non-hosted holiday accommodation in Hobart and similarly, how Hobart Council is looking to prohibit new non-hosted accommodation conversions occurring in Central Hobart. **This prohibition, like Barcelona, is effectively an acknowledgement that the total number of whole-home listings in Hobart has crested the tipping point for what local residents and communities can bear** in terms of housing availability, affordability, and social cohesion.

The Western Australian Government is proceeding with State-wide plans to regulate short term holiday accommodation with day-caps of 60 days per calendar year<sup>28</sup>.

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<sup>26</sup> Barcelona City Council. PEUAT. (2022). Retrieved from <https://ajuntament.barcelona.cat/pla-allotjaments-turistics/en>

<sup>27</sup> Phibbs, P, Ely, J, & Shelter Tasmania. (December 2022). *Monitoring the impact of short-term rentals on Tasmanian housing markets*. Retrieved from <https://sheltertass.org.au/monitoring-the-impact-of-short-term-rentals-on-tasmanian-housing-markets-1st-update-since-june-2022-baseline-report-dec-2022/>

<sup>28</sup> WA Government. (14 December 2022). Short term rental accommodation. Retrieved from <https://www.wa.gov.au/organisation/departments-of-planning-lands-and-heritage/short-term-rental-accommodation>

The (former) Department of Planning & Environment admitted that the 180-day State-default cap was “arbitrary... no real science behind it”<sup>29</sup>. This admission tracks with the lack of international case studies one can find in relation to government bodies instituting a 180-day whole-home, unhosted accommodation cap – let alone where such a cap has been effective at incentivising the return of homes to the long-term rental or owner-occupier market.

In discussions with international expert and data scientist, Murray Cox, Founder of InsideAirbnb, Mr Cox indicated that the highest cap he has come across in his work is “120 days per year, unhosted whole-homes... and that was an intentionally generous cap introduced by the City of Los Angeles”. In fact, the following extract from Gauß et al. (2024) shows that **day-caps, where instituted, tend to normalise around the 30 to 90 day range**<sup>30</sup>:

**Table 1** Overview of STR regulations in major cities worldwide in 2023

| City                            | (Partial) Ban of short-term rentals | Day cap | Registration required | Affected properties  |
|---------------------------------|-------------------------------------|---------|-----------------------|--|
| <i>(Partial) ban</i>            |                                     |         |                       |  |
| Barcelona                       | Yes                                 | No      | No                    | Tourist Use House license necessary; currently new licenses are not issued |
| New Orleans                     | Yes                                 | No      | No                    | License possible in some zip codes   |
| Vancouver                       | Yes                                 | No      | No                    | Business license required; license only for primary homes                  |
| <i>Day cap</i>                  |                                     |         |                       |  |
| Amsterdam                       | No                                  | ≤ 30    | Yes                   | All properties   |
| Berlin                          | No                                  | ≤ 90    | Yes                   | Secondary homes  |
| Copenhagen                      | No                                  | ≤ 70 *  | No                    | All properties   |
| Dublin                          | No                                  | ≤ 90    | No                    | Specific zip codes   |
| Hamburg                         | No                                  | ≤ 56    | Yes                   | Primary homes  |
| London                          | No                                  | ≤ 90    | No                    | All properties are affected  |
| Los Angeles                     | No                                  | ≤ 120   | Yes                   | Primary homes  |
| Madrid                          | No                                  | ≤ 90    | Yes                   | All properties   |
| Munich                          | No                                  | ≤ 56    | No                    | All properties   |
| Oslo                            | No                                  | ≤ 90    | No                    | All properties   |
| Paris                           | No                                  | ≤ 120   | No                    | Primary homes  |
| San Francisco                   | No                                  | ≤ 90    | Yes                   | Primary homes (one-host-one-home)  |
| <i>Registration requirement</i> |                                     |         |                       |  |
| Boston                          | No                                  | No      | Yes                   | All properties   |
| Chicago                         | No                                  | No      | Yes                   | All properties   |
| Lisbon                          | No                                  | No      | Yes                   | All properties   |
| Montreal                        | No                                  | No      | Yes                   | All properties   |
| New York                        | No                                  | No      | Yes                   | All properties   |
| Philadelphia                    | No                                  | No      | Yes                   | All properties   |
| Phoenix                         | No                                  | No      | Yes                   | All properties   |
| Rome                            | No                                  | No      | Yes                   | All properties   |
| Toronto                         | No                                  | No      | Yes                   | Primary homes  |

\* If platform does not collaborate with city government, day limit is reduced to 30 days.

*Ban*: situation where short-term rentals are not allowed in at least some parts of the city; often implemented with licenses that are no longer distributed. *Day cap*: maximum number of days a property can be rented out per year. *Registration requirement*: situation where hosts have to register with the city to legally be allowed to rent out on short term. Registration requirements can differ in design (e.g., in registration costs). *Affected properties*: type of properties affected by the regulation.

<sup>29</sup> Walton, L. on behalf of DPE. (21 February 2023, p. 9). *Public Hearing Day 1: Transcript of Proceedings*. NSW IPC Case: Byron Shire Short Term Rental Accommodation Planning Proposal. Retrieved from <https://www.ipcn.nsw.gov.au/resources/pac/media/files/pac/transcripts-and-material/2022/byron-bay-stra/230221-byron-shire-stra-pp-public-hearing-transcript-day-1.pdf>

<sup>30</sup> Gauß, P., Gensler, S., Kortenhaus, M., and Riedel, N., & Schneider, A. (January 2024). Regulating the sharing economy: The effects of day caps on short- and long-term rental markets and stakeholder outcomes. Retrieved from <http://dx.doi.org/10.2139/ssrn.4068526>



The IPC in its Final Advice Report to the NSW Planning Minister – drawing on [technical advice from AHURI](#) – also **recommended a 60-day cap as a threshold point beyond which, a house is likely no longer operating as a home and more like a commercial accommodation provider.**

We observe that in addition to these international examples of day-cap norms, the existing Standard Instrument LEP clause 2.8 on “temporary use of land” includes a default placeholder for the **number of days use per year beyond which a use is no longer considered temporary: 52 days.** If the Standard Instrument already recognises uses beyond 52 days as likely no longer being temporary and constituting a DA change of use, why has this thinking not been applied to creating a starting point for day-cap thresholds for non-hosted “STRA” (beyond which it is no longer considered an ancillary residential or temporary use)?

It must be acknowledged that research internationally<sup>31</sup> has shown that annual day-caps as a lone planning mechanism for limiting non-hosted accommodation conversions are less efficient in returning dwellings to the long-term rental market than policies **limiting the total number of whole-home accommodation conversions per suburb.** We suggest that the total number of non-hosted accommodation permits should be capped per LGA or broader regional planning area, in accordance with local studies into the maximum allowable number of non-hosted accommodation that can occur without adverse impact on the long-term rental market in each location.

Furthermore, **total non-hosted accommodation volume caps for LGAs/suburbs/regional planning areas should be guided by density caps** (e.g. no more than y number of non-hosted accommodation options per z suburb), to ensure hollowing out of well-serviced, well-located neighbourhoods for whole-home accommodation use does not occur. Local research and evidence for density caps and as they vary from suburb to suburb will be required.

Sociospatial disadvantages of whole-home holiday accommodation use are well documented globally<sup>32</sup>, in that local residents are generally pushed further afield from their areas of employment and community facilities, with significant burdens on planning for transport, open space, schools, and other physical and social infrastructure.

*“In non-peak season, we’re a ghost town because no one can afford to live here year round... local community services and groups and churches are no longer viable or vibrant” – Community service provider, Blue Mountains*

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<sup>31</sup> (Such as London versus Barcelona). Frenken, K & Schor, J. (2019). Putting the sharing economy into perspective. In *A research agenda for sustainable consumption governance*. Edward Elgar Publishing; Temperton, J. (February 13, 2020). *Airbnb has devoured London – and here’s the data that proves it*. <https://www.wired.co.uk/article/airbnb-london-short-term-rentals>  
<sup>32</sup> (example: formerly working class district of Alfama in Lisbon, now thoroughly gentrified) Shabrina, Z et al (2021). Airbnb and its potential impact on the London housing market. <https://doi.org/10.1177/0042098020970865>; Cocola-Gant, A & Gago, A. (2019). Airbnb, buy-to-let investment and tourism-driven displacement: A case study in Lisbon. <https://doi.org/10.1177/0308518X19869012>



*"We lost our local head of SES as he's a renter and he's not able to find anywhere to live in Bellingen" – Community member, Bellingen*

**Density caps that are tipped more favourably to non-hosted accommodation uses in certain neighbourhoods will allow better infrastructure planning**, more creative precinct planning, and more holistic leisure experiences in line with tourism goals of cities and regions.

The concept of non-hosted accommodation volumes caps and density caps harmonises well with the NSW Government's apparent desire to foster more socially diverse neighbourhoods, and so it is hoped these long-range reforms to how we deal with non-hosted holiday accommodation will be seriously considered.

*"[non-hosted STRA] is disruptive to community wellbeing, and not knowing your neighbours, it's a further form of isolation" – Community service provider, Blue Mountains*

### Non-hosted accommodation occupancy data

Day-cap thresholds can also be informed by occupancy/booking data on non-hosted accommodation. A sample of occupancy data for select LGAs is displayed below in Table 3 (full Table for all LGAs at [Appendix B](#)):

**Table 3. Occupancy/booking data for existing whole-home accommodation on Airbnb<sup>33</sup>**

| LGA (2016 boundaries) | Whole-home Airbnb listings occupancy/bookings in the 12 months to November 2023 |           |           |           |            |                               |  |
|-----------------------|---|-----------|-----------|-----------|------------|-------------------------------|--|
|                       | 0 days  | 0-60 days | > 60 days | > 90 days | > 180 days | total no. whole-home listings | whole-home listings average occupancy days |
| Shoalhaven            | 701   | 2651      | 1213      | 884       | 399        | 3864                          | 63   |
| Sydney                | 1826  | 2455      | 1294      | 1073      | 637        | 3749                          | 81   |
| Byron                 | 917   | 1917      | 748       | 587       | 294        | 2665                          | 63   |
| Waverley              | 1330  | 1745      | 484       | 386       | 186        | 2229                          | 45   |
| Gosford               | 462   | 1314      | 484       | 376       | 182        | 1798                          | 56   |
| Port Stephens         | 389   | 1196      | 341       | 261       | 133        | 1537                          | 49   |
| Tweed                 | 454   | 1049      | 403       | 307       | 146        | 1452                          | 61   |
| Great Lakes           | 318   | 988       | 323       | 236       | 112        | 1311                          | 52   |
| Snowy River           | 330   | 984       | 312       | 216       | 74         | 1296                          | 49   |
| Randwick              | 740   | 956       | 241       | 198       | 88         | 1197                          | 47   |
| Warringah             | 664   | 907       | 182       | 146       | 62         | 1089                          | 36   |
| Eurobodalla           | 191   | 735       | 321       | 234       | 102        | 1056                          | 63   |

Note that this sample was pulled from LGAs with the highest number of whole-home Airbnb listings. **The average occupancy days/days booked sit somewhere between**

<sup>33</sup> Cox, M. (2021). *Inside Airbnb*. Retrieved from <http://insideairbnb.com/get-the-data.html> [spreadsheet avail on request]

**30 to 90 days for the entire sample** (last column). Proportionally, very few listings from this sample are booked in excess of 180 days per year.

Table 3 demonstrates how 180 days is such a high cap that it regulates only a small portion (10%) of whole-home Airbnbs in the sample. For a day-cap mechanism to have any hope in effectively enticing homes back to the regular housing market, the cap needs to substantially capture some of those properties that would otherwise be booked out above the day-cap. As indicated elsewhere in this submission, 180-days per year exempt cap on non-hosted accommodation is nearly unheard of in international and national policy frameworks. The “norm” for unhosted, non owner-occupied accommodation caps tends to sit around 30 to 90 days per year<sup>34</sup>.

### Strategic planning and local Council resources

There are significant challenges at the local level in investigating and formulating responses to non-hosted “STRA” impacts. Anecdotally, Council staff are gun-shy in engaging with the Department on this topic and critically under-resourced to do their own economic and social impact analyses of non-hosted STRA. The Byron Planning Proposal has been decades in the making with much back-and-forth arbitration between Council and the NSW Government needed.

*“Establishing day-caps at the moment is arduous for Councils and we are hindered by State Government... just let Councils opt into a day-cap process, as a simplified template” – local Council planner, North Coast*

**Strong regional submarket planning for tourism goals and housing need is critical to informing a well-oiled day-cap permit system that is place-based and strategy-led.** This sort of work – funded and resourced by the State Government for regional planning areas – will ensure negative spillover effects of regulating in one LGA but not a neighbouring LGA is limited:

*“We’ve already started to see investors spooked by the Byron outcome, sniffing around Bellingen and other nearby ‘trendy’ locations to set up Airbnbs... it’s a moving feast” – Community member, Bellingen*

Day-cap thresholds serve as a useful indicator in many international examples of where a use is teetering towards being more commercial in nature rather than residential/incidental income in someone’s principal place of residence.

Internationally as seen in the above section **“Day-cap and permit approaches”**, the normal range for day-cap thresholds tends to be anywhere between 30 to 90 days, where beyond that number of days proposed use per year, non-hosted STRA could be classified as a change of use to commercial tourist accommodation. Whether this change of use needs to be regulated through a permit system is very much dependent on local

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<sup>34</sup> Hubscher, M, & Kallert, T. (8 September 2022). Taming Airbnb Locally: Analysing regulations in Amsterdam, Berlin, and London. *Journal of Economic and Human Geography*. Retrieved from <https://onlinelibrary.wiley.com/doi/10.1111/tesg.12537>

conditions and local housing and productivity pressures, **but it is still a material change in use.**

The State Government to date has provided limited functional guidance for local Councils looking at using day-caps (below 180 days) to regulate changes of use from residential to commercial accommodation, and we would suggest **it is the role of State Government to do that high level analysis** (incorporating assessment of international examples).

Feasibly, the State Government could:

- Introduce a system whereby it signals to local Councils and/or Joint Organisations of Councils that the accepted day-cap threshold range is 30 to 90 days for non-hosted, beyond which a use is likely a change of use from residential to tourist and visitor accommodation
- Encourage Councils and regional consortia of Councils to introduce a permit system for “highly affected”<sup>35</sup> LGAs where the day-cap threshold is within that 30 to 90 day range, and non-hosted accommodation will exceed that day-cap
  - Councils and consortia of Councils that use this pathway face a simplified Planning process<sup>36</sup> without overly onerous economic impact assessments and social impact assessments needing to be submitted – Councils could rely on readily available data for rental vacancy rates and rental bond lodgements to furnish their case that they are a “vulnerable housing zone” and fill out a standardised form to submit to the Department
  - Merits assessment of permits for non-hosted use above the cap would need to be informed by local/regional planning strategies on the sustainable number of conversions that a locality can withstand as a “vulnerable housing zone” and with consideration paid to the density of “STRA” conversions in localities – see points under “**Day-cap and permit approaches**”
  - Alternatively, if Councils that are “highly affected” by non-hosted STRA are seeking a very high day cap above 90 days (or no cap at all), these Councils or consortia of Councils in a regional planning area must undertake full economic impact assessments and social impact assessments to prove they are not a “vulnerable housing zone”
- Where LGAs (e.g. Bland Shire in western NSW) do not have non-hosted “STRA” as a notable proportion of all dwelling stock – and/or other housing pressure indicators such as rental vacancy rates below 2-3% - non-hosted “STRA” above 30 to 90 days use per year could be considered Exempt changes of use from residential to tourist and visitor accommodation.

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<sup>35</sup> High proportion (>3%) of total dwelling stock is used as non-hosted STRA, consistent with advice from P Phibbs and N Gurran

<sup>36</sup> Accelerated Gateway Determination or inclusion in Ministerial Order as a “vulnerable housing zone”, consistent with advice from P Phibbs

## Tenure security for renters

There is significant interest at the moment in ending no-grounds evictions for renters in NSW. We advocated for no-grounds evictions of all lease types (periodic and fixed agreements) to be replaced with reasonable grounds in [our submission to the Department of Customer Service last year](#) on its *Rental Reform Consultation Paper*.

“So many families come to us because of landlord reno-victions for Airbnb” – Community service provider, Blue Mountains

In that submission, Shelter NSW highlighted that we accept that landlords may wish to use a residential property for commercial or other purposes and that these proposed changes of use are generally required to obtain Development Application consent or Complying Development certificates through relevant planning authorities.

**Reasonable grounds for eviction when it comes to “change of use” must be accompanied by parallel legislation in the NSW planning framework** (*Housing SEPP 2021 or Standard Instrument Local Environmental Plan 2006*) that re-identifies “non-hosted short term rental accommodation” (over a certain number of days use per year) as a form of “tourist and visitor accommodation”, in line with the IPC Final Advice report<sup>37</sup> and supporting report by AHURI<sup>38</sup>. This factor is crucial to ensuring long term rental stock does not leach out into the lucrative ‘Airbnb’ market, and that any such land-use changes are adequately regulated by the planning system – rather than leaving it up to NCAT to hear and decide on individual cases of whether or not an eviction for this purpose is “reasonable”.

## Emergency accommodation use

Shelter NSW contributed to UNSW City Futures Research into “The impact of housing vulnerability on climate disaster recovery for the Northern Rivers 2022 flood events”<sup>39</sup>. This piece of research highlights how chronically housing stressed the North Coast region was prior to the 2022 flood events – due in large part to whole-home holiday accommodation conversions reducing general housing stock for owner occupiers and renters alike – and how this chronic stress led to already scarce housing options for vulnerable people becoming essentially non-existent after the floods.

Late last month, the NSW Audit Office released a [Report](#) into processes around emergency accommodation and housing shortfalls in the Northern Rivers and Central

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<sup>37</sup> Coakes, S., Grant, J. and Mackay, R. (24 April 2023). *Byron Shire Short-Term Rental Accommodation Planning Proposal: Final advice report*. NSW Independent Planning Commission. Retrieved from [https://www.ipcn.nsw.gov.au/resources/pac/media/files/pac/projects/2022/12/byron-shire-short-term-rental-pp/advice/230424\\_byron-stra-pp\\_advice-report\\_final.pdf](https://www.ipcn.nsw.gov.au/resources/pac/media/files/pac/projects/2022/12/byron-shire-short-term-rental-pp/advice/230424_byron-stra-pp_advice-report_final.pdf)

<sup>38</sup> Burke, T., Ralston, L., Stone, W. and Goodall, Z. (April 2023). *Short term rental accommodation: new directions, new debates*. AHURI advising the IPC. Retrieved from <https://www.ipcn.nsw.gov.au/resources/pac/media/files/pac/projects/2022/12/byron-shire-short-term-rental-pp/ahuri-report/ahuri-report.pdf>

<sup>39</sup> van den Nouwelant, R. & Cijin, A. (October 2022). The impact of housing vulnerability on climate disaster recovery: The 2022 Northern Rivers Floods. *UNSW City Futures Research Centre*. Retrieved from <https://cityfutures.adu.unsw.edu.au/documents/700/Northern-Rivers-postflood-housing-20221102.pdf>

West of NSW following large-scale flood events in 2022. The findings of the Report highlight what many on the frontline know: waitlists are still climbing and ‘temporary’ accommodation options are looking increasingly like long-term options for many families.

It is not socially or economically sustainable to rely upon headleasing arrangements for crisis accommodation with property-investor Airbnb landlords. Following the North Coast floods in early 2022, DCJ assisted people into non-hosted holiday accommodation as crisis accommodation for a few weeks, and then served evictions from these homes in order to “honour Easter 2022 tourist bookings” and the fact that Bluesfest was still planning to go ahead<sup>40</sup>. DCJ at the time was not able to confirm how many of these evictees would be relocated to other suitable accommodation and simply stated “when Easter is over, we will transport people back again, and we will put people back in emergency accommodation”.

The good PR of offering up whole-home holiday accommodation during times of crisis can serve to expand the social licence of platforms such as Airbnb and Stayz. But in reality, these feel-good stories have sad, abrupt endings. The extent to which Airbnb and Stayz were able to help with the problem of the need for crisis accommodation also shows the extent to which they were already part of the problem – in withholding well-located housing stock from the general rental and owner-occupier market.

There are 724 flood-affected households on the waitlist for temporary housing in the Northern Rivers and this demand is unlikely to be met, according to the Auditor-General<sup>41</sup>. Temporary housing villages must be dismantled within 5 years of their establishment – meaning approximately 546 households will need to be relocated in the Northern Rivers by 2027/2028 with no clear plans on how this will be rolled out in an orderly and trauma-informed way.

Accessing STRA properties for emergency purposes – resulting from a natural disaster or chronic housing vulnerability in a region – needs a State-wide strategy and program for implementation. **The DA permit system needs to be more elegant in its ability to suspend, recall, or revoke change of use consents** of residential to tourist accommodation (including non-hosted “STRA”) in exceptional circumstances.

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<sup>40</sup> Oatway, L & Shoebridge, J. in ABC News. (1 April 2022). *Flood victims told to leave emergency housing in Byron Bay to make way for Easter holiday-makers*. Retrieved from <https://www.abc.net.au/news/2022-04-01/flood-victims-told-to-leave-emergency-accommodation/100959270>

<sup>41</sup> NSW Audit Office. (22 February 2024). *Flood housing response*. Retrieved from <https://www.audit.nsw.gov.au/our-work/reports/flood-housing-response>

# The STRA Register: Enforcement and compliance

Vital to any regulatory reform around “STRA” is the ability to enforce, monitor, and report on the State Register or planning permits issued with changes of use.

*“Data collection and data sharing is very poor in the Register... we don’t have a search function for properties... so if we get a complaint, it’s very hard to bring up the property” – Local Council planner, South Coast*

*“The compliance team deals with the STRA register on a complaints-based process and usually for nuisances, it’s not proactive, we don’t have the resources to be proactive” – Local Council planner, lower Hunter region*

*“We rely on third parties like AirDNA and InsideAirbnb to understand how much non-hosted STRA there is as its easier to interrogate... rather than the State register, it’s kind of insane that that’s the case” – Local Council planner, Sydney Eastern Suburbs*

Table 1 in the Discussion Paper lists the numbers of non-hosted “STRA” for various locations, per the State Register. **This is the only publicly available, up-to-date, and readily accessible extract of the Register available to the community to interrogate.**

As “properties can leave the Register at any time” (p. 11 of Discussion Paper), the Table 1 snapshot is not truly representative of all the non-hosted “STRA” per LGA (in say a 12-month period).

**We have questions about how the Register is populated, managed, enforced, and audited.** These questions have arisen from discussions with Murray Cox, founder of InsideAirbnb, and Planning Officers in various local Councils. Our questions are collated below:

- What is the process for a host claiming an exemption from needing to list a property on the Register?
- Is it true that the obligation is on the platforms themselves to ensure registration numbers for properties are populated before a property is listed?
  - Does the same registration number/property ID follow a property listing even when it changes ownership?
- Apparently Airbnb and the like are required to submit data to the Register.
  - How frequently does this occur? Is it instantaneous (API integration)?
- We are of the understanding that the Register relies on self-reporting from hosts of days commercially booked across various platforms.
  - How is this information verified, external to self-reporting by hosts?
- We are of the understanding that hosts can self-nominate on the Register whether they are hosted or unhosted, resulting in compliance headaches for local Planning and Compliance teams seeing registered IDs for “hosted” and then public-view on Airbnb, Stayz booking websites of the same property able to be booked as “entire home”.

- What warnings are given to accommodation listers around the fines associated with incorrectly listing as hosted or unhosted?
- Are there any plans to phase out self-nomination from hosts as to whether accommodation is hosted or unhosted (or at least, instantaneously update the register listing from “unhosted” to “hosted” as contradicting data is pulled from the listing itself on various platforms as “entire home” or “spare room”)?
- What percentage of fees collected go directly to local Councils to assist with compliance and enforcement costs?
  - Registration fees should be much higher than \$25-\$65 to reflect the actual technical and human resources required to monitor, enforce, and maintain the Register at a State level, as well as local enforcement roles of Council officers
- Does the Department have plans to make publicly available Register data, for external interrogation?
  - Are there plans for annual statistical reporting of the Register’s performance and key data to be made available to the public? If not, why?
  - Are there plans to alter the Planning regulations to legislate mandatory schedules for reporting on the Register? If not, why?

## Levies and land taxes

Shelter NSW agrees in principle with the concept of levying “STRA”, vacant properties, and holiday homes to try and encourage greater long-term housing utilisation of these properties and to potentially offset some of the negative externalities that these properties create in terms of chronic housing vulnerability for local populations. We agree that the levy should be broad-based to discourage loophole-seeking behaviours by property investors.

Levies – in of themselves – are not proven to reliably return properties to the long term housing market<sup>42</sup>. We advocate for a planning permit system (DA change of use for non-hosted STRA in certain circumstances above a day-cap threshold; potentially capping the total number of conversions in a locality) **in conjunction with** levies to more reliably prevent conversions of homes to non-residential purposes (and return houses to the long term housing market).

**Levies and land tax rates on “STRA”, holiday homes, vacant properties should be varied by location** to recognise some areas are highly affected by these underutilised properties. For instance, profit yields in areas like Shoalhaven and Byron from non-hosted

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<sup>42</sup> Burke, T., Ralston, L., Stone, W., & Goodall, Z. (April 2023). *Short term rental accommodation: New directions, new debates*. AHURI Professional Services prepared for the NSW Independent Planning Commission. Retrieved from <https://www.ipcn.nsw.gov.au/resources/pac/media/files/pac/projects/2022/12/byron-shire-short-term-rental-pp/ahuri-report/ahuri-report.pdf>



STRA would warrant higher levies in the order of 10 percent. Distribution of funds should then logically be to those locations that are most impacted and most in need of 'offsets' for community infrastructure and housing services.

It must be noted that levies and land tax changes proposed in the Discussion Paper will ultimately go into State Revenue. **Local Councils are struggling now with non-hosted "STRA" impacts on local infrastructure:**

*"We are wanting to class non-hosted STRA as commercial rather than residential in our rates, which we can't do at the moment without Planning recognising it as changes of use... our community needs upgrades to mountain biking trails around town, waste facilities, footpaths, all these things that tourists use when staying in these properties" – Local Council planner, South East Tablelands region*

**DA changes of use to "tourist and visitor accommodation" will allow a change in rates assessment from residential to business for local rates** (s516 of *Local Government Act 1993*). If the State Government does seek to clarify non-hosted STRA above a certain day-cap threshold specifically as "serviced apartments", however, it would need to seek an amendment to the *Local Government (General) Regulation 2021* (cl. 122) to ensure "serviced apartments" of these kinds are **not** counted as residential for rating purposes.

## Social housing and specialist homelessness services

**Social housing and specialist homelessness services should be adequately and robustly funded through core Budget streams regardless of levies/taxes collected on underutilised private properties.** Levies/taxes can help offset acute housing pressure impacts in certain locations, but levies should not be used as a de facto way to grow social housing and specialist homelessness services across the State.

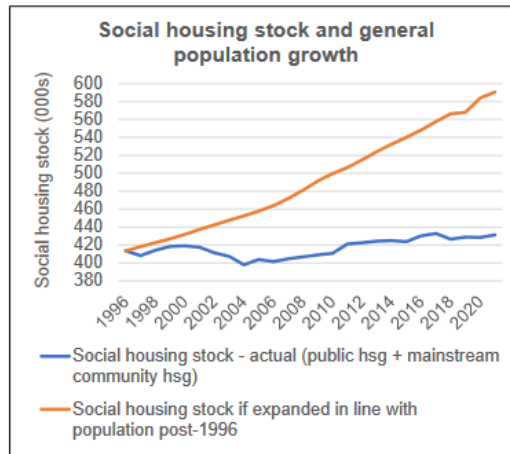
**Public housing has moved away from being a valued part of the housing mix** in the 1950s – housing workers and welfare recipients alike – to being a highly rationed form of housing for very vulnerable populations with complex needs<sup>43</sup>. Thus, social housing stock has been in real decline across the State for at least a decade<sup>44</sup>. Further, there is a widening gap between population growth and the commensurate required growth in social housing:

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<sup>43</sup> Pawson, H., Milligan, V., & Yates, J. (2020, p. 104). *Housing Policy in Australia: A case for system reform*. (P. Macmillan, Ed.) Singapore: Springer Nature. doi:<https://doi.org/10.1007/978-981-15-0780-9>; Pawson, H. & Lilley, D. (May 2022). Working Paper: Managing Access to Social Housing in Australia - unpacking policy frameworks and service provision outcomes. *UNSW City Futures Research Centre*. Retrieved from [https://shelternsw.org.au/wp-content/uploads/2022/05/Waithood\\_paper.pdf](https://shelternsw.org.au/wp-content/uploads/2022/05/Waithood_paper.pdf)

<sup>44</sup> NSW Parliament, Legislative Council. (1 March 2021, pp. 57 & 83). *Budget Estimates 2020-2021 Portfolio Committee No. 4 Industry: Answers to supplementary questions (Pavey)*. Retrieved from <https://www.parliament.nsw.gov.au/lcdocs/other/15376/Answers%20to%20supplementary%20questions%20-%20Pavey.pdf>





Sources: ABS; Productivity Commission ROGS



Fig 2. Extracted from [UNSW City Futures Research Centre presentation](#) by Hal Pawson.

**The people of NSW need genuine alternatives to the private rental market.** In other countries<sup>45</sup>, a large and robust social housing program provides real competition (both in quality and affordability) to the private rental market.

The most efficient and most direct way to alleviate housing stress for low-income households is through restoring social housing stock levels to 5% of all dwelling stock in each LGA, with 10% of all housing stock being social housing by 2040 in NSW. These are not fantastical or unrealistic percentages; in Australia up until a decade or so ago, 5% of housing as social housing was the norm<sup>46</sup>. **Shelter NSW advocacy in the 5-10% range would put NSW below the average of other OECD jurisdictions**<sup>47</sup>.

**We must move beyond viewing social housing as merely a safety net for those most in need** – it must be a robust market player in our housing system, acknowledged for its social return on investment and ability for State governments to capture long-term capital gains. Thus, numerical social housing targets should also be commensurate with the growth in population forecast for each LGA or planning region<sup>48</sup>. For instance, as 80% of the State’s population will reside somewhere within the ‘6 cities metropolis’ by 2041<sup>49</sup>, **close to 80% of social housing properties in NSW should be delivered in the metropolis region.** Our 10% social housing stock ask would materially result in more

<sup>45</sup> Quince, A. and Baker, N. in *ABC Radio National* (4 August 2023). *Vienna has created an equitable and affordable housing market, here's how*. Retrieved from <https://www.abc.net.au/news/2023-08-04/vienna-s-social-housing-and-low-rent-strategy/102639674>

<sup>46</sup> Pawson, H., Milligan, V., & Yates, J. (2020). *Housing Policy in Australia: A case for system reform*. (P. Macmillan, Ed.) Singapore: Springer Nature. doi:<https://doi.org/10.1007/978-981-15-0780-9>

<sup>47</sup> OECD Affordable Housing Database. (2022). *PH4.1 Social Rental Housing Stock*. Retrieved from <https://www.oecd.org/els/family/PH4-2-Social-rental-housing-stock.pdf>

<sup>48</sup> NSW Department of Planning & Environment. (2022). *GCC Six Cities 2022 CPA Population and Dwelling projections*. Retrieved from <https://www.planning.nsw.gov.au/Research-and-Demography/Population-Projections/Explore-the-data>

<sup>49</sup> NSW Department of Planning & Environment. (2022). *GCC Six Cities 2022 CPA Population and Dwelling projections*. Retrieved from <https://www.planning.nsw.gov.au/Research-and-Demography/Population-Projections/Explore-the-data>

than 75% of all social housing properties (333,000 dwellings) in the State being delivered in the Metropolis of 6 cities by 2041 – refer [Appendix C](#).

**Specialist homelessness services in NSW need much more baseline funding to respond to the acute housing crisis** facing families, young people, the elderly, and people with a disability. In NSW, 50% of the 47,700 or more people seeking accommodation assistance from the Specialist Homelessness Sector were turned away during the reporting period of 2021-22<sup>50</sup>. In another review, the NSW Auditor-General found<sup>51</sup> that the reach of specialist homelessness services into regional areas was limited, with just 34 of 128 local government areas receiving direct support. Our most recent [submission on the State Budget 2024-2025](#) calls for a 20% increase to baseline funding for these services so they can keep up with current demand.

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<sup>50</sup> Productivity Commission (Cth). (20 January 2023). *Report on Government Services, Part G Housing and Homelessness*. Retrieved from <https://www.pc.gov.au/ongoing/report-on-government-services/2023/housing-and-homelessness>

<sup>51</sup> NSW Office of the Auditor-General (4 June 2021, p. 15). *Performance Audit: Responses to homelessness*. Retrieved from <https://www.audit.nsw.gov.au/our-work/reports/responses-to-homelessness>

## Summary of recommendations

Shelter NSW recommends the following courses of action to the State Government:

1. Make clear to the public – and particularly to local Councils – how the Discussion Paper feeds into an overall review of the *Housing SEPP 2021* and what other consultation opportunities there will be on the topic of whole-home holiday accommodation regulation before any State Government decisions are finalised
2. Conduct and release analysis of trends observed in the STRA register to date (since 2021) to help inform a deeper discussion of better regulating these uses
  - a. This analysis should be mindful of any correlated trends in rental vacancy rates and rental bonds lodgement data
3. Acknowledge the limitations in framing the underutilisation of homes as a stop-gap policy measure during an ‘unusual’ housing crisis; rather, frame the issue as a standalone pillar in reforming the speculative nature of Australian property markets that allows for chronic and recurring housing crises
4. Reconsider the framing of “STRA” as ubiquitously being an economic positive for communities
  - a. Acknowledge the value of local resident dollars and year-round economic participation and community cohesion
5. Align definitions and categories wherever possible with the Australian Bureau of Statistics reporting and norms (e.g. “vacant homes” and “long term unoccupied homes”)
6. Track the loss of housing stock to non-hosted accommodation conversions through the NSW Housing Monitor and/or Urban Development Programs
  - a. Heed IPC Advice on restricting conversions of dwelling stock to non-hosted accommodation for new housing supply, new urban release areas, and new allotments. Alternatively, work with Councils to create guidance on the ‘sustainable’ number of conversions that can be tolerated in new supply and in new allotments
7. Require greater scrutiny of DA proposals and Social Impact Assessments accompanying large resource/mining/infrastructure projects that induce greater worker accommodation demand
  - a. Ensure local markets can actually absorb DIDO/FIFO workforces (and where they cannot – require in-kind dedications for homes to offset the impacts)

8. Strongly consider the IPC's advice around establishing legislation that non-hosted accommodation above x number of days per year is a land use change from residential to "tourist and visitor accommodation"
  - a. DA changes of use to "tourist and visitor accommodation" will allow a change in rates assessment from residential to business for local rates (s516 of *Local Government Act 1993*)
  - b. If the State Government does seek to clarify non-hosted STRA above a certain day-cap threshold specifically as "serviced apartments", however, it would need to seek an amendment to the *Local Government (General) Regulation 2021* (cl. 122) to ensure "serviced apartments" of these kinds are **not** counted as residential for rating purposes
9. The definitions of hosted and non-hosted "STRA" should be tightened to ensure "hosted" captures spare room(s) within the host's principal place of residence **and** the host is residing in the same dwelling for the duration of the booking. "Non-hosted" should capture all other scenarios
10. Clarify that the commercial accommodation use of secondary dwellings for "STRA" is non-hosted use and should be subject to the same levies that will be imposed on other non-hosted STRAs
11. To preserve the intention of "secondary dwellings" within the NSW Planning framework, "secondary dwellings" should be exempt/complying when they will be used by traditional tenants as affordable housing or used by family members with no/nominal rent charged
  - a. In this vein, any secondary dwellings not to be used for this purpose (e.g. as "non-hosted STRA" above a certain day cap threshold) should be subject to a Development Application and the merits of the secondary dwelling conversion to commercial accommodation assessed in that manner
12. Non-hosted holiday accommodation is **not** a form of housing diversity and regulations should not be couched in the *Housing SEPP*
13. The State Government needs to be flexible in working with and allowing Councils to set their own short-term holiday accommodation regulations and policies. This will require the State Government to set aside its own arbitrary, blanket cap of 180 days:
  - a. The Standard Instrument LEP (cl 2.8) already recognises temporary uses are no longer temporary beyond 52 days use in a 12-month period. This premise could feasibly extend to the setting of a day-cap threshold beyond which non-hosted accommodation is considered "tourist and visitor accommodation"
  - b. Introduce a system whereby State Government signals to local Councils and/or Joint Organisations of Councils that the accepted day-cap threshold range is 30

to 90 days for non-hosted, beyond which a use is likely a change of use from residential to tourist and visitor accommodation

- c. Encourage Councils and regional consortia of Councils to introduce a permit system for “highly affected”<sup>52</sup> LGAs where the day-cap threshold is within that 30 to 90 day range, and non-hosted accommodation will exceed that day-cap
- d. Councils and consortia of Councils that use this pathway face a simplified Planning process<sup>53</sup> without overly onerous economic impact assessments and social impact assessments needing to be submitted – Councils could rely on readily available data for rental vacancy rates and rental bond lodgements to furnish their case that they are a “vulnerable housing zone” and fill out a standardised form to submit to the Department
- e. Merits assessment of permits for non-hosted use above the cap would need to be informed by local/regional planning strategies on the sustainable number of conversions that a locality can withstand as a “vulnerable housing zone” and with consideration paid to the density of “STRA” conversions in localities
- f. Alternatively, if Councils that are “highly affected” by non-hosted STRA are seeking a very high day cap above 90 days (or no cap at all), these Councils or consortia of Councils in a regional planning area must undertake full economic impact assessments and social impact assessments to prove they are not a “vulnerable housing zone”
- g. Where LGAs (e.g. Bland Shire in western NSW) do not have non-hosted “STRA” as a notable proportion of all dwelling stock – and/or other housing pressure indicators such as rental vacancy rates below 2-3% - non-hosted “STRA” above 30 to 90 days use per year could be considered Exempt changes of use from residential to tourist and visitor accommodation

14. Annual day-caps as a lone planning mechanism for limiting non-hosted accommodation conversions are less efficient in returning dwellings to the long-term rental market than policies limiting the total number of whole-home accommodation conversions per suburb

- a. Total non-hosted accommodation volume caps for LGAs should be guided by density caps (e.g. no more than y number of non-hosted accommodation options per z suburb), to ensure hollowing out of well-serviced, well-located neighbourhoods for whole-home accommodation use does not occur. Local

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<sup>52</sup> High proportion (>3%) of total dwelling stock is used as non-hosted STRA, consistent with advice from P Phibbs and N Gurran

<sup>53</sup> Accelerated Gateway Determination or inclusion in Ministerial Order as a “vulnerable housing zone”, consistent with advice from P Phibbs

research and evidence for density caps and as they vary from suburb to suburb will be required.

- b. Strong regional submarket planning for tourism goals and housing need is critical to informing a well-oiled day-cap permit system that is place-based and strategy-led. This sort of work – funded and resourced by the State Government for regional planning areas – will ensure negative spillover effects of regulating in one LGA but not a neighbouring LGA is limited
- c. Density caps that are tipped more favourably to non-hosted accommodation uses in certain neighbourhoods will allow better infrastructure planning, more creative precinct planning, and more holistic leisure experiences in line with tourism goals of cities and regions

15. Reasonable grounds for tenant eviction (of all lease types) in the *Residential Tenancies Act 2010* when it comes to “change of use” must be accompanied by parallel legislation in the NSW planning framework

- a. Re-identify “non-hosted short term rental accommodation” (over a certain number of days use per year) as a form of “tourist and visitor accommodation”, in line with the IPC Final Advice report and supporting report by AHURI
- b. Ensure residential to tourist and visitor accommodation land-use changes are adequately regulated by the planning system – rather than leaving it up to NCAT to hear and decide on individual cases of whether or not an eviction for these purposes are “reasonable”

16. The DA permit system needs to be more elegant in its ability to suspend, recall, or revoke change of use consents of residential to tourist accommodation (including non-hosted “STRA”) in exceptional circumstances

- a. Accessing STRA properties for emergency purposes – resulting from a natural disaster or chronic housing vulnerability in a region – needs a State-wide strategy and program for implementation

17. Vital to any regulatory reform around “STRA” is the ability to enforce, monitor, and report on the State Register or planning permits issued with changes of use:

- a. What is the process for a host claiming an exemption from needing to list a property on the Register?
- b. Is it true that the obligation is on the platforms themselves to ensure registration numbers for properties are populated before a property is listed?
  - i. Does the same registration number/property ID follow a property listing even when it changes ownership?
- c. Apparently Airbnb and the like are required to submit data to the Register.

- i. How frequently does this occur? Is it instantaneous (API integration)?
    - d. We are of the understanding that the Register relies on self-reporting from hosts of days commercially booked across various platforms.
      - i. How is this information verified, external to self-reporting by hosts?
    - e. We are of the understanding that hosts can self-nominate on the Register whether they are hosted or unhosted, resulting in compliance headaches for local Planning and Compliance teams seeing registered IDs for “hosted” and then public-view on Airbnb, Stayz booking websites of the same property able to be booked as “entire home”.
      - i. What warnings are given to accommodation listers around the fines associated with incorrectly listing as hosted or unhosted?
      - ii. Are there any plans to phase out self-nomination from hosts as to whether accommodation is hosted or unhosted (or at least, instantaneously update the register listing from “unhosted” to “hosted” as contradicting data is pulled from the listing itself on various platforms as “entire home” or “spare room”)?
    - f. What percentage of fees collected go directly to local Councils to assist with compliance and enforcement costs?
      - i. Registration fees should be much higher than \$25-\$65 to reflect the actual technical and human resources required to monitor, enforce, and maintain the Register at a State level, as well as local enforcement roles of Council officers
    - g. Does the Department have plans to make publicly available Register data, for external interrogation?
      - i. Are there plans for annual statistical reporting of the Register’s performance and key data to be made available to the public? If not, why?
      - ii. Are there plans to alter the Planning regulations to legislate mandatory schedules for reporting on the Register? If not, why?
18. Shelter NSW agrees in principle with the concept of levying “STRA”, vacant properties, and holiday homes
- a. We agree that the levy should be broad-based to discourage loophole-seeking behaviours by property investors
  - b. Levies and land tax rates on “STRA”, holiday homes, vacant properties should be varied by location

- i. profit yields in areas like Shoalhaven and Byron from non-hosted STRA would warrant higher levies in the order of 10 percent
- 19. We advocate for a planning permit system (DA change of use for non-hosted STRA in certain circumstances above a day-cap threshold; potentially capping the total number of conversions in a locality) **in conjunction with** levies to more reliably prevent conversions of homes to non-residential purposes (and return houses to the long term housing market).
- 20. Local Councils are struggling **now** with non-hosted “STRA” impacts on local infrastructure
  - a. Formalised planning pathways for changes of use to “tourist and visitor accommodation” will allow a change in rates assessment from residential to business for local rates collection
- 21. Social housing and specialist homelessness services should be adequately and robustly funded through core Budget streams regardless of levies/taxes collected on underutilised private properties
  - a. Specialist homelessness services in NSW need much more baseline funding to respond to the acute housing crisis facing families, young people, the elderly, and people with a disability
  - b. The State needed to increase baseline funding for these services by 20% so they can meet current demand
- 22. In setting housing targets, the NSW Government must commit to restoring social housing stock levels to 5% of all dwelling stock in each LGA, with 10% of all housing stock being social housing by 2040 in NSW
  - a. Numerical social housing targets should also be commensurate with the growth in population forecast for each LGA or planning region
    - i. as 80% of the State’s population will reside somewhere within the ‘6 cities metropolis’ by 2041, close to 80% of social housing properties in NSW should be delivered in the metropolis region
    - ii. Our 10% social housing stock ask would materially result in more than 75% of all social housing properties (333,000 dwellings) in the State being delivered in the Metropolis of 6 cities by 2041.



## Appendix A - Growth of whole-home Airbnbs in all LGAs (2018 – 2023)

InsideAirbnb data (Nov 2023) supplied by M Cox, spreadsheet available on request

| LGA (2016 boundaries) | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | % growth |
|-----------------------|------|------|------|------|------|------|----------|
| Albury                | 128  | 180  | 164  | 142  | 167  | 206  | 60.9     |
| Armidale Dumaresq     | 72   | 81   | 85   | 75   | 78   | 92   | 27.8     |
| Ashfield              | 124  | 156  | 126  | 77   | 103  | 132  | 6.5      |
| Auburn                | 297  | 388  | 184  | 151  | 217  | 318  | 7.1      |
| Ballina               | 448  | 536  | 521  | 531  | 691  | 744  | 66.1     |
| Balranald             | 3    | 1    | 3    | 5    | 6    | 2    | -33.3    |
| Bankstown             | 49   | 96   | 81   | 36   | 56   | 69   | 40.8     |
| Bathurst Regional     | 205  | 254  | 235  | 233  | 239  | 307  | 49.8     |
| Bega Valley           | 577  | 659  | 571  | 560  | 645  | 690  | 19.6     |
| Bellingen             | 153  | 176  | 168  | 188  | 223  | 246  | 60.8     |
| Berrigan              | 10   | 17   | 16   | 18   | 22   | 24   | 140.0    |
| Blacktown             | 57   | 85   | 66   | 56   | 75   | 139  | 143.9    |
| Bland                 | 2    | 4    | 5    | 7    | 8    | 9    | 350.0    |
| Blayney               | 41   | 44   | 47   | 49   | 57   | 58   | 41.5     |
| Blue Mountains        | 894  | 970  | 902  | 847  | 929  | 1035 | 15.8     |
| Bogan                 | 2    | 2    | 2    | 6    | 2    | 5    | 150.0    |
| Bombala               | 8    | 8    | 9    | 9    | 7    | 8    | 0.0      |
| Boorowa               | 9    | 9    | 7    | 7    | 7    | 11   | 22.2     |
| Botany Bay            | 198  | 301  | 231  | 136  | 148  | 205  | 3.5      |
| Bourke                | 2    | 1    | 2    | 4    | 3    | 4    | 100.0    |
| Broken Hill           | 24   | 28   | 35   | 48   | 79   | 103  | 329.2    |
| Burwood               | 81   | 100  | 69   | 62   | 94   | 113  | 39.5     |
| Byron                 | 2294 | 2737 | 2624 | 2670 | 2584 | 2665 | 16.2     |
| Cabonne               | 55   | 77   | 81   | 90   | 87   | 92   | 67.3     |
| Camden                | 11   | 21   | 24   | 19   | 29   | 44   | 300.0    |
| Campbelltown          | 53   | 54   | 41   | 25   | 29   | 51   | -3.8     |
| Canada Bay            | 223  | 274  | 195  | 133  | 165  | 212  | -4.9     |
| Canterbury            | 133  | 147  | 117  | 81   | 103  | 123  | -7.5     |
| Carrathool            | 5    | 5    | 6    | 2    | 4    | 4    | -20.0    |
| Central Darling       | 1    | 2    | 2    | 2    | 6    | 9    | 800.0    |
| Cessnock              | 524  | 624  | 665  | 695  | 803  | 877  | 67.4     |
| Clarence Valley       | 371  | 538  | 533  | 615  | 749  | 885  | 138.5    |
| Cobar                 | 2    | 1    | 1    | 1    | 2    | 3    | 50.0     |
| Coffs Harbour         | 583  | 740  | 692  | 703  | 779  | 843  | 44.6     |
| Conargo               | 0    | 2    | 2    | 2    | 2    | 1    |          |
| Coolamon              | 0    | 2    | 2    | 1    | 3    | 2    |          |
| Cooma-Monaro          | 23   | 24   | 30   | 30   | 40   | 42   | 82.6     |

|                    |      |      |      |      |      |      |       |
|--------------------|------|------|------|------|------|------|-------|
| Coonamble          | 1    | 2    | 2    | 3    | 3    | 4    | 300.0 |
| Cootamundra        | 6    | 8    | 9    | 9    | 11   | 12   | 100.0 |
| Corowa Shire       | 109  | 122  | 102  | 76   | 91   | 77   | -29.4 |
| Cowra              | 7    | 12   | 12   | 15   | 22   | 27   | 285.7 |
| Deniliquin         | 6    | 7    | 8    | 7    | 6    | 10   | 66.7  |
| Dubbo              | 53   | 90   | 77   | 96   | 111  | 145  | 173.6 |
| Dungog             | 72   | 82   | 91   | 97   | 111  | 125  | 73.6  |
| Eurobodalla        | 569  | 705  | 671  | 733  | 963  | 1056 | 85.6  |
| Fairfield          | 27   | 49   | 35   | 35   | 49   | 82   | 203.7 |
| Forbes             | 17   | 24   | 24   | 17   | 17   | 17   | 0.0   |
| Gilgandra          | 3    | 2    | 0    | 0    | 2    | 3    | 0.0   |
| Glen Innes Severn  | 17   | 15   | 19   | 23   | 26   | 33   | 94.1  |
| Gloucester         | 24   | 29   | 34   | 34   | 47   | 65   | 170.8 |
| Gosford            | 1428 | 1584 | 1516 | 1553 | 1874 | 1798 | 25.9  |
| Goulburn Mulwaree  | 43   | 67   | 68   | 76   | 85   | 90   | 109.3 |
| Great Lakes        | 661  | 921  | 966  | 1110 | 1241 | 1311 | 98.3  |
| Greater Hume Shire | 11   | 12   | 13   | 10   | 14   | 14   | 27.3  |
| Greater Taree      | 180  | 186  | 179  | 192  | 236  | 310  | 72.2  |
| Griffith           | 8    | 11   | 13   | 14   | 18   | 27   | 237.5 |
| Gundagai           | 20   | 22   | 23   | 20   | 18   | 20   | 0.0   |
| Gunnedah           | 10   | 13   | 13   | 10   | 9    | 11   | 10.0  |
| Guyra              | 8    | 15   | 13   | 18   | 13   | 9    | 12.5  |
| Gwydir             | 2    | 1    | 1    | 1    | 3    | 2    | 0.0   |
| Harden             | 14   | 15   | 13   | 17   | 21   | 23   | 64.3  |
| Hawkesbury         | 150  | 187  | 193  | 197  | 229  | 253  | 68.7  |
| Hay                | 10   | 10   | 12   | 12   | 19   | 16   | 60.0  |
| Holroyd            | 25   | 32   | 31   | 17   | 29   | 47   | 88.0  |
| Hornsby            | 174  | 230  | 213  | 185  | 212  | 284  | 63.2  |
| Hunters Hill       | 42   | 41   | 35   | 20   | 24   | 29   | -31.0 |
| Hurstville         | 67   | 82   | 71   | 49   | 55   | 69   | 3.0   |
| Inverell           | 14   | 13   | 15   | 18   | 18   | 25   | 78.6  |
| Jerilderie         | 0    | 2    | 1    | 1    | 2    | 2    |       |
| Junee              | 2    | 2    | 3    | 4    | 4    | 4    | 100.0 |
| Kempsey            | 337  | 377  | 371  | 325  | 380  | 631  | 87.2  |
| Kiama              | 468  | 562  | 570  | 585  | 662  | 653  | 39.5  |
| Kogarah            | 48   | 71   | 82   | 41   | 47   | 69   | 43.8  |
| Ku-ring-gai        | 175  | 163  | 150  | 97   | 130  | 161  | -8.0  |
| Kyogle             | 33   | 32   | 35   | 28   | 31   | 43   | 30.3  |
| Lachlan            | 3    | 6    | 7    | 6    | 4    | 7    | 133.3 |
| Lake Macquarie     | 344  | 425  | 389  | 411  | 503  | 566  | 64.5  |
| Lane Cove          | 152  | 194  | 169  | 91   | 110  | 127  | -16.4 |
| Leeton             | 4    | 3    | 2    | 3    | 5    | 11   | 175.0 |
| Leichhardt         | 687  | 698  | 600  | 366  | 396  | 444  | -35.4 |
| Lismore            | 117  | 146  | 147  | 136  | 139  | 178  | 52.1  |
| Lithgow            | 94   | 113  | 127  | 154  | 170  | 194  | 106.4 |

|                         |      |      |      |      |      |      |       |
|-------------------------|------|------|------|------|------|------|-------|
| Liverpool               | 62   | 97   | 65   | 42   | 53   | 102  | 64.5  |
| Liverpool Plains        | 3    | 4    | 5    | 6    | 10   | 14   | 366.7 |
| Lockhart                | 1    | 1    | 1    | 2    | 2    | 3    | 200.0 |
| Maitland                | 54   | 78   | 74   | 78   | 92   | 100  | 85.2  |
| Manly                   | 1339 | 1392 | 1249 | 818  | 915  | 1025 | -23.5 |
| Marrickville            | 623  | 686  | 578  | 353  | 399  | 489  | -21.5 |
| Mid-Western Regional    | 208  | 271  | 316  | 390  | 503  | 489  | 135.1 |
| Moree Plains            | 6    | 7    | 7    | 7    | 3    | 2    | -66.7 |
| Mosman                  | 406  | 421  | 379  | 244  | 257  | 325  | -20.0 |
| Murray                  | 44   | 45   | 48   | 45   | 64   | 70   | 59.1  |
| Murrumbidgee            | 4    | 3    | 3    | 13   | 7    | 7    | 75.0  |
| Muswellbrook            | 5    | 10   | 14   | 17   | 19   | 18   | 260.0 |
| Nambucca                | 149  | 166  | 162  | 173  | 217  | 262  | 75.8  |
| Narrabri                | 6    | 4    | 6    | 9    | 9    | 12   | 100.0 |
| Narrandera              | 6    | 9    | 10   | 9    | 11   | 10   | 66.7  |
| Narromine               | 2    | 7    | 6    | 3    | 3    | 7    | 250.0 |
| Newcastle               | 723  | 699  | 500  | 458  | 527  | 641  | -11.3 |
| North Sydney            | 920  | 997  | 839  | 549  | 583  | 703  | -23.6 |
| Oberon                  | 33   | 54   | 57   | 63   | 67   | 78   | 136.4 |
| Orange                  | 171  | 216  | 242  | 282  | 324  | 362  | 111.7 |
| Palerang                | 53   | 51   | 51   | 51   | 69   | 75   | 41.5  |
| Parkes                  | 25   | 33   | 33   | 31   | 38   | 42   | 68.0  |
| Parramatta              | 195  | 255  | 213  | 140  | 150  | 221  | 13.3  |
| Penrith                 | 68   | 101  | 86   | 84   | 91   | 113  | 66.2  |
| Pittwater               | 1054 | 1138 | 1054 | 799  | 991  | 1015 | -3.7  |
| Port Macquarie-Hastings | 496  | 536  | 532  | 547  | 701  | 748  | 50.8  |
| Port Stephens           | 959  | 1316 | 1289 | 1336 | 1373 | 1537 | 60.3  |
| Queanbeyan              | 28   | 32   | 30   | 25   | 26   | 42   | 50.0  |
| Randwick                | 1892 | 1919 | 1687 | 1037 | 1118 | 1197 | -36.7 |
| Richmond Valley         | 20   | 25   | 29   | 43   | 47   | 95   | 375.0 |
| Rockdale                | 309  | 386  | 342  | 200  | 194  | 215  | -30.4 |
| Ryde                    | 243  | 322  | 252  | 171  | 217  | 268  | 10.3  |
| Shellharbour            | 82   | 106  | 108  | 119  | 170  | 192  | 134.1 |
| Shoalhaven              | 2669 | 3088 | 3022 | 3155 | 3682 | 3864 | 44.8  |
| Singleton               | 144  | 167  | 189  | 183  | 205  | 215  | 49.3  |
| Snowy River             | 747  | 879  | 882  | 932  | 980  | 1296 | 73.5  |
| Strathfield             | 56   | 60   | 55   | 36   | 47   | 78   | 39.3  |
| Sutherland Shire        | 326  | 411  | 370  | 269  | 346  | 429  | 31.6  |
| Sydney                  | 5714 | 6478 | 4976 | 3127 | 3311 | 3749 | -34.4 |
| Tamworth Regional       | 143  | 174  | 175  | 149  | 163  | 180  | 25.9  |
| Temora                  | 13   | 14   | 11   | 17   | 15   | 21   | 61.5  |
| Tenterfield             | 30   | 34   | 33   | 35   | 39   | 54   | 80.0  |
| The Hills Shire         | 87   | 128  | 123  | 84   | 134  | 186  | 113.8 |
| Tumbarumba              | 13   | 17   | 13   | 27   | 33   | 32   | 146.2 |
| Tumut Shire             | 34   | 44   | 44   | 53   | 60   | 70   | 105.9 |

|                     |       |       |       |       |       |       |       |
|---------------------|-------|-------|-------|-------|-------|-------|-------|
| Tweed               | 967   | 1126  | 1117  | 1121  | 1420  | 1452  | 50.2  |
| Unincorporated NSW  | 4     | 3     | 4     | 5     | 5     | 4     | 0.0   |
| Upper Hunter Shire  | 25    | 27    | 25    | 27    | 31    | 41    | 64.0  |
| Upper Lachlan Shire | 9     | 33    | 48    | 53    | 54    | 58    | 544.4 |
| Uralla              | 11    | 15    | 18    | 19    | 27    | 27    | 145.5 |
| Wagga Wagga         | 114   | 157   | 153   | 164   | 193   | 259   | 127.2 |
| Wakool              | 12    | 8     | 9     | 10    | 9     | 9     | -25.0 |
| Walcha              | 6     | 5     | 6     | 7     | 9     | 9     | 50.0  |
| Walgett             | 13    | 12    | 12    | 16    | 14    | 15    | 15.4  |
| Warren              | 0     | 0     |       | 0     | 0     | 0     |       |
| Warringham          | 1342  | 1421  | 1305  | 829   | 957   | 1089  | -18.9 |
| Warrumbungle Shire  | 12    | 20    | 25    | 28    | 35    | 40    | 233.3 |
| Waverley            | 3492  | 3591  | 3138  | 1940  | 2097  | 2229  | -36.2 |
| Weddin              | 0     | 0     | 2     | 3     | 2     | 3     |       |
| Wellington          | 3     | 1     | 1     | 1     | 4     | 5     | 66.7  |
| Wentworth           | 15    | 17    | 17    | 16    | 19    | 21    | 40.0  |
| Willoughby          | 276   | 357   | 301   | 199   | 237   | 261   | -5.4  |
| Wingecarribee       | 444   | 497   | 523   | 552   | 646   | 742   | 67.1  |
| Wollondilly         | 27    | 34    | 30    | 34    | 36    | 38    | 40.7  |
| Wollongong          | 415   | 463   | 410   | 391   | 826   | 713   | 71.8  |
| Woollahra           | 1057  | 1126  | 991   | 596   | 603   | 662   | -37.4 |
| Wyong               | 505   | 540   | 539   | 576   | 773   | 892   | 76.6  |
| Yass Valley         | 31    | 42    | 49    | 50    | 52    | 73    | 135.5 |
| Young               | 9     | 9     | 13    | 5     | 8     | 18    | 100.0 |
| <b>Grand Total</b>  | 42858 | 49112 | 44565 | 38081 | 43723 | 48770 | 13.8  |

## Appendix B - Occupancy/booking data for whole-home accommodation on Airbnb (2023)

InsideAirbnb data (Nov 2023) supplied by M Cox, spreadsheet available on request

| LGA (2016 boundaries) | Whole-home Airbnb listings in the 12 months to November 2023 |           |           |           |            |      | total no. whole-home listings | whole-home listings average occupancy days |
|-----------------------|--|-----------|-----------|-----------|------------|------|-------------------------------|--|
|                       | 0 days   | 0-60 days | > 60 days | > 90 days | > 180 days |      |                               |  |
| Albury                | 23   | 87        | 119       | 102       | 57         | 206  | 123                           |  |
| Armidale Dumaresq     | 9  | 35        | 57        | 50        | 29         | 92   | 137                           |  |
| Ashfield              | 52   | 97        | 35        | 29        | 11         | 132  | 67                            |  |
| Auburn                | 99   | 208       | 110       | 78        | 40         | 318  | 78                            |  |
| Ballina               | 266  | 564       | 180       | 137       | 76         | 744  | 55                            |  |
| Balranald             | 1  | 1         | 1         | 1         | 1          | 2    | 128                           |  |
| Bankstown             | 22   | 33        | 36        | 28        | 14         | 69   | 135                           |  |
| Bathurst Regional     | 48   | 184       | 123       | 96        | 39         | 307  | 75                            |  |
| Bega Valley           | 150  | 481       | 209       | 152       | 69         | 690  | 63                            |  |
| Bellingen             | 38   | 126       | 120       | 100       | 59         | 246  | 106                           |  |
| Berrigan              | 3  | 14        | 10        | 7         | 1          | 24   | 71                            |  |
| Blacktown             | 33   | 78        | 61        | 39        | 19         | 139  | 103                           |  |
| Bland                 | 1  | 6         | 3         | 2         | 0          | 9    | 62                            |  |
| Blayney               | 9  | 29        | 29        | 21        | 6          | 58   | 82                            |  |
| Blue Mountains        | 78   | 398       | 637       | 535       | 302        | 1035 | 123                           |  |
| Bogan                 | 3  | 5         | 0         | 0         | 0          | 5    | 19                            |  |
| Bombala               | 0  | 2         | 6         | 6         | 4          | 8    | 169                           |  |
| Boorowa               | 1  | 9         | 2         | 1         | 1          | 11   | 47                            |  |
| Botany Bay            | 94   | 149       | 56        | 46        | 19         | 205  | 88                            |  |
| Bourke                | 3  | 3         | 1         | 1         | 0          | 4    | 36                            |  |
| Broken Hill           | 9  | 52        | 51        | 34        | 12         | 103  | 88                            |  |
| Burwood               | 30   | 52        | 61        | 50        | 17         | 113  | 108                           |  |
| Byron                 | 917  | 1917      | 748       | 587       | 294        | 2665 | 63                            |  |
| Cabonne               | 12   | 51        | 41        | 34        | 17         | 92   | 93                            |  |
| Camden                | 4  | 17        | 27        | 20        | 11         | 44   | 124                           |  |
| Campbelltown          | 13   | 33        | 18        | 14        | 7          | 51   | 89                            |  |
| Canada Bay            | 89   | 142       | 70        | 55        | 23         | 212  | 84                            |  |
| Canterbury            | 55   | 76        | 47        | 37        | 16         | 123  | 80                            |  |

|                       |     |      |     |     |     |      |     |
|-----------------------|-----|------|-----|-----|-----|------|-----|
| Carrathool            | 0   | 3    | 1   | 1   | 0   | 4    | 48  |
| Central Darling       | 0   | 7    | 2   | 1   | 0   | 9    | 45  |
| Cessnock              | 110 | 515  | 362 | 276 | 132 | 877  | 83  |
| Clarence Valley       | 289 | 650  | 235 | 194 | 91  | 885  | 57  |
| Cobar                 | 0   | 2    | 1   | 1   | 1   | 3    | 105 |
| Coffs Harbour         | 148 | 499  | 344 | 264 | 152 | 843  | 87  |
| Conargo               | 1   | 1    | 0   | 0   | 0   | 1    | 36  |
| Coolamon              | 0   | 1    | 1   | 0   | 0   | 2    | 54  |
| Cooma-Monaro          | 5   | 19   | 23  | 18  | 9   | 42   | 113 |
| Coonamble             | 0   | 1    | 3   | 2   | 1   | 4    | 139 |
| Cootamundra           | 3   | 5    | 7   | 5   | 3   | 12   | 107 |
| Corowa Shire          | 16  | 48   | 29  | 21  | 11  | 77   | 73  |
| Cowra                 | 1   | 13   | 14  | 10  | 1   | 27   | 94  |
| Deniliquin            | 3   | 5    | 5   | 4   | 3   | 10   | 99  |
| Dubbo                 | 9   | 56   | 89  | 76  | 45  | 145  | 135 |
| Dungog                | 27  | 82   | 43  | 32  | 15  | 125  | 71  |
| Eurobodalla           | 191 | 735  | 321 | 234 | 102 | 1056 | 63  |
| Fairfield             | 25  | 50   | 32  | 21  | 13  | 82   | 138 |
| Forbes                | 5   | 12   | 5   | 4   | 3   | 17   | 64  |
| Gilgandra             | 0   | 1    | 2   | 2   | 2   | 3    | 176 |
| Glen Innes<br>Severn  | 5   | 17   | 16  | 11  | 4   | 33   | 88  |
| Gloucester            | 19  | 42   | 23  | 20  | 9   | 65   | 76  |
| Gosford               | 462 | 1314 | 484 | 376 | 182 | 1798 | 56  |
| Goulburn<br>Mulwaree  | 10  | 41   | 49  | 42  | 21  | 90   | 117 |
| Great Lakes           | 318 | 988  | 323 | 236 | 112 | 1311 | 52  |
| Greater Hume<br>Shire | 3   | 8    | 6   | 5   | 4   | 14   | 135 |
| Greater Taree         | 71  | 202  | 108 | 79  | 40  | 310  | 69  |
| Griffith              | 6   | 14   | 13  | 8   | 7   | 27   | 91  |
| Gundagai              | 0   | 8    | 12  | 9   | 5   | 20   | 150 |
| Gunnedah              | 2   | 7    | 4   | 3   | 1   | 11   | 92  |
| Guyra                 | 0   | 5    | 4   | 3   | 1   | 9    | 75  |
| Gwydir                | 0   | 1    | 1   | 1   | 1   | 2    | 155 |
| Harden                | 1   | 9    | 14  | 11  | 8   | 23   | 123 |
| Hawkesbury            | 34  | 129  | 124 | 102 | 52  | 253  | 98  |
| Hay                   | 1   | 4    | 12  | 10  | 9   | 16   | 181 |
| Holroyd               | 10  | 27   | 20  | 15  | 7   | 47   | 115 |
| Hornsby               | 71  | 182  | 102 | 75  | 36  | 284  | 81  |
| Hunters Hill          | 15  | 21   | 8   | 5   | 1   | 29   | 54  |
| Hurstville            | 29  | 52   | 17  | 15  | 7   | 69   | 70  |
| Inverell              | 6   | 16   | 9   | 8   | 6   | 25   | 85  |
| Jerilderie            | 0   | 0    | 2   | 2   | 2   | 2    | 255 |
| Junee                 | 1   | 1    | 3   | 3   | 2   | 4    | 146 |

|                         |     |      |     |     |     |      |     |
|-------------------------|-----|------|-----|-----|-----|------|-----|
| Kempsey                 | 242 | 478  | 153 | 117 | 56  | 631  | 50  |
| Kiama                   | 97  | 420  | 233 | 175 | 87  | 653  | 72  |
| Kogarah                 | 28  | 48   | 21  | 19  | 10  | 69   | 76  |
| Ku-ring-gai             | 74  | 120  | 41  | 34  | 11  | 161  | 65  |
| Kyogle                  | 6   | 24   | 19  | 16  | 9   | 43   | 92  |
| Lachlan                 | 3   | 5    | 2   | 1   | 0   | 7    | 48  |
| Lake Macquarie          | 101 | 350  | 216 | 171 | 87  | 566  | 81  |
| Lane Cove               | 60  | 95   | 32  | 23  | 13  | 127  | 65  |
| Leeton                  | 0   | 4    | 7   | 7   | 4   | 11   | 128 |
| Leichhardt              | 195 | 290  | 154 | 125 | 57  | 444  | 76  |
| Lismore                 | 43  | 96   | 82  | 61  | 29  | 178  | 95  |
| Lithgow                 | 22  | 99   | 95  | 71  | 27  | 194  | 90  |
| Liverpool               | 22  | 61   | 41  | 28  | 5   | 102  | 81  |
| Liverpool Plains        | 5   | 10   | 4   | 2   | 2   | 14   | 62  |
| Lockhart                | 0   | 1    | 2   | 2   | 2   | 3    | 144 |
| Maitland                | 14  | 48   | 52  | 40  | 24  | 100  | 102 |
| Manly                   | 536 | 776  | 249 | 198 | 89  | 1025 | 47  |
| Marrickville            | 220 | 329  | 160 | 130 | 70  | 489  | 75  |
| Mid-Western Regional    | 60  | 227  | 262 | 199 | 80  | 489  | 94  |
| Moree Plains            | 0   | 1    | 1   | 1   | 0   | 2    | 183 |
| Mosman                  | 200 | 252  | 73  | 58  | 32  | 325  | 45  |
| Murray                  | 10  | 57   | 13  | 10  | 2   | 70   | 41  |
| Murrumbidgee            | 2   | 4    | 3   | 3   | 2   | 7    | 99  |
| Muswellbrook            | 2   | 12   | 6   | 3   | 1   | 18   | 56  |
| Nambucca                | 44  | 153  | 109 | 84  | 52  | 262  | 92  |
| Narrabri                | 0   | 6    | 6   | 5   | 2   | 12   | 121 |
| Narrandera              | 0   | 1    | 9   | 8   | 5   | 10   | 181 |
| Narromine               | 1   | 6    | 1   | 0   | 0   | 7    | 36  |
| Newcastle               | 78  | 298  | 343 | 280 | 159 | 641  | 114 |
| North Sydney            | 327 | 469  | 234 | 192 | 112 | 703  | 72  |
| Oberon                  | 14  | 40   | 38  | 31  | 14  | 78   | 91  |
| Orange                  | 32  | 167  | 195 | 153 | 67  | 362  | 100 |
| Palerang                | 11  | 35   | 40  | 29  | 17  | 75   | 104 |
| Parkes                  | 10  | 28   | 14  | 12  | 7   | 42   | 93  |
| Parramatta              | 102 | 139  | 82  | 61  | 29  | 221  | 84  |
| Penrith                 | 29  | 61   | 52  | 36  | 20  | 113  | 101 |
| Pittwater               | 507 | 787  | 228 | 181 | 79  | 1015 | 46  |
| Port Macquarie-Hastings | 133 | 454  | 294 | 224 | 144 | 748  | 89  |
| Port Stephens           | 389 | 1196 | 341 | 261 | 133 | 1537 | 49  |
| Queanbeyan              | 5   | 16   | 26  | 21  | 7   | 42   | 114 |
| Randwick                | 740 | 956  | 241 | 198 | 88  | 1197 | 47  |
| Richmond Valley         | 31  | 74   | 21  | 16  | 8   | 95   | 51  |

|                     |      |      |      |      |     |      |     |
|---------------------|------|------|------|------|-----|------|-----|
| Rockdale            | 104  | 142  | 73   | 59   | 38  | 215  | 102 |
| Ryde                | 108  | 182  | 86   | 69   | 24  | 268  | 68  |
| Shellharbour        | 19   | 94   | 98   | 79   | 51  | 192  | 106 |
| Shoalhaven          | 701  | 2651 | 1213 | 884  | 399 | 3864 | 63  |
| Singleton           | 31   | 139  | 76   | 51   | 22  | 215  | 68  |
| Snowy River         | 330  | 984  | 312  | 216  | 74  | 1296 | 49  |
| Strathfield         | 27   | 50   | 28   | 28   | 17  | 78   | 90  |
| Sutherland Shire    | 149  | 269  | 160  | 123  | 56  | 429  | 74  |
| Sydney              | 1826 | 2455 | 1294 | 1073 | 637 | 3749 | 81  |
| Tamworth Regional   | 34   | 89   | 91   | 78   | 47  | 180  | 110 |
| Temora              | 1    | 8    | 13   | 11   | 4   | 21   | 111 |
| Tenterfield         | 1    | 24   | 30   | 23   | 13  | 54   | 111 |
| The Hills Shire     | 51   | 107  | 79   | 59   | 30  | 186  | 93  |
| Tumbarumba          | 3    | 13   | 19   | 15   | 4   | 32   | 89  |
| Tumut Shire         | 7    | 42   | 28   | 19   | 10  | 70   | 81  |
| Tweed               | 454  | 1049 | 403  | 307  | 146 | 1452 | 61  |
| Unincorporated NSW  | 0    | 0    | 4    | 3    | 0   | 4    | 102 |
| Upper Hunter Shire  | 9    | 18   | 23   | 17   | 7   | 41   | 103 |
| Upper Lachlan Shire | 13   | 29   | 29   | 25   | 14  | 58   | 104 |
| Uralla              | 0    | 10   | 17   | 14   | 6   | 27   | 122 |
| Wagga Wagga         | 34   | 97   | 162  | 147  | 96  | 259  | 140 |
| Wakool              | 1    | 8    | 1    | 0    | 0   | 9    | 39  |
| Walcha              | 1    | 4    | 5    | 3    | 2   | 9    | 83  |
| Walgett             | 2    | 2    | 13   | 7    | 3   | 15   | 122 |
| Warren              | 0    | 0    | 0    | 0    | 0   | 0    | 0   |
| Warringah           | 664  | 907  | 182  | 146  | 62  | 1089 | 36  |
| Warrumbungle Shire  | 1    | 18   | 22   | 16   | 5   | 40   | 100 |
| Waverley            | 1330 | 1745 | 484  | 386  | 186 | 2229 | 45  |
| Weddin              | 0    | 2    | 1    | 0    | 0   | 3    | 34  |
| Wellington          | 0    | 3    | 2    | 2    | 0   | 5    | 85  |
| Wentworth           | 3    | 14   | 7    | 6    | 4   | 21   | 85  |
| Willoughby          | 118  | 177  | 84   | 67   | 36  | 261  | 68  |
| Wingecarribee       | 89   | 380  | 362  | 295  | 166 | 742  | 100 |
| Wollondilly         | 5    | 15   | 23   | 19   | 13  | 38   | 126 |
| Wollongong          | 137  | 368  | 345  | 290  | 155 | 713  | 105 |
| Woollahra           | 393  | 505  | 157  | 128  | 63  | 662  | 48  |
| Wyong               | 200  | 582  | 310  | 247  | 118 | 892  | 70  |
| Yass Valley         | 11   | 36   | 37   | 24   | 16  | 73   | 95  |
| Young               | 3    | 9    | 9    | 3    | 2   | 18   | 80  |



# Appendix C - Population and implied dwelling demand projections to 2041 and social housing asks

| *DPE data ( <a href="https://www.planning.nsw.gov.au/Research-and-Demography/Population-Projections/Explore-the-data">https://www.planning.nsw.gov.au/Research-and-Demography/Population-Projections/Explore-the-data</a> ) |                                       |            |   | *Shelter NSW asks                                   |  |
|---|---------------------------------------|------------|---|---|--|
| Year  | Location                              | Population | Implied dwelling demand (no. of total dwellings required to house projected population, all tenure types) | Restoring 5% of all housing stock as social housing | 10% of all housing stock as social housing |
| 2041  | Central Coast City                    | 404265     | 191696  | 9585  | 19170                                      |
| 2041  | Central River City                    | 2098251    | 788127  | 39406   | 78881                                      |
| 2041  | Eastern Harbour City                  | 2534535    | 1153553   | 57678   | 115355                                     |
| 2041  | Illawarra-Shoalhaven City             | 558708     | 265264  | 13263   | 26526                                      |
| 2041  | Lower Hunter & Greater Newcastle City | 773825     | 353608  | 17680   | 35361                                      |
| 2041  | Western Parkland City                 | 1509489    | 572168  | 28608   | 57217                                      |
| 2041  | Remainder of NSW outside of 6 cities  | 1993862    | 1005058   | 50253   | 100506                                     |
| 2041  | NSW total                             | 9872934    | 4329475   | 216473  | 433016                                     |
| <b>Total percentage of NSW population that will live in the metropolis of 6 cities region by 2041</b>   |                                       |            |   |   | 79.8                                       |
| <b>Total percentage of NSW social housing dwellings that will be delivered in metropolis of 6 cities region per Shelter's 10% of all housing stock ask by 2041</b>  |                                       |            |   |   | 76.8                                       |
| <b>Total number of social housing dwellings in the metropolis of 6 cities region per Shelter's 10% of all housing stock ask by 2041 (calc includes existing social housing stock)</b>                                       |                                       |            |   |   | 332510                                     |