UPPER HUNTER DESTINATION MANAGEMENT PLAN

PREPARED BY: STAFFORD STRATEGY
FOR: UPPER HUNTER SHIRE COUNCIL





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staffordstrategy.com.au **ACN** 079 055 100 **ABN** 34 565120 454

SYDNEY OFFICE
A 3.02 POST 46a MacLeay Street, Potts Point NSW 2011, Australia
E sydney@staffordstrategy.com.au
P +61 2 9331 6222

MELBOURNE OFFICE
A 36 Cobden Street North Melbourne VIC 3051, Australia
E melbourne@staffordstrategy.com.au
P +61 416 200 458

BRISBANE OFFICE
A PO BOX 265 Sandgate QLD 4017, Australia
E brisbane@staffordstrategy.com.au
P +61 417 721 342

WELLINGTON OFFICE
A Level 1, 2 Broderick Road, Johnsonville 6037, Wellington, NZ
E wellington@staffordstrategy.co.nz
P +64 21 337 377

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EXECUTIVE SUMMARY

Introduction & Key Findings

Stafford Strategy (Stafford) was engaged by Upper Hunter Shire Council to develop a Destination Management Plan (DMP) which is an update and replacement of the previous DMP which covered both Muswellbrook and the Upper Hunter shires. This updated DMP just covers the Upper Hunter Shire.

The DMP has involved community and industry consultation from November 2020 – February 2021. A variety of workshops and meetings have been facilitated to enable as many stakeholders as possible to contribute. In addition, extensive research and analysis has been carried out to determine the destinations points of uniqueness and difference and to help ensure that points of difference are captured between the various communities throughout the shire who reside in or close to Aberdeen, Merriwa, Murrurundi and Scone.

Though each of these sub-areas of the Upper Hunter has unique product etc to offer, it is their collective proposition which this DMP seeks to bring together to offer visitors exciting, interesting and compelling reasons to visit.

Although many stakeholders have expressed their desire to see a variety of urban-based improvements to towns, in particular, this DMP is deliberately focussed on mechanisms to help grow the Upper Hunter's visitor economy, so the focus is on new activations which can achieve this outcome. There are, however, several tourism focussed urban improvements which are highlighted as these will also assist in strengthening the visitor economy, but are not the primary focus.

Interestingly, it has not been the intention of this exercise to find specific product opportunities for each sub-regional area of the Upper Hunter; rather, the focus has been on identifying the most viable opportunities to support the regions visitor economy. Nevertheless, the outcomes illustrate that there are various product and related opportunities which will be unique to various sub-regional areas, and which allow all communities to benefit accordingly.

However, the only way that these opportunities are likely to be activated successfully is if all stakeholders work collaboratively. Suggested recommendations to achieve this are outlined in this DMP including governance improvements.

Major Challenges to Address

The following table highlights the major barriers or challenges which will need to be adequately addressed to successfully implement the DMP for the Upper Hunter. It should be noted that these challenges are not unique to the Upper Hunter; they exist in many comparable regions.

Table 1: Barriers Impacting Tourism Growth in the Upper Hunter

Barrier	PRODUCT DEVELOPMENT	INFRA-STRUCTURE	GOVERNANCE	SUSTAINABILITY	MARKETING & PROMOTION
Ability to access skilled and trained staff					
Activation of built heritage	●		●		
Activating National Park areas	●	●		●	
Agriculture is a strength, but accessing the product is difficult	●				●
Competition from neighbouring regions	●		●	●	●
Consistency of interpretation and directional signage		●			●
Digital literacy of operators					●
Gaining agreement on acceptable levels of visitor economy growth				●	●
Lack of access to equine product	●		●		●
Lack of a clear destination brand (and confusion with Hunter Valley brand)					●
Lack of coordination, collaboration & structure			●		
Limited all-weather charge-for visitor experiences	●				●
Limited commissionable tourism experiences	●			●	●
Limited community awareness of the importance of tourism				●	●
Limited critical mass population to support viability		●			
Limited evening activities to grow overnight visitation	●			●	●
Limited export-ready product	●				●
Limited funding for marketing			●		●
Limited higher-quality accommodation stock	●			●	
Limited number of family-friendly visitor experiences	●				●
Limited retail trading hours					●
Limited tourism investment flows	●	●			
Market perception that the region is a "drive-through" rather than an overnight destination					●
Regional visitation data challenges	●				●
The impact of the bypass		●			●
Variable F&B quality and diversity	●				
Volunteer burnout risk			●		
Mining activity in surrounding regions which can impact environmental quality and image	●			●	●

Product Gap Analysis (Accommodation & Attractions/experiences)

The following illustrates gaps in both accommodation product and attractions and experiences product throughout the Upper Hunter region. Without new product to update the experiences on offer, the Shire risks falling behind other regions and restricting growth in the visitor economy.

The diagram highlights accommodation product gaps as illustrated by those items which have a dotted line around them. Figure 1 reflects only commercial accommodation while Figure 2 reflects attractions and experience product gaps.

Figure 1: Accommodation Gap Analysis

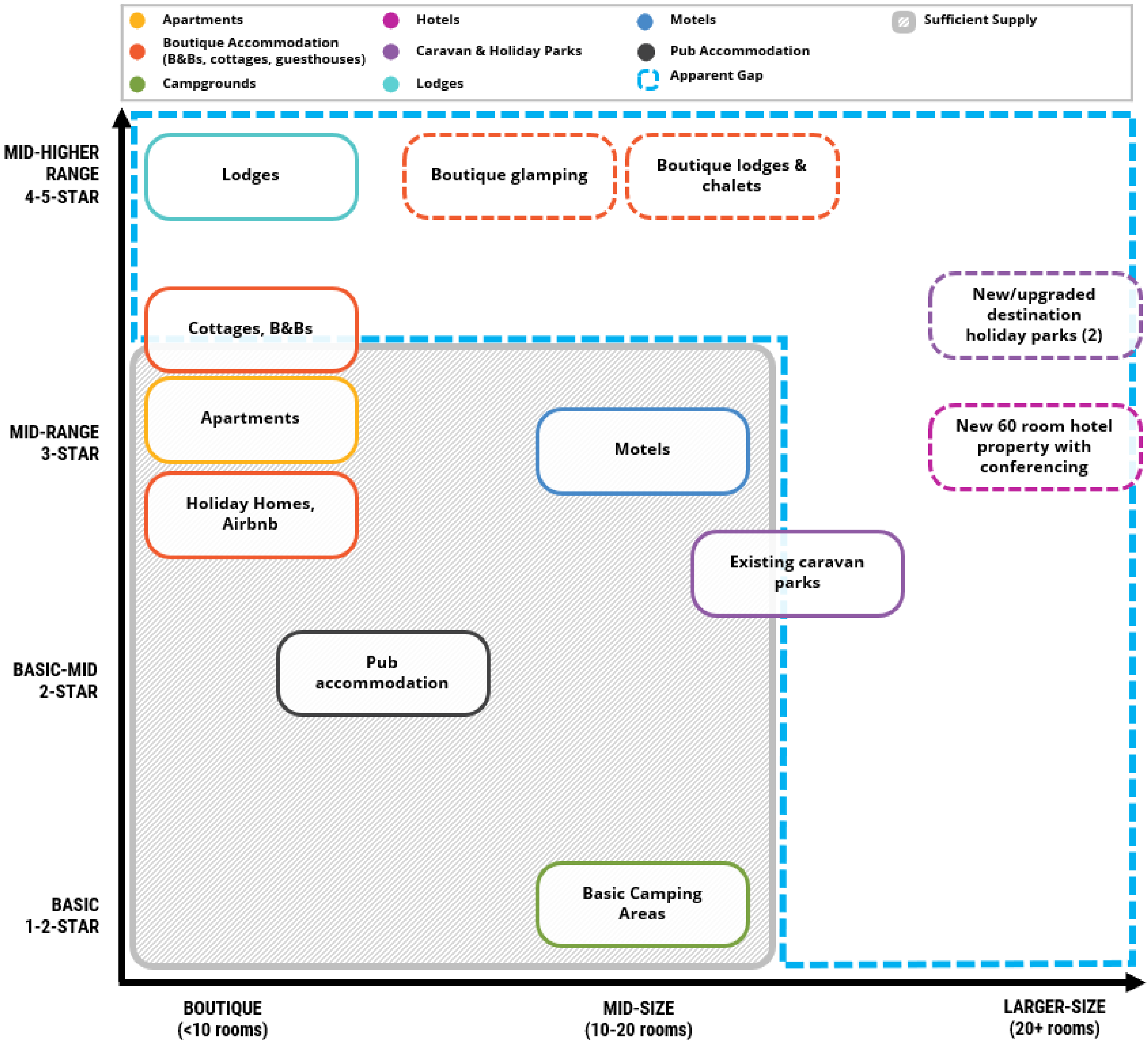
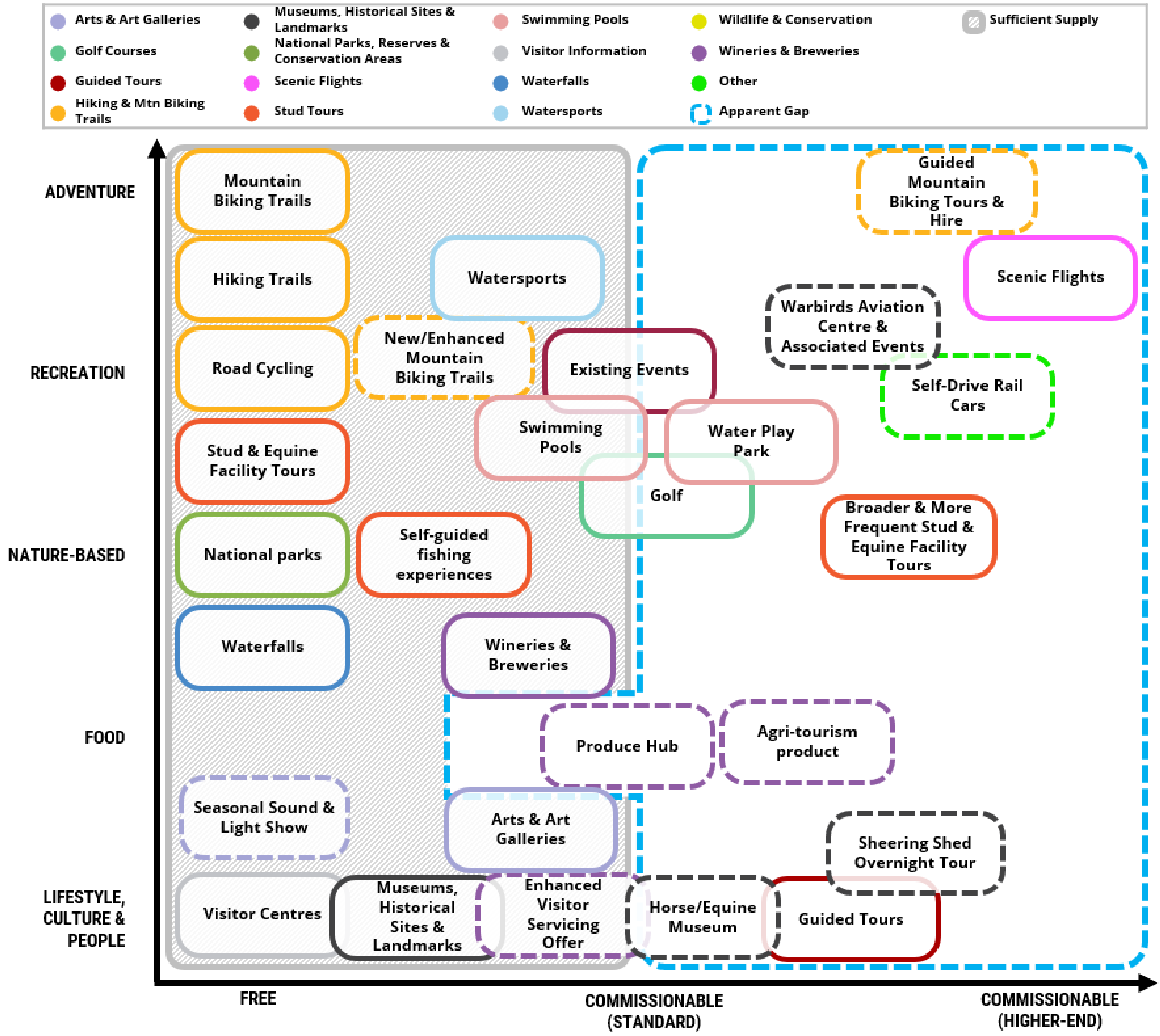


Figure 2: Tourism Attractions & Experiences Gap Analysis



Experience Platforms

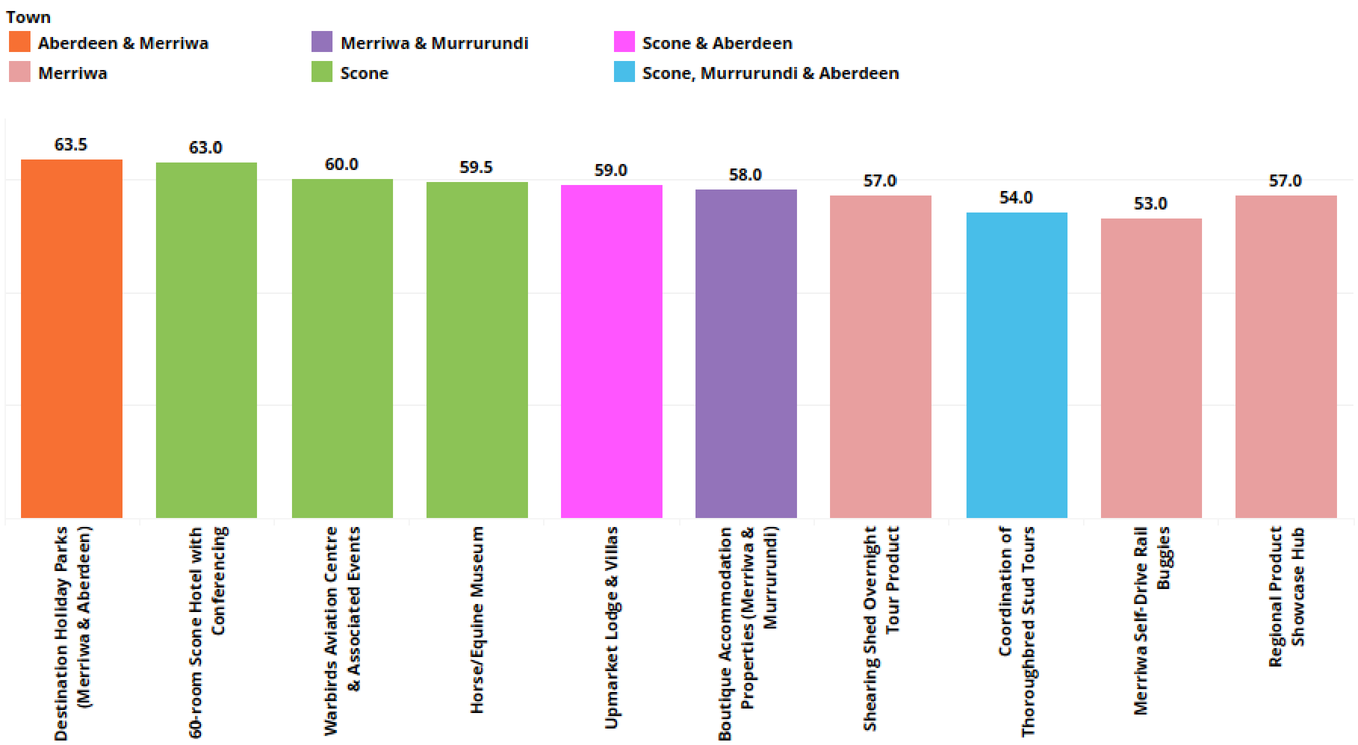
The following experience platforms sit under the “product development” destination management component and have been used to guide the identification of product and experiences. They leverage off the Upper Hunter’s existing natural assets and product strengths as well as opportunities that have been identified.

Figure 3: Experience Platforms

Catalyst Development Projects to Focus on

Based on the analysis and modelling of product opportunities and a sophisticated weighting system of variables and factors, catalyst or priority projects have been identified. These are illustrated below and reflect a mix of mostly private-sector funded projects. We consider that as tourism is an entrepreneurial sector, this weighting in favour of private investment rather than government-funded projects, is appropriate. There are, however, a number of non-product-based funding requirements including infrastructure, governance and events, which Council and/or State Government, would need to help fund to activate.

Figure 4: The Catalyst Projects



The above projects are those that are seen as the catalyst projects to develop, which in turn can act as catalysts to drive other initiatives to help grow the Upper Hunter's visitor economy on a sustainable basis. To facilitate these projects, however, Council may need to look at ensuring that land can be zoned fit for purpose, that the approval process is fast and efficient, and that the development and investment sector sees Council as a "can do/open for business" facilitator to help drive opportunities.

Other Key Recommendations

The following reflects other key recommendations (which are not in any priority order) to assist the sustainable growth and ongoing development of the visitor economy for the Upper Hunter. These are expanded upon in this DMP report.

- *Creation of a Tourism Advisory Group* to generate greater cohesion and buy-in from all key stakeholders including industry and Council and to help drive many of the recommendations contained in this DMP. Council should provide a secretariat and facilitate all TAG meetings.
- *Rotational roster for F&B providers* noting that a major challenge outlined during consultation is the variable hours of F&B providers throughout the Shire, particularly at weekends. To ensure that each town has at least one F&B provider (café, restaurant etc.) open each day and past lunchtime, a rotational roster could be organised.
- *Tourism industry networking events* to address limited collaboration amongst industry operators within the tourism sector
- *Tourism Training & Capacity Building* noting there is a need to offer upskilling and business development programs for operators.
- *Local community visitor economy awareness campaign* as there appears to be insufficient understanding of the important role the visitor economy plays in the Shire and why it needs stronger support. There is also a lack of awareness of how the tourism dollar spreads throughout the economy and how many sectors are positively impacted by visitors.
- *Visitor Management* especially for environmentally sensitive areas such as national parks in the region, council reserve areas etc and avoiding the risk of overtourism especially in various towns during peak visitation periods where the ratio of visitors to community residents may be significantly higher.
- *Tourism Ambassador Program* to promote towns and specific events when lots of visitors are visiting. The role is often performed by retirees who have great local knowledge and who help visitors (day and overnight visitors) on a casual basis
- *Australian Tourism Data Warehouse* listing drive and keep this up to date. The ATDW's ultimate function is to support Australian tourism operators with digital marketing to help extend their exposure and attract more business online. Through a single listing, an operator's details will then appear on Australia.com and over 50 other websites.
- *Destination branding*, noting that there is currently a lack of understanding (locally, domestically and internationally) regarding "what" the Upper Hunter is as a visitor destination and the lack of a clear destination brand. This is particularly the case because there is often confusion between the Hunter Valley and Upper Hunter which offer very different visitor experiences.
- *Destination events strategy* to help in stimulating visitor demand, particularly during low season periods. Although the Shire has a vibrant calendar of events, there is only a small portion of these that yield higher economic value and attract visitors from outside of the Shire.
- *Destination events calendar* to avoid events clashing on the same weekends and thus addressing a lack of communication and awareness as to when events are being held
- *Destination content creation* is required as there are no images of the Upper Hunter Shire on the DNSW Content Library[1]. When "Scone" is entered, the only images displayed are of visitors eating scones in other destinations throughout NSW
- *Development of a regional events toolkit* to grow the events sector in the region and which requires actively seeking out events and promoting to event organisers that the region is "open" for events.
- *Product packaging* recognising that there is limited bookable product packaging available on destination-based websites for the Shire. As additional new, marketable product is introduced in the Shire, the potential exists to develop packages which visitors can book, rather than merely providing suggested itineraries.
- *Glenbawn Dam Master Plan* to ensure that any future proposed development/redevelopment at the Dam is undertaken in a coordinated way and maximises the benefit of this waterway
- *Coordinated signage strategy* including signage in its broadest context [including] roadside signs, information kiosks, information centres and online information sources such as apps (able to be accessed while travelling) as well as gateway entry signage to create a sense of entrance into the Shire and its various towns as well as signage to guide visitors to points of interest throughout the Shire.
- *Biking expansion master plan* noting that the Shire is popular for all forms of bike riding, including road cycling, bike packing and mountain biking and has an active cycling community.
- *Implement the tourism components only, of the Revitalisation Strategies* for each town as previously identified.
- *Visitor information servicing review* noting that the Shire currently has three visitor information centres (VICs), each of which is yellow i accredited (). These are situated in Scone, Merriwa and Murrurundi. Digital technology and online platforms have disrupted the visitor communication landscape and demonstrate the different channels which can now deliver visitor information services cost-effectively and faster.
- *Need for cultural and public art attractions* noting that these initiatives will more often require a major funding

[1] https://content.destinationnsw.com.au/

commitment locally for raising matching state government capital funding. In addition, these facilities always require an ongoing financial commitment from councils to cover their ongoing operating cost shortfall. But regardless, they are important public good projects to help deliver to local community needs and aspirations and to offer further product to help grow the visitor economy to the region. The proposed Murrurundi Art Gallery and Indigenous Centre is an example of such an initiative.

Summary

The Upper Hunter region has a number of exciting opportunities to consider strengthening its visitor economy and grow a variety of amenities and recreational facilities to benefit its local communities as well as the visitor markets. Importantly, the region's stakeholders need to encourage far greater private sector investment and development interest of a sustainable nature, to achieve this outcome.

Council has a key facilitation and enabling role to play in encouraging private investor interest and facilitating desired outcomes. Whilst there are some local developers and investors, most likely it will require out of region developers to be encouraged as well.

Strategically, there also needs to be a far stronger collaboration between key parties such as Council and various industry and community stakeholders. There are many opportunities for each of the Upper Hunters sub-regional areas/towns, but it needs to be remembered that it is the collection of all the component parts, which offers the best opportunities for the Upper Hunter visitor economy going forward. This is a regional DMP for the whole Shire, and therefore should not be viewed as separate sub-regional projects or elements, it needs a whole of Upper Hunter approach to work.

Finally, whilst we know some of the region's community stakeholders have been keen to see more of the urban improvement recommendations activated, as identified in the four town revitalisation strategies, this DMP is focused only on the visitor economy and therefore, has selected those revitalisation initiatives which can support this DMP and help develop the regions visitor economy. If the list of these identified for the DMP can be activated, significant urban improvement will be achieved for local towns and their communities as well.

PART 1: WHERE ARE WE NOW?

1.1. Introduction

Stafford Strategy (Stafford) was commissioned by Upper Hunter Shire Council (the Council) to develop a Destination Management Plan (DMP) for the Upper Hunter Shire (the Shire).

While the previous DMP for the region included Muswellbrook Shire, this DMP focuses specifically on the Upper Hunter Shire LGA only.

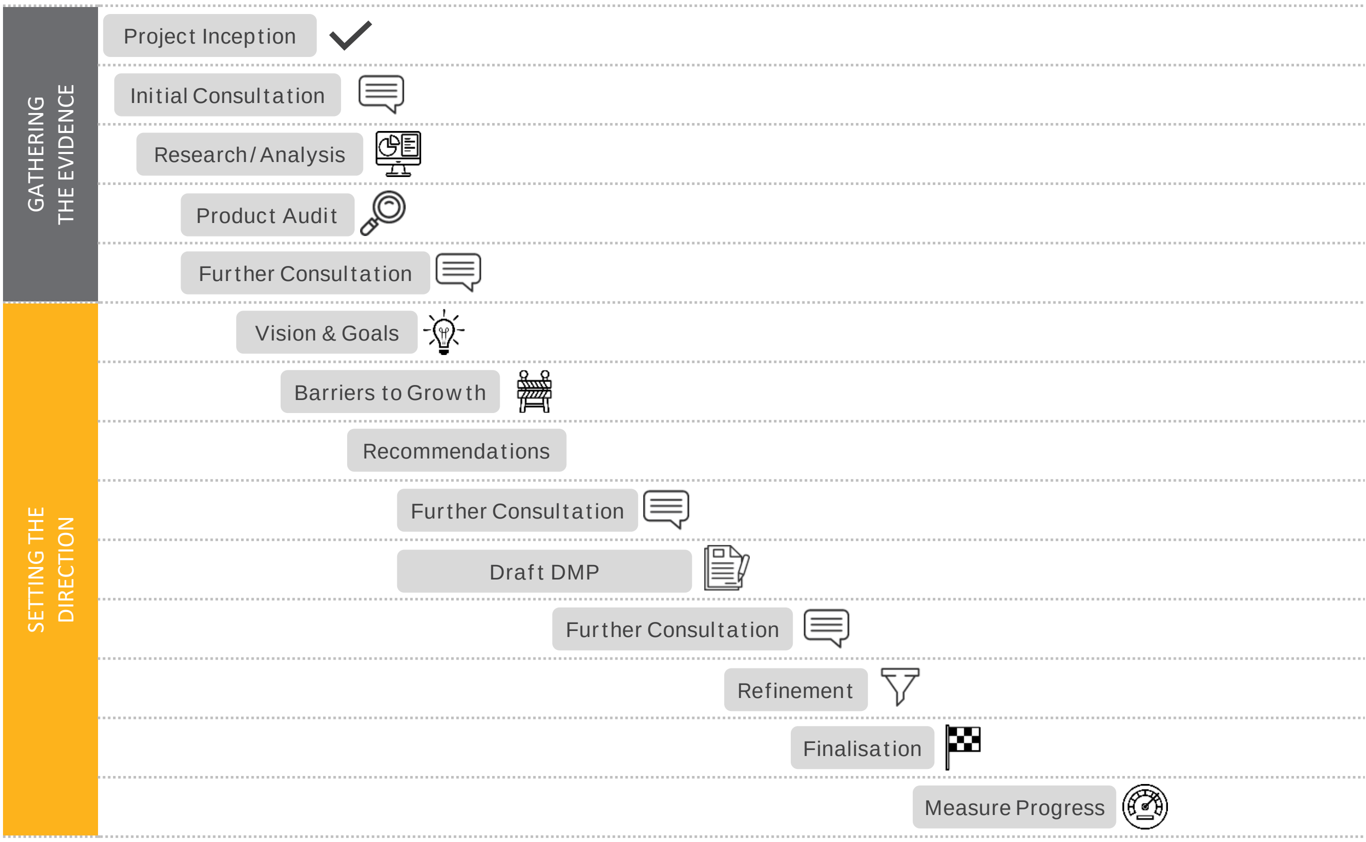
1.2. The Approach Followed

Working alongside those directly involved in the visitor economy, this DMP was developed via a 14-stage process, which is outlined in Figure 5.

The project involved extensive consultation with a wide variety of stakeholders across the public and private sectors as well as the local Upper Hunter community.

Stafford would like to take this opportunity to thank all those who have contributed to the development of this DMP. The contributions from stakeholders were invaluable to the development of this robust and pragmatic DMP. Like all robust strategies and plans, there was often a divergence of opinions; whilst every effort has been made to accommodate these, we acknowledge that this has not always been possible, though a predominant view has been applied wherever possible.

Figure 5: Stages followed to complete the DMP



1.3. What is Destination Management?

Destination management is the coordinated management of all elements that make up a destination, these include placing a priority on social license, sustainability and carbon impacts, the provision of visitor infrastructure, attracting and managing investment into attractions, amenities, access, marketing and pricing.

Quite simply, at its core, destination management is no more than people working together in a defined area to develop a plan, which **satisfies visitor desires** and **delivers sustainable benefits** for the **community**. It is as much about considering **residents' desires** and the **destination's long-term sustainability**, as it is about visitor demands.

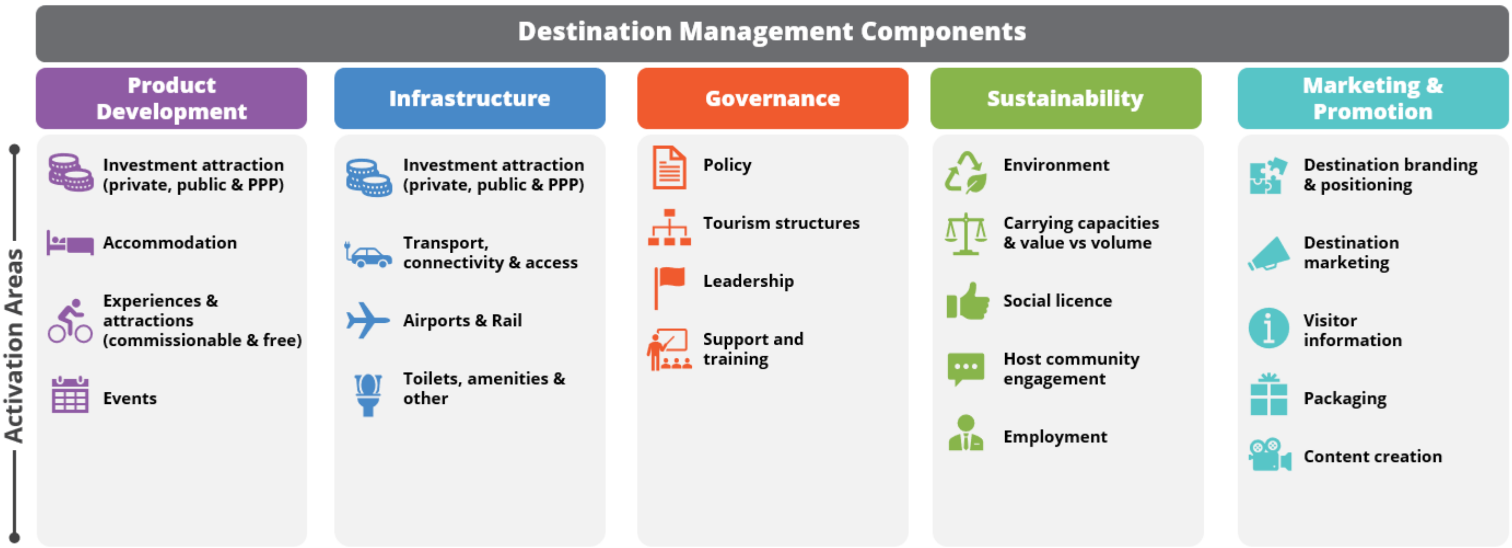
A DMP covers:

- a shared statement of intent to manage a destination over a stated period;
- a vision for the destination;
- barriers to sustainable growth and how these can be mitigated;
- recommendations that align with the guiding vision to sustainably grow and enhance the visitor economy; and
- articulates the roles of different stakeholders and identifies clear actions they should take.

It is a much wider and **more holistic perspective than destination marketing.** It should be considered a "living" plan, that is **continuously reviewed and updated** as circumstances change, and lessons are learned.

Figure 6 summarises the five broad components of destination management, being: Product Development, Infrastructure, Governance, Sustainability and Marketing & Promotion. Within these components, there are different activation areas that can assist in delivering a destination management approach and a sustainable visitor economy.

Figure 6: Destination Management Components



1.4. Definitions

For clarity, Table 2 explains a variety of terms used throughout the DMP. Where applicable, these definitions align with those outlined in national and state policy and planning documents.

Table 2: Definitions

Who Is a Visitor?	For the purpose of this DMP, a visitor includes all those travelling to the region, either for a day trip or staying overnight, for a variety of reasons, including for leisure/holiday purposes; events (including sports, cultural and arts events and conferences); business-based travel; visiting friends and relatives (VFR); medical tourism; educational purposes; and employment purposes. 
What is the Visitor Economy?	The visitor economy accounts for the fact that visitor activity does not occur in isolation, but rather, contributes to investment in jobs across a broad range of industry sectors. This includes all industries that directly and indirectly serve visitors, ranging from accommodation and tourism operators and attractions to broader goods and services such as retail and food and beverage industries. As tourism is not a defined industry sector on its own, but rather the amalgamation of a variety of industry sectors including accommodation, food and beverage etc., the full extent of what comprises the visitor economy and its reach across many elements of the broader economy is often not fully understood.
What is a Social Licence to Operate?	The concept of social licence to operate (SLO) has its origins in the late 1990s in the extractive industries and has since been adopted within the wider business context. There is no one commonly accepted definition of SLO, however, community acceptance and approval of commercial operations are recognised as critical features of the concept. Although society as a whole 'issues' the SLO to businesses and organisations, it is usually local communities who are the 'key arbiter' of the terms of the SLO[2]. Tourism is heavily dependent upon gaining and maintaining a SLO because as an industry it makes its income off the back of public goods such as roads, beaches, tracks and mountain ranges. Visitors utilise infrastructure such as transport, utilities, accommodation and national parks, and can put pressure on places where there are low numbers of residents. The trade-off the public makes is jobs, visitor spending in the local economy and new retail, food outlets and activities and experiences.
What is the domestic leisure market?	The domestic visitor market is defined as Australian residents who travel outside of the LGA (Council area) on either an overnight trip or a day trip. The domestic leisure market is a subsector of the total domestic visitor market and includes those travelling for a variety of leisure reasons including but not limited to: for a holiday, to shop, to cycle or undertake a walk, to attend a cultural or sporting event etc.

1.5. About Upper Hunter Shire

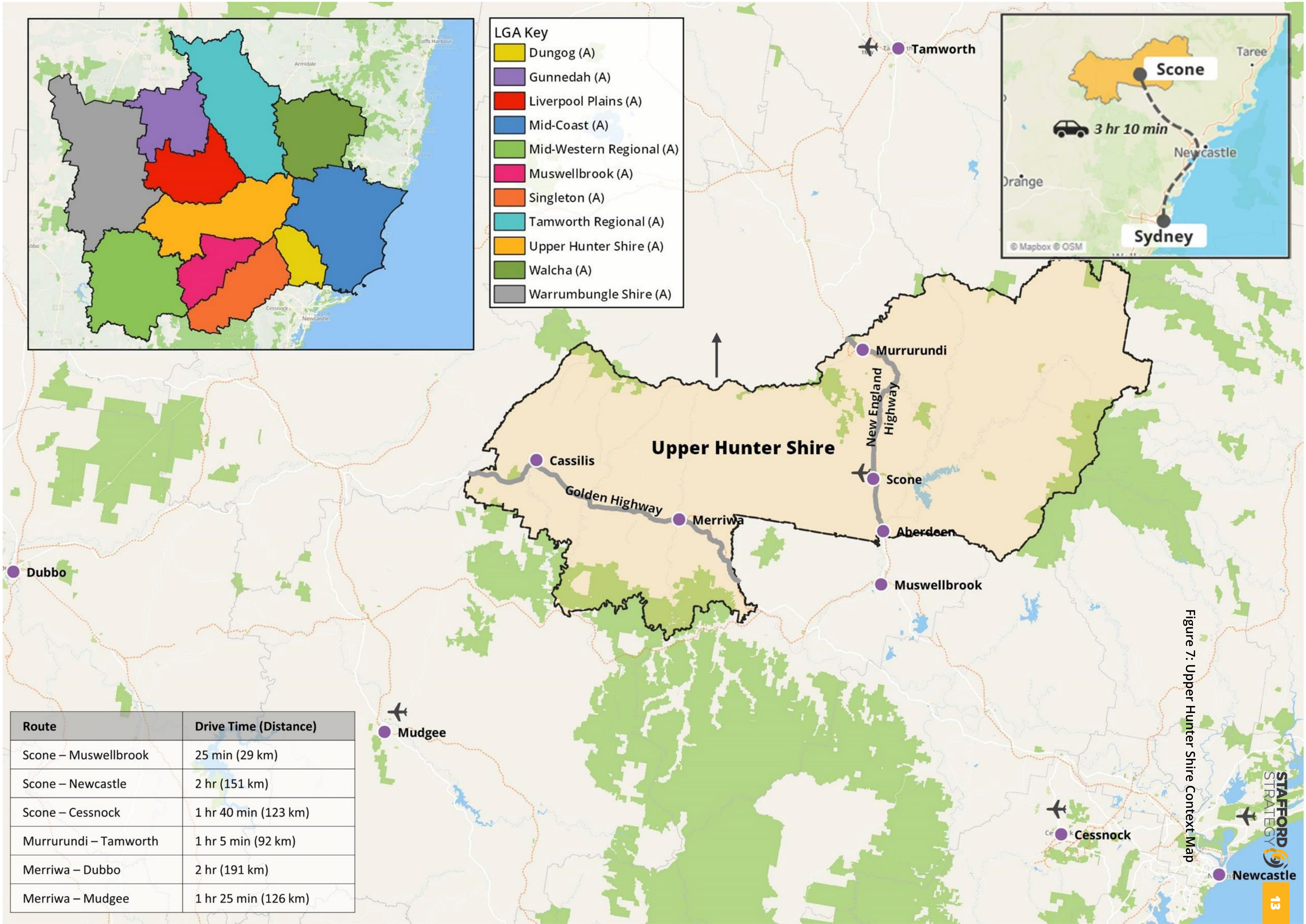
The Shire is situated in northern NSW, halfway between Tamworth and Newcastle and just over 3 hours' drive from Sydney. It is on the main inland route, the New England Highway, and connects to Central West NSW through the Golden Highway and south to the National Capital through inland tourist routes.

The Shire was formed in 2004 as a result of the amalgamation of Scone Shire as well as parts of Murrurundi and Merriwa Shires. It covers just over 8,000 square kilometres, and, as of 2019, was home to 14,180 residents.

The Shire includes the towns of Aberdeen, Merriwa, Murrurundi and Scone, the village of Cassilis, as well as a number of rural communities. Murrurundi delineates the Shire to the north; the Barrington Tops to the east, Goulburn River National Park and Cassilis to the west, and Aberdeen to the south. Figure 7 which follows demonstrates the size of the Shire as well as its strategic proximity to several other major destination hubs situated on the New England Highway as well as the Golden Highway.

Surrounding shires such as Muswellbrook and Singleton are impacted by competing industry sectors such as coal mining, the Upper Hunter Shire is less impacted, though there is a constant desire by mining companies to expand resource extraction into the Upper Hunter.

[2] New Zealand Sustainable Business Council, 2013



Route	Drive Time (Distance)
Scone – Muswellbrook	25 min (29 km)
Scone – Newcastle	2 hr (151 km)
Scone – Cessnock	1 hr 40 min (123 km)
Murrurundi – Tamworth	1 hr 5 min (92 km)
Merriwa – Dubbo	2 hr (191 km)
Merriwa – Mudgee	1 hr 25 min (126 km)

Figure 7: Upper Hunter Shire Context Map

1.6. Our Visitor Economy

1.6.1. How Visitation Data Has Been Compiled

Visitor data has been compiled for the Shire using the National and International Visitor Survey (NVS and IVS) data published by Tourism Research Australia (TRA). The NVS and IVS provide visitation data based on 'Statistical Area 2' (SA2) boundaries. Every LGA in Australia is made up of one or more SA2s. The SA2s included in the Shire are Scone and Scone Region.

As per the methodology applied by TRA for LGAs and regions, visitation data is averaged over three-year periods, rather than being provided on an annual basis, as this minimises the impact of variability in estimates from year to year and provides more robust estimates. The periods assessed in this DMP include:

- September 2012 to September 2014, referred to as 2014;
- September 2015 to September 2017, referred to as 2017; and
- September 2018 to September 2020, referred to as 2020.

September YE data (unless otherwise specified) has been applied as this is the most recent iteration of data released by TRA via the NVS and IVS.

1.6.2. Visitor Profile[3]

Figure 8 on the following page provides a summary of visitation to Upper Hunter Shire (a full breakdown of visitation is provided in Appendix 1). It includes the following.

- Total visitation to the Shire from 2014 – 2020.
- Visitation to the Shire by visitor type (domestic day, domestic overnight and international).
- Total visitor spend in the Shire, including a breakdown by visitor type.
- Visitation by motivation for travel (holiday, visiting friends and relatives, education/other and business).

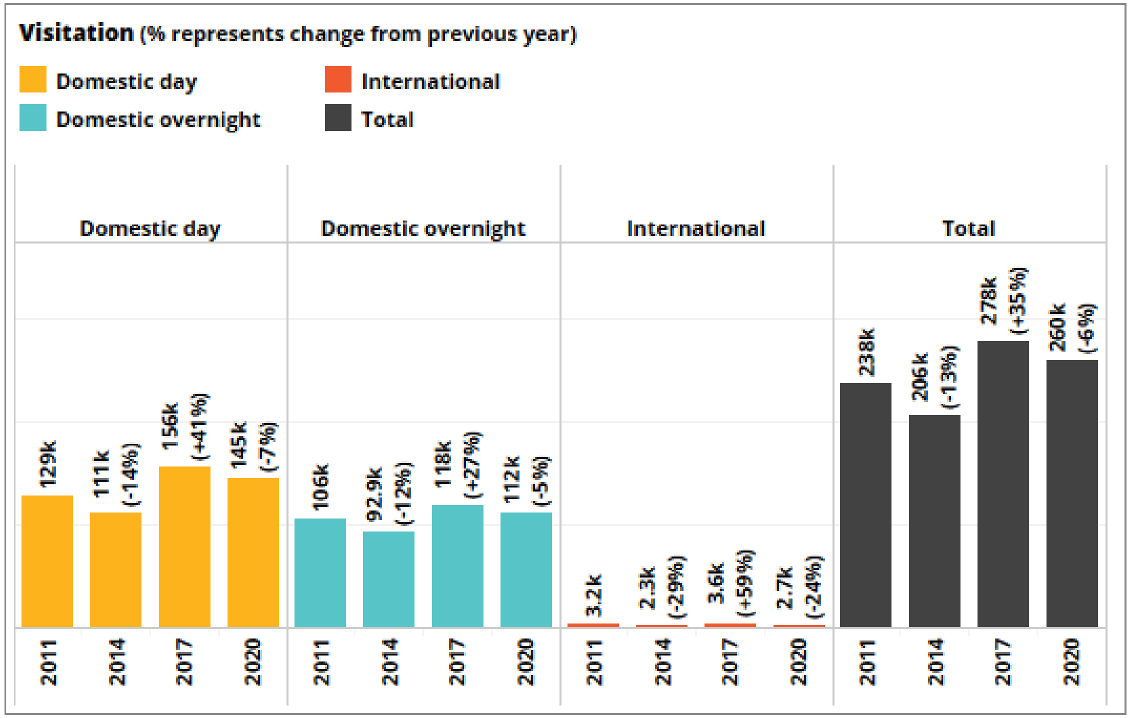
Key points to note are as follows.

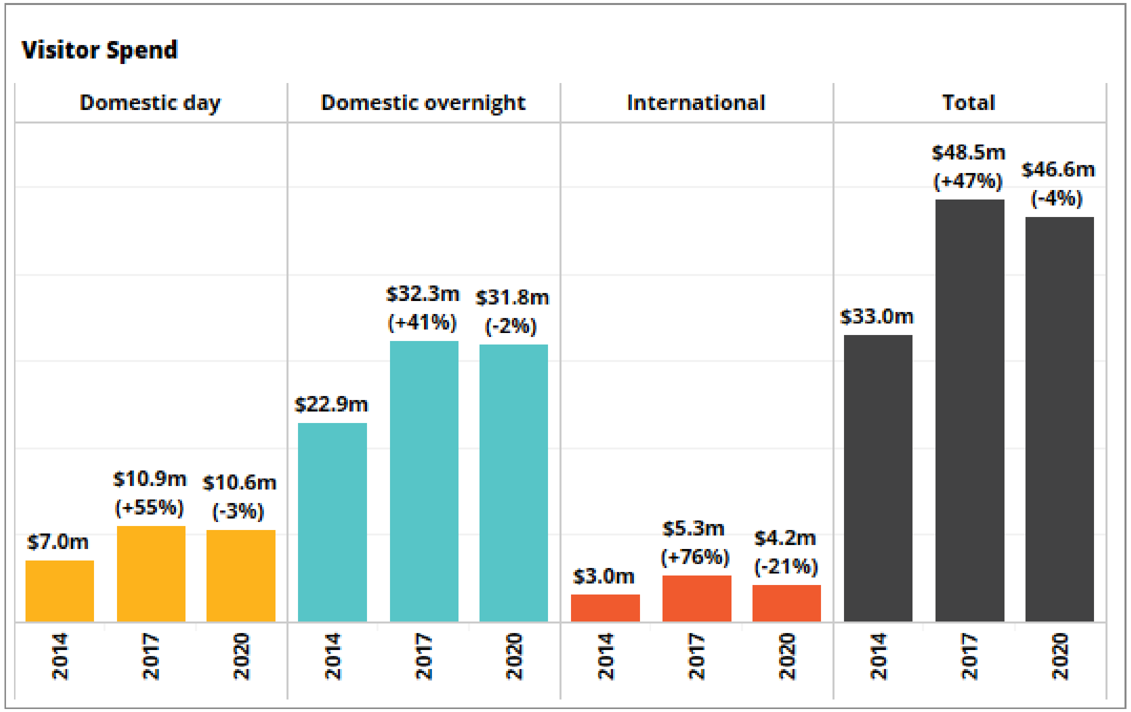
- From 2014-2020, visitation to the Shire has fluctuated. However, between the years of 2014 and 2020, overall visitation has grown, increasing by 26%, or 54k visitors, from 206k visitors to 260k visitors. This growth has been driven across all visitor markets; however, the most significant growth has been in domestic day trip visitation, increasing by 34k visitors (+31%) from 2014-2020.
- As well as experiencing the most growth, domestic day trippers also make up the largest visitor market for the Shire, comprising more than half (54%) of all visitation to the Shire (based on a five-year average from 2016-2020). While the day tripper market does comprise an important part of the visitor economy, a more even balance is required between overnight and day trippers to derive greater economic benefit. Overnight visitors tend to contribute far more due to their spending on accommodation, additional food and beverage, transport, experiences etc. **By way of example, in the Shire, domestic day trippers, on average, spend $73 per trip, while domestic overnight visitors spend more than 3.8 this amount at $284 per trip.**
- Despite overnight visitors (domestic and international) only comprising 46% of total visitation to the Shire, they make up more than 79% of all visitor spend demonstrating their importance to the Shire's economy.
- As visitation to the Shire has fluctuated, so too has visitor spend. In 2020, total visitor spend was estimated at $46.6m, a decline of -4% (-$1.9m) from 2017, but an increase of +41% (+$13.6m) from 2014.
- The motivation for visitation to the Shire is fairly consistent across each visitor type, with VFR and holiday visitation being the predominant motivator of visitation.

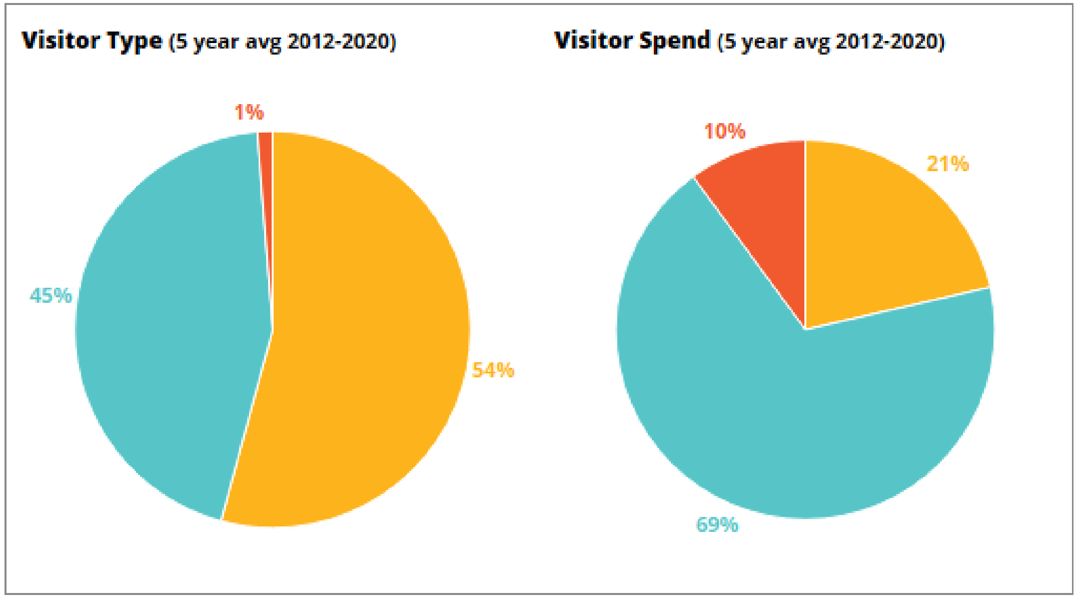
[3] All visitor data is compiled from a special data request to Tourism Research Australia (TRA).TRA obtain the data from the National and International Visitor Surveys.

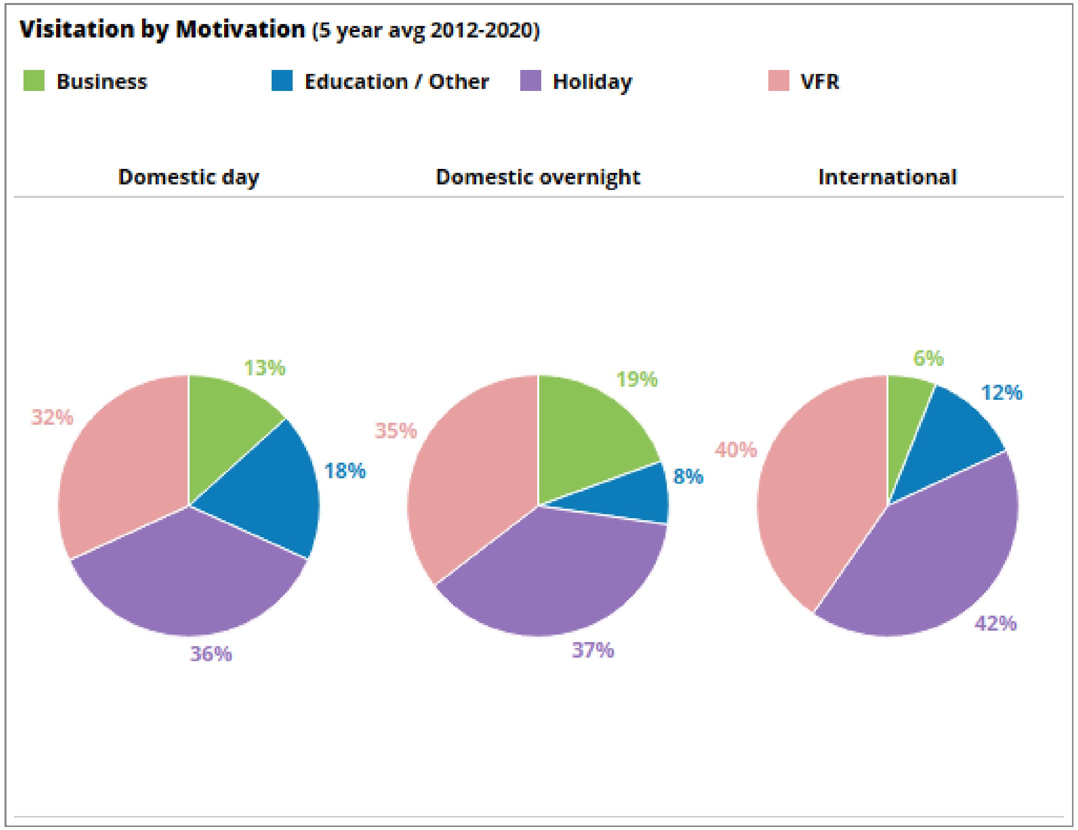
Upper Hunter Shire Visitor Profile

Figure 8: Upper Hunter Shire Visitor Profile









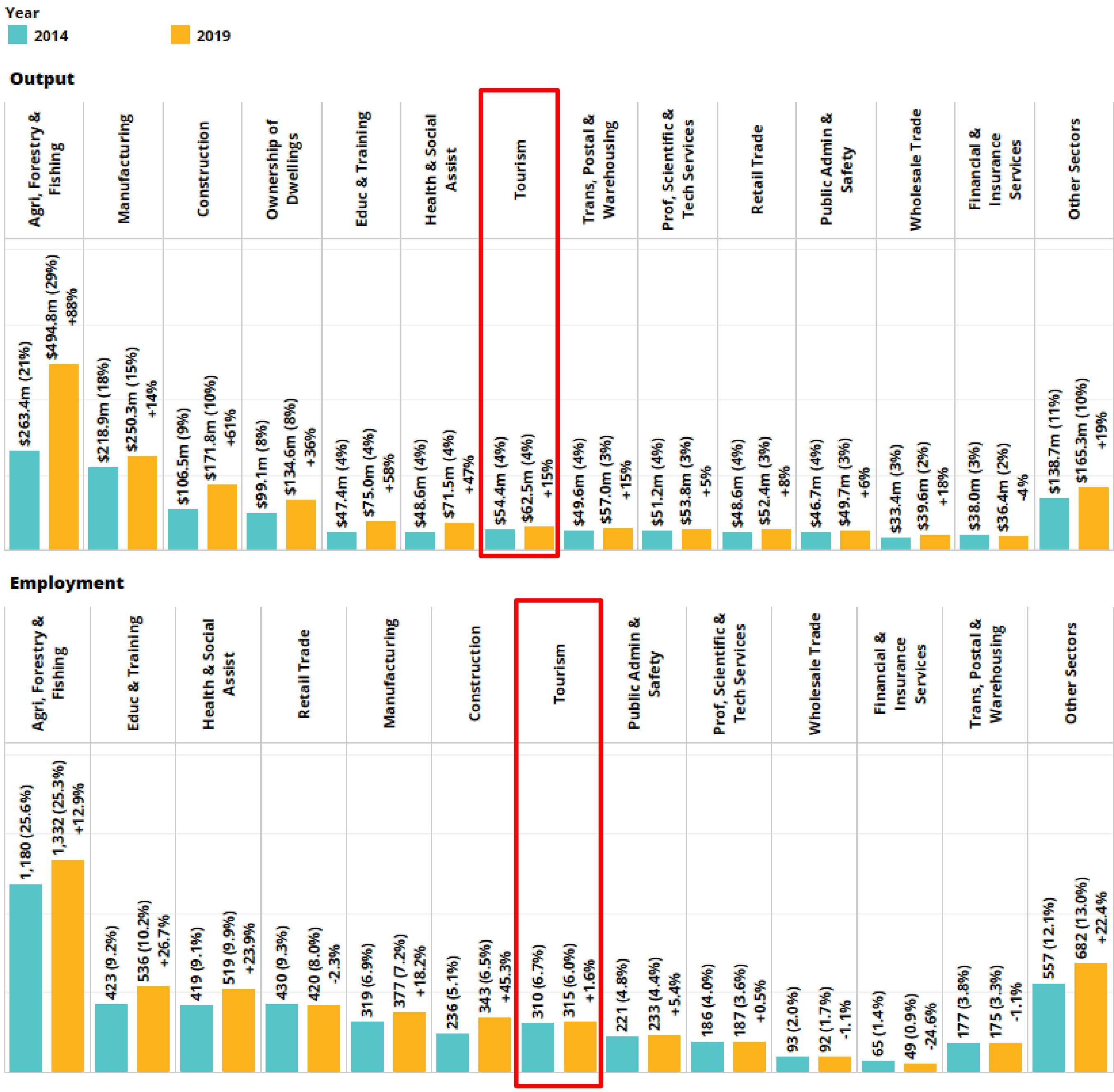
1.6.3. Economic Impact of Tourism

Tourism is an important sector for the Shire. In terms of economic output, it is the seventh-largest sector, contributing $62.5m in output in 2019 and totalling just under 4% of all output. Between 2014 and 2019, output by the sector grew by 15%.

The sector is also the seventh-largest employer, generating 315 jobs and comprising 6% of all employment within the Shire. While some sectors saw reduced employment between 2014 and 2019, the number employed in the tourism sector increased (albeit minimally) by 1.6%.

The largest sector for the Shire (in terms of both output and employment) is the Agriculture, Forestry & Fishing sector which dominates, comprising 29% ($495m) of all economic output and 25% (1,332) of all employment.

Figure 9: Economic Output and Employment by Sector (2014 & 2019)[4,5]



[4] https://app.remplan.com.au/upperhunter/economy/
[5] The "Other Sectors" category includes: Accommodation & Food Services, Administrative & Support Services, Arts & Recreation Services, Electricity, Gas, Water & Waste Services, Information Media & Telecommunications, Mining, Other Services, Rental, Hiring & Real Estate Services. These are much smaller sectors by output and employment and have been amalgamated for ease of reading.

1.7. Our Tourism Offering

1.7.1. Product Audit

1.7.1.1. Methodology

The following section provides a tourism product audit for the Shire. The purpose of the audit is twofold: firstly, to ascertain where product gaps may exist in the tourism product mix and secondly, to identify existing product strengths.

The audit is primarily based on an extensive 'data scraping' exercise which leveraged off the following sources: the Australian Tourism Data Warehouse's (ATDW), TripAdvisor, Booking.com, Google Travel, Google Maps and Upper Hunter Country Tourism's website.[6]

1.7.1.2. Accommodation Audit

The accommodation audit has focused on commercial forms of accommodation in the Shire. The rationale for investigating accommodation is to discern whether any gaps in the accommodation mix exist and potentially whether these could be investigated as opportunities as part of the DMP. Table 3 provides a summary of the categories utilised.

It is important to note that holiday homes and Airbnb have been excluded from the audit because they are often not available year-round and, as a result, overinflate the size of accommodation stock available. And there are also issues of quality control as there is no robust accreditation system for this sector.

Table 3: Accommodation Categories

Category
Apartments
Boutique (B&Bs, Cottages, Guesthouses)
Campgrounds
Caravan & Holiday Parks
Lodges
Motels
Pub Accommodation

When reviewing the audit, it is important to note that some properties are listed online across multiple categories. In these cases, Stafford has selected the most applicable category based on online information available.

For each property, the number of rooms was also included (where this information was provided)[7]. For caravan parks, only room numbers were included (such as those in cabins, chalets, villas). Site numbers have been excluded from the assessment as this data is difficult to obtain with accuracy.

The full listing of the accommodation audit findings is provided in Appendix 2.

Figure 10 on the following page summarises the findings of the audit and demonstrates the following.

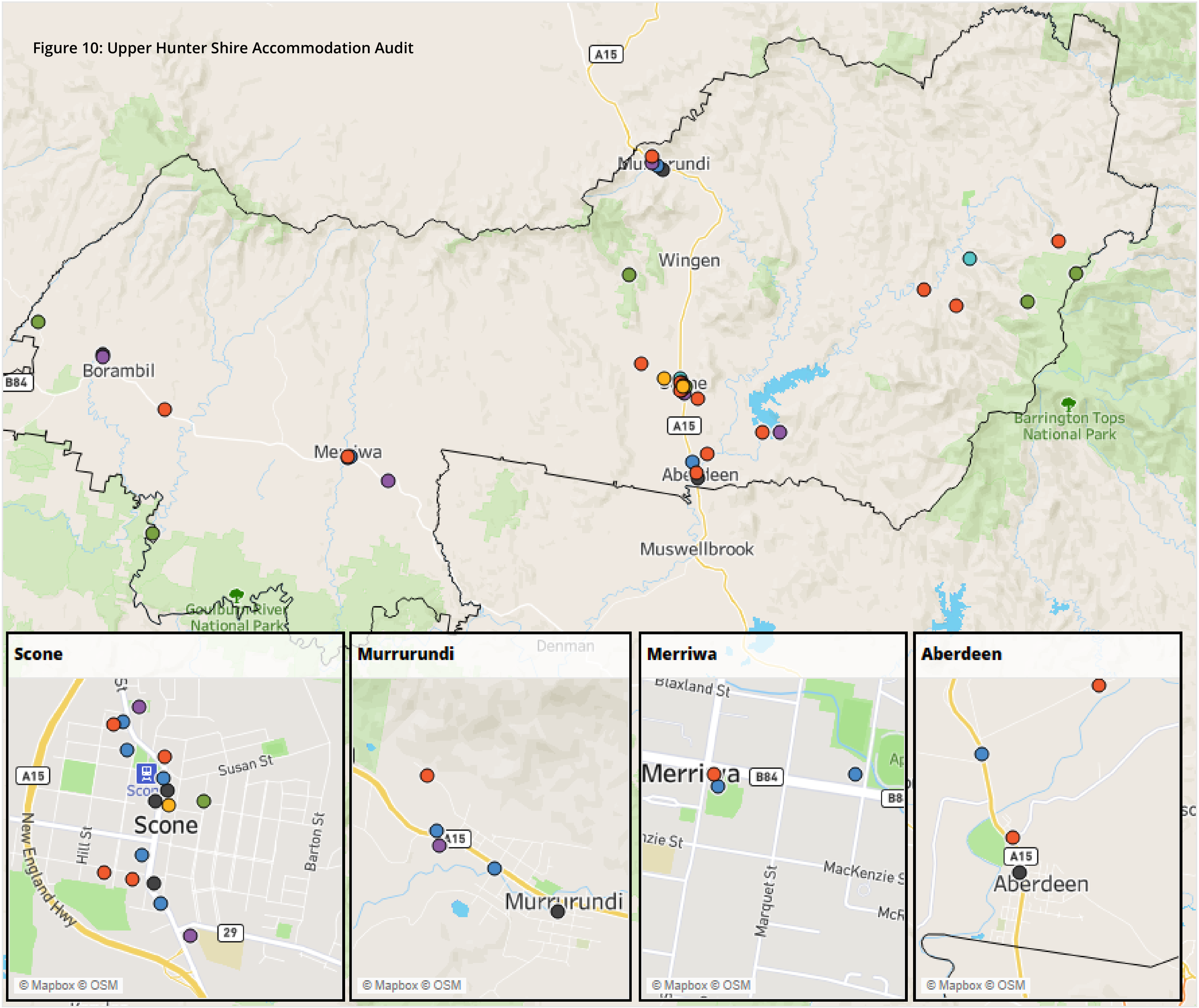
- Based on the audit, there are 47 accommodation properties and campgrounds in the Shire and 289 rooms[8].
- Of these 47 properties, the largest proportion is 'boutique (B&Bs, Cottages Guesthouses) comprising 32% of all properties identified.
- Motels, however, represent the bulk of room stock, comprising 55% of room stock (160 rooms) in the Shire.
- The largest property in the Shire (by number of rooms) is the motel property "Airlie House Motor Inn" which offers 25 rooms and comprises 9% of the Shire's total room stock. This is followed by Colonial Motor Lodge (24 rooms), Scone Motor Inn (19) and Isis Motel Scone (19).
- The Shire's accommodation stock receives an average (NPS)[9] score of +17. (based on 1,043 reviews). Breaking this down by accommodation type produces the following results:
  - Lodges: +89 (141 reviews);
  - Boutique (B&Bs, Cottages, Guesthouses): +51 (115 reviews);
  - Apartments: +30 (59 reviews);
  - Motels: +18 (based on 657 reviews);
  - Pub Accommodation: -17 (4 reviews);
  - Caravan & Holiday Parks: -18 (65 reviews); and
  - Campgrounds: n/a[10].
- Properties that score higher NPS (i.e. higher than +80) include Russley Rural Retreat (+100), Runnymeade (+100), LeCamah Hill B&B (+92.9), Golden Fleece Motor Inn (+91.7) and Strathearn Park Lodge (+89.4).
- Six properties within the Shire score NPS ratings of less than 0. Most of these are in motel and caravan park categories.

[6] It is important to note, therefore, that the audit may not be fully comprehensive, particularly for those operators who are not listed online.
[7] There were only two properties where room numbers were unable to be determined: Travellers Haven Backpackers Hostel and Moondarra Caravan Park Mount Isa.
[8] Note, room data was only available for 35 of the 47 properties.
[9] It is important to recognise that an NPS does not necessarily reflect a higher quality property. It tends to reflect, however, that the quality and product on offer, matches the price and consumer expectation.
[10] Not enough data was available.

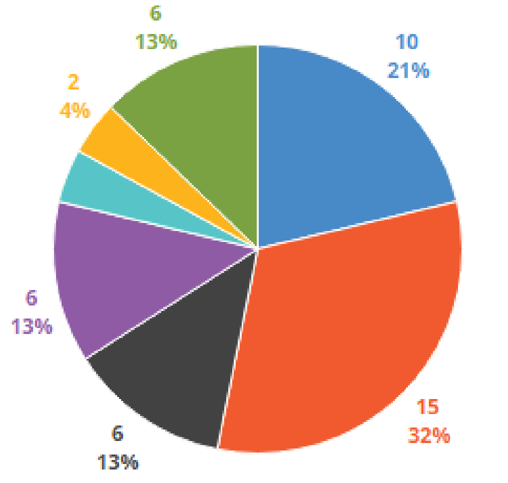
Accommodation Type

- Apartments
- Boutique (B&Bs, Cottages, Guesthouses)
- Campgrounds
- Caravan & Holiday Parks
- Lodges
- Motels
- Pub Accommodation

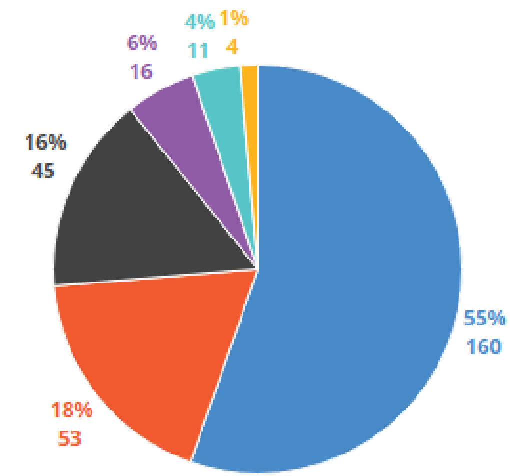
Figure 10: Upper Hunter Shire Accommodation Audit



Number of Properties by Type



Number of Rooms by Type



1.7.1.3. Tourism Attractions & Experiences Audit

Because the tourism sector is so far-reaching, there are many products, experiences and assets which can be considered tourism based. This audit, has, however, focused on those which are considered primary tourism experiences, that is, those which are marketed and positioned as "things to do" when visitors travel to the Shire. Those products/experiences which are primarily utilised by the local community have, therefore, been excluded.

To be able to derive qualitative and meaningful findings from the product audit, product has had to be listed within product categories. Table 4 summarises the attraction type categories used.

Table 4: Attraction type categories

Category		
Arts & Art Galleries	National Parks, Reserves & Conservation Areas	Waterfalls
Golf Courses	Scenic Flights	Watersports
Guided Tours	Stud Tours, Racing & Facilities	Wildlife & Conservation
Hiking & Mountain Biking Trails	Swimming Pools	Wineries & Breweries
Museums, Historical Sites & Landmarks	Visitor Information	

When reading the product findings, it is important to note:

- general parks are excluded from the audit because of the number of these throughout the region which would skew the findings;
- events have been excluded from the audit;
- general food and beverage (cafes, restaurants, bars), rather, the audit only focuses on unique food experiences such as distilleries, food tours, wineries etc. if these are available in the Shire;
- the audit does not provide an assessment on the quality of the product as this would require visiting each product which was not possible within the scope of this exercise;
- the audit does not list every historical building in the Shire but rather focuses on those which are identified as major tourism drawcards/sites of significance; and
- only those horse studs which have been identified as having tours are included in the audit.

The full listing of the attractions audit findings is provided in Appendix 3.

Figure 11 illustrates the findings of the attractions audit and demonstrates the following.

- Based on the audit findings, there are 65 tourism attractions in the Shire.
- Of these 65 attractions, the majority (23%) are categorised as 'Hiking & Mountain Biking Trails: these are free attractions. This is followed by 'National Parks, Reserves & Conservation Areas' (22%). Many of the hiking and biking trails are situated within these areas.
- Product is primarily clustered around: Scone, Murrurundi, Merriwa and Barrington Tops. There is little to do outside of these hubs/clusters.
- While there are many historic sites of significance throughout the Shire, these are yet to be activated into tourism drawcards.
- Although the Shire promotes itself as the horse capital of Australia, there are only a few studs that offer tours, and the supply of these is not always consistent. To market the Shire, from a destination marketing perspective, as the horse capital, there needs to be a consistent and year-round supply of equine product available.
- With agriculture being the largest economic sector for the Shire (in terms of employment and output), there is little by way of agri-tourism product available. This is a booming tourism sector, and, if possible, should be capitalised on.
- There are limited:
  - Paid tourism attractions within the Shire. Paid experiences are important for generating stronger economic benefit from the visitor economy by encouraging longer length of visitor stay and a stronger tourism profile.
  - All-weather experiences for visitors to undertake during times of inclement weather (too hot or during periods of excessive wet weather).
  - Family-friendly experiences for both visitors and locals alike to undertake.

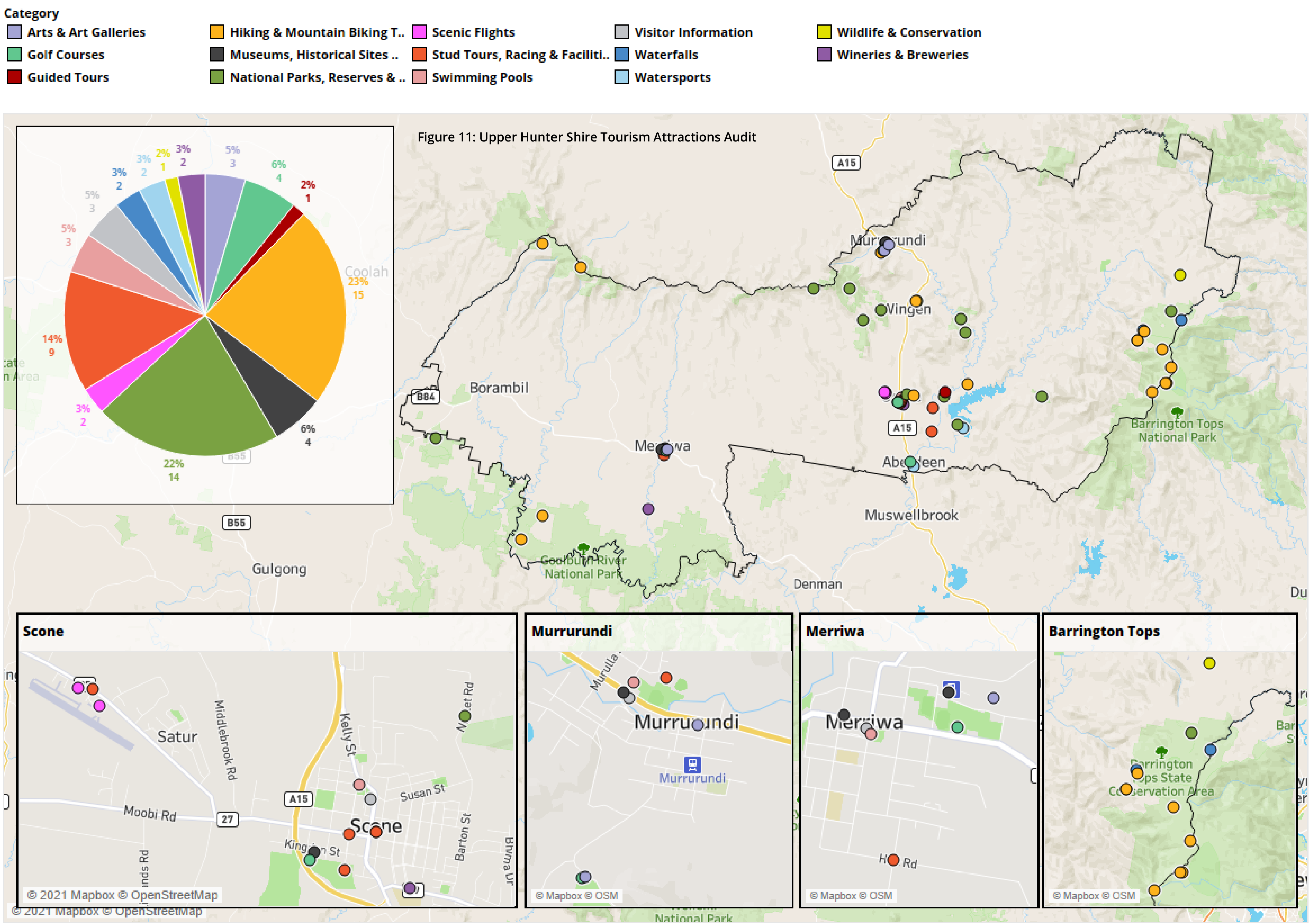


Figure 11: Upper Hunter Shire Tourism Attractions Audit

1.7.2. Gap Analysis

The following gap analysis is based on online data analysis of the region's product offering and (where applicable) the quality of this; discussions with industry and other stakeholders; and previous strategies/research that have been undertaken for the Shire.

It is an important component of this project as it provides an opportunity to step back and assess what, if anything, is missing to support growth in the Shire's visitor economy.

1.7.2.1. Accommodation

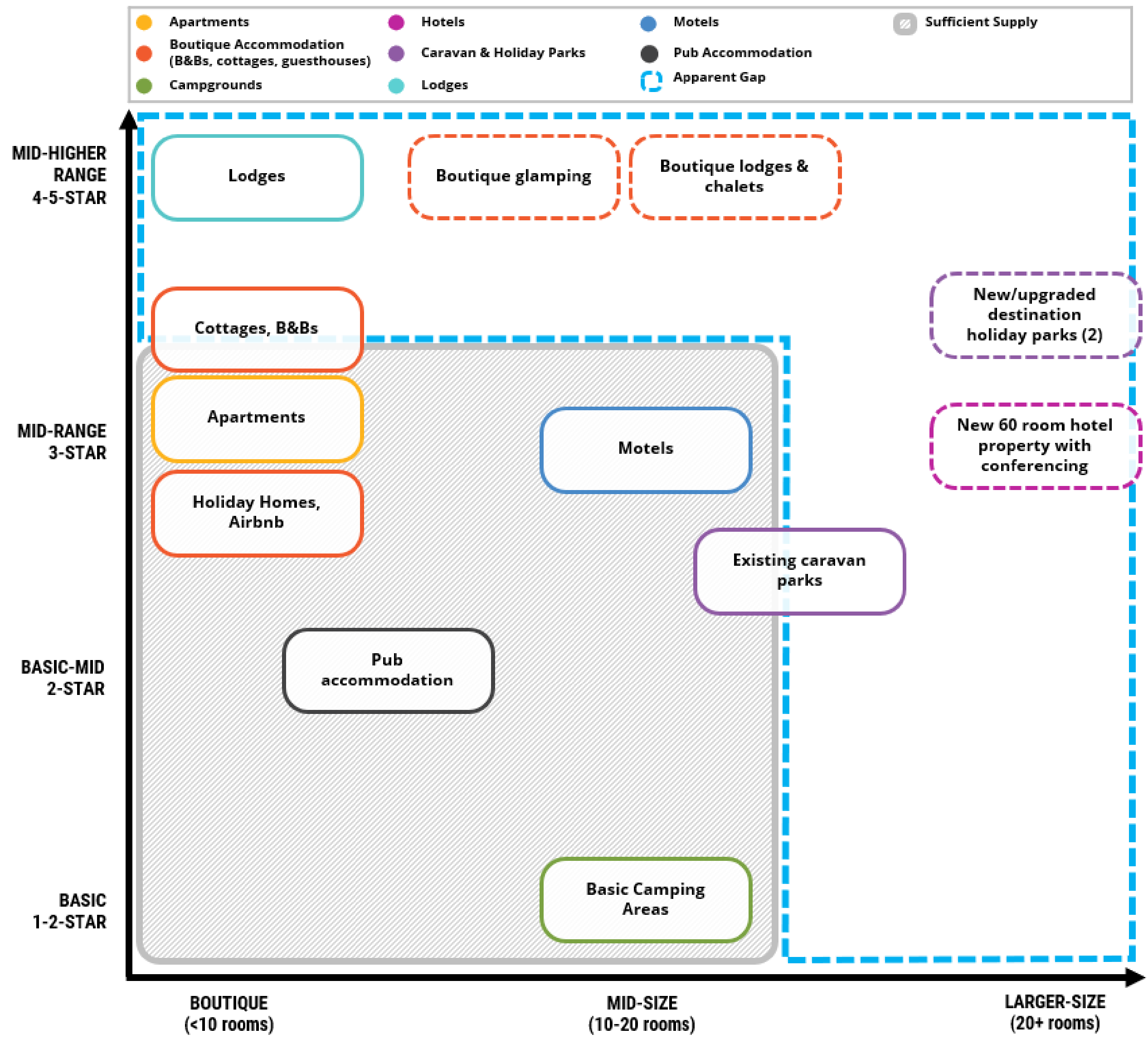
The audit undertaken, along with the research and consultation undertaken, indicates that while there are many accommodation options within the basic (1-2-star) and mid-range (3-3.5 star), there is a limited number of higher-quality (based on benchmarking) properties (boutique or larger size). There is also a limited number of properties that leverage the strengths of the region's geography and natural assets.

Figure 12 demonstrates the gaps identified in the accommodation mix. Opportunities exist to consider encouraging, by way of example:

- boutique-sized (10-20 rooms) higher-quality lodges, chalets and/or glamping in stunning natural locations;
- a larger-scale, 3.5-star+ hotel property in Scone to attract a higher-yielding business and family market and to provide greater accommodation capacity for events; and
- higher-quality, branded, destination holiday parks.

Importantly, it is not the intent that introducing new accommodation will compete with existing operators. Feedback indicates that there are many periods throughout the year where the Shire suffers from economic leakage to other LGAs because of a lack of accommodation capacity. By increasing the capacity of room stock and introducing new forms of accommodation, it is considered that new markets may be attracted to stay in the Shire who may have previously stayed elsewhere.

Figure 12: Accommodation Gap Analysis



1.7.2.2. Tourism Attractions & Experiences Gap Analysis

Figure 13 provides a gap assessment of the attractions and experiences sector in the Shire. As identified in the product audit, the Shire currently has a plethora of free product including (but not limited to) natural sites (such as national parks), trails and historic sites/attractions, but there is limited:

- commissionable (paid) product;
- all-weather tourism product and experiences particularly for those times of inclement weather;
- attractions which are focused primarily on families with children;
- evening-based experiences to encourage a longer length of visitor stay and to provide experiences which locals can enjoy;
- higher quality food and beverage offering;
- commissionable mountain biking product; and
- agri- and farm-based tourism product.

Nonetheless, Figure 13 demonstrates there is a range of attractions and experiences which could be developed throughout the Shire to deliver on the DMP's goals of:

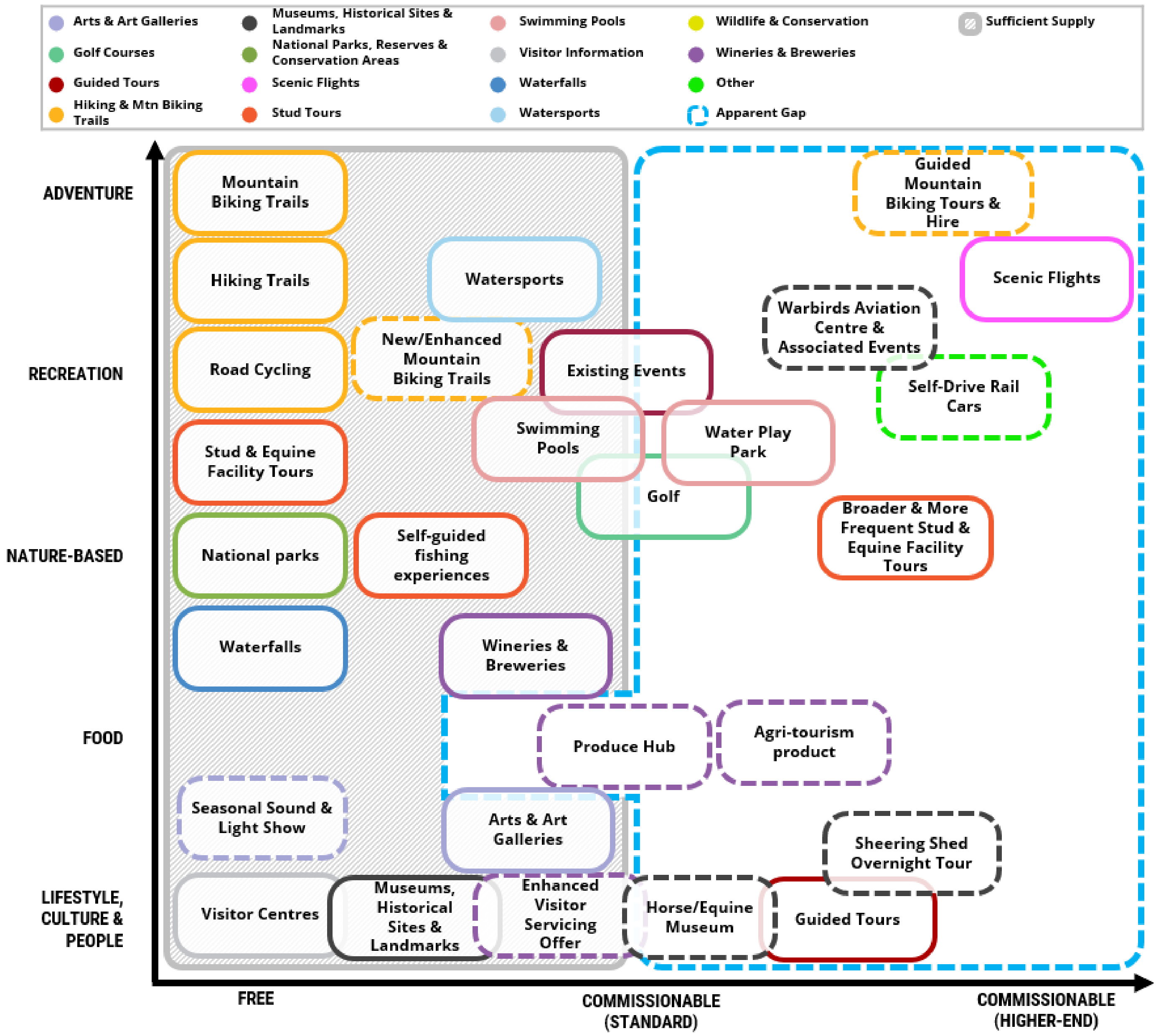
- Increase visitor numbers and dispersal in the region
- Extend visitors' length of stay in the Upper Hunter and visitor yield
- Develop new products and experiences and enhance existing product
- Focus on the identified experience platforms which match the strengths of the Upper Hunter: Agri-Tourism, F&B & Produce Arts, Heritage & Culture, Aviation, Equine, Events, Recreation & Adventure.

It is important to note that while some free product (i.e., non-paid product) has been included in the gap analysis, there is the potential/need to introduce commissionable experiences (such as guided tours and pop-ups) as part of these experiences.

This is seen as essential as, for example, whilst introducing mountain biking trails is a great recreational asset to support local communities as well as visitor markets, the estimated annual cost per kilometre of maintaining relatively flat trails to a good standard is $2k per km. Therefore, having ways to offset this ongoing maintenance and operational cost rather than expecting the Council to fund it directly is important.

Ways to help fund this may include via pop up cafes at trailheads, transport services to help get people back to starting points via a collection/pick up fee for service etc. and via events that ensure competitors pay an entry fee to help offset the cost.

Figure 13: Tourism Attractions & Experiences Gap Analysis



1.8. Barriers Impacting Tourism Growth

The barriers identified in the following table – which are alphabetically ordered - have been aligned with the destination management components of product development; infrastructure; governance; sustainability; and marketing & promotion.

Table 5: Barriers Impacting Tourism Growth in the Upper Hunter

Barrier	PRODUCT DEVELOPMENT	INFRA-STRUCTURE	GOVERNANCE	SUSTAINABILITY	MARKETING & PROMOTION
Ability to access skilled and trained staff					
Activation of built heritage	●		●		
Activating National Park areas	●	●		●	
Agriculture is a strength, but accessing the product is difficult	●				●
Competition from neighbouring regions	●		●	●	●
Consistency of interpretation and directional signage		●			●
Digital literacy of operators					●
Gaining agreement on acceptable levels of visitor economy growth				●	●
Lack of access to equine product	●		●		●
Lack of a clear destination brand (and confusion with Hunter Valley brand)					●
Lack of coordination, collaboration & structure			●		
Limited all-weather charge-for visitor experiences	●				●
Limited commissionable tourism experiences	●			●	●
Limited community awareness of the importance of tourism				●	●
Limited critical mass population to support viability		●			
Limited evening activities to grow overnight visitation	●			●	●
Limited export-ready product	●				●
Limited funding for marketing			●		●
Limited higher-quality accommodation stock	●			●	
Limited number of family-friendly visitor experiences	●				●
Limited retail trading hours					●
Limited tourism investment flows	●	●			
Market perception that the region is a “drive-through” than an overnight destination					●
Regional visitation data challenges	●				●
The impact of the bypass		●			●
Variable F&B quality and diversity	●				
Volunteer burnout risk			●		
The impact of surrounding regional mining activity on environmental quality and regional image	●			●	●

PART 2: WHERE DO WE WANT TO BE?

2.1. Our vision & mission

The Upper Hunter DMP vision is to strengthen the visitor economy within the Upper Hunter through introducing more unique new and improved product opportunities which will generate investment and employment.

The Upper Hunter DMP mission is to motivate stakeholders to work collaboratively to strengthen the key areas of the Upper Hunter through greater product diversity and associated marketing and investment.

2.2. Goals & Objectives

Underpinning this vision and mission statement are DMP goals and objectives guiding principles. These are indicated in Figure 14 and have been used to help shape this DMP.

Figure 14: DMP Goals & Objectives

VISITOR NUMBERS & DISPERSAL

Increase visitor numbers and dispersal in the region

LENGTH OF STAY

Extend visitors' length of stay in the Upper Hunter and visitor yield

NEW PRODUCTS & EXPERIENCES

Develop new products and experiences and enhance existing product

EXPERIENCE PLATFORMS

Focus on the identified experience platforms which match the strengths of the Upper Hunter: Agri-Tourism, F&B & Produce Arts, Heritage & Culture, Aviation, Equine, Events, Recreation & Adventure.

2.3. Experience Platforms

The following experience platforms sit under the "product development" destination management component and have been used to guide the identification of product and experiences. They leverage off the Upper Hunter's existing natural assets and product strengths as well as opportunities that have been identified.

The rationale for the experience platforms selected is as follows:

- Agri-tourism and farm-based product and experiences are a natural strength of the region with its focus on agriculture and horticulture. What is needed is to grow the "paddock to plate" experiences so fresh farm produce becomes a hallmark of the region whether this is beef, dairy products, veggies and fruit, more exotic produce and condiments.
- Arts, heritage and culture can build on the existing strengths especially in Murrurundi with its various art galleries and cultural focus.
- The new Hunter Warbirds attraction in Scone will offer an exciting new visitor attraction and will help leverage partnerships with other major attractions in a far wider regional catchment so collective marketing can occur with attractions in Hunter Wine Country and potentially attractions/experiences in the mid-north coast and around Newcastle.
- The strong equine focus provided by the thoroughbred studs in the region along with pony club activities etc provides a logical strength to build on and to help open up equine experiences more so the visitor markets can see and experience horse trails etc.
- The existing events provide an important platform leveraging of events including the Aberdeen Highland Games, the Horse Festival in Scone amongst a number of others, and the opportunity to expand these and add other festivals and events where possible.
- The development of quality recreational and adventure activity such as cycleways, walking trails, equine bridle trails and lake-based kayak trails. Whilst the Barrington Tops provides a number of trail options the area isn't generally accessed from the Upper Hunter so the region needs to be thinking about alternative sites and venues for adventure experiences.

Figure 15: Experience Platforms

PART 3: HOW WILL WE GET THERE?

3.1. The Opportunities

3.1.1. Overview

A variety of recommendations have been identified through this DMP process. They have been included because they:

- mitigate or overcome the barriers to growth;
- assist in activating the identified destination vision and goals;
- align with broader destination management work completed, particularly the DNSW State wide DMP;
- provide the necessary building blocks to develop a sustainable visitor economy; and/or
- offer the potential to grow the visitor economy sustainably, focusing on growing visitor yield rather than just visitor numbers, and maintaining community support (and a social licence for tourism activity) going forward.

The recommendations have been identified through input and ideas received from numerous stakeholders during the consultation for this DMP as well as through analytical and strategic work completed. They have been grouped according to the destination management components outlined in Section 1.3.

Importantly, each of these recommendations will have varying degrees of impact on the Shire's visitor economy. In order to prioritise the recommendations, an assessment matrix has been developed which measures, at a top-line level, each recommendation's ability to meet certain criteria (such as the ability to secure government funding, likely visitor appeal, size of investment and uniqueness of product etc.). The viability of many of these recommendations will require feasibility studies and business cases developed to test assumptions and find specific locations.

Figure 16 on the following page provides a summary of the 39 recommendations identified. The recommendations are in indicative locations only, noting that some will commence before others, and this may, over time, impact on the proposed locations identified for other recommendations.

This is followed by a closer look at each recommendation, categorised according to the destination management components identified earlier.

Location-Based Opportunities	
1.1-1.2	Boutique Accommodation Properties
2.1-2.2	Destination Holiday Parks
3	Development of Bike Packing Tours
5	Coordination of Thoroughbred Stud Tours
7	Glenbawn Dam House Boats
8	Horse/Equine Museum
9	Merriwa Carp Fishing Competition
10	Merriwa Self-Drive Rail Buggies
11	Murrurundi Public Cultural Facility (Museum/Gallery)
12	New 60-room Hotel Property at Scone With Conferencing
13	Regional Product Showcase Hub
14	Recreational Attraction (zipline, Treetops Adventure Course etc.)
15	Reopen Hunter Valley Museum of Rural Life
16	Sea Plane Charters From Rose Bay to Glenbawn Dam
17.1-17.4	Seasonal Sound/light Shows Profiling Key Towns
18	Shearing Shed Overnight Tour Product
19	Upmarket Lodge & Villas (Scone/Aberdeen)
20	Warbirds Aviation Centre & Associated Events
23	Glenbawn Dam Master Plan
24.1-24.4	Implement the Tourism Components of the Revitalisation Strategies

Regional Opportunities (i.e. no specific location)	
4	Evening Based Activities (Light Show, Music Event, Progressive Dinners)
6	Expansion of Existing Major Events
21	Biking Expansion Master Plan
22	Coordinated Signage Strategy
25	Visitor Information Servicing Strategy
26	Creation of a Tourism Advisory Group
27	Rotational Roster for F&B Providers
28	Tourism Industry Networking Events
29	Tourism Training & Capacity Building
30	Local Community Visitor Economy Awareness Campaign
31	Visitor Management
32	ATDW Listing Drive & Keep This Up to Date
33	Destination Branding
34	Destination Content Creation
35	Destination Events Calendar
36	Destination Events Strategy
37	Development of Regional Events Toolkit
38	Enhanced Destination Website
39	Product Packaging

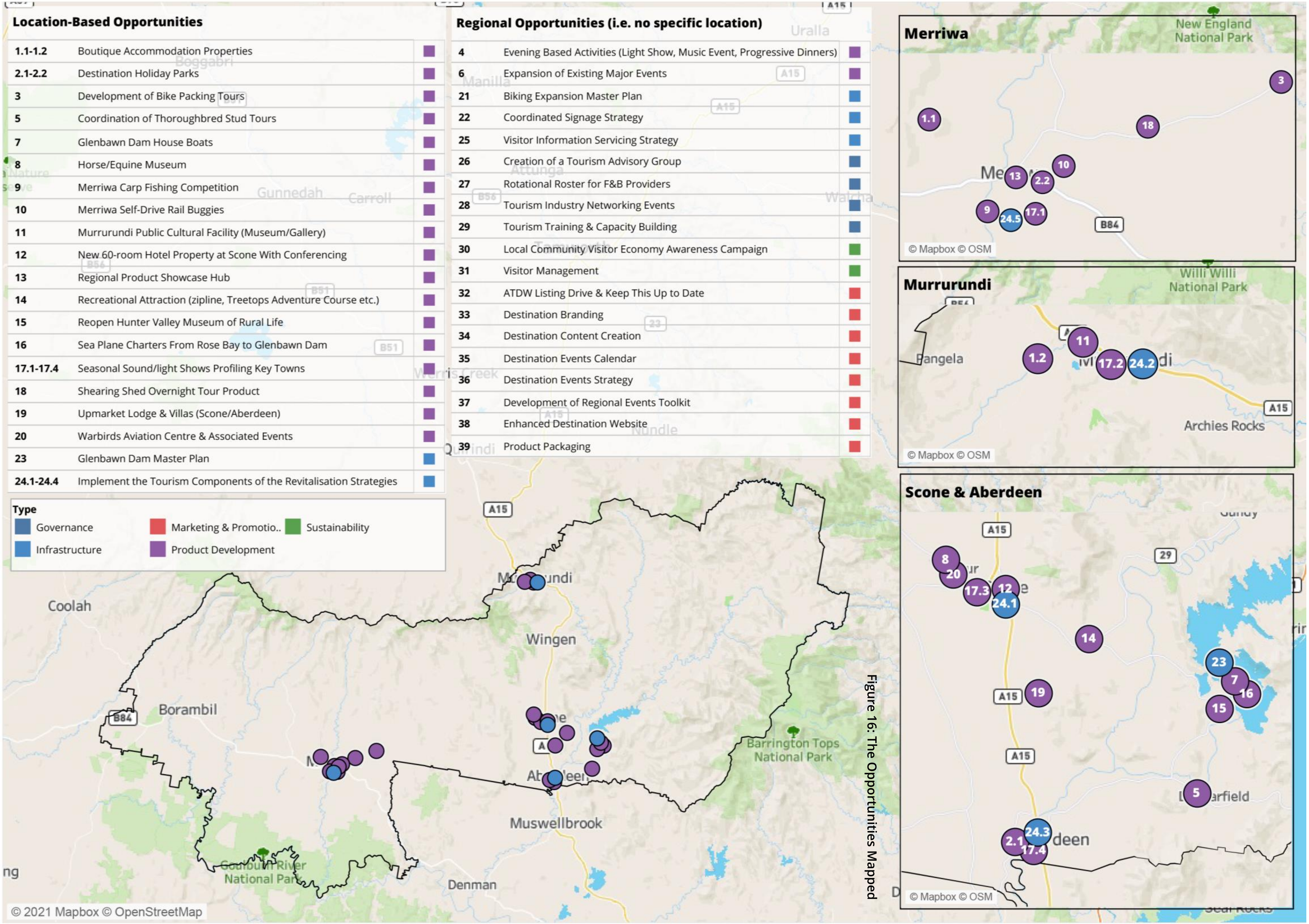


Figure 16: The Opportunities Mapped

Destination Management Component

ONE

PRODUCT DEVELOPMENT

3.1.2. Product Development

3.1.2.1. Boutique Accommodation Properties (Merriwa & Murrurundi)

With the region's desire to attract a higher-yielding visitor market (focusing on value over volume), there is a need to introduce accommodation which appeals to this market. As identified previously, while the Shire has a plethora of accommodation that caters to the 1-3.5-star market, there is a limited number of higher-end properties.

The opportunity exists to investigate the potential of introducing new, small-scale boutique accommodation properties. Although it is beyond the brief of this DMP to determine specific locations for this accommodation, opportunities for this form of accommodation may exist in Merriwa and Murrurundi.

The accommodation, which is ideally situated on a prominent site, could:

- offer 10-30 rooms/units/chalets;
- be positioned as good quality mid-range 3-4 star;
- ideally, utilise an existing heritage or similar building to be retrofitted where possible;
- offer a quality dining experience which can be used by guests as well as locals as casual diners; and
- potentially be positioned at the staging post for the walking/cycle trails offered in the Shire.

The accommodation could be set up as a year-round venture or could be offered as pop-up or seasonal glamping product. Figure 17 provides some examples of boutique accommodation and glamping in other Australian destinations.

Figure 17: Examples of boutique accommodation[11]



3.1.2.2. Destination Holiday Parks (Aberdeen & Merriwa)

Although the Shire does have some camping and traditional caravan parks, these tend to be traditional transit-style caravan parks and natural camping grounds. Often transit-style caravan parks have basic facilities and are used as overnight accommodation when travelling between two destinations, rather than being destinations in their own right. Figure 18 provides some examples of traditional style caravan parks.

Figure 18: Examples of traditional-style caravan parks


[11] Saltbush Retreat, Longreach, QLD; Ilkley Cottages, Mudgee, NSW; Nightfall Camp, Lamington National Park, QLD.

Figure 19 illustrates a newer style of caravan and camping parks referred to as destination holiday parks. These parks tend to be operated by major operators and offer a mix of facilities to guests such as swimming pools, aquatic parks, kids clubs, camp kitchens, mini-golf, group entertainment and shops etc. These parks often attract a family market who use the parks as a base for day excursions to surrounding regions. They are important for attracting a good quality mid-range domestic family market and need to have policies that avoid long term stayers.

Figure 19: Destination holiday park examples[12]

In Australia and the USA, the domestic caravan, motorhome and camping industry has been fast-growing over the last 15 years. Savvy operators are responding to consumer demand for better standards and facilities by transforming traditional transit parks into quality holiday/destination parks. They are characterised by:

- land area of 8 ha. or greater (able to be leased ideally for a minimum of 40 years + or purchased);
- a mix of powered RV and camping and caravan sites (often 50-150 sites);
- often 15-30 quality cabins/chalets;
- a strict focus on visitors rather than permanent residents;
- a family-friendly focus to attract the family market and to convert day trips into overnight stays;
- offering a range of quality recreational activities geared to families so water park features, rope courses, heated pools etc;
- amenities such as a heated pool, spa, BBQ facilities, camp kitchen, bike hire/loan, kids' playground, daily children's activities, a café and a convenience store;
- retail and restaurant facilities with capacity for self-catering as well;
- operators are often comfortable purchasing or leasing sites, as long as lease periods are 40 years plus;
- good access to and from main roads is important for gateway signage and safety; and
- do not permit longer-term stays (most would be 1-5 nights).

If the Shire is to attract a domestic leisure market and encourage regional touring routes to help offer visitors the chance to experience a multitude of destinations and experiences within the region, a network of 1-2 destination holiday parks should be considered. Ideally, these could be considered for:

- Merriwa: because of its strategic location on the Golden Highway, its central positioning (it is 2 hours from Dubbo, Tamworth, Newcastle and Gunnedah and 1.5 hours from Mudgee) and its ability to cater to a market travelling between Newcastle, Dubbo and further west; and
- Aberdeen: because it is one of the few towns which will not be bypassed and travelling north, it will be the first major town post the Singleton & Muswellbrook bypasses & the last before the Scone bypass

Zoning land fit-for-purpose, and ensuring utility services (electricity, gas, mains sewer system, potable water, Wi-Fi, and telecommunications) are brought to the boundary of sites, are important areas of support which councils need to look to be offering.

Possible site options to consider may include:

- Aberdeen (Saint Andrews Reserve or the meatworks site) as it isn't going to be by-passed on the highway
- Possibly expanding the Merriwa caravan park if possible though the site appears tightly constrained by the river and surrounding area

[12] Deniliquin Holiday Park, NSW; BIG4 Adventure Whitsunday Resort; Port Fairy Holiday Park, VIC

- The region may be able to sustain two destination holiday parks with a new one in Merriwa to service the Golden Highway through to Dubbo and the Aberdeen destination holiday park to service the traffic on the New England Highway.
- Both of these projects for Aberdeen and Merriwa are likely to be catalyst projects to support ongoing and sustainable tourism growth in both towns.

3.1.2.3. Evening Based Activities (Light Show, Music Event, Progressive Dinners)

Currently, there is little evening-based product for both visitors and locals to enjoy. The success of the recent evening Christmas on Kelly Street event demonstrates that demand does exist, particularly from a local market, for evening-based product.

The potential exists to investigate seasonal:

- twilight concerts and cultural shows;
- dining experiences associated with shows/performances;
- evening walking tours (heritage tours etc.);
- outdoor dining experiences; and
- food and wine events and night markets offering food stalls etc.

Figure 20: Evening Activities[13]

3.1.2.4. Glenbawn Dam House Boats

Glenbawn Dam is a popular recreational boating destination for locals and visitors. There is currently caravan park-style accommodation available at the Dam, but the opportunity may exist to introduce houseboats on the Dam to offer an alternative and unique form of accommodation. Alternative accommodation options need to be considered to elevate the significance of the waterway and its potential as a larger drawcard area.

[13] Sounds of Silence, NT; Brisbane Night Noodle Markets; Thanksgiving Point Evening Summer Concerts, Salt Lake City and Port Arthur Ghost Tour, TAS.

3.1.2.5. Murrurundi Art Gallery and Indigenous Centre (MAGIC)

There is currently no public gallery/museum in Upper Hunter. With the strong art focus in Murrurundi, the potential exists to develop a Murrurundi Art Gallery and Indigenous Centre for the Shire. This could act as a hub for the cultural and arts-based events which Murrurundi currently hosts and could also be a location for workshops and tours to help encourage greater overnight visitor stays and higher visitor yield potentially through:

- Attendance at art-based symposiums
- Art classes and programs
- Art-based festivals and events
- Wider cultural-based activations which could include heritage and history, artisan and food-based opportunities and training and upskilling in multi-art forms
- a technology-based 4D attraction to help tell regional stories and
- Offering a café and retail outlet.

Council have secured funding for a business case and we understand the basic concept has been formulated. Murrurundi is an indigenous word thought to mean '5 fingers' due to the surrounding mountains. Although there is no evidence of the Murrurundi area having indigenous dwellers it is widely thought to have been a meeting place and, in that context, perfect for MAGIC – Murrurundi Art Gallery & Indigenous Centre (5 letters/5 fingers etc).

MAGIC, as planned, is intended to be an innovative space consisting of (proposed) Gallery, Library, Café/gift shop and a theatre space that applies cutting edge 4D technology. The vision is for MAGIC to be a major learning experience and tourism hub.

It is understood that there is a loose concept for the design of the building to resemble the five fingers/mountains, and one suggestion was that silo's be used. The ability to move forward with the project is dependent on a positive business case being proven. It is also understood that the project concept is supported by the Wanaruah Lands Council and the Murrurundi Arts & Crafts Society.

3.1.2.6. 60-room Scone Hotel with Conferencing

- 60 room, 3-star hotel for Scone with conferencing, there to grow and leverage the warbird attraction, the proposed Racing NSW horse centre and wider regional events

The Shire is characterised by an abundance of motel stock, supported by the occasional caravan park and a mix of B&B and smaller properties. The commercial accommodation typology across the region is under-represented in various forms including boutique mid-range and better-quality hotels and lodges, newer style destination holiday parks, and more premium quality hotel stock.

While the motel sector fills much of the mid-market demand, to attract higher-spending visitor markets, there is a need for a larger scale (approximately 60 rooms), 3-4-star hotel property. Feedback received from industry operators also indicates that the Shire often suffers from economic leakage during major events because of the lack of room capacity in general and because of the lack of a larger scale accommodation property. Event attendees end up staying in Hunter Wine Country and commuting to and from Upper Hunter events and festivals which creates noticeable economic leakage.

The larger-scale property could also provide a much-needed conference facility to cater for circa 120-150 patrons.

It is understood that investigations are currently underway looking at the development of a new hotel property situated in Scone though nothing concrete has been provided to date on a site or possible operator. And we note that The Golden Fleece Hotel in Scone has been purchased by a Sydney based investor and is to be converted into a 38 room boutique hotel.

Importantly, additional quality 3-4 star room stock may also provide greater confidence to other investors as the investment commitment is often a trigger for other tourism developers and investors to consider other forms of investment such as new or extended attractions, new food and beverage facilities (cafes and restaurants), transport operations, retail etc.

3.1.2.7. Seasonal Sound/Light Shows Profiling Key Towns (Rotational)

Heritage tourism is considered an opportunity for the Shire, strengthened by the selection of historic buildings throughout the region and its historic shearing sheds. Opportunities to create interactive experiences to showcase this history need to be investigated and could include developing a seasonal evening heritage experience that capitalises on the historic architecture that the Shire has to offer.

Figure 21: Adelaide Fringe Festival (North Lights Terrace Show), Vivid Sydney and IlluminARTe (Picton, NSW)

The success of major light shows such as Vivid Sydney and the popularity of sound and light shows such as the Tower of David (Israel) and the Blood on the Southern Cross (Ballarat) illustrates that, with the right product and technology mix, heritage stories can be brought alive and made more interesting.

For the Shire, the following experiences could be investigated.

- Light shows on historic buildings which could tell a series of stories and potentially rotate annually through the different towns; and
- An "Upper Hunter after dark" trail experience that links a number of heritage properties and a food experience together offering visitors a progressive dinner. Essentially, visitors could complete different meal courses at a range of eateries (including pop-up eateries) around a specific part of the LGA while also stopping at historic properties on their way to the next course. Each stop would be marked and could provide an interactive historic experience either via a guide or via a short audiovisual experience (5-10 minutes).

Importantly, these types of experiences will help stimulate visitors to get out during the evening; to walk, dine and experience the unique and history of the Shire. Even if locals are reluctant at times to go out in the evenings, regional visitors may provide a stronger visitor market.

3.1.2.8. Shearing Shed Overnight Trekking Tour Product

The Shire has a number of sheering sheds with extensive history and many interesting stories. The opportunity exists to create a unique guided touring product that takes visitors on a multi-day journey to visit several of these sheering sheds and potentially other sites of significance. The experience could include:

- staying at one of the shearing sheds in either dedicated accommodation or potentially in swags;
- authentic Australian outback cuisine;
- cycling between stopping points or trekking; and
- a tour guide who provides stories and interactivity throughout the journey.

Figure 22: Brindley Park Woolshed, Merriwa

3.1.2.9. Regional Produce Showcase Hub

The region is a highly developed agricultural region, with the sector being the largest for the Shire in terms of output (comprising 27% of total output), exports (totalling 45% of all exports) and job creation (26% of jobs are in the sector).[14] Importantly, it is not just the Shire that is an agricultural hub, but also many of the surrounding areas have strong agricultural focuses. The Shire's traditional agricultural focus has been on cattle, crop, pig, poultry and sheep; however, the Shire also has an increasing number of vineyards, small producers (as well as those value-adding to produce) and supports a cattle abattoir which supplies the Australian and overseas markets.

While the LGA's agricultural products are clearly of exceptional quality, it is not necessarily easy to find places to purchase them, to sample them and to package them up and take them with you.

What is needed is a larger-scale and well-marketed regional facility which can provide a retail outlet to showcase the best of the Upper Hunter (and surrounding regions) produce, and in so doing, offer a hub for:

- displaying seasonal meats, oils, cheese, condiments, nuts etc.;
- offering tastings so groups and can try before purchasing;
- potentially offer a seasonal cooking school and a base for cooking competitions with local and visiting chefs;
- regular farmers markets;
- to act as a regional hub and coordination point for various agri-tourism experiences including farm visits; and
- a café/restaurant venue to help increase the critical mass of facilities available to support a local market as well as encouraging more visitor markets.

Although it is understood that a small-scale version of a similar facility exists in Merriwa (The Hut), the potential exists to expand on this concept and make it a major regional showcase facility with far wider market appeal.

Importantly, the facility is not just limited to showcasing the Upper Hunter Shire's product: visitors do not recognise local government boundaries. It could showcase the highest quality produce from around the broader region.

- Campbell's Corner (Aberdeen) - using this as a hub for tourism information, pop-ups, central location to buy local produce etc. it's smack bang in the middle of town, will bring people into the centre of town, has parking out the back, will encourage people to walk to other shops
- Chocolate Licorice factory, such as the one in Junee in the Murrumbidgee region as a good example of a facility driving strong visitation to a more regionally remote location
- A whisky shop in Aberdeen would be a potential idea (Scottish). However, it is noted that whisky takes a long time to mature apparently, while gin is apparently much quicker. Hence why the operators in Murrurundi have focussed on a gin distillery (https://www.magpiedistilling.com.au/)

[14] https://app.remplan.com.au/upperhunter/economy/industries/

3.1.2.10. Merriwa Self-Drive Rail Buggies

The Merriwa railway line, which extends 35km from Merriwa Railway Station to Sandy Hollow, was closed in 1988. Since then, several attempts have been made by heritage railway groups to reactivate the line for steam-based excursions, however, for a variety of reasons, this has been unachievable.

While steam train experiences can be exciting, re-establishing lines to be of sufficient quality and standard to cater to steam, particularly when they have been disused for an extended period is often extremely capital intensive.[15] There are, however, other, more innovative ways in which disused rail lines can be activated for use. One example of this is through self-drive rail buggies, which require far less work to re-establish the line because they are significantly lighter. These can be in non-automated (peddle) or automated (golf buggy style) format and enable visitors to explore the rail line via a self-drive experience.

Figure 23 provides a best practice example of self-drive rail buggies in New Zealand which are situated on a 100-year-old rail line that was decommissioned in the 1980s. The attraction offers experiences of varying lengths (5.5 hours, 10 hours and two days) and includes a ploughman's lunch at the turn around point. It receives over 9,000 visitors a year and employs 35 seasonal staff.

We note that the rail line from Merriwa to Sandy Hollow is approximately 35km in length which could offer a 3.5-hour experience. There is also an alternative which is far shorter at 10km to take visitors on a 1-hour excursion. Further analysis of the route would be required as we understand:

- Parts of the rail line would need replacing and or reintroduction
- Parts of the alignment would need vegetation to be cleared and
- It is unclear whether there may be a need for bridges etc to be reintroduced.

Figure 23: Best practice example (Forgotten World Adventures, NZ – non-automated and automated examples & lunch station)

[15] Based on work Stafford has completed for Transport Heritage NSW

3.1.2.11. Recreational Attraction (Zipline, Treetops Adventure Course etc.)

As identified in Section 1.8, there is little family-friendly product in the Shire for both a local and visitor market to undertake. Leveraging off the high-quality natural environment, the potential exists to investigate introducing a recreational experience/attraction which could appeal to locals and visitors. Such experiences could include (see also Figure 24):

- zip lines;
- treetop canopy walkway;
- luge experience;
- outdoor adventure playground;
- treetop adventure course; and
- outdoor bike park.

Figure 24: Best practice nature-based and recreational experiences

TreeTops Sydney, NSW
Which has leveraged off the natural trees to develop the experience

SkyPeak Adventures, NSW
Which is a man-made treetops/aerial experience and demonstrates that a heavily forested environment is not necessarily needed for an aerial park

Gallagher Bike Skills Park, Waikato, NZ
Which is a high-quality bike skills park situated in a regional area and clustered next to other bike-related activities.

Fairfield Adventure Park, NSW
Which is a high-quality, regional adventure park playground which attracts a local and broader visitor market. it includes a 33m double flying fox and 11m high climbing net.

3.1.2.12. Development of Bike Packing Tours

It is understood that bike packing is becoming increasingly popular in the Shire and broader region. The opportunity exists to investigate the development of several bookable multi-day bike packing itineraries/tours which include routes, accommodation (primarily in boutique accommodation and pubs) and meals.

3.1.2.13. Expansion of Existing Major Events

There are a number of existing successful events which the Shire hosts. Feedback received indicates the potential to expand the following events through the addition of extra programs and/or competitions:

- Aberdeen Highland Games;
- Scone Horse Festival;
- Scone Literary Festival;
- Le Tour de Merriwa;
- Merriwa Festival of the Fleeces; and
- The King of the Ranges Stockman's Challenge & Bush Festival.

An assessment should be undertaken to identify how/if these events could be expanded (particularly focusing on growing the number of days/nights the events run for to encourage increased overnight visitation) and whether event grant funding exists to assist with expansion.

3.1.2.14. Reopen Hunter Valley Museum of Rural Life

The Hunter Valley Museum of Rural Life is situated near Glenbawn Dam and was originally opened in the 1960s. In 2004, the Museum was only open by prior arrangement and since 2010 the Museum has been permanently closed. It is understood the Museum has a number of artefacts that depict the everyday rural life in the Hunter Valley. These include carriages, carts, a horse-drawn hearse, ploughing implements, implements used for winemaking, butter making, various tools, household items, washing machines, sewing machines, lamps, irons, musical instruments etc.[16]

An investigation should be undertaken looking at the potential to reopen the Museum. It is understood that some artefacts have been exposed to the weather and may need restoration. And consideration may need to be given to potentially relocating the museum's artifacts to a location that is easier to access and which offers a more central facility such as in Scone or Aberdeen.

3.1.2.15. Warbirds Aviation Centre and Associated Events

The funding for this new major visitor all-weather attraction has been secured from State Government and other sources and construction is expected to be completed by December 2021. It will provide the opportunity for not only year-round visitation as an interactive experience attraction (providing hands-on simulators, audiovisual experiences and the chance to go up in an aircraft) but also for several annual and major events and festivals.

The facility will act as a major drawcard for the region and provide a further compelling reason for various visitor markets to come to the Upper Hunter.

3.1.2.16. Seaplane charters from Rose Bay to Glenbawn Dam

Through the upgrading of facilities at Glenbawn Dam as proposed by Reflections Holiday Parks, the potential may exist to investigate the introduction of seaplane charters and excursions from Sydney to the dam lake. With the upgrading of the airport at Scone, the option of landing at the airport (as opposed to on the dam lake) also exists in times of inclement weather conditions so important options are possible.

3.1.2.17. Upmarket Lodge & Villas

An accommodation gap in the product mix is for an up-market lodge with villas and could potentially be attached to a thoroughbred stud or major farming operation if interest is shown. Much of the region’s accommodation is focussed on catering for a lower to mid-range market but considering a number of the niche visitor segments are higher-spending tourists, the region has very limited choices to cater for them. It is understood that this often results in some visitors preferring to stay in the Hunter wine country region, which is 1 hour plus drive time from the Upper Hunter, and results in significant economic leakage as accommodation and most food and beverage spend occurs outside of the Upper Hunter.

3.1.2.18. Merriwa Carp Fishing competition

Potential should be investigated for a fishing competition centred around Merriwa, and potentially focussed on carp. This would be a seasonal event and research is required to assess fishing holes and regional locations. This may also include fishing options at Glenbawn Dam though up to date details of fish stock and quality are not yet known.

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[16] https://aumuseums.com/nsw/hunter/hunter-valley-museum-rural-life

3.1.2.19. Expansion & Coordination of Thoroughbred Stud Tours

Opportunities for introducing guided exclusive tours of thoroughbred studs in the region need to be further investigated as though the region has a major claim to being the horse capital of NSW if not Australia, it is hard to find places to see horses, to ride them and to understand the significance of the thoroughbred stud industry etc. They are needed as part of the overall equine experience and could potentially be provided on a rotational basis (different studs having exclusive tours on different weekends) so the opportunity might be able to be shared amongst 2-3 studs if the level of interest exists.

Care is needed however as there are site constraints because of breeding programs, biosecurity and other reasons so the actual tour itinerary would need to be tightly controlled and managed. The breeding programs and sensitivity to sites in the thoroughbred stud farms may result in most stud operators being cautious to open up sites to visitor tours. The high value of horses, foals etc means security (bio and physical) has to often remain very tight so tours may need to be limited in what they can physically cover on site.

3.1.2.20. Horse/Equine Museum

With the proposed major jockey training school and other amenities being planned by Racing NSW on a site opposite the Scone Airport, the potential exists to introduce a Horse Museum – Experience Centre which can help explain the significance of the equine sector for the region and Australia generally. Importantly, it will add a further all-weather visitor experience and through this, help extend visitor length of stay in the region. It also has the potential to act as a hub/staging post, to encourage visitors to undertake horse treks, to visit equine events, etc. Opportunities to investigate could include the following.

- Expansion of the various equine events and festivals held in the Shire.
- Proceed with the proposed Horse Centre of Australia (HCA) to be located in Scone. The HCA will include an interpretive centre, living legends attraction and exhibition space. The centre would then refer visitors to tourism operators offering horse-related experiences.
- Having a venue at the Racing NSW site to re-home ex-racing horses.
- Set up a model horse stud. This could be based on the Irish Model (the Curragh in Ireland). Victoria has also done this with the Living Legends where people can go and pat an old Melbourne Cup winner.
- Acting as the hub for a variety of horse trekking experiences, whether these be shorter rides or even overnight treks.

Destination Management Component

TWO

INFRASTRUCTURE

3.1.3. Infrastructure

3.1.3.1. Glenbawn Dam Master Plan

Glenbawn Dam offers significant tourism potential if it can be enhanced and further developed. There is a need, however, to ensure that any future proposed development/redevelopment at the Dam is undertaken in a coordinated way. The various stakeholders involved need to be communicating closely with one another. To achieve this, a master planning exercise should be undertaken which looks to incorporate the development opportunities recommended below.

- Introducing new accommodation options such as seasonal glamping and houseboats (see section 3.1.2.4).
- Offering water-based recreational equipment hire, including kayaks, SUPs and motorboats.
- Sectioning off part of the Dam for non-motorised water-based recreation.
- Land-based recreation product including rock climbing, horse trekking, abseiling, orienteering, mountain biking etc.
- Landscaping enhancements.
- Reopening the Hunter Valley Museum of Rural Life at Glenbawn (see section 3.1.2.14) or relocating it.
- Development of a greater diversity of F&B offering.

3.1.3.2. Coordinated signage strategy

There is a need for a coordinated tourism signage and wayfinding strategy. This includes signage in its broadest context [including] roadside signs, information kiosks, information centres and online information sources such as apps (able to be accessed while travelling) as well as gateway entry signage to create a sense of entrance into the Shire and its various towns as well as signage to guide visitors to points of interest throughout the Shire. Wayfinding is an important component for encouraging visitor dispersal.

The signage strategy needs to:

- ensure a consistent approach to signage is applied throughout the Shire and which can, in turn, support drive circuits and other trails across the LGA;
- identify the potential for stronger branding identities for circuits/driving routes;
- take into account that visitors do not recognise LGA boundaries, but rather travel to destinations and attractions; and
- align with the destination branding that is developed.

3.1.3.3. Biking expansion master plan

The Shire is popular for all forms of bike riding, including road cycling, bike packing and mountain biking and has an active cycling community. The Le Tour De Merriwa has been highly successful and the opportunity exists to leverage off this popularity and complete a master plan to identify ways to expand biking opportunities throughout the Shire.

To achieve this, the following could be considered.

- Completing a regional trail audit to ensure trailheads are adequately signposted and appropriate parking and bike racks are provided.
- Identifying opportunities to expand mountain biking trails and other cycling routes.
- Working with bike hire companies (in the Shire and the broader region) to offer packaged bike hire, potentially incorporating accommodation, bike hire and food and beverage.
- Attracting a bike tour operator to provide guided bike tours that showcase the Shire. This could include road-based cycling tours and/or mountain biking tours.
- Introducing an ARTBIKE program to the Shire which provides greater connectivity between the region's cultural facilities and brings art from outside the confines of cultural institutions through a series of art bike trails. By way of example, Launceston and Hobart offer ARTBIKES which is a bike borrowing service that takes participants on an easy access tour to the city's cultural hubs including galleries and museums (Figure 25).
- Considering the development (based on a feasibility assessment) of a major regional bike skills park (Figure 26) which, in addition to being a tourism experience, would likely also strongly appeal to the region's younger family demographic.

Figure 25: ARTBIKES

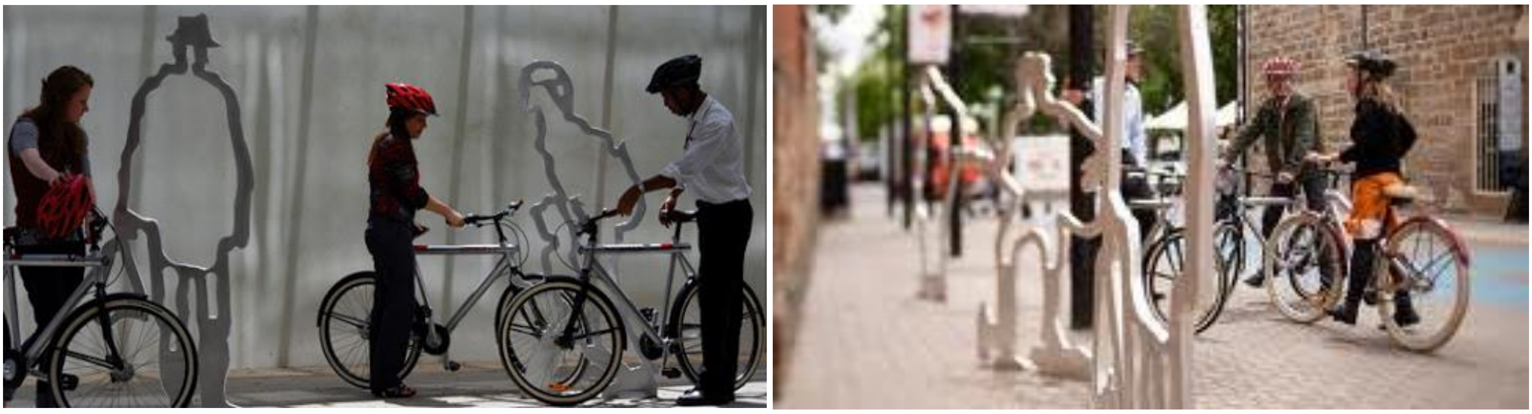


Figure 26: Bike Skills Park Example in NZ[17]

3.1.3.4. Implement the tourism components of the Revitalisation Strategies

Four revitalisation masterplan strategies were completed in 2016 for each of the Shire's key town centres. They focused on outlining a strategic framework to revitalise each town centre and establish the key direction for each town over the next 15+ years, to create a safe, attractive, and thriving town centre well into the future.

The following table provides the tourism-related actions from each master plan which should be implemented.

Table 6: Revitalisation master plans – tourism actions

Area	Ref	Actions	Priority	Cost	Time	Responsibility
Scone	C-03	Council has recently purchased Campbell's Corner for a visitor centre and related equine info hub rather than the St Aubins Arms Inn site.	High	High	Short term	Council, with advice from heritage, property tourism advisors.
Scone	C-04	Create a Branding Strategy for Scone that builds on its fame as the 'Horse Capital of Australia' and expands for wider appeal and to capitalise on its history.	Medium	Medium	Short Term	Council
Scone	C-07	Identify attractive buildings that can be lit at night to improve the quality of the adjacent public domain.	Low	Low	Medium term	Council /property owners

[17] Gallagher Bike Skills Park

Area	Ref	Actions	Priority	Cost	Time	Responsibility
Scone	C-10	Council has recently purchased Campbell's Corner for a visitor centre and related equine info hub rather than the St Aubins Arms Inn site. Explore issues of moving the 'Mare and Foal' to this location.	High	High	Short term	Council
Scone	C-12	Locate a sign at the train station that indicates the direction to key local facilities (preferably a town map) Identify opportunities for improved landscape and lighting.	Medium	Medium	Medium term	Council and ARTC
Scone	C-12	Mark the gateways and key locations in the centre of the town with flags/banners. A few large flags grouped together have a greater impact than smaller flags widely spaced. Provide flags (or increase the size of flags) at the following locations: the intersection of the New England Highway and Gundy Rd, along Liverpool St and Kelly St, and on Kelly Street, adjacent to Elizabeth Park. The design of the flags can celebrate the town, reinforce the brand or highlight a key event. Gateway treatments should also be considered in conjunction with speed zone signage locations.	Medium	Medium	Short term	Council
Merriwa	C-02	Design and carry out modifications required for Welcoming Centre to possibly house Information Centre	low	low	Medium term	Council, consultants including Architect, Interior Designer
Merriwa	C-04	Create a Branding Strategy for Merriwa that builds on its strong rural feel and also capitalise on its history with the sheep industry and its heritage.	High	High	Short Term	Council
Merriwa	C-07	Identify attractive buildings that can be lit at night to improve the quality of the adjacent public domain.	Low	Low	Long term	Council and property owners
Merriwa	C-11	Mark the gateways and key locations in the centre of the town with flags/banners. A few large flags grouped together have a greater impact than smaller flags widely spaced. Provide flags at the eastern entry near No 1 Oval, the western entry near the Showground and bridge and the northern entry near the intersection of Vennacher and Blaxland Streets (bridge over Whitney's Creek). The flag design can celebrate the town, reinforce the brand or highlight a key event. Gateway treatments need to be considered in conjunction with speed zone signage locations.	Medium	Medium	Short term	Council
Merriwa	C15	Encourage business and shop owners/ tenants along Bettington Street to extend opening hours into the evening, i.e every Thursday and longer opening hours on a Saturday/Sunday once a month. Link longer opening hours with events/ festivals/ markets.	High	High	Short term	Council and local business organisation.
Merriwa	C-15	Explore the use of pop-up events to utilise vacant premises.	High	High	Short term	Council, property owners/ tenants, local business organisation

Area	Ref	Actions	Priority	Cost	Time	Responsibility
Merriwa	C-15	Investigate opportunities to activate empty shopfronts with temporary exhibitions, historic displays and/or displays for businesses outside the centre.	High "Quick win"	High "Quick win"	Short term	Council, property owners/ tenants, Chamber of Commerce
Merriwa	C-15	Explore additional opportunities that could be added to along the main street (ie music, food trucks) during existing events	High	High	Short term	Council
Merriwa	C-16	Encourage outdoor dining through active marketing, speeding up DA approvals and/or granting rent-free periods (1-2 years) for outdoor seating.	High	High	Short term	Council, local business organisation
Merriwa		Increase match funding for painting of facades and shopfronts if the business agrees to use the approved colour palette (potentially up to $3000) . Match funding to be usable for modifications to facades, for example installation of new larger openings and operable doors etc	High	High	Short term	Council with local community and local Chamber of Commerce.
Murrurrundi	C-03	Create a Branding Strategy for Murrurundi that builds on its strong Arts Culture and expands for wider appeal to also capitalise on its pastoral roots, heritage, food and wine and rural character..	Medium	Medium	Short Term	Council
Murrurrundi	C-06	Identify attractive buildings that can be lit at night to improve the quality of the adjacent public domain.	Low	Low	Long term	Council /property owners
Murrurrundi	C-06	Investigate opportunities for adaptive reuse of the Court House Precinct. Discussions required with NSW State Government and potential private developers / operators.	High	High	Short term	Council, NSW State Govt, Private Developer / Operator
Murrurrundi	C-14	Explore the use of pop-up events to utilize vacant premises.	High	High	Short term	Council, property owners/ tenants, local business organisation
Murrurrundi	C-15	Investigate opportunities to activate empty shopfronts with temporary exhibitions, historic displays and/or displays for businesses outside the centre.	High "Quick Win"	High "Quick Win"	Short term	Council, property owners/ tenants, Chamber of Commerce
Murrurrundi	C-15	Explore additional opportunities that could be added to along the main street (ie music, food trucks) during existing events	High	High	Short term	Council
Murrurrundi	C-12	Encourage outdoor dining and smaller licensed premises (i.e restaurants /wine bars) through active marketing, speeding up DA approvals and/or granting rent-free periods (1-2 years) for outdoor seating.	High	High	Short term	Council, local business organisation
Aberdeen	C-04	Create a Branding Strategy for Aberdeen that builds on its Hunter River location and expands for wider appeal to also capitalise on its heritage and recreational opportunities.	Medium	Medium	Short term	Council
Aberdeen	C-07	Identify attractive buildings that can be lit at night to improve the quality of the adjacent public domain.	Low	Low	Long term	Council /property owners
Aberdeen	C-10	Commission art work for silos. Artist to undertake consultation with community in order for piece to reflect town vision. This site is highly visible from the highway and the railway line.	High	High	Short term	

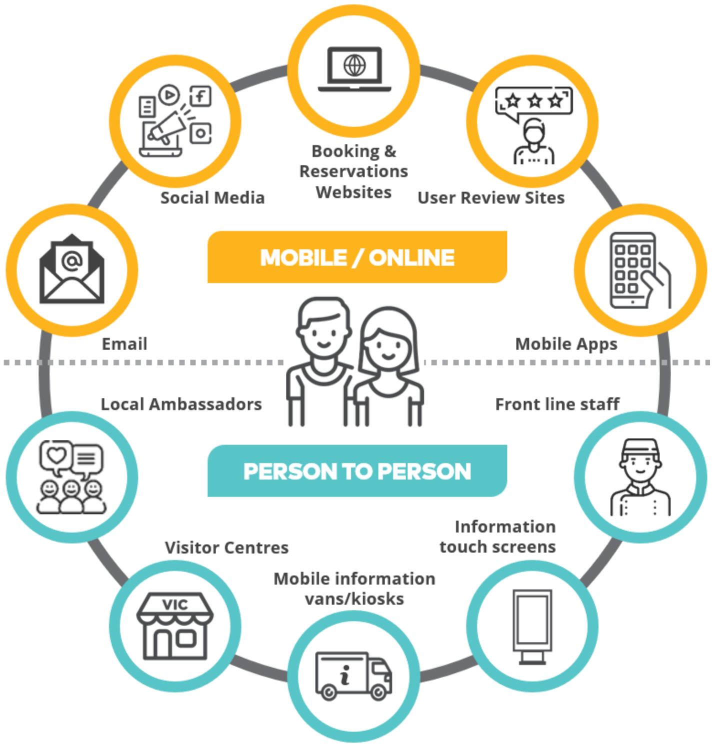
Area	Ref	Actions	Priority	Cost	Time	Responsibility
Aberdeen	C-11	Mark the gateways and key locations in the centre of the town with flags/banners. A few large flags grouped together have a greater impact than smaller flags widely spaced. Provide flags at the following locations: Segenhoe St intersection, Jockey Park and Valley Fair. The flag design can celebrate the town, reinforce the brand or highlight a key event.	Medium	Medium	Short term	Council, (and ARTC for Jockey Park)
Aberdeen	C-14	Explore the use of pop-up events to utilize vacant premises.	High	High	Short term	Council, property owners/ tenants, local business organisation
Aberdeen	C-15	Investigate opportunities to activate empty shopfronts with temporary exhibitions, historic displays and/or displays for businesses outside the centre.	High "Quick win"	High "Quick win"	Short term	Council, property owners/ tenants, Chamber of Commerce

3.1.3.5. Visitor information servicing strategy

The Shire currently has three visitor information centres (VICs), each of which is yellow i accredited ( ). These are situated in Scone, Merriwa and Murrurundi.

Many Councils and tourism organisations around Australia, New Zealand and globally are increasingly assessing the role VICs play. This is primarily because of the recognition that the travel cycle and the way visitors plan/book trips has shifted and that VICs and visitor services generally need to adapt to maintain relevancy. Digital technology and online platforms have disrupted the visitor communication landscape. Figure 27 demonstrates the different channels which can now deliver visitor information services. These include pre-trip, during the trip and post-trip services.

Figure 27: Different channels for delivering visitor information



Nationally, an estimated 4.4% of domestic visitors utilise VICs during their travels in Australia. [18] The vexed question, therefore, is how the remaining 95.6% of visitors being serviced?

Visit Scotland is considered a leader in the visitor information services space. They recently undertook a major review of all accredited VICs (called iCENTREs) nationally and reduced the number down from 65 to 26. Those 26 who remained were those who were in high-profile destinations and were receiving significant numbers of visitors (as opposed to locals). To replace those closed centres, a roaming ambassador program (with unique "Coo-vans" – see Figure 28) were introduced and are present at major events and destinations during peak periods throughout the country. This is also supported at a local level with an iKNOW program.

There are many other examples of councils and regional tourism bodies who are increasingly opting for roaming visitor services models because this:

- enables them to take information to the visitor rather than expecting the visitor to come to them;
- has lower overheads than a physical brick and mortar VIC enabling greater investment in the actual provision of information and services;
- visit different areas during events etc. to spread the benefit far more widely; and
- visit tourism events outside of the region to create a stronger profile.

Figure 28: Coo-vans

[18] Queensland Visitor Information Centres Snapshot of the year ending September 2017, Tourism and Events Queensland

To ensure an evidence-based approach is applied when making decisions about whether to rationalise VICs and other information services in the Shire and that future trends are incorporated into decision making, a visitor information servicing strategy should be undertaken. This should include the following.

- Assessing the current VIC performance in the Shire. This should include, for each VIC, utilisation, penetration rates, financial performance, digital performance etc. Importantly, this should segment between local/community use of VICs and true visitor use.
- Assessing the location of the VICs and whether these are strategically situated from a visitor perspective. For example, the potential may exist to relocate the Scone VIC to the Warbirds Visitor Attraction which is currently under development.
- Shifting to potentially a stronger focus on the provision of online information through the Shire's destination website.
- Providing enhanced itinerary information, particularly concerning the driving distances between attractions.
- Identifying mobile coverage "dead spots" to ensure that physical visitor information is provided in these locations.
- Improving wayfinding and signage to encourage greater visitor dispersal throughout the Shire.
- Investigating new and more flexible options to deliver visitor information services including (see Figure 29):
  - mobile visitor information services throughout mobile kiosks (vans and trailers etc.) which can be relocated to where the visitors primarily are (such as for events or market days);
  - automated information containers which open up during set hours and provide large multi-user touch screens;
  - high-quality digital information platforms which provide cohesive and up-to-date information about a destination, including booking and packaging capabilities; and
  - co-locating visitor information services with other facilities such as major tourist attractions, museums and libraries.
- Coordinating any local destination websites to ensure that a consistent and accurate message is offered to those interested in visiting.
- Investigate initiatives that leverage the knowledge of the area held by semi-retired and retired community members and develop a "roving ambassador" program to assist visitors during peak season periods, during events etc.

Figure 29: Pop-up and Digital Visitor Information Examples

Destination Management Component

THREE

GOVERNANCE

3.1.4. Governance

3.1.4.1. Creation of a Tourism Advisory Group

There is currently a local tourism body in the Shire as well as a Council-run Tourism & Economic Development Committee. To create greater cohesion and buy-in, it is recommended that the tourism component of the Committee is restructured and merged with a newly structured local tourism body to form a Tourism Advisory Group (TAG). This need not be a committee of Council.

The TAG needs to be representative of the industry, however, and strongly focussed on the sector rather than general urban planning etc. To ensure this, and to guarantee a good composition of skills, the Council should advertise for the positions via an expression of interest, requesting CVs from interested parties. A very specific set of criteria for choosing candidates should be developed to ensure that those selected are proactive and progressive members of the tourism sector.

The composition of the TAG could include the following stakeholders:

- a Council staff member(s);
- an accommodation sector representative;
- a cultural sector (but who has a tourism-focus) representative;
- an attraction/experience operator;
- an events sector representative;
- a NPWS representative;
- a representative from the Shire's Chambers of Commerce;
- a representative from the investment and development community; and
- a representative from DSSN.

For specific projects, there should be the ability to second others if specialised skills or knowledge is needed (such as IT expertise).

Other points to consider for the TAG include the following.

- Importantly, the Chair of the TAG should be a representative of the Council.
- Each non-Council member should have a maximum serving a term of 2 – 3 years to ensure continuity is achieved and other tourism industry stakeholders are given the chance to be on the TAG.
- The TAG should meet 4-6 times per year and be focused on monitoring and advising the initiatives outlined in this DMP.
- Council should provide a secretariat and facilitate all TAG meetings.

Whilst a variety of efforts have been historically made to get the tourism industry, Council and other stakeholders to work collaboratively, far stronger and more transparent communication may be required to ensure a more cohesive approach to growing the visitor economy on a sustainable basis is able to be achieved.

3.1.4.2. Rotational roster for F&B providers

A major challenge outlined during consultation is the variable hours of F&B providers throughout the Shire, particularly at weekends. To ensure that each town has at least one F&B provider (café, restaurant etc.) open each day and past lunchtime, a rotational roster could be organised.

3.1.4.3. Tourism industry networking events

The consultation undertaken for this DMP highlighted that, currently, there is a limited collaboration amongst industry operators within the tourism sector. The opportunity exists to set up quarterly industry networking events where:

- Council can provide the industry with an update on the state of the sector;
- the industry can discuss with Council any issues they are facing collectively as an industry (rather than focusing on issues individual operators are experiencing);
- the industry can network and get to know other operators in the sector; and
- Council and industry can discuss updates and the progress of implementing the opportunities identified in this DMP.

The sessions could potentially be hosted at different businesses throughout the Shire to increase awareness of the product range available.

3.1.4.4. Tourism Training & Capacity Building

Almost all operators in the tourism sector in the Shire are micro to small operators. To grow its visitor economy and to achieve many of the recommendations outlined in this DMP, there is a need to offer upskilling and business development programs for these operators.

The types of support required are likely to include (but not be limited to):

- programs focused on social media and how to correctly utilise the various social media tools available (including what tool is best for specific types of marketing);
- assistance in storytelling and experience development;
- help in clustering and bundling experiences to make itineraries interesting and appealing;
- visibility and assistance in helping to stand out;
- networking with other businesses to understand what is in the area;
- help in participating in additional programs to develop product offering;
- understanding how to value-add to existing product;
- providing the opportunity to network along the value chain to develop relationships with other suppliers.
- training on getting listed on the ATDW to ensure their product is listed on the appropriate state government tourism websites;
- customer service upskilling; and
- programs on understanding the difference between start-up, market-ready, accredited and export-ready tourism product (Figure 30).

Figure 30: Market readiness stages

Destination Management Component

FOUR

SUSTAINABILITY

3.1.5. Sustainability

3.1.5.1. Local community visitor economy awareness campaign

Currently, there appears to be an insufficient understanding of the important role the visitor economy plays in the Shire and why it needs stronger support. There is also a lack of awareness of how the tourism dollar spreads throughout the economy and how many sectors are positively impacted by tourism spend.

There is a need to consider developing and implementing a tourism awareness campaign aimed at locals to show:

- how the tourism dollar disperses through the local economy (the direct and indirect impact of visitor spend);
- what businesses benefit from tourism including cafés, retailers, service stations, bars and transport providers etc;
- how extended trading hours (even seasonally) can benefit the community;
- what the estimated value of tourism is via direct, indirect and induced spending impacts (this could be demonstrated in terms such as how many steaks, hamburgers, cups of coffee and litres of fuel etc. are purchased by visitors on any given day); and
- why Council/ratepayer funding is required to maximise returns to the Shire's communities via economic, social and infrastructure benefits.

3.1.5.2. Visitor Management

For a variety of reasons, there are challenges with activating National Park areas. The vexed issue which extends nationwide and not just for the Shire is the timeliness of introducing carrying capacities to help better manage National Park areas in general, but also most other areas where the ratio of visitors to locals is thought to be problematic. Carrying capacity levels are not just for helping to manage social and environmental needs and benefits, they are also important for helping to maintain and control the quality of the visitor experience and to protect fauna and flora and the quality of the overall experiences on offer.

Importantly, implementing visitor management strategies are also not just for areas that already have a significant number of visitors, but rather can be proactively implemented to ensure overtourism does not occur.

The issue of determining what a carrying capacity level/limit, on any given day at any given time, is complex, due to the number of competing interests and variables to consider. For some, the preference is to merely look at better ways to deliver visitor management; while others indicate concerns that some sites are already now suffering from overtourism.

This is likely to entail assessing how to determine a social-community level of acceptable impacts (noise, the volume of people/crowding, etc,), environmental impacts such as waste, track and site maintenance levels, impact on wildlife and flora, pollution rating levels etc., and visitor impacts associated with visitor access to vistas and views, crowding, numbers of people on walkways and determination of enjoyment factors etc.

As visitation grows to the region, there is a need to ensure that the region is proactively considering the protection, enhancement and preservation of the region's fauna/flora. Part of this may include looking at stronger visitor education initiatives, assessing carrying capacities at certain locations where wildlife exists and is being impacted on and introducing visitor management initiatives to protect wildlife.

Whilst the risk of overtourism and environmental degradation may not be such an issue for the region now, putting in place strategies and policies that avoid over-tourism from occurring is forward-thinking.

3.1.6. Tourism Ambassador Program

Opportunities need to be explored to develop tourism ambassadors to promote towns and specific events when lots of visitors are visiting. The role is often performed by retirees who have great local knowledge and who help visitors (day and overnight visitors) on a casual basis.

The opportunity exists to get the community to engage more fully in the visitor economy and encouraging retirees especially to exercise their vast knowledge of the area and to be part of a visitor enhancement related program to encourage greater insight and time in the region's towns, is a positive outcome.

3.1.7. Preservation and Conservation of the Remnant Red Gum Forest

This forest (covering 30 ha.) is located northwest of Aberdeen, within the Upper Hunter, and is the largest remnant of an original 20,000-hectare forest across the floor of the Hunter Valley before settlement and is classified as an endangered species. The forest consists of many ancient trees with the oldest over 1000 years old. There are also Aboriginal scar trees located in the forest reflecting its special

Indigenous cultural significance as well. The landholders/custodians are looking to establish a permanent visitor/food experience (based on the Red Gum forest) to add a special natural environment experience for visitors to the Upper Hunter.

Keeping and preserving these remaining remnant forests are an important component of the longer-term visitor experience and reflect the communities desire for greater sustainability of natural features.

Figure 31: Remnant Red Gum Forest

Destination Management Component

FIVE

MARKETING & PROMOTION

3.1.8. Marketing & Promotion

3.1.8.1. ATDW listing drive and keep this up to date

The audit completed for this DMP, along with the consultation undertaken, revealed that there is a need to work with operators, particularly micro-smaller operators to ensure they are aware of the need and many benefits of being listed on the Australian Tourism Data Warehouse (ATDW). Many are currently not.

The ATDW's ultimate function is to support Australian tourism operators with digital marketing to help extend their exposure and attract more business online. Through a single listing, an operator's details will then appear on Australia.com and over 50 other websites.

Often, destination networks and DNSW offer training workshops that operators can subscribe to.

3.1.8.2. Destination branding

The consultation that was undertaken for this DMP, along with research completed, identified that there is currently a lack of understanding (locally, domestically and internationally) regarding "what" the Upper Hunter is as a visitor destination and the lack of a clear destination brand. This is particularly the case because there is often confusion between the Hunter Valley and Upper Hunter which offer very different visitor experiences.

To overcome this, consideration should be given to developing a stronger destination brand for the Upper Hunter and its various key towns. This could potentially include:

- determine the Shire's destination attributes and its unique points of difference – these are often different from liveability attributes;
- develop a series of sub-regional/local brands which demonstrate the unique flavour of key towns, but which align with the overarching Shire destination brand so they can all fit under a Shire wide brand;
- link to local community identity so that locals can clearly identify with a regional brand and a local town brand; and
- distinguish the brand and the Shire's position from the Hunter Valley's destination positioning.

Potential sub-regional/local brands could potentially focus on the following:

- Scone: horses and warbirds;
- Merriwa: agriculture;
- Murrurundi: arts and culture; and
- Aberdeen: Scottish heritage.

It is important that the unique attributes of these towns are evident in the destination branding. This is particularly important because the large geographic size of the Shire, along with the road network, means that target audiences for the various towns differ. For example, Merriwa's target audience is quite different from Scone because:

- Merriwa tends to attract a market travelling west along the Golden Highway to destinations such as Mudgee and Dubbo; while
- Scone tends to attract a market travelling north/south along the New England Highway.

Once completed, the Shire's destination website should then be updated to align with the new destination branding.

It is important to note, however, that the development of a destination brand is not a panacea, it must be supported by product and infrastructure development initiatives as recommended in this DMP. **Visitors do not travel to destinations simply because of a nice brand, they travel for experiences and attractions. Without attractive product including events and attractions, visitation is likely to be constrained.**

3.1.8.3. Destination events strategy

Whether they are centred on arts, culture, business or sports, destination events play an important role in stimulating visitor demand, particularly during low season periods. Events are considered a mechanism to "feel more connected to other people, the community, and the world".[19] Although the Shire has a vibrant calendar of events, there is only a small portion of these that yield higher economic value and attract visitors from outside of the Shire. Most are seen as important community rather than visitor-focused destination events.

Destination events perform an important role in visitor economy activation as they:

- draw a far stronger visitor market than local community events (which are primarily aimed at encouraging a local market) and, as a result, contribute to the local economy through spend on accommodation, transport, F&B etc.;
- assist in achieving greater destination awareness and promotion, particularly within the domestic market; and
- help stimulate demand in low and shoulder seasons (when held during these periods).

Some of the larger-scale and/or well-known events which the region already hosts include: Aberdeen Highland Games; Scone Horse Festival; Le Tour de Merriwa; Merriwa Festival of the Fleeces; The Scone Literary Festival; and The King of the Ranges Stockman's Challenge & Bush Festival.

To continue to grow the Shire's destination event calendar in a coordinated and strategic manner, there is a need for a Shire-wide Destination Events Strategy. This should identify:

- current major/key events to evaluate actual running costs including costs incurred by various Council departments not directly involved, community and visitor patronage, economic and social impacts of these events etc.;
- current gaps within the existing events calendar and to determine existing key events that could be used to enhance visitation to the region;
- learning/workshop experiences associated with events and festivals to offer broader community benefits wherever possible;
- prioritising existing community events and festivals and determining those which offer the best social and related benefits;
- assess potential sites for holding larger scale events;
- determining those events and festivals which can operate on a cost neutral basis or better; and
- identifying how to build capacity for event organisers including identifying skill gaps and recommendations for targeted training on topics such as traffic management plans etc.

A Destination Events Strategy would provide a strategic framework for identified signature or key events, ensuring that these events further boost the economic, cultural and social fabric of the Shire.

3.1.8.4. Destination events calendar

Feedback received indicated that often events clash because there is a lack of communication and awareness as to when events are being held. As part of the destination branding (see Section 3.1.8.2) and destination events strategy (see Section 3.1.8.3), the opportunity also exists to investigate the introduction of a high-quality and easy-to-update destination events calendar to be profiled on the updated/enhanced destination website (see Section 3.1.8.7).

Events can be added to the ATDW and sourced directly into the events calendar.

3.1.8.5. Destination content creation

Currently, there are no images of the Upper Hunter Shire on the DNSW Content Library[20]. When "Scone" is entered, the only images displayed are of visitors eating scones in other destinations throughout NSW (see Figure 32). Searches for Aberdeen, Murrurundi, Merriwa and Upper Hunter yield zero results.

For the Upper Hunter to enhance its destination marketing, to continue to produce high-quality destination-related content for digital channels as well as to distribute to trade and for promotional purposes, it is important that high-quality images of the Shire are available on the Content Library.

It is understood that the Shire recently had a photography competition. If these images are of sufficient quality, they should be submitted to the Content library either via DNSW or via the destination network (DSSN). Images need to be kept up-to-date so they should be refreshed regularly.

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[19] Eventbrite Research Shows Australians Believe Events Inspire Positive Change, 6th September 2017, Ausleisure
[20] https://content.destinationnsw.com.au/

Figure 32: DNSW Content Library – “Scone” search

3.1.8.6. Development of regional events toolkit

To grow the events sector in the region requires actively seeking out events and promoting to event organisers that the region is “open” for events. The opportunity exists to develop an enhanced regional events toolkit that can be provided to event organisers which:

- demonstrates that the councils have a number of pre-approved event locations ready to go so that red tape for event organisers is minimal;
- has an overview of the pre-approved locations including their capacities, types of events they can support, the hours of operation permitted etc.;
- includes a simple summary of the events approval process as well as an overview of insurance required;
- has information on waste management required (based on the size of the event) as well as toilets; and
- has a summary of applicable fees and how these are to be paid and includes contact details for event management personnel at each Council.

Figure 33 offers a best practice example of a proactive events promotion tool to support event organisers.

The events toolkit could be enhanced as part of the Destination Events Strategy (see Section 3.1.8.3).

Figure 33: Wollongong Events Toolkit (sample pages only)[21]

MAJOR EVENTS

Looking to host an event? Wollongong's got you covered with eight pre-approved sites ready to go!

With a warm temperate climate, picturesque foreshore, and local businesses ready to work with you, Wollongong is the ideal location for your next event. Plus, Wollongong's just an hour south of Sydney Airport.

This information pack provides you with everything you need to know about choosing the right site for your event, Wollongong City Council's streamlined process, the permits required and how much it's going to cost.

With generic site plans, event notification plans and traffic management plans available, event organisers are already a step ahead in the planning process.

SITES

Our eight pre-approved event sites are: Stuart Park, Lang Park, Wollongong Foreshore, The Arts Precinct, MacCabe Park, Osborne Park, Dalton Park, and Wollongong Botanic Garden. All sites are accessible by the Free Gong Shuttle and also easily reached from Wollongong and North Wollongong Stations.

Each site comes with its own parameters including the types of events that can be hosted and the capacity of each site. We encourage you to please check site details carefully when making your selection. Changing sites during lodgement could cause significant delays in the assessment process or, in a worst case scenario, your application could be refused.

This application covers all of Wollongong City Council's requirements. However, there are cases/sites where additional approvals from other agencies are required. Ascertaining these additional permits is the sole responsibility of the event organiser.

- STUART PARK
- LANG PARK
- WOLLONGONG FORESHORE (INCLUDING THE BLUE MILE)
- THE ARTS PRECINCT
- MacCABE PARK
- OSBORNE PARK
- DALTON PARK
- WOLLONGONG BOTANIC GARDEN

THE PROCESS

1 **Read this information pack** and make sure you understand everything you need to provide. If things are missing when you submit your application, delays could result and additional fees may be incurred.

2 **Consult with Council events staff:** We strongly advise that you speak with our events team before starting your application. They will talk you through the required documentation, and provide some additional helpful hints to make your application better, and the process smoother.

3 **Prepare your documentation:** This information pack outlines what you need to consider when preparing the event application. Make sure you provide as much information as possible when filling out the forms. Any missing information could result in delays or additional fees.

4 **Lodgement:** The easiest way to apply for an event on one of our pre-approved sites is through our online lodgement portal. Simply register as a user and fill out the online application form, upload the appropriate supporting documents, pay the applicable fee/s and you're away. Note: by lodging your application you are not guaranteed to receive an event permit.

THINGS TO CONSIDER WHEN PREPARING YOUR APPLICATION

EVENT LOCATION

Council has identified eight sites which are pre-approved for a variety of events. Each site comes with its own limitations, including the types of events that can be hosted and the capacity at each site. It's very important you pay attention to this information as applying for an event permit at a site that isn't suitable for your event could cause significant delays in the assessment process of your application, or in a worst case scenario, could mean your application may be refused.

Please refer to the event information on each of the eight sites in the early part of this toolkit.

PREFERRED DATES

The application form will ask you for your preferred date, but we also require two alternate dates. With our picturesque locations and a busy schedule of events, there's a chance your preferred location and date may not be available. We'll let you know if that's the case, and also tentatively book your alternate date if available.

If your preferred date is available, we will book it and automatically continue the progression of your event application. If the alternate date is required we will wait for your confirmation before progressing your application. With seven other pre-approved sites, we may also be able to relocate your event to a different venue or site if required.

Please ensure you allow time for bump in and out, and include this in your application. This would include the time taken to return the site back to its original condition. Please note that additional fees may be payable.

EVENT NUMBERS

The larger your event, the more requirements you may have to meet, such as additional toilets, waste facilities and security. Please think carefully about your event numbers prior to lodgement and be specific as to how many people you expect to attend, both overall and at any one time.

INSURANCE

It is paramount that you have all the right insurance information ready to go. Please ensure your event has Public Liability Insurance to the value of $20 million with Wollongong City Council noted as an interested party on your policy. We will need to see a copy of your Certificate of Currency which can be uploaded at lodgement.

Ultimately it is the responsibility of the event organiser to ensure the right insurances are in place for your event - we advise you look at the following insurances in addition to the public liability insurance for the event itself:

- Public Liability insurances of sub-contractors
- Volunteers' insurance
- Workers compensation
- Professional indemnity.

POWER

Council has power available at each event site. Use of Council's power will incur additional fees. It is important when preparing your site plan that you are aware of Council's power connection location so that you can plan your event accordingly.

Power generators can be used to service your event and are a great way to structure your event exactly how you need it.

Any generators to be used must be included on your site plan. In addition, consider residents when positioning such equipment and ensure it is properly secured.

Please see the Overview of Existing Facilities table on page 19 of this toolkit to find out what's available at each site.

[21] Available at: http://www.wollongong.nsw.gov.au/city/events/toolkit/Documents/Events%20Toolkit.PDF

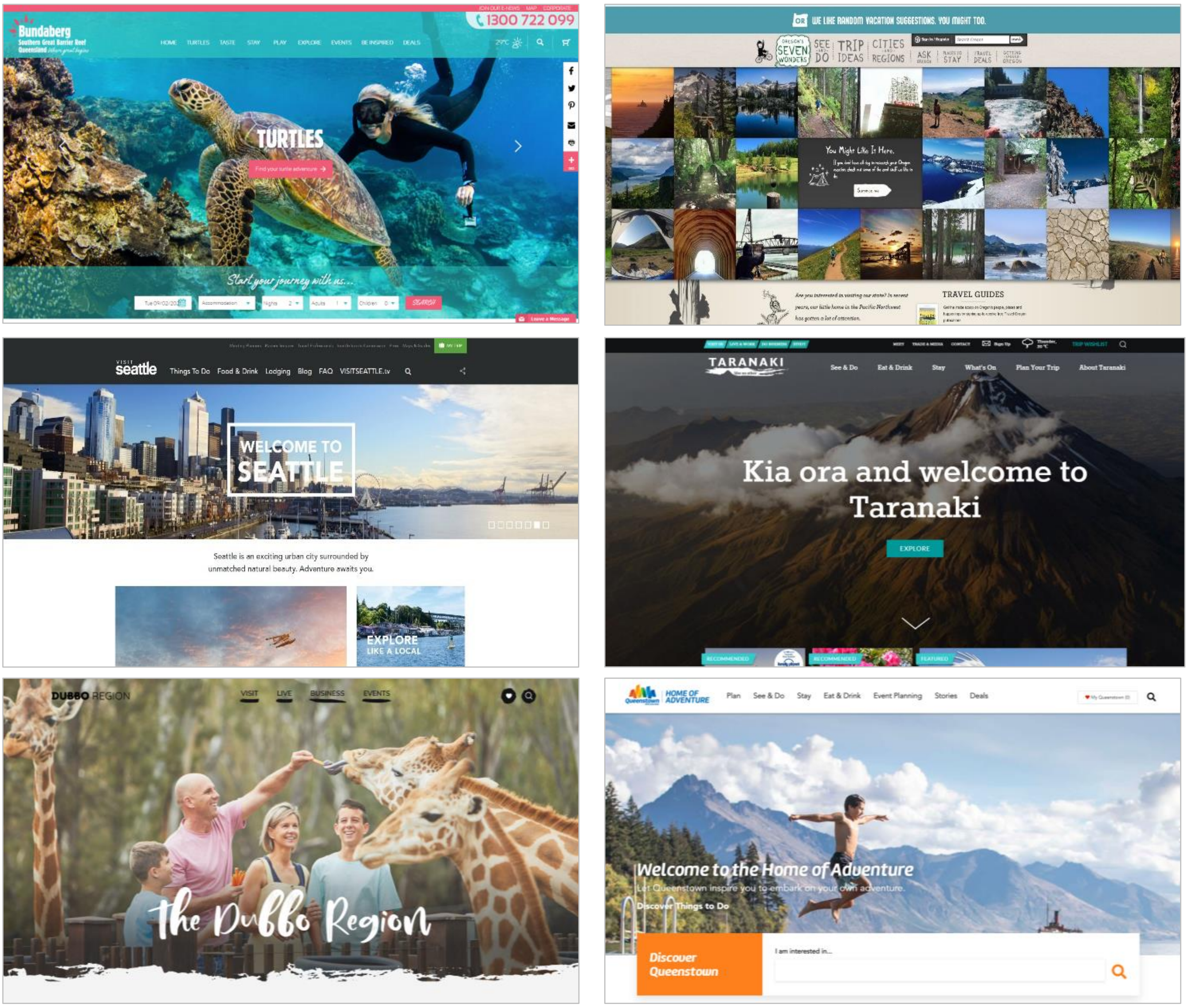
3.1.8.7. Enhanced destination website

The Shire's destination website is UpperHunterCountry.com. While significant effort has gone into the development and maintenance of this website, the opportunity exists to further enhance the website to more strongly profile the Shire and its tourism offering.

Any redevelopment of the website should be undertaken by destination website specialists. Figure 34 provides examples of best practice destination websites as examples only. While some of these websites are for much larger tourism destinations, they demonstrate what is possible and each has elements of best practice destination website design that provide valuable learning points for the Shire. These include the incorporation of bookable product, up-to-date listings of product (drawn from national tourism databases, such as the ATDW), bookable packages and they unashamedly focus on the strengths and highest quality experiences on offer.

As part of the website's functionality, there is a need to investigate whether e-commerce functions (such as online booking) should be included. While having e-commerce functions can provide a range of benefits, it also may add complexity to managing the website and will require a larger budget for developing and maintaining the website.

Figure 34: Examples of Best Practice Destination Websites User Interfaces



3.1.8.8. Product packaging

Currently, there is limited bookable product packaging available on destination-based websites for the Shire. As additional new, marketable product is introduced in the Shire, the potential exists to develop packages which visitors can book, rather than merely providing suggested itineraries. The bookable packages could include accommodation, transport, guided walks/cycling, food and beverage etc.

As identified in Section 1.8, the Shire does not currently have a large amount of commissionable product which can be packaged. In the interim (until such time as operators are at a stage where they are ready to collaboratively package products), the potential exists to further explore product bundling. Product packaging refers to aligning and marketing complementary products which form compelling and unique experiences for visitors and assists by offering a stronger commissionable proposition for distribution partners for visitors.

The opportunity then exists to work with industry operators to develop bookable product packages which could combine (by way of example):

- Accommodation + dining + unique experience, such as a guided cycling experience; and
- Accommodation + dining + shopping + event participation, such as the Stockman's Challenge.

The need for bookable packages (as part of a Shire's product offering) is based on the ability to simplify consumer choice in the digital age where too much information and choice makes decisions difficult for consumers. Package deals have a strong appeal because they are motivating, create a call to action and offer a sense of urgency to book.[22] They also offer the potential to focus on and target specific markets, particularly during shoulder and off-season periods[23] and to gain greater market exposure and sales[24].

To achieve this may require offering industry training and up-skilling programs to identify opportunities for packaging product of similar quality.

[22] Destination Marketing Strategy 2015-2020, Visit Canberra https://tourism.act.gov.au/wp-content/uploads/2017/05/Marketing_Strategy_15-20.pdf
[23] Packaging and Bundling, Tourism Council WA
[24] Product Review and Packaging, Tourism Australia

3.2. The Catalyst Opportunities

3.2.1. Determining the catalyst projects

To determine the priority recommendations, each recommendation was assessed against the weighted criteria outlined in Table 7.

A weighted score has been used to reflect that some of the criteria have a stronger positive impact than others.

Where possible, the assessment has utilised quantitative data (particularly for those projects where feasibilities or business cases have been developed). In the absence of such assessments, however, a qualitative assessment has been undertaken based on local knowledge, stakeholder consultation, professional experience, and a general assessment of the perceived benefits.

Each project has been given a score for each of the 14 criteria identified.

Table 7: Project ranking criteria

Criteria	Score	Weighting	Description
Estimated CAPEX (Total)	<$100,000 = 1 <$500,000 = 2 <$1,000,000 = 3 >=$1,000,000 = 4	2	The size of investment – both public and private – to develop the project. The larger the investment, the higher the ranking, because of the various economic benefits able to be generated.
Size of Private Investment	<$100,000 = 1 <$500,000 = 2 <$1,000,000 = 3 >=$1,000,000 = 4	3	Projects which are more likely to attract private sector investment (regardless of the value of this investment) are ranked higher.
Size of Public Investment	<$100,000 = 4 <$500,000 = 3 <$1,000,000 = 2 >=$1,000,000 = 1	2	Projects which have a stronger public sector investment requirement are ranked lower.
Private Sector Interest	<30% of CAPEX = 1 <60% of CAPEX = 2 >60% of CAPEX = 3	3	The level of private sector interest (as a percentage of total investment). Those with a stronger proportion of private sector interest are ranked higher.
Ability to Secure Govt. Funding for Project	Limited = 1 Medium = 2 Strong = 3	2	Those projects which may be more likely to be able to secure government funding (capex or opex) are ranked higher.
Requirement for ongoing operational Govt. funding	None = 4 Limited = 3 Medium = 2 Strong = 1	3	If the project is likely to require ongoing government contributions to fund operating costs, it is ranked lower. If the project is likely to be commercially viable/sustainable, it is ranked higher.
Short term to activate	Yes = 2 No = 0	3	If the project is likely to be able to be activated in a shorter period, it is ranked higher.
Likelihood to be profiled by DNSW	None = 0 Limited = 1 Medium = 2 Strong = 3	1	The ability of the project to grow the Shire's destination profile. Projects which may have stronger marketing budgets (particularly those run by larger tourism players), as well as highly unique product, are ranked higher.
Likely visitor appeal	None = 0 Limited = 1 Medium = 2 Strong = 3	2	The projects which are likely to have a stronger appeal to the visitor market are ranked higher than those which may generate lower visitor interest.
Regional dispersal of visitors	None = 0 Limited = 1 Medium = 2 Strong = 3	3	If a project is able to encourage stronger visitor dispersal throughout the region, it is ranked higher.
Uniqueness of Product	None = 0 Limited = 1 Medium = 2 Strong = 3	1	The uniqueness of the product is ranked according to whether it is unique across Australia (ranked higher), across the region, or whether the product is likely to be unique only to the specific area it is situated in (ranked lower).

Criteria	Score	Weighting	Description
Ability to Grow Visitor Yield	None = 0 Limited = 1 Medium = 2 Strong = 3	3	The ability of the project to increase visitor yield. Projects which are likely to encourage greater overnight stays (particularly in commercial accommodation) and those which introduce commissionable elements are ranked higher.
Estimated visitation once operational	0-500 = 1 501-5,000 = 1 5,001-10,000 = 2 10,001-25,000 = 3 25,000+ = 4	2	Potential estimated visitor numbers to the project once operational.
Employment (Operational) Potential	Less than 5 FTE = 1 5-10 FTE = 1 11-20 FTE= 2 21-50 FTE= 3 More than 50 FTE = 4	2	The level of FTE employment generated once the project is operational.

3.2.2. The results of the weighted ranking

Figure 35 summarises the top 10 projects identified. These projects achieved a top-10 score based on the ranking matrix. It demonstrates there is a range of types of projects identified across the various towns in the Shire.

Table 8 on the following page provides the full ranking of the projects based on the total weighted score, followed by Table 9 which provides a more detailed breakdown of the project scores achieved.

Figure 35: The top 10 projects

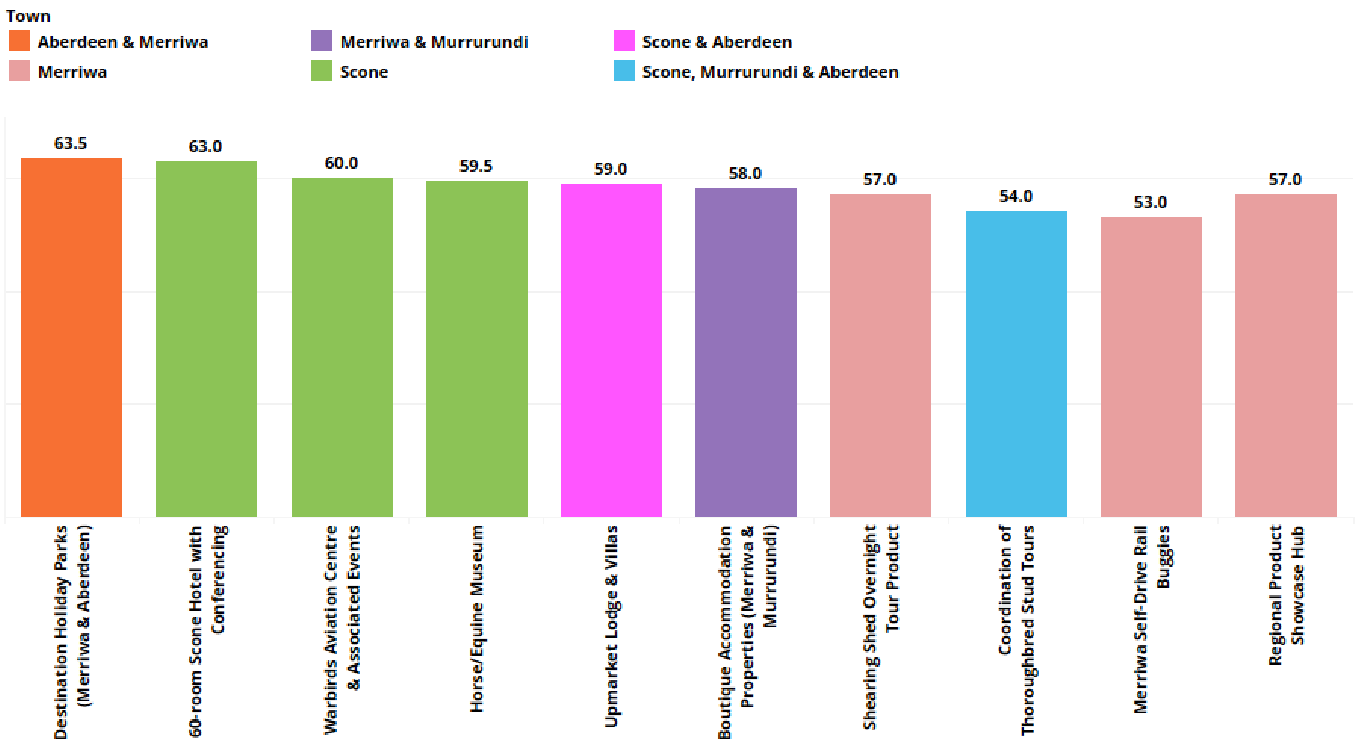


Table 8: Opportunity ranking (based on weighted scores)

Category
Governance
Infrastructure
Marketing & Promotion
Product Development
Sustainability

Project #	Name	Town	
2	Destination Holiday Parks (Merriwa & Aberdeen)	Aberdeen & Merriwa	63.5
12	60-room Scone Hotel with Conferencing	Scone	63.0
20	Warbirds Aviation Centre & Associated Events	Scone	60.0
8	Horse/Equine Museum	Scone	59.5
19	Upmarket Lodge & Villas	Scone & Aberdeen	59.0
1	Boutique Accommodation Properties (Merriwa & Murrurundi)	Merriwa & Murrurundi	58.0
18	Shearing Shed Overnight Tour Product	Merriwa	57.0
13	Regional Product Showcase Hub	Merriwa	57.0
5	Coordination of Thoroughbred Stud Tours	Scone, Murrurundi & Aberdeen	54.0
10	Merriwa Self-Drive Rail Buggies	Merriwa	53.0
7	Glenbawn Dam House Boats	Glenbawn	48.5
6	Expansion of Existing Major Events	Regional	46.0
3	Development of Bike Packing Tours	Regional	46.0
16	Sea Plane Charters From Rose Bay to Glenbawn Dam	Glenbawn	44.0
14	Recreational Attraction (Zipline, Treetops Adventure Course etc.)	Scone	42.5
17	Seasonal Sound/Light Shows Profiling Key Towns (Rotational)	Regional	36.5
4	Evening Based Activities (Light Show, Music Event, Progressive Di..	Regional	36.5
39	Product Packaging	Regional	33.0
9	Merriwa Carp Fishing Competition	Merriwa	32.5
23	Glenbawn Dam Master Plan	Glenbawn	31.5
38	Enhanced Destination Website	Regional	28.5
25	Visitor Information Servicing Strategy	Regional	28.5
21	Biking Expansion Master Plan	Regional	28.0
24	Implement the Tourism Components of the Revitalisation Strateg..	Regional	27.5
15	Reopen Hunter Valley Museum of Rural Life	Glenbawn	27.5
11	Murrurundi Public Cultural Facility (Museum/Gallery)	Murrurundi	26.0
22	Coordinated Signage Strategy	Regional	24.5
27	Rotational Roster for F&B Providers	Regional	24.0
37	Development of Regional Events Toolkit	Regional	20.5
36	Destination Events Strategy	Regional	20.5
35	Destination Events Calendar	Regional	20.5
34	Destination Content Creation	Regional	20.5
33	Destination Branding	Regional	20.5
32	ATDW Listing Drive & Keep This Up to Date	Regional	20.5
31	Visitor Management	Regional	19.0
30	Local Community Visitor Economy Awareness Campaign	Regional	18.5
29	Tourism Training & Capacity Building	Regional	18.5
28	Tourism Industry Networking Events	Regional	18.5
26	Creation of a Tourism Advisory Group	Regional	18.5

Table 9: Full opportunity matrix results (weighted)

Town

- Aberdeen & Merriwa
- Glenbawn
- Merriwa
- Merriwa & Murrurundi
- Murrurundi
- Regional
- Scone
- Scone & Aberdeen
- Scone, Murrurundi & Aberdeen

Name	Project #	Ability to Grow Visitor Yield	Ability to Secure Govt. Funding for Project	Employment (Operational)	Estimated CAPEX (Total)	Estimated Visitation	Likelihood to be profiled by DNSW	Likely visitor appeal	Need for ongoing operational Govt. funding	Private Sector Interest	Regional Dispersal of Visitors	Short term to Activate	Size of Private Investment	Size of Public Investment	Uniqueness of Product	Grand Total
Destination Holiday Parks (Merriwa & Aberdeen)	2	6.0	1.5	3.0	6.0	4.5	1.0	4.5	8.0	6.0	4.0	4.0	8.0	6.0	1.0	63.5
60-room Scone Hotel with Conferencing	12	6.0	1.5	4.5	6.0	4.5	1.0	4.5	8.0	6.0	2.0	4.0	8.0	6.0	1.0	63.0
Warbirds Aviation Centre & Associated Events	20	6.0	4.5	1.5	6.0	6.0	3.0	4.5	6.0	4.0	2.0	4.0	8.0	1.5	3.0	60.0
Horse/Equine Museum	8	6.0	4.5	3.0	6.0	6.0	3.0	4.5	6.0	4.0	4.0	0.0	8.0	1.5	3.0	59.5
Upmarket Lodge & Villas	19	6.0	1.5	1.5	6.0	1.5	3.0	4.5	8.0	6.0	4.0	0.0	8.0	6.0	3.0	59.0
Boutique Accommodation Properties (Merriwa & Murrurundi)	1	6.0	1.5	1.5	6.0	1.5	2.0	4.5	8.0	6.0	6.0	0.0	8.0	6.0	1.0	58.0
Shearing Shed Overnight Tour Product	18	6.0	4.5	1.5	3.0	1.5	3.0	4.5	6.0	6.0	6.0	4.0	2.0	6.0	3.0	57.0
Regional Product Showcase Hub	13	4.0	4.5	1.5	6.0	3.0	2.0	4.5	6.0	4.0	6.0	4.0	8.0	1.5	2.0	57.0
Coordination of Thoroughbred Stud Tours	5	6.0	1.5	1.5	3.0	1.5	3.0	4.5	8.0	6.0	2.0	4.0	4.0	6.0	3.0	54.0
Merriwa Self-Drive Rail Buggies	10	6.0	4.5	1.5	6.0	3.0	3.0	4.5	6.0	4.0	2.0	0.0	8.0	1.5	3.0	53.0
Glenbawn Dam House Boats	7	4.0	1.5	1.5	6.0	1.5	0.0	3.0	8.0	6.0	2.0	0.0	8.0	6.0	1.0	48.5
Expansion of Existing Major Events	6	4.0	3.0	3.0	3.0	4.5	3.0	4.5	4.0	0.0	4.0	4.0	2.0	6.0	1.0	46.0
Development of Bike Packing Tours	3	4.0	3.0	1.5	1.5	3.0	1.0	3.0	6.0	4.0	6.0	4.0	2.0	6.0	1.0	46.0
Sea Plane Charters From Rose Bay to Glenbawn Dam	16	6.0	1.5	1.5	1.5	1.5	2.0	3.0	8.0	6.0	2.0	0.0	2.0	6.0	3.0	44.0
Recreational Attraction (Zipline, Treetops Adventure Course ..	14	4.0	3.0	1.5	3.0	3.0	0.0	3.0	6.0	6.0	2.0	0.0	4.0	6.0	1.0	42.5
Seasonal Sound/Light Shows Profiling Key Towns (Rotational)	17	4.0	3.0	1.5	3.0	1.5	2.0	3.0	4.0	0.0	2.0	4.0	2.0	4.5	2.0	36.5
Evening Based Activities (Light Show, Music Event, Progressiv..	4	2.0	3.0	1.5	3.0	3.0	2.0	3.0	4.0	0.0	2.0	4.0	2.0	6.0	1.0	36.5
Product Packaging	39	4.0	3.0	0.0	1.5	1.5	0.0	3.0	6.0	0.0	4.0	4.0	0.0	6.0	0.0	33.0
Merriwa Carp Fishing Competition	9	2.0	1.5	1.5	1.5	1.5	0.0	1.5	4.0	4.0	2.0	4.0	2.0	6.0	1.0	32.5
Glenbawn Dam Master Plan	23	2.0	3.0	0.0	3.0	0.0	0.0	1.5	4.0	4.0	2.0	4.0	2.0	6.0	0.0	31.5
Visitor Information Servicing Strategy	25	2.0	3.0	0.0	1.5	0.0	0.0	0.0	8.0	0.0	4.0	4.0	0.0	6.0	0.0	28.5
Enhanced Destination Website	38	4.0	3.0	0.0	1.5	0.0	0.0	0.0	6.0	0.0	4.0	4.0	0.0	6.0	0.0	28.5
Biking Expansion Master Plan	21	2.0	3.0	0.0	1.5	0.0	0.0	1.5	4.0	0.0	6.0	4.0	0.0	6.0	0.0	28.0
Reopen Hunter Valley Museum of Rural Life	15	2.0	3.0	1.5	1.5	1.5	0.0	3.0	2.0	0.0	2.0	4.0	0.0	6.0	1.0	27.5
Implement the Tourism Components of the Revitalisation Str..	24	2.0	3.0	0.0	6.0	0.0	0.0	3.0	4.0	0.0	4.0	4.0	0.0	1.5	0.0	27.5
Murrurundi Public Cultural Facility (Museum/Gallery)	11	2.0	3.0	1.5	6.0	3.0	1.0	3.0	2.0	0.0	2.0	0.0	0.0	1.5	1.0	26.0
Coordinated Signage Strategy	22	2.0	3.0	0.0	3.0	0.0	0.0	0.0	4.0	0.0	4.0	4.0	0.0	4.5	0.0	24.5
Rotational Roster for F&B Providers	27	2.0	3.0	1.5	1.5	0.0	0.0	0.0	6.0	0.0	0.0	4.0	0.0	6.0	0.0	24.0
Development of Regional Events Toolkit	37	0.0	3.0	0.0	1.5	0.0	0.0	0.0	6.0	0.0	0.0	4.0	0.0	6.0	0.0	20.5
Destination Events Strategy	36	0.0	3.0	0.0	1.5	0.0	0.0	0.0	6.0	0.0	0.0	4.0	0.0	6.0	0.0	20.5
Destination Events Calendar	35	0.0	3.0	0.0	1.5	0.0	0.0	0.0	6.0	0.0	0.0	4.0	0.0	6.0	0.0	20.5
Destination Content Creation	34	0.0	3.0	0.0	1.5	0.0	0.0	0.0	6.0	0.0	0.0	4.0	0.0	6.0	0.0	20.5
Destination Branding	33	0.0	3.0	0.0	1.5	0.0	0.0	0.0	6.0	0.0	0.0	4.0	0.0	6.0	0.0	20.5
ATDW Listing Drive & Keep This Up to Date	32	0.0	3.0	0.0	1.5	0.0	0.0	0.0	6.0	0.0	0.0	4.0	0.0	6.0	0.0	20.5
Visitor Management	31	0.0	1.5	0.0	1.5	0.0	0.0	0.0	6.0	0.0	0.0	4.0	0.0	6.0	0.0	19.0
Tourism Training & Capacity Building	29	0.0	3.0	0.0	1.5	0.0	0.0	0.0	4.0	0.0	0.0	4.0	0.0	6.0	0.0	18.5
Tourism Industry Networking Events	28	0.0	3.0	0.0	1.5	0.0	0.0	0.0	4.0	0.0	0.0	4.0	0.0	6.0	0.0	18.5
Local Community Visitor Economy Awareness Campaign	30	0.0	3.0	0.0	1.5	0.0	0.0	0.0	4.0	0.0	0.0	4.0	0.0	6.0	0.0	18.5
Creation of a Tourism Advisory Group	26	0.0	3.0	0.0	1.5	0.0	0.0	0.0	4.0	0.0	0.0	4.0	0.0	6.0	0.0	18.5

3.3. Implementation Plan

The following tables provide the implementation plan to assist in delivering the various initiatives identified in this DMP. They highlight the:

- primary activations needed to implement this DMP (but not necessarily all activations);
- key agencies/groups who should collectively be engaged to drive each one;
- the estimated time frame for effective activation noting that many may change over time as resources are revised and priorities potentially change;
- indicative budget required for feasibility studies, or strategies required to be undertaken; and
- key performance indicators to ensure actions are implemented.

The implementation plan needs to be considered a working document and, as such, it needs to remain fluid to take account of the needs of different stakeholders and their ability to undertake actions along with their other responsibilities.

Table 10: Implementation plan – catalyst projects

Recommendation	Action	Who	Budget	When	KPIs
Destination Holiday Parks	▪ Site selection ▪ Zone fit for purpose	Council and operators	$20m per Destination Holiday park	2022-2023	▪ Land designated for development ▪ Zoned correctly ▪ Interested parties found ▪ Operator secured ▪ Operational by Dec 2023
60-room Scone Hotel with Conferencing	▪ Site selected ▪ Zoned fit for purpose	Council and developer	$30m	2021-2023	▪ Developer secured ▪ Site secured and zoned correctly ▪ Operational by Dec 2023
Boutique Accommodation Properties (Merriwa & Murrurundi)	▪ Site selected ▪ Zoned fit for purpose	Council and developers	$8m	2022-2024	▪ Developer secured ▪ Site secured and zoned correctly ▪ Operational by Dec 2024
Expansion & Coordination of Thoroughbred Stud Tours	▪ Stud owners in agreement	Stud owners and council	<$100k	2021-2022	▪ Studs approached and interest secured ▪ Tours developed and coordinated ▪ Tours operational
Horse/Equine Museum	▪ Racing NSW approached ▪ Site secured ▪ Funding secured	Racing NSW, Equine stakeholders, Council	$20m	2021-2024	▪ The concept developed with the full business case ▪ Funding secured from government and other parties ▪ Site secured and zoned fit for purpose ▪ Contract let for construction ▪ Opening by July 2024
Merriwa Self-Drive Rail buggies	▪ Secure private operator ▪ Secure rail line for usage	Council and developer-operator	<$10m	2021-2024	▪ Secure funding for rail line assessment and business case ▪ Ensure commercially viable and if so, secure a developer/operator ▪ Repair elements of the rail corridor as required ▪ Look to be operational by early 2024
Regional Produce Showcase Hub	▪ Find an ideal operator ▪ Find a site	Council and developer-operator	<$6m	2021-2023	▪ Identify a developer/operator ▪ Assess the viability of the concept through a business case ▪ Secure funding ▪ Secure a site ▪ Look to be operational in late 2023

Recommendation	Action	Who	Budget	When	KPIs
Shearing Shed Overnight Tour Product	▪ Get approval from shearing shed owners ▪ Find an operator	Operator, shearing shed owners and Council	$100k	2022-2023	▪ Identify potential trail options and shearing shed owners ▪ Work with shed owners to secure support for access to sites ▪ Get approvals ▪ Put marketing program together and ▪ Opening in 2023
Upmarket Lodge & Villas	▪ Seek interest from leading Thoroughbred studs major farming properties	Interested landowner and Council	<$25m	2021-2025	▪ Identify potentially interested parties to develop the concept ▪ Feasibility study undertaken ▪ Council approvals secured ▪ Construction by 2023/24 and operational by 2025
Warbirds Aviation Centre and Associated Events	▪ Build a calendar of events ▪ Create partnership opportunities	Warbirds major stakeholders and industry	$13m for construction, $150k for promotions	2021-2022	▪ Facility operational by Dec 2021 ▪ Partnerships for marketing and sponsorship etc by April 2022 ▪ Event calendar locked in with sponsors etc by July -August 2022

Table 11: Implementation plan – product development

Recommendation	Action	Who	Budget	When	KPIs
Development of Bike Packing Tours	▪ Identify tour options ▪ Identify operators	Industry operators	<$20k	2021 onwards	▪ Assess the ongoing level of market demand ▪ Identify operators ▪ Commence marketing on or before October 2021
Evening Based Activities	▪ Identify activities ▪ Identify operators	Industry operators	<$50k	2021 onwards	▪ Assess the ongoing level of market demand for specific activities ▪ Identify operators ▪ Commence marketing on or before October 2021
Expansion of existing major events	▪ Choose 3 hallmark events	Event organisers, Council and DSSN	<$100k	2022 onwards	▪ Identify events with expansion potential ▪ Work with event organisers to facilitate event growth ▪ Secure expansion funding ▪ Roll out expansion from 2022 onwards
Glenbawn Dam House Boats	▪ Identify operators ▪ Secure licence	Operators and State Govt	<$2m for moorings and supporting infra Circa $5m for 10 -15 houseboats	2022 onwards	▪ Identify an operator ▪ Assess the approval process and secure ▪ Undertake a feasibility study ▪ Develop in stages ▪ Undertake marketing program ▪ Start operating by late 2023
Merriwa Carp Fishing competition	▪ Identify an event coordinator ▪ Assess viability	Event coordinator and community stakeholders	<$20k for event marketing	2022 onwards	▪ Assess the viability of the concept ▪ If viable determine an event coordinator ▪ Develop a marketing program ▪ Look to hold on a seasonal basis

Recommendation	Action	Who	Budget	When	KPIs
Murrurundi Public Museum/Gallery	■ Identify an operator ■ Identify a site and concept	Industry stakeholders, Council and state govt	$10m for concept development	2021-2024	■ Undertake feasibility of the concept ■ If viable, find a suitable site and secure it ■ Find an operator for the facility ■ Operational by June 2024 or earlier
Seasonal Sound/Light Shows Profiling Key Towns (Rotational)	■ Identify town interest ■ Identify an event coordinator	Community stakeholders and Council	$100k per annum	2022 ongoing	■ Assess the viability of the concept ■ If viable, establish community coordination groups ■ Secure ongoing funding ■ Activate the marketing campaign ■ Ensure the first town is rolled out by 2024

Table 12: Implementation plan – infrastructure

Recommendation	Action	Who	Budget	When	KPIs
Biking expansion master plan	■ Determine locations ■ Secure funding	Council and stakeholders	$30k for the masterplan	2022	■ Secure funding for the masterplan ■ Commission masterplan ■ Review master plan report ■ Roll out recommendations from mid-2023 onwards
Coordinated signage strategy	■ Review signage ■ Assess changes required	Council	$35k	2023	■ Secure funding for the strategy ■ Commission strategy ■ Review findings of strategy and secure funding for changes ■ Roll out recommendations by 2025
Glenbawn Dam Master Plan	■ Review usage for future activities	Reflections, State govt and industry stakeholders	$45k	2023	■ Secure funding for the masterplan ■ Commission master plan ■ Review findings of the masterplan and secure funding for changes ■ Roll out recommendations by 2025
Implement the tourism components of the Revitalisation Strategies	■ Follow up from tourism-related strategies developed in 2018	Council and community groups	<$500k	2023 onwards	■ Assess the cost of tourism-related strategies and actions ■ Secure funding for a staged rollout ■ Commence activations of tourism-related strategies identified, by 2025
Visitor information servicing strategy	■ Review visitor information needs for future	Council and industry	$35k for strategy	2023 onwards	■ Secure funding for the strategy ■ Commission strategy ■ Review findings of strategy and secure funding for changes ■ Roll out recommendations commencing 2025

Table 13: Implementation plan – governance

Recommendation	Action	Who	Budget	When	KPIs
Creation of a Tourism Advisory Group	▪ Coordinated efforts for growing visitor economy	Industry and council	n/a	2021	▪ Establish a group to develop a TAG with terms of reference ▪ Advertise for participants and independently select a group ▪ Ensure the first meeting of the TAG by November 2021 or earlier
Rotational roster for F&B providers	▪ Coordinate food and beverage offerings over weekends in each town	Operators and TAG	n/a	2022	▪ Establish process with F&B operators to discuss the practicality ▪ Roll out on a town basis for those receptive ▪ Ensure each town has an F&B facility open 9-5 on both Saturdays and Sundays
Tourism industry networking events	▪ Develop more effective collaboration	Industry stakeholders and TAG	<$5k	2022	▪ Determine preferred networking events ▪ Ensure 4 + held each calendar year ▪ Commence in early 2022
Tourism Training & Capacity Building	▪ Assess and improve industry skills	DSSN, DNSW, state govt training entities and TAG	n/a as grants available	2022 ongoing	▪ Assess industry skills and needs for training ▪ Work with state govt to introduce a training program for industry operators ▪ Roll out by late 2022

Table 14: Implementation plan – sustainability

Recommendation	Action	Who	Budget	When	KPIs
Local community visitor economy awareness campaign	▪ Raise community support for the visitor economy	TAG and industry	<$25k	2022 ongoing	▪ Develop a business case for a campaign ▪ Secure funding ▪ Introduce campaign initiatives by 2023

Table 15: Implementation plan – marketing & promotion

Recommendation	Action	Who	Budget	When	KPIs
ATDW listing drive and keep this up to date	▪ Get more industry operators on the ATDW	TAG, industry, DSSN	n/a	2022 ongoing	▪ Develop a comprehensive list of those operators registered already on ATDW ▪ Identify those not on ATDW ▪ Work with those not on ATDW to get registered ▪ Review success by Dec 2023
Destination branding	▪ Create a more appealing and compelling destination brand	TAG, Council and industry	$65k	2023	▪ Secure funding for destination brand refresh ▪ Engage a professional company to assess and develop brand ▪ Agree on brand components ▪ Secure industry endorsement ▪ Roll out by late 2024

Recommendation	Action	Who	Budget	When	KPIs
Destination content creation	■ Improve collateral for marketing the region	TAG, Council and industry	$50k	2023	■ Assess existing collateral for marketing and gaps ■ Secure funding for developing quality content creation ■ Create a series of marketing campaigns by late 2024 ■ Roll out new destination content from 2025 onwards or earlier
Destination events calendar	■ Create year-round destination events	TAG, Council, Industry, DSSN	n/a	2023	■ Assess current destination events and any timing overlaps ■ Assess new destination events ■ Secure funding for new events and find sponsors and partners ■ Roll out destination event calendar by late 2023
Development of regional events toolkit	■ Ensure all destination events are highly professionally organised	TAG, Council, Industry	n/a (existing online options available)	2023	■ Determine criteria ■ Find the most applicable online model ■ Inform the community and industry ■ Make freely available on council and tag websites by late 2023
Enhanced destination website	■ Ensure a highly compelling website for destination	TAG	$50k	2023	■ Utilise new destination brand ■ Utilise new collateral and content ■ Secure funding ■ Engage a professional web design firm ■ Develop a dedicated high-quality destination website ■ Roll out by 2024 if not earlier
Product packaging	■ Offer consumers compelling well-coordinated product options (accom, attractions, events etc)	TAG and industry	n/a	2022 ongoing	■ Review all product on offer ■ Look to package complementary items ■ Work with product providers to determine options for packaging ■ Promote on destination website and through other promotional channels

PART 4: APPENDICES

Appendix 1 Full Visitation & Visitor Spend Dataset

Table 16: Visitation Data (based on 3-year averages)

Visitor Type	Motivation	2014	2017	2020
Domestic day	Business	15,700	20,533	22,667
	Education / Other	1,133	26,300	26,233
	Holiday	43,533	60,667	56,867
	VFR	50,133	48,333	39,167
	Total	110,500	155,833	144,933
Domestic overnight	Business	13,633	24,300	20,267
	Education / Other	3,133	9,667	6,867
	Holiday	41,733	46,900	43,400
	VFR	34,467	37,300	41,533
	Total	92,967	118,167	112,067
International	Business	0	200	200
	Education / Other	67	500	300
	Holiday	1,433	1,367	1,200
	VFR	667	1,567	1,167
	Total	2,167	3,633	2,867
Grand Total		205,633	277,633	259,867

Table 17: Visitation Data (annual breakdown)

Visitor Type	Motivation	2012	2013	2014	2015	2016	2017	2018	2019	2020
Domestic day	Business	7,200	8,400	31,500	34,000	5,300	22,300	6,800	28,600	32,600
	Education / Other	0	0	3,400	25,400	33,300	20,200	43,500	26,100	9,100
	Holiday	11,900	45,800	72,900	91,200	58,400	32,400	70,800	93,100	6,700
	VFR	77,300	29,500	43,600	34,400	63,600	47,000	0	88,400	29,100
	Total	96,400	83,700	151,400	185,000	160,600	121,900	121,100	236,200	77,500
Domestic overnight	Business	17,900	13,200	9,800	18,900	15,100	38,900	8,700	34,000	18,100
	Education / Other	1,700	3,800	3,900	3,400	2,600	23,000	2,500	12,200	5,900
	Holiday	42,300	43,300	39,600	51,200	50,200	39,300	49,400	56,600	24,200
	VFR	23,400	53,100	26,900	27,700	28,500	55,700	28,800	47,200	48,600
	Total	85,300	113,400	80,200	101,200	96,400	156,900	89,400	150,000	96,800
International	Business	0	0	0	200	200	200	200	200	200
	Education / Other	100	0	100	400	600	500	400	300	200
	Holiday	1,600	1,200	1,500	800	1,500	1,800	1,900	900	800
	VFR	300	1,300	400	1,500	1,200	2,000	1,000	2,000	500
	Total	2,000	2,500	2,000	2,900	3,500	4,500	3,500	3,400	1,700
Grand Total		183,700	199,600	233,600	289,100	260,500	283,300	214,000	389,600	176,000

Table 18: Visitor Spend Data (based on 3-year averages)

Visitor Type	2014	2017	2020
Domestic day	$7.0m	$10.9m	$10.6m
Domestic overnight	$22.9m	$32.3m	$31.8m
International	$3.0m	$5.3m	$4.2m
Grand Total	$33.0m	$48.5m	$46.6m

Table 19: Visitor Spend Data (annual breakdown)

Visitor Type	2012	2013	2014	2015	2016	2017	2018	2019	2020
Domestic day	$5.9m	$5.3m	$10.0m	$12.7m	$11.3m	$8.7m	$8.8m	$17.2m	$5.7m
Domestic overnight	$20.2m	$27.9m	$20.6m	$27.1m	$26.3m	$43.7m	$25.4m	$42.6m	$27.5m
International	$2.7m	$3.5m	$2.9m	$4.2m	$5.2m	$6.6m	$4.8m	$5.4m	$2.5m
Grand Total	$28.7m	$36.7m	$33.5m	$43.9m	$42.7m	$59.0m	$39.0m	$65.2m	$35.6m

Appendix 2 Accommodation Audit

Table 20: Full Accommodation Audit

Name	Category	Rooms	Number of Reviews	Excellent	Very Good	Average	Poor	Terrible
Aberdeen Motel	Motels	15	39	17	20	1	0	1
Airlie House Motor Inn	Motels	25	100	20	51	19	4	6
B and B on Bettington	Boutique (B&Bs, Cottages, Guesthouses)	5	38	22	9	3	2	2
Belltrees	Boutique (B&Bs, Cottages, Guesthouses)	6	9	6	2	0	0	1
Belmore Hotel Scone	Pub Accommodation	9	1	0	1	0	0	0
Big River campground	Campgrounds							
Cassilis Bowling Club & Caravan Park	Caravan & Holiday Parks		3	1	1	1	0	0
Cassilis War Memorial Park Camping Area	Campgrounds		1	0	1	0	0	0
Cherson Cottage	Boutique (B&Bs, Cottages, Guesthouses)	1						
Colonial Motor Lodge	Motels	24	68	20	34	12	1	1
Devils Retreat	Boutique (B&Bs, Cottages, Guesthouses)	1						
El Dorando Motel	Motels	12	21	1	8	11	0	1
Golden Fleece Motor Inn	Motels	6	12	11	1	0	0	0
Gummi Falls campground	Campgrounds							
Gunsynd Studio Apartment	Apartments	1	44					
Highway Caravan Park	Caravan & Holiday Parks		6	1	1	2	2	0
Hillview Scone	Boutique (B&Bs, Cottages, Guesthouses)	1						
Inland waters Glenbawn Dam	Campgrounds		1	0	0	0	0	1
Inn Scone	Apartments	3	15	10	4	1	0	0
Isis Motel Scone	Motels	19	95	35	44	12	1	3
Kellys Top Pub	Pub Accommodation	8						
Lake Glenbawn Holiday Cottages	Boutique (B&Bs, Cottages, Guesthouses)							
LeCamah Hill	Boutique (B&Bs, Cottages, Guesthouses)	4	14	13	1	0	0	0
Merriwa Caravan Park	Caravan & Holiday Parks							
Moonan Cottage	Boutique (B&Bs, Cottages, Guesthouses)	1						
Murrurundi Caravan Park	Caravan & Holiday Parks		47	33	10	2	0	2
Murrurundi Motel	Motels	16	16	3	2	7	2	2
Polblue campground and picnic area	Campgrounds							
Portman House	Motels	8	53	33	16	1	2	1
Railway Hotel Murrurundi	Pub Accommodation	8	3	1	0	2	0	0
Reflections Holiday Parks Lake Glenbawn	Caravan & Holiday Parks	16	5	2	1	1	0	1
Royal Hotel Motel	Pub Accommodation	8						
Runnymeade Studio B&B	Boutique (B&Bs, Cottages, Guesthouses)	1						
Runnymede	Boutique (B&Bs, Cottages, Guesthouses)	2	1	1	0	0	0	0
Russley Rural Retreat	Boutique (B&Bs, Cottages, Guesthouses)	7	3	3	0	0	0	0

Name	Category	Rooms	Number of Reviews	Excellent	Very Good	Average	Poor	Terrible
Scone Caravan Park	Caravan & Holiday Parks		4	0	0	1	1	2
Scone Motor Inn	Motels	19	126	57	51	16	1	1
Scone Villas	Boutique (B&Bs, Cottages, Guesthouses)	10	1	0	0	1	0	0
Segenhoe Inn Bed & Breakfast	Boutique (B&Bs, Cottages, Guesthouses)	9	44	30	9	2	3	0
Strathearn Park Lodge	Lodges	4	141	127	13	1	0	0
The Cedars Scone	Boutique (B&Bs, Cottages, Guesthouses)	1						
The Orchard Lodge	Lodges	7						
The Royal Hotel Cassilis	Pub Accommodation	4						
The Thoroughbred Hotel	Pub Accommodation	8						
Valley View Motel	Motels	16	127	69	49	7	2	0
Washpools campground	Campgrounds							
Willowgate Hall Luxury Hosted B&B	Boutique (B&Bs, Cottages, Guesthouses)	4	5	4	0	0	1	0

Appendix 3 Attraction Audit

Table 21: Full Attractions Audit

Category	Name
Arts & Art Galleries	Darcy and the Fox, Murrurundi
Arts & Art Galleries	Graincorp Silo Art
Arts & Art Galleries	Michael Reid at Murrurundi
Golf Courses	Aberdeen Golf Club
Golf Courses	Merriwa Golf Club
Golf Courses	Murrurundi Golf Club
Golf Courses	Scone Golf Club
Guided Tours	Scone Country Tours
Hiking & Mountain Biking Trails	Barrington Trail
Hiking & Mountain Biking Trails	Burning Mountain Walk
Hiking & Mountain Biking Trails	Careys Peak Road
Hiking & Mountain Biking Trails	Cobark Lookout
Hiking & Mountain Biking Trails	Edwards Swamp Trail
Hiking & Mountain Biking Trails	Eye of the Needle Walk
Hiking & Mountain Biking Trails	Flat Rock Track
Hiking & Mountain Biking Trails	Gundy MTB Adventures
Hiking & Mountain Biking Trails	Junction Pools Trail
Hiking & Mountain Biking Trails	Lee's Pinch Walking Track
Hiking & Mountain Biking Trails	Lees Pinch Lookout Walking Track
Hiking & Mountain Biking Trails	Polblue Falls Track
Hiking & Mountain Biking Trails	Polblue Swamp Track
Hiking & Mountain Biking Trails	The Snow Gums Walking Track
Hiking & Mountain Biking Trails	Tralbragar Falls Walking Track
Museums, Historical Sites & Landmarks	Merriwa Colonial Museum & Historical Society
Museums, Historical Sites & Landmarks	Merriwa Railway Station
Museums, Historical Sites & Landmarks	Murrurundi Museum
Museums, Historical Sites & Landmarks	Scone & Upper Hunter Historical Society
National Parks, Reserves & Conservation Areas	Barrington Tops State Conservation Area
National Parks, Reserves & Conservation Areas	Brushy Hill Nature Reserve
National Parks, Reserves & Conservation Areas	Burning Mountain Nature Reserve
National Parks, Reserves & Conservation Areas	Camerons Gorge Nature Reserve
National Parks, Reserves & Conservation Areas	Camerons Gorge State Conservation Area
National Parks, Reserves & Conservation Areas	Cedar Brush Nature Reserve
National Parks, Reserves & Conservation Areas	Durridgere CCA Zone 3 State Conservation Area
National Parks, Reserves & Conservation Areas	Lake Glenbawn State Park
National Parks, Reserves & Conservation Areas	Scone Mountain National Park
National Parks, Reserves & Conservation Areas	The Firs Forest
National Parks, Reserves & Conservation Areas	Towarri National Park
National Parks, Reserves & Conservation Areas	Washpools waterhole
National Parks, Reserves & Conservation Areas	Wingen Maid Nature Reserve
National Parks, Reserves & Conservation Areas	Woolooma National Park
Scenic Flights	Airspeed Aviation
Scenic Flights	Pay's Air Charter
Stud Tours, Racing & Facilities	Arrowfield Stud
Stud Tours, Racing & Facilities	Australian Stock Horse Society
Stud Tours, Racing & Facilities	Hunter Thoroughbred Breeders Association
Stud Tours, Racing & Facilities	Merriwa Race Club
Stud Tours, Racing & Facilities	Rosedale Equine Complex
Stud Tours, Racing & Facilities	Scone Race Club
Stud Tours, Racing & Facilities	Upper Hunter Tours
Stud Tours, Racing & Facilities	Vinery Stud Tours
Stud Tours, Racing & Facilities	White Park

Category	Name
Swimming Pools	Merriwa Olympic Pool
Swimming Pools	Murrurundi & District War Memorial Pool
Swimming Pools	Scone Memorial Swimming Pool
Visitor Information	Merriwa Visitor Information Centre
Visitor Information	Murrurundi Visitor Information Centre
Visitor Information	Scone Visitor Information and Horse Centre
Waterfalls	Gummi Falls
Waterfalls	Polblue Falls
Watersports	Hunter Valley SUP
Watersports	Lake Glenbawn
Wildlife & Conservation	Aussie Ark
Wineries & Breweries	Stone Hill Vineyard
Wineries & Breweries	Tilse's Apple Track Cider