

ACCOMMODATION SECTOR Q2 INSIGHTS

Based on the Regional NSW Hotel Market Assessment Q2 2025

MARKET OVERVIEW – REGIONAL NSW



Majority of regions recorded growth across ADR, occupancy & RevPAR.



April was the strongest month due to Easter, ANZAC Day & school holidays.



Winter events injected strong visitation across regional NSW.

KEY TRENDS IMPACTING PORT STEPHENS

Weekend performance stronger than weekdays across most regions.

Weekday growth emerging – especially strong in the Hunter Valley.

Newcastle posted the state's highest occupancy, presenting spillover opportunity.

BLUE MOUNTAINS – PREMIUM BENCHMARK

- Highest ADR (\$248.9) and RevPAR (\$163.2).
- Signals strong demand for premium nature-based accommodation.
- Opportunity: Lift ADR through enhanced luxury experiences.



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HUNTER VALLEY – STRONGEST GROWTH REGION

- RevPAR up 13.7% and occupancy up 6.8 points.
- Strong business events, weddings, and short-break demand.
- Opportunity: Multi-region itineraries with Port Stephens.



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CENTRAL COAST & WOLLONGONG - SOFTENING

- Central Coast posted lowest occupancy (51.3%).
- Wollongong declined across all key performance metrics.
- Opportunity: Position Port Stephens as premium coastal alternative.



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OPPORTUNITIES FOR PORT STEPHENS

- Capitalise on peak seasonal periods (Easter, ANZAC, events).
- Strengthen mid-week strategy via corporate, MICE & wellness segments.
- Lift ADR through premium add-ons and curated experiences.



WEEKDAY GROWTH POTENTIAL

- Corporate retreats and small conferences showing renewed demand.
- International market – current visitation exceeds 2019.
- Mid-week occupancy can grow through targeted packages.
- Leverage outdoor, nature and wellness offerings.



AVIATION-DRIVEN DEMAND

- Newcastle Airport continues to strengthen domestic & international routes.
- Pre- and post-flight stays present strong conversion potential.
- DPS will collaborate on aviation-led trade and media opportunities.
- Regional collaboration – Hunter Global.



STRATEGIC POSITIONING FOR PORT STEPHENS

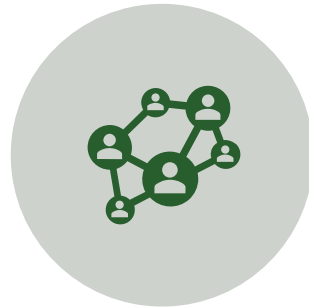
- Premium nature destination supported by the 'Incredible by Nature' brand.
- Unique experiences: dunes, wildlife, coastline, luxury stays.
- Focus on high-yield segments and shoulder-season growth.



RECOMMENDED OPERATOR ACTIONS



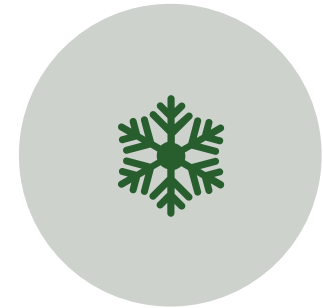
DEVELOP MID-WEEK AND SEASONAL PACKAGES TO FILL DEMAND GAPS.



COLLABORATE WITH DPS ON JOINT CAMPAIGNS AND ITINERARIES.



SHARE PERFORMANCE DATA TO ENHANCE BROADER DEMAND STRATEGIES.



PREPARE WINTER OFFERS EARLY TO COUNTER SEASONAL SOFTNESS – AWAKEN WINTERS WILD CAMPAIGN 2026.

THANK YOU