

**Gunnedah Shire
Destination Management Plan
2015**

DESTINATION ANALYSIS



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GUNNEDAH SHIRE DESTINATION MANAGEMENT PLAN

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1. INTRODUCTION

1.1 Background

In 2014, Gunnedah Shire resolved to prepare a Destination Management Plan (DMP) for Gunnedah Shire. DMPs are one of the tools introduced by the Federal and State Governments to provide the direction and framework for the development of the 'visitor economy'. The visitor economy is a broader concept than the tourism industry, incorporating all businesses and activities that benefit, both directly and indirectly, from money spent by travellers. The visitor economy is recognised as major driver of economic growth, with growth in the visitor economy a strategic priority at both Federal and State Government levels.

At the local level, the visitor economy is a significant part of the economic base of Gunnedah Shire. The Shire attracts an estimated 211,000 visitors per year¹, of whom 100,000 are overnight visitors staying one or more nights in the Shire and 111,000 are day trippers. Overnight visitors spend in the order of 267,000 nights in the Shire. Direct expenditure by visitors to the Shire is in the order of \$48 million per year, with overnight visitors spending an estimated \$33 million per year and day trippers \$15 million per year. Expenditure by visitors creates significant employment opportunities across a range of industry sectors.

Gunnedah Shire Council is a key stakeholder in the visitor economy and is also in a position to coordinate and drive the sector. Council operates the Gunnedah Visitor Information Centre, provides a number of tourist attractions and venues, has a significant investment in the infrastructure and facilities that underpin visitation, and supports a range of events and activities that are held in the Shire. Council is also the regulatory authority in areas such as planning, development and food safety.

1.2 Gunnedah Shire

Gunnedah Shire is located in North Western NSW approximately 425 kilometres north west of Sydney and 77 kilometres west of Tamworth. The Shire sits on the cross-roads of the Oxley and Kamilaroi Highways.

The Shire covers an area of 4,992 square kilometres. The Shire sits at the southern end of the Nandewar Range and is the centre of the highly productive Liverpool Plains. Gunnedah Shire is bounded by Tamworth Regional Council to the north-east and east, Liverpool Plains Shire to the south, Warrumbungle Shire to the west and Narrabri Shire to the north. The Shire is drained by the Namoi River and three of its headwater tributaries, the Mooki and Peel Rivers and Cox's Creek.



Figure 1.1 Location of Gunnedah Shire

The original inhabitants of Gunnedah Shire were the Gunn-e-darr people, a sub-group of the Kamilaroi 'nation'. Throughout most of the year, the group divided into smaller 'bands' and hunted and gathered along the Namoi and Mooki Rivers. It is believed that the bands primarily retreated to the foothills of the surrounding ranges during winter, using the caves to provide protection from the winds. Mullibah Lagoon in Gunnedah is believed to have been the summer camp of the Gunn-e-darr people.

Today, Gunnedah Shire has a population of around 12,203 people². The township of Gunnedah (population 7,888) is the commercial and administrative centre of the Shire. There are five small villages – Breeza, Carroll, Curlewis, Mullaley and Tambar Springs and 26 rural localities (Basin Plain, Blue Vale, Boggabri (part), Booroondarra, Burgurgate, Carroll Gap, Coocooboonah, Emerald Hill, Ghoolendaadi, Gulligan, Gunnembene/Crossing, Keepit, Kelvin (part), Kurrumbede, Marys Mount, Meermaul, Milroy, Mornington, Nea, Noggabri, Orange Grove, Pialloway, Pullaming, Rangari, Watermark and Willala).

¹ Statistics in this section are taken from Destination NSW – Local Government Area Visitor Profile – Gunnedah Shire, YE September 2014.

² Population statistics taken from the Australian Bureau of Statistics – Population Census, 2011.

The Shire has a diverse economic base. The primary activities are agriculture and coal mining, with the Shire also having strong retail, health care and social assistance, tourism and hospitality, construction and education and training sectors.

Agriculture is the dominant landuse and economic activity in Gunnedah Shire, with the Shire incorporating some of the most productive agricultural land in Australia - the Liverpool Plains. Agricultural activities include broad-acre farming (cereal, cotton, legumes, oil seeds), intensive farming and orchards and plantations and livestock production (cattle, sheep, goats and pigs). The main crops are grain (primarily wheat and sorghum) and cotton, with minor crops including other grains, legumes and oil seeds – including canola and sunflowers. The Shire also has a small number of citrus and olive producers, and a vegetable producer and a cut flower producer. With the variety of crops, the Liverpool Plains are a vibrant, ever-changing patchwork of colour.

Gunnedah is the centre of the resource-rich Gunnedah Basin. While coal mining has occurred in the Gunnedah area for more than 135 years, the strong global demand for coal over the past decade, has resulted in the opening up of the Gunnedah Basin, with the Gunnedah Basin recognised as the 'New Frontier' for coal mining in NSW. There are a number of open cut coals mines operating in the north western corner of the Shire, as well as proposals to develop two large mines in the Breeza – Carroona area in the south east of the Shire.

The township of Gunnedah is a sub-regional centre, with its trade area extending into the surrounding Shires. The town is anchored by Woolworths, Coles and Aldi supermarkets with a number of national traders, including Target Country, Harvey Norman, Best & Less, Millers, Reject Shop, Mitre 10 and McDonalds. Gunnedah has a range of cafes and eateries, as well as boutique and lifestyle stores. The town also has a District Hospital, TAFE College, art galleries, a number of large conference - entertainment venues, and a range of quality sporting and recreation facilities. It also has a concentration of accommodation properties including motels, pub hotels, serviced apartments, a caravan park, and a camping area at the Showground. Gunnedah is the home of AgQuip, the largest agricultural trade show in Australia.

The five villages in the Shire – Curlewis, Breeza, Carroll, Mullaleey and Tambar Springs, are service centres and meeting places for the surrounding rural areas. The larger villages of Curlewis, Mullaleey, Carroll and Tambar Springs have general stores / post offices, with Curlewis, Mullaleey and Tambar Springs also having hotels, with these hotels providing basic pub accommodation. Mullaleey has a small caravan park attached to the Hotel.

For the past decade, Gunnedah Shire has been promoted at the 'Koala Capital of the World'. It is also known as 'Dorothea Mackellar Country' due to its strong links to Dorothea Mackellar and her poem 'My Country'. The main attractions of the Shire include the stunning rural scenery, Lake Keepit and the Lake Keepit State Park, the Namoi River, Koalas, Rural Museum, and the recently opened, Boonalla Aboriginal Area. Curlewis hosts a popular camp draft. Tambar Spring's claims to fame are the diprotodon skeleton found in the area and the first WW1 war memorial in Australia, while Breeza has an association with the bush ranger Ben Hall, and Carroll with Kibah Tic-Tic and Kibah Sandstone, well-known Olympic Eventing horses.

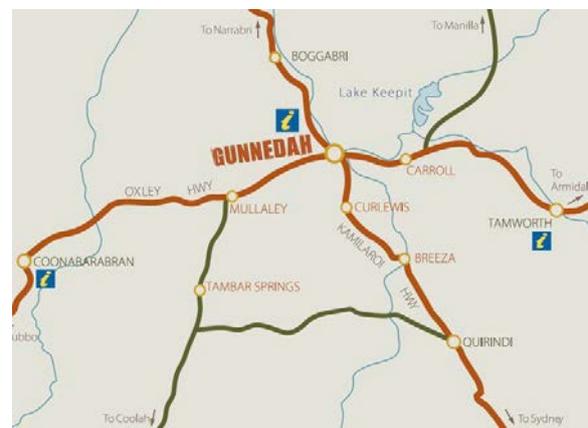


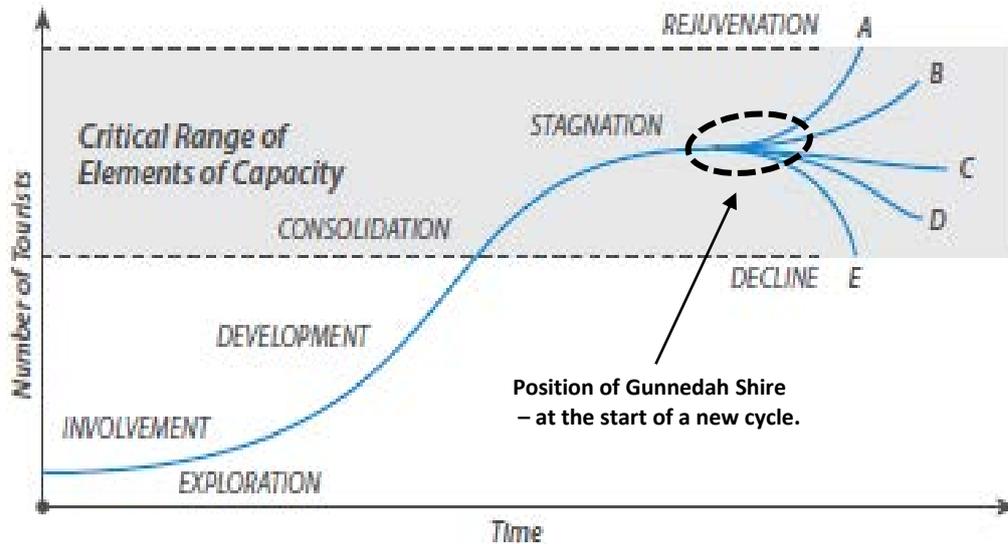
Figure 1.2 The Gunnedah District



1.3 Destination Development

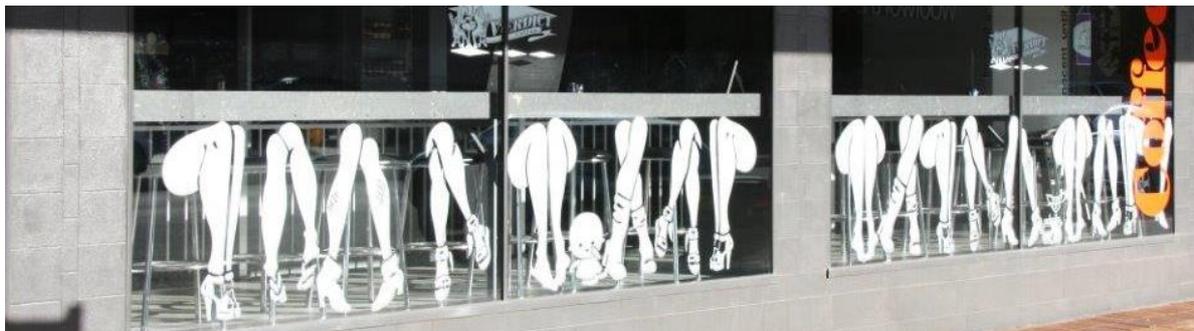
Destinations are generally discussed in terms of lifecycle – emerging, mature, declining or rejuvenating. The stages of destination development are summarised in Figure 2.1. At the stagnation stage, the options are to re-invent and/or rejuvenate the destination (A and B) – starting the cycle again; retain the status quo (C); or allow the destination to decline (D and E).

Figure 1.3 Destination Lifecycle



Source: ARTN: The Guide to Best Practice Destination Management

Until the last few years, Gunnedah Shire as a destination was relatively stagnant. With the development of new accommodation, the relocation of the Visitor Information Centre and the product development that is underway, Gunnedah Shire has moved into the rejuvenation phase with the start of a new cycle. The preparation of the DMP is part of the exploration stage of this new cycle. The emphasis over the next few years needs to be on product and infrastructure enhancement and development.



1.4 Destination Management

Destination management introduces a 'holistic' approach to the development, management and marketing of tourist destinations. The approach requires that all tiers of Government, the tourism industry and business and community leaders work together to develop and manage destinations to ensure that tourism adds value to the economy and social fabric of the area, is sustainable into the future, is resilient to external shocks and is responsive to changes in both the marketplace and competitive environment. It involves formulating a strong vision for the future of the destination and putting in place the framework and resources to 'deliver' this vision.

Destination Management Plans (DMPs) are one of the tools used to identify the product and infrastructure needed to support and facilitate growth in visitation and to set the directions and priorities for growth.

1.5 Purpose of the Gunnedah Shire Destination Management Plan (DMP)

The purpose of the Gunnedah Shire DMP is to provide the direction and framework for taking Shire's visitor economy forward over the next five years. The primary goal of this Plan is to increase visitor expenditure within the Shire, with resultant economic and social benefits for the Shire community. To achieve this, the Plan focuses on:

- Identifying opportunities to strengthen and grow the Shire's existing market base and diversify into new markets in order to deliver visitation year-round.
- Understanding the needs and expectations of visitors and ensuring that the infrastructure, facilities and services are in place within the Shire to meet these.
- Encouraging and facilitating the development of tourist attractions, accommodation, events and infrastructure within the Shire.
- Setting the directions for the marketing and promoting the Shire.
- Identifying priorities to ensure the most effective use of limited funds and resources.

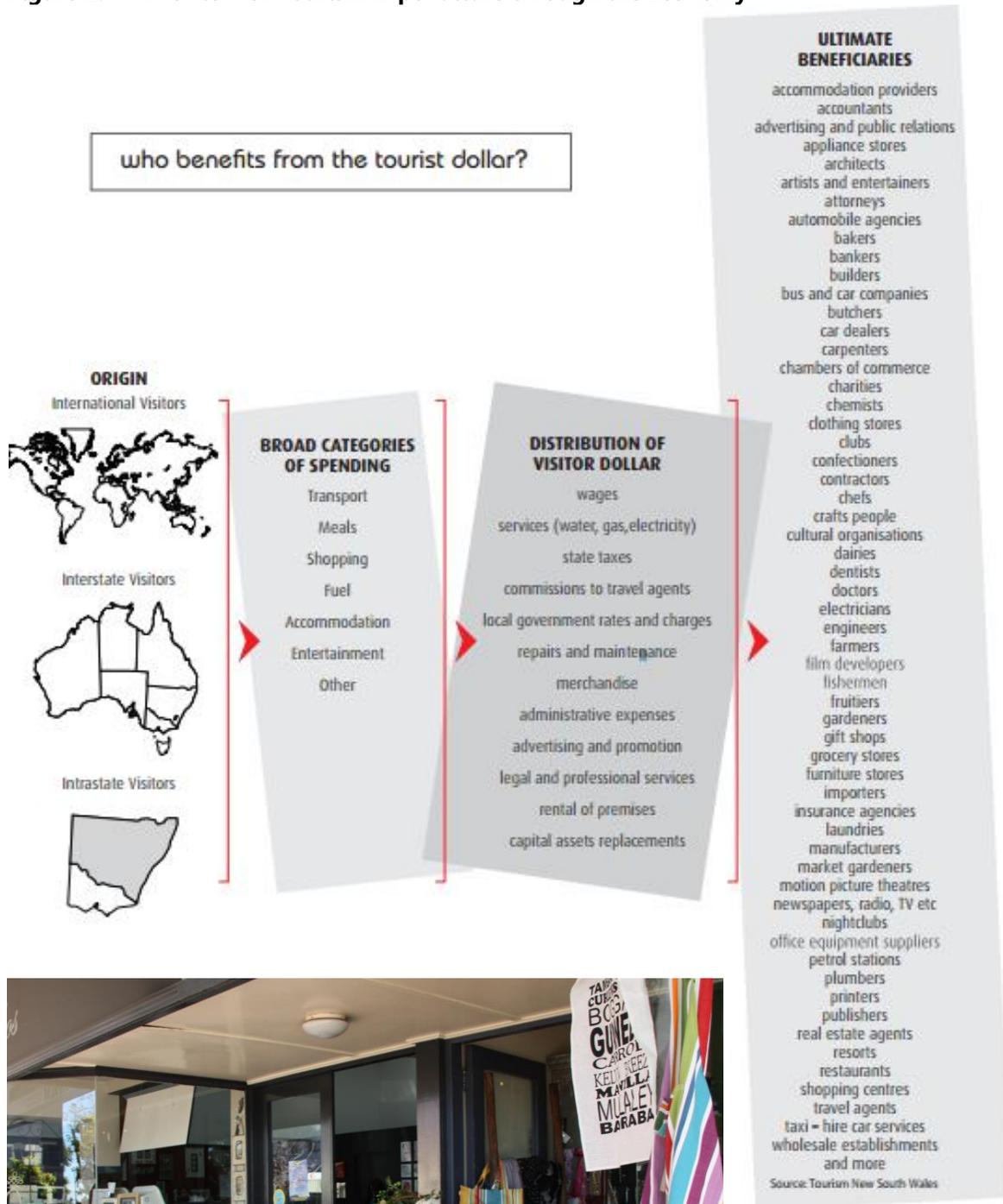
1.6 Outcomes being Sought

The main outcomes being sought from the Gunnedah Shire Tourism Plan are:

- To deliver on Council's Strategic Objectives as articulated in the Gunnedah Shire Community Strategic Plan.
- A growing visitor economy that is economically, socially and environmentally sustainable.
- Increased appeal and competitiveness of Gunnedah Shire as a service centre and destination – in particular to build the Shire's attraction and activity base.
- Higher profile / increased awareness of Gunnedah Shire - from both a tourism and economic development perspective.
- Increased visitor satisfaction – providing quality experiences that deliver on the brand promise and core values of the area, and services that meet visitor needs and expectations.
- Retention and protection of the lifestyle, heritage, cultural, landscape and environmental assets that form the basis for tourism within the Shire.
- Increased public and private sector investment in appropriate and sustainable tourism products and facilities within the Shire.
- Increased skills and professionalism within the tourism sector, including improved customer service, more packaging and value-adding, and widespread adoption of web-based and digital technology for information dissemination and sales and marketing.

Growing visitation to the Shire will bring 'new' dollars into the local economy with these 'new' dollars having a multiplier effect, filtering through to most sectors. This will contribute to increasing the long term viability of local businesses and generate and sustain employment. Research undertaken by Tourism Research Australia in conjunction with the Australian Bureau of Statistics has found that the value created by tourism expenditure exceeds that of other major economic activities, with every dollar spent by the tourism sector generating an additional \$0.90 in value-add. In contrast the value-add spend for retail is \$0.70, mining is \$0.60 and health care and social assistance is \$0.50.

Figure 1.4 The Flow of Tourism Expenditure through the Economy



Source: Destination NSW



1.7 Structure of the Gunnedah Destination Management Plan

The Gunnedah Shire DMP is presented in two volumes Destination Analysis and the DMP Action Plan. The Destination Analysis (this document) provides information on:

- The planning framework.
- The markets attracted to the Shire and surrounding region and the changes that are occurring in the marketplace.
- The product base of the Shire – localities, attractions, activities, events and experiences.
- The infrastructure, facilities and services available to support the visitor economy.
- Product, infrastructure and market development opportunities.

The DMP Action Plan provides the strategies and actions needed to facilitate the co-ordination, development and marketing of the visitor economy within the Shire.

1.8 Use of this Plan

The Gunnedah Shire DMP contains relatively detailed information on the product and market development opportunities available in Gunnedah Shire and the challenges facing the tourism sector. The Plan is designed to be used as follows:

- Destination Analysis – to provide resource material for Council, community and business groups and tourism operators.
- To inform Gunnedah Shire Council, Destination NSW, Inland NSW Tourism, Government Agencies and regional bodies of the needs and priorities of the visitor economy in Gunnedah Shire to assist these organisations in formulating strategic directions and policies, allocating funds and resources, and making planning and development decisions.
- Resource material with sections of the Plan be 'cut and pasted' to form briefing material for individual projects / project teams, input into grant applications and funding submissions and submissions to Government, local Members of Parliament, funding bodies and other organisations when seeking assistance to implement the projects identified in the Plan.

Ownership of the DMP is vested in Gunnedah Shire Council.

1.9 Implementation

The DMP is the starting point for consolidating and growing the visitor economy within Gunnedah Shire over the next five years. It will however take time, resources and commitment to implement the strategies and actions incorporated in this Plan.

Given the limited resources available to Council, actions need to be prioritised. There are a number of relatively simple, cost effective actions that can be undertaken in the short-term that will result in growth in visitation. Sustaining visitation in the medium to longer term will only be achieved if the Shire's tourism product and infrastructure base continues to be improved and expanded. This will require a strong partnership between Council and the Shire communities, strategic relationships with surrounding LGAs and regional organisations, and support from tourism and business operators.

There are a number of projects and actions in this Plan that are 'aspirational' and are well beyond Council's financial capacity at this time. These projects are however included in-case funding opportunities arise in the future. The fact that the projects have been identified and documented as important for the development of the local and/or regional visitor economy should assist in securing funding.

To be effective, the DMP must be a living document that is constantly evolving. The recommended actions need to be implemented and the results evaluated. Periodically the DMP will need to be revised, building on what has been achieved, so that Gunnedah Shire can continue to move forward.

1.10 Abbreviations Used in this Plan

ABS	Australian Bureau of Statistics
DMP	Destination Management Plan
DNSW	Destination NSW
GME	Gunnedah Motorsports Enthusiasts
LGA	Local Government Area
MTB	Mountain Bike
NPWS	National Parks & Wildlife Service
RMS	Roads & Maritime Services
RTO	Regional Tourism Organisation
RV	Recreational Vehicle (eg motorhome, campervan)
TRA	Tourism Research Australia
VEAP	Visitor Economy Action Plan
VFR	Visiting Friends and Relatives



2. STRATEGIC PLANNING FRAMEWORK

The Gunnedah Shire Tourism Destination Management Plan is being prepared within the framework set by Federal and State Government policies for the development and management of tourism destinations. It is also consistent with Regional planning and development strategies and with the directions and strategic directions of the Gunnedah Shire Community Strategic Plan.

2.1 Government Policy

Australian Government - National Long Term Tourism Strategy

The National Long Term Tourism Strategy for Australia recognised that the future of tourism is dependent on providing 'compelling and sustainable experiences' to consumers. It also recognised that for Australia to move up the international tourism value chain and to remain competitive, required 'innovation, continuous improvement and renewal' of products, experiences and infrastructure. To facilitate this, the Commonwealth Government, in conjunction with the State Tourism Agencies is advocating for integrated planning, development and management of tourism destinations, with localities encouraged to prepare and adopt Destination Management Plans (DMPs).

NSW Government – NSW 2021

In 2010 the NSW State Government released 'NSW 2021' - a 10 year strategic business plan to rebuild the NSW economy, return quality services to the State, renovate infrastructure, restore accountability to government, and strengthen local environment and communities. 'NSW 2021' recognised the potential of the Visitor Economy to drive growth in the State's economy and set a target for the Visitor Economy to double overnight visitor expenditure to NSW by 2020. Growth in expenditure of 7.1% per annum (compound) is required to meet this target. This growth rate includes an allowance of 2.5% per annum for inflation.

To deliver on the NSW Visitor Economy target, Destination NSW, through the Visitor Economy Taskforce, has produced the *Visitor Economy Action Plan* (the VEAP Report). The vision for the NSW Visitor Economy, as stated in the VEAP report is:

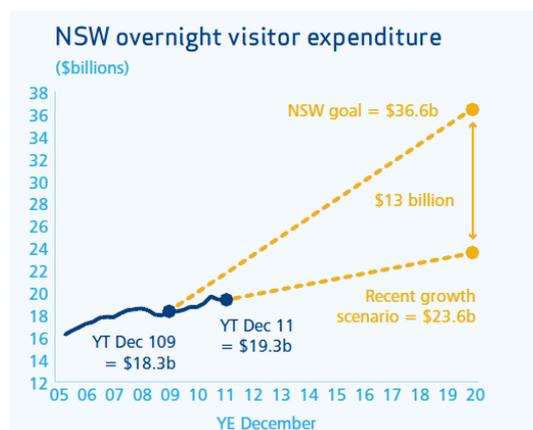


Figure 2.1 Visitor Expenditure Target – NSW 2011 - 2021

Vision for the 2020 NSW Visitor Economy

By 2020, NSW will have a high-performance visitor economy that has doubled its contribution to the State's economy as measured by overnight visitor expenditure (in nominal terms).

NSW will be established as the premier destination for visitors from key priority target markets and market segments, including holiday/leisure, business, business event, education, employment, backpacker, and 'visiting friends and relatives' (VFR) visitors.

The best of the State will be showcased through appealing, authentic and high-quality visitor experiences. The 2020 visitor economy will be characterised by a culture of innovation, entrepreneurship and industry leadership. Businesses in the visitor economy will contribute strongly to NSW's economic, social and cultural strengths.

Destination Management Plans will provide clear frameworks to guide Government support at all levels and industry investment to deliver experiences that match and exceed visitor expectations and provide growth.

NSW will be a State that welcomes visitors and celebrates the NSW experience, reflecting civic pride in the State and its success.

2.2 Destination Management Plan – Northern Inland Region

In 2013 the Inland Regional Tourism Organisation (RTO) adopted a DMP for the Northern Inland Region, with the Region incorporating Tamworth Regional, Gunnedah and Liverpool Plains Local Government Areas (LGAs). The Vision, Mission and Goals for the development of the Visitor Economy within the Region are:

Vision.

We are the land of opportunity and proud of our country way of life. Like our ever-changing landscape, we are strong, resilient and sometimes rugged. We are never predictable, we are the real deal, and there is no pretence here! We value and nurture creativity and innovation, resourcefulness and hard work, but above all we are about having fun! Our future, like our sky is big, filled with bright rising stars that constantly remind us to aim high and think beyond what we can see, beyond convention. We welcome you to share our vision, our opportunity and to experience our abundant country life.

Mission

Our Mission is to make the most of the opportunity our visitor presents. We will do this by collaborating and together demonstrate that we are still the lucky country, rich in resources and opportunity. Together we will just get on and get the job done, without pretence or boundaries, but with integrity and strong leadership. With determination and innovative approaches we will grow and prosper. We stay grounded, respecting our people and place, our heritage and culture. We will ensure we are always welcoming and friendly and we will have fun.

Goals

- Goal 1: We will double the visitor economy by 2020 and be recognised as a region of prosperity and growth.
- Goal 2: We will respect and protect our place – the environment and man-made assets that have provided us with a rich opportunity.
- Goal 3: We will respect our people – both the communities that comprise our region and the visitors who come to experience our Australian country landscape.
- Goal 4: We promise tell our compelling story with honesty and be true to ourselves.
- Goal 5: We promise to deliver upon our commitment to visitors with honesty and integrity.

The Regional DMP identifies development of nature and outdoor experiences; food, wine and agritourism; heritage and Aboriginal based tourism; and events as product development opportunities for the Region. The key directions of the Action Plan relate to:

- Working together - improving linkages, at all levels, across the region.
- Improving the presentation of towns and villages, and increasing their level of interest and appeal through outdoor dining and public art.
- Enhancing business skills and improving customer service.
- Market development – growing the Visiting Friends and Relatives (VFR), business events and sporting markets.
- Developing and implementing a Digital Strategy to communicate directly with the market, disseminate information and market and promote the region.

2.3 Gunnedah Shire - Community Strategic Plan

As required by the Local Government Act, Gunnedah Shire Council delivers its services through an integrated planning approach, with the Gunnedah Community Strategic Plan 2013-2023 being the 'co-ordinating' plan that sets the vision, direction and framework for Gunnedah Shire for the next decade.

As stated in this Plan, Council's vision for the Shire is for:

'A prosperous, caring and proud community reflected in the achievements and aspirations of the people'.

Growing the Shire's economy is one of the Plan's core priorities, with developing the tourism sector being one of the strategies to achieve economic growth. Section 2.4 of the Plan relates specifically to the tourism sector with the key strategies being:

Outcome	Strategies	
2.4 - Our identity and reputation promoted to tourists	2.4.1	Undertake visitor analysis to better understand what attracts tourists to the area and identify opportunities to attract more visitors.
	2.4.2	Continue to explore social and cultural events and activities in partnership with businesses and organisations to encourage the community to meet, socialize, support and understand each other and attract income to the region.
	2.4.3	Extend improved access to telecommunication and broadband services.
	2.4.4	Support effective communication and promotion of services in the area.
	2.4.5	Actively seek to bring business, sporting and cultural events to the area, eg Sundowner Bicycle Race.
	2.4.6	Review and better establish branding of Gunnedah area to facilitate marketing by Council, business and industry.
	2.4.7	Gunnedah is a welcoming place for tourists and visitors alike. We provide accessible areas for all travellers including caravans and recreational vehicles.

Developing the visitor economy can also assist Council achieve a number of target outcomes including:

Community Strategic Plan Outcomes	
Engaging and Supporting the Community	
1.5	Population increases through targeted promotion of the Shire identity and opportunities
1.6	Retention of our young population through increased employment and social opportunities
1.8	Access to education and training opportunities
Building Our Shire's Economy	
2.1	Our economic employment base diversified
2.2	Our infrastructure strategically managed
2.3	Access to our goods, services and markets
2.5	Entrepreneurs and developers contribute to local economic growth
Retaining Our Quality of Life	
3.4	Villages are sustainable
3.7	Our younger people attracted, retained and developed
3.8	Entertainment facilities, cultural development opportunities, equipment and stimulation for community members of all ages
3.10	Recognise and support our cultural activities
3.11	Our community values retained over time
3.12	Create opportunities for people to participate in active and healthy recreational activities

Community Strategic Plan Outcomes

Protecting and enjoying our beautiful surrounds

4.3	Secure our native fauna and encourage biodiversity in the Gunnedah shire
4.5	Protect our heritage
4.8	Manage our exposure and contribution to the changing climate
4.9	Enhance our Streetscapes in Gunnedah and Villages





DESTINATION ANALYSIS
The Market:
Visitation & Trends

3. VISITATION

3.1 Regional Context

3.1.1 Visitation to the New England North West Region³

Gunnedah Shire is part of the New England North West (NE-NW) Tourism Region. Travel within the Region tends to be concentrated north-south along the New England Highway in the east and Newell Highway in the west. The main east-west routes are the Kamilaroi, Oxley and Gwydir Highways. The main destinations within the Region are Tamworth, Armidale and Moree.



Figure 3.1 NE-NW Tourism Region

In 2014, the NE-NW Region attracted 1.192 million domestic and 30,800 international visitors who stayed one or more nights in the Region. In addition, the Region attracted 1.617 million day trippers. Visitation figures for the period 2002 to 2014 are given in Table 3.1. Over the past decade visitation to and within the Region has been trending down (Figures 3.2 and 3.3).

In 2014, total visitors to the Region spent in the order of \$762 million. Domestic overnight visitors spent on average \$136 per night, down 0.2% on 2013. The average expenditure of domestic day visitors was \$155 per visit, up 32% on 2013, while the average expenditure by international overnight visitors was \$65 per night.

Information on visitation to the NE-NW Region is provided in Appendix 1, with the main characteristics of domestic overnight visitors being:

- The majority of domestic visitors to the Region are from Regional NSW (51.8%), with Sydney (17.4%) and Queensland (21.8%) being significant secondary markets.
- The average length of stay within the Region is relatively short – 2.86 nights.
- People aged 55+ years are the dominant market. The majority of visitors are travelling as adult couples, alone or with adult friends or relatives. Only 16.8% of visitors were travelling with children.
- 40% of visitors are visiting friends and relatives, with 31.9% being holiday and leisure travellers and 20.4% travelling for business / work.
- The majority of visitors arrive in the Region by car (85.3%).
- The most popular forms of accommodation are staying with friends and relatives (40.9%), in hotels and motels (21.6%) and in caravan parks (15%). Over the past decade, the number of nights spent in caravan parks has been trending up, while nights spent in other types of accommodation have been trending down.
- 53.7% of visitors dine out during their stay, with 21.6% visiting hotels and licensed clubs. The propensity to dine out and visit hotels and clubs has grown significantly over the past decade.
- The most popular activities undertaken are food and wine (63%), cultural and heritage (24%) and nature-based (23.8%).

³ The New England – North West Tourism Region incorporates 13 LGAs – Armidale, Glen Innes Severn, Gunnedah, Guyra, Gwydir, Inverell, Liverpool Plains, Moree Plains, Narrabri, Tamworth, Tenterfield, Uralla and Walcha.

Table 3.1 Visitation to the New England North West Region, 2002 - 2014

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	% change 2002-14
Domestic Overnight Visitors														
Visits – Number ('000)	1,593	1,545	1,642	1,317	1,317	1,283	1,228	1,280	1,307	1,230	1,410	1,227	1,192	
% change pa		-3.0%	6.3%	-19.8%	0.0%	-2.6%	-4.3%	4.2%	2.1%	-5.9%	14.6%	-13.0%	-2.9%	-25.2%
Nights – Number ('000)	4,321	3,563	4,879	4,485	4,238	3,873	3,750	3,911	3,820	3,456	4,168	3,554	3,410	
% change pa		-17.5%	36.9%	-8.1%	-5.5%	-8.6%	-3.2%	4.3%	-2.3%	-9.5%	20.6%	-14.7%	-4.1%	-21.1%
Domestic Day Trippers														
Visits – Number ('000)	1,960	2,324	1,754	1,884	2,007	1,817	1,777	1,931	1,920	1,701	1,719	1,531	1,617	
% change pa		18.6%	-24.5%	7.4%	6.5%	-9.5%	-2.2%	8.7%	-0.6%	-11.4%	1.1%	-10.9%	5.6%	-17.5%
International Overnight Visitors#														
Visits – Number ('000)				52.9	53.1	58.6	40.3	50.4	38.3	36.0	34.0	35.6	30.8	
% change pa					0.4%	10.4%	-31.2%	25.1%	-24.0%	-6.0%	-5.6%	4.7%	-13.5%	
Nights – Number ('000)				458.2	552.7	523.3	428.9	520.8	605.3	567.1	775.6	991.1	751.5	
% change pa					20.6%	-5.3%	-18.0%	21.4%	16.2%	-6.3%	36.8%	27.8%	-24.2%	

Source: Destination NSW – Travel to the New England North West Region – Time Series Data 2002-2014 # Visitor Numbers are very small and may not be statistically valid.

Figure 3.2: Domestic Overnight Visits ('000) and Nights ('000) Spent in the NE-NW Region. 2002 - 2014

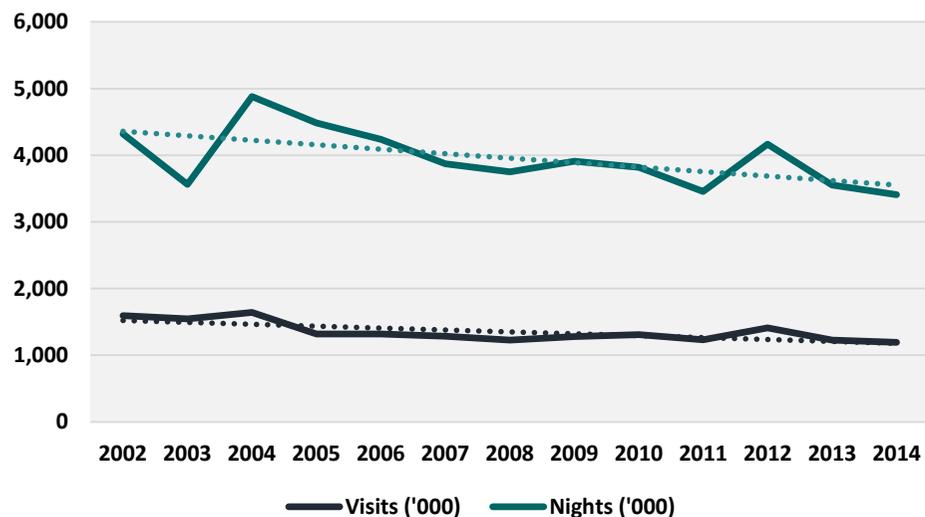
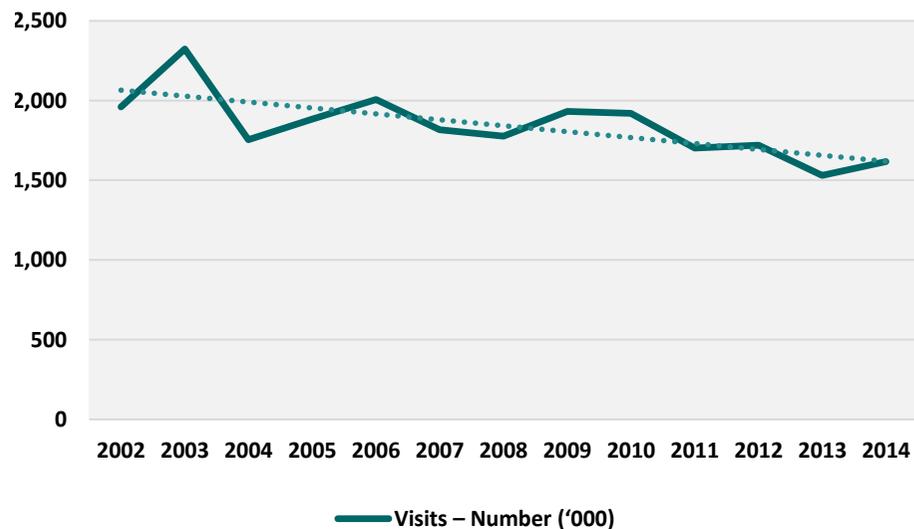


Figure 3.2 Domestic Day Visits to the NE-NW Region. Number of Day Trippers ('000). 2002-2014



Implications and Opportunities for Gunnedah Shire

- Regional NSW followed by Queensland and then Sydney are the main source of visitors to the Region. Gunnedah needs to be represented in these markets.
- The Region has a large VFR market, providing the opportunity to put in place local and regional promotions to encourage residents to show their visitors around Gunnedah Shire.
- The VFR market tends to rely on word of mouth recommendations from their host rather than seek out VICs. The challenge lies in educating and motivating the host community. Recent research into the VFR market has found that in researching what to do with visitors, hosts generally turn first to their local Council website.
- An increasing number of visitors are dining out and patronising hotels and licensed clubs. It is important that Gunnedah has a dining out guide (online and in print) and strongly promotes its eateries, hotels and clubs.
- Food and wine and nature-based experiences are popular with both the domestic and international overnight markets, with 'shopping for pleasure' being popular in all markets. Culture and heritage, is also important. These opportunities need to be further developed and promoted in Gunnedah Shire.
- The caravan market is growing, with Gunnedah needing to continue to improve facilities and infrastructure to cater for this sector.

3.1.2 Visitation to LGAs within the New England North West Region

Destination NSW publishes visitor profiles for selected LGAs in NSW, with the most recent figures being for the Year Ending (YE) September 2014. These profiles are based on 4 year rolling average figures taken from the National and International Visitor Surveys. As sample sizes are small, the data should be regarded as indicative only. Data is available for 11 of the LGAs within the Region, with data not published for Guyra and Gwydir Shires.

Number of Visitors

Within the Region, Tamworth Regional LGA is the most visited destination averaging 434,000 domestic overnight visitors per year. Armidale Dumaresq LGA ranks second (201,000 visitors) followed by Moree Plains Shire (144,000 visitors), and Narrabri Shire (100,000 visitors). Gunnedah Shire (99,000) ranks fifth, just behind Narrabri, up from equal 7th place in 2011.

From 2011 to 2014, visitation to Gunnedah increased by 13.8%, with Gunnedah having the second highest growth rate in the Region. Moree Plains experienced the strongest growth in visitation (up 19%), with visitation to Tamworth growing by 5.9%, and Narrabri by 1%. In contrast, Armidale (down 11.1%), Tenterfield (-9.2%), Glen Innes (-3.1%) and Inverell (-2.2%), experienced a decline in visitation.⁴

Visitor Nights

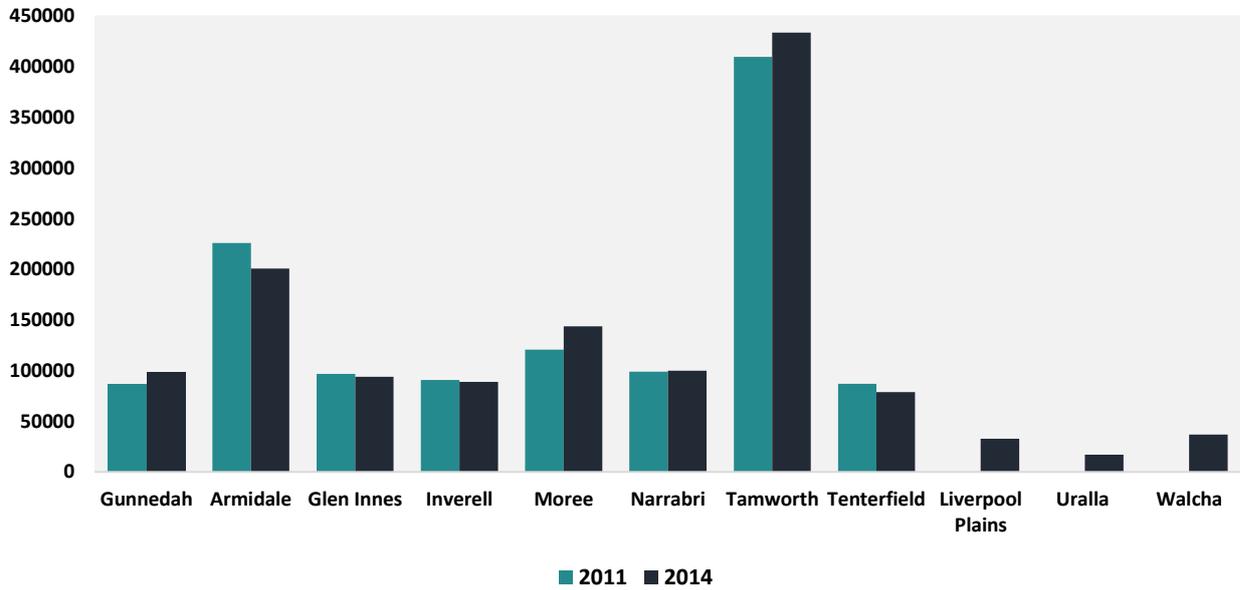
Visitors spent 1.1 million nights per annum in Tamworth Regional LGA, with Armidale Dumaresq ranking second (471,000 nights), followed by Moree Plains (363,000 nights), Glen Innes Severn (283,000 nights), Inverell (253,000 nights), Gunnedah (244,000 nights) and Narrabri (234,000 nights) Shires.

From 2011 to 2014, Moree Plains Shire (up 19.4%), Glen Innes – Severn (12.7%), Tamworth (6.2%) and Gunnedah (3.8%) experienced an increase in the number of nights spent in the LGA, while Armidale (down 25.5%),

⁴ Visitation statistics not published for the four smaller LGAs in 2011.

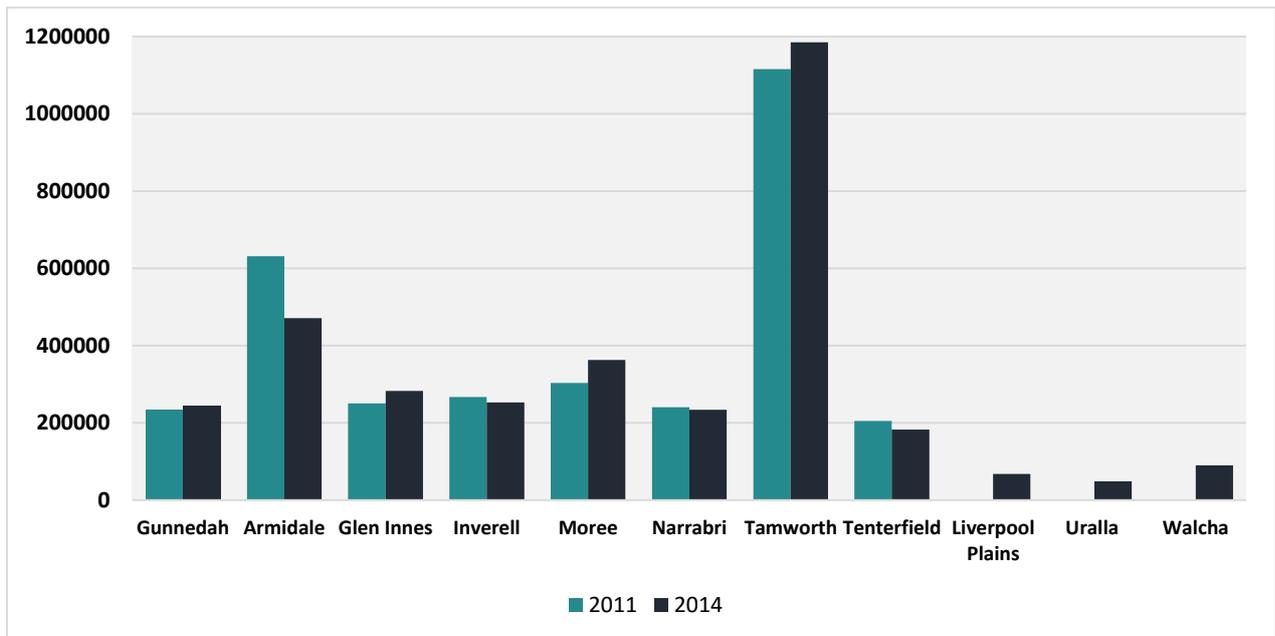
Tenterfield (-10.7%), Inverell (-5.2%) and Narrabri (-2.9%) experienced a decline in the number of nights spent in the LGA.

Figure 3.4 Domestic Overnight Visitors by LGA – Change in Number of Visitors, YE September 2011-2014 (based on 4 year rolling averages)



Source: Destination NSW – Local Government Area Visitor Profiles, YE September 2011 and 2014

Figure 3.5 Nights Spent in the LGA by Domestic Overnight Visitors – Change in Number of Nights, YE September 2011-2014 (based on 4 year rolling averages)



Source: Destination NSW – Local Government Area Visitor Profiles, 2011 and 2014

Visitor Characteristics are summarised in Table 3.2.

Table 3.2 Visitation Profiles – Domestic Overnight Visitors, Selected LGAs – NE-NW Region – 4 year average – Year Ending September 2014

	Gunnedah	Armidale	Glen Innes Severn	Inverell	Liverpool Plains	Moree	Narrabri	Tamworth	Tenterfield	Uralla	Walcha
All Visitors											
Domestic Overnight											
Visits	99,000	201,000	94,000	89,000	33,000	144,000	100,000	434,000	79,000	17,000	37,000
Nights	244,000	471,000	283,000	253,000	68,000	363,000	234,000	1,185,000	183,000	49,000	90,000
Av Stay - nights	2.5	2.3	3.0	3.0	2.1	2.5	2.3	2.7	2.3	2.9	2.4
Domestic Day Trips											
Trips	111,000	234,000	np	143,000	np	np	np	595,000	71,000		68,000
International Overnight											
Visits	1,000	9,000	2,000	2,000	np	3,000	2,000	10,000	2,000		5,000
Nights	23,000	188,000	22,000	39,000		125,000	48,000	210,000	7,000		42,000
Domestic Overnight Visitors											
Origin											
Intrastate	83%	70%	52%	59%	89%	56%	58%	78%	50%	73%	85%
Interstate	17%	30%	48%	41%	11%	44%	42%	22%	50%	27%	15%
Regional NSW	65%	50%	44%	49%	83%	42%	48%	56%	45%		50%
Sydney	18%	20%	8%	10%	6%	14%	10%	22%	5%		35%
Queensland	-	20%	34%	36%	-	26%	26%	12%	43%		-
Victoria	-	-	-	-	-	12%	-	5%	-		-
Purpose											
Holiday / Leisure	23%	31%	42%	52%		54%	26%	32%	43%		42%
VFR	37%	40%	41%	33%		18%	37%	36%	27%		-
Business	31%	15%	-	-		22%	33%	21%	-		-
Other	9%	14%	-	-		6%	4%	12%	-		-
Accommodation											
Motel, Hotel, Resort	27%	30%	15%	-		32%	23%	23%	31%		
Rented House / Apt	-	-	-	-		-	-	-	-		
Caravan Park	-	9%	13%	-		36%	13%	14%	-		
Friends or Relatives	41%	47%	48%	46%		17%	32%	49%	28%		
Free Camping	-	-	-	-		-	-	9%	-		
Guesthouse / B&B	-	-	-	-		-	-	-	-		

	Gunnedah	Armidale	Glen Innes Severn	Inverell	Liverpool Plains	Moree	Narrabri	Tamworth	Tenterfield	Uralla	Walcha
<u>Main Activities Undertaken</u>											
Eat Out / Restaurants	40%	52%	45%	43%		43%	36%	56%	39%		
Sightseeing	-	19%	21%	16%		17%	-	20%	21%		
Visiting Friends or Relatives	35%	48%	3%	43%		22%	29%	46%	30%		
Shopping for Pleasure	-	16%	-	-		-	18%	20%	-		
Pubs, Clubs & Discos	19%	15%	22%	-		15%	-	23%	-		
Bush Walking	-	-	-	-		-	-	-	-		
National Parks / State Forests	-	-	-	-		-	-	-	-		
<u>Age Group</u>											
15-24 years	-	-	-	-		-	-	8%	-		
25-34 years	-	-	-	-		-	-	17%	-		
35-44 years	-	17%	-	-		-	-	19%	-		
45-54 years	-	16%	-	-		12%	-	14%	-		
55-64 years	20%	22%	27%	19%		27%	26%	20%	19%		
65+ years	20%	18%	22%	18%		27%	27%	22%	23%		
<u>Travel Party</u>											
Alone	25%	29%	17%	-		26%	29%	28%	-		
Adult Couple	25%	28%	32%	30%		33%	39%	28%	43%		
Family	-	28%	27%	-		17%	-	23%	27%		
Friends / Relatives	17%	8%	18%	22%		15%	-	14%	-		
Business Associates	-	-	-	-		-	-	6%	-		
Other	-	-	-	-		-	-	-	-		

Source: Destination NSW – Local Government Area Visitor Profiles, YE September 2014 – Four Year Rolling Average

In comparison to the other ten LGAs for which data is available within the Region, Gunnedah Shire has:

- The second highest proportion of visitors from NSW (83%) ranking behind Liverpool Plains Shire, and the second lowest proportion of visitors from interstate. This reflects Gunnedah’s and Quirindi’s positions off the main interstate Highways (Newell and New England).
- A high proportion of business and work related travellers (31%), ranking second to Narrabri (33%). By comparison, business travellers account for 21% of the visitors to Tamworth, 15% of the visitors to Armidale and 22% of visitors to Moree.
- The lowest proportion of holiday and leisure travellers – only 23% of visitors, with Narrabri ranking next (26%). Holiday and leisure travellers account for 32% of visitors to Tamworth, 31% of visitors to Armidale and 54% of visitors to Moree. In Gunnedah, the strong demand for accommodation from business and work-related travellers may be displacing leisure travellers, particularly mid-week.
- A marginally lower proportion of people travelling as adult couples and a lower proportion of people travelling with family than other LGAs in the Region. This reflects the higher proportion of business travellers. It may also reflect the limited attraction and accommodation base targeted to the family market.

3.1.3 Northern Inland Region – Tamworth, Gunnedah & Liverpool LGAs

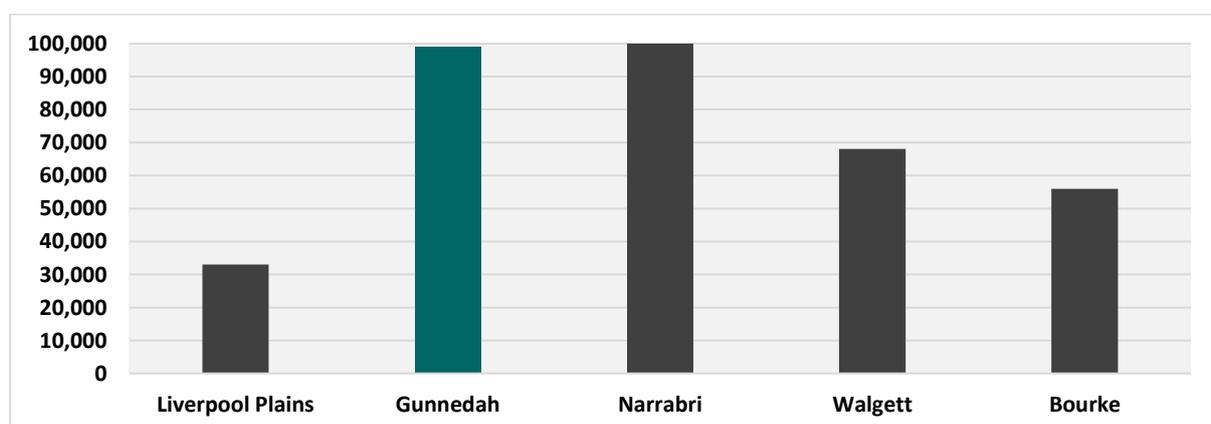
The DMP for the Northern Inland Region identified that the product base of the Northern Inland Region best fits with the Wanderers and Compatriot markets. Wanderers are travellers who have the time and inclination to stop and explore. They are generally older people who are retired or semi-retired. A significant proportion of caravanners and motorhomers are Wanderers. Compatriots are essentially the family market, looking to spend time exploring as a family.

The DMP also identifies business and work-related travellers and the VFR market as significant markets for this Region.

3.1.4 Kamilaroi Highway

Of the five LGAs along the Kamilaroi Highway, Gunnedah Shire has the 2nd highest level of domestic visitation, ranking behind Narrabri. As each of the Shires have two or more highways ‘feeding’ into them it is not possible to isolate statistics for Kamilaroi Highway travellers. Tourism Managers along the Highway report that the number of Highway travellers has increased substantially over the past 3-4 years, with most of the growth being in the touring caravan and motorhome markets.

Figure 3.6 Domestic Overnight Visitors to LGA’s along the Kamilaroi Highway YE September 2014.



Source: Destination NSW – Local Government Area Visitor Profiles, 2014

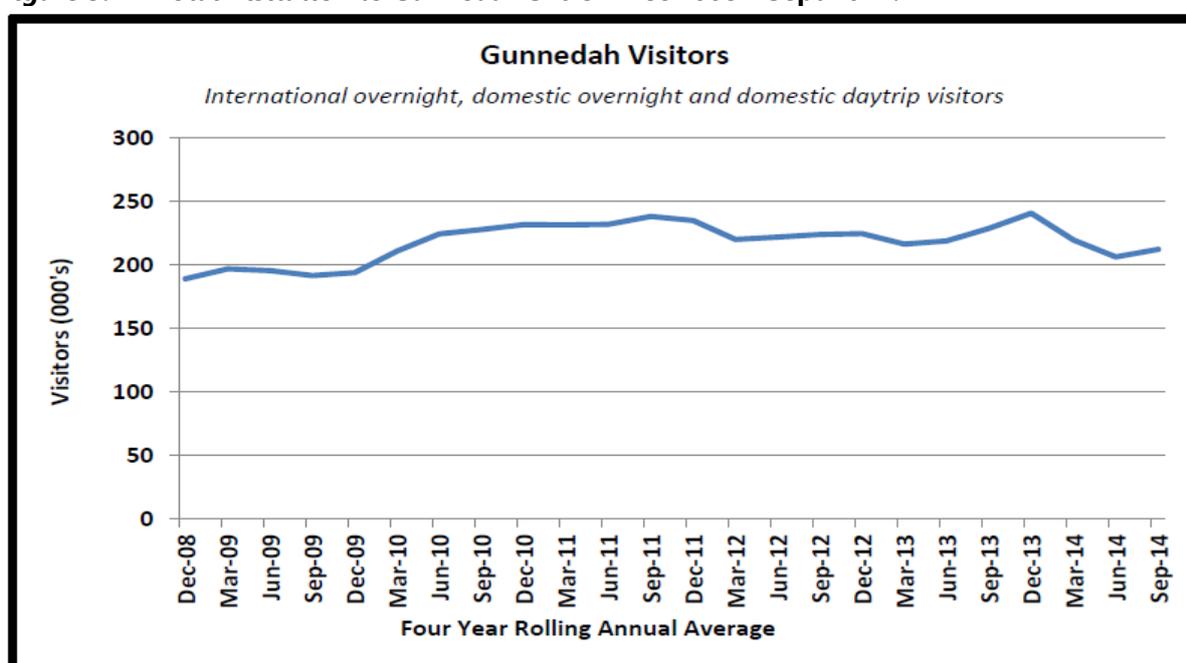
3.2 Gunnedah Shire

3.2.1 Visitation

Destination NSW estimated that in YE September 2014, Gunnedah Shire attracted 212,000 visitors, of whom 99,000 were domestic visitors who stayed one or more nights in the Shire, 1,000 were international overnight visitors and 111,000 were day trippers. Visitors spent an estimated 267,000 nights in the Shire. Since YE September 2011, the number of domestic overnight visitors to Gunnedah Shire has increased by 13.8%, while the number of nights spent in the Shire increased by 3.8%. As discussed in Section 3.1.1, from 2011 to 2014, Gunnedah Shire had the second highest growth rate in visitation within the Region, with the number of visitors increasing by 13.8%.

Total expenditure by visitors was in the order of \$48 million, with domestic overnight visitors spending on average \$129 per person per night, while domestic day trippers spent on average \$139 per person per visit. Expenditure by international visitors was significantly lower at \$51 per visitor per night.

Figure 3.7 Total Visitation to Gunnedah Shire – Dec 2008 – Sept 2014.



Source: Destination NSW – Local Government Area Visitor Profiles – Gunnedah Shire, 2014

Based on the LGA Profile, the main characteristics of domestic overnight visitors to Gunnedah Shire are:

- 83% of visitors to the Shire are from NSW with 18% being from Sydney and 65% from Regional NSW. Interstate visitors account for 17% of visitors, with the majority of interstate visitors being from Queensland. Visitors from Sydney are more likely to arrive in Gunnedah on the Kamilaroi Highway, while visitors from Queensland are more likely to be Oxley Highway travellers, moving between the New England and Newell Highways.
- Visitors from Sydney had the longest length of stay in the Shire (3.4 nights), followed by visitors from Interstate (2.8 nights) and Regional NSW (2.1 nights).
- The majority of visitors to the Shire were visiting friends and relatives (VFR market - 37%), followed by business travellers (31%) and leisure travellers (23%).
- VFR travellers had the longest length of stay in the Shire (3.0 nights), followed by business travellers (2.3 nights) and leisure travellers (2.1 nights).

- 90% of visitors to Gunnedah Shire travel by car.
- The main activities undertaken by visitors to the Shire were dining at restaurants (40%), visiting friends and relatives (35%) and visiting hotels and clubs (19%). Data is not published for the number of visitors sight-seeing or for shopping for pleasure (the proportion would be less than 19%).
- A breakdown by all age categories is not provided. 40% of visitors are 55+ years indicating a high proportion of semi- retired and retired people.
- 25% of visitors are travelling alone, 25% as adult couples and 17% travelling with other adults. Data is not provided on people travelling with children, nor on people travelling with business associates however the proportion would be less than 17% each.

3.2.2 Markets Attracted

The following information on the different markets that visit Gunnedah Shire is based largely on discussions with the Tourism Manager and VIC staff in Gunnedah and the surrounding region, and local accommodation, attraction and business operators. The information is qualitative and should be regarded as indicative only.

Gunnedah Shire attracts a very diverse range of markets, with the market mix varying in the different localities throughout the Shire. The primary markets are:

- Highway traffic – through traffic, including truck drivers.
- Business and work-related travellers – dominated in recent years by coal mine and infrastructure project workers, but also including sales representatives, tradesmen, professionals, government officers, contractors and rural workers.
- Touring traffic - primarily retirees and semi-retirees, many in caravans and motor-homes, plus some families.
- Regional residents – day visitors coming into Gunnedah to shop, dine, visit friends and relatives, play sport, attend events and/or for entertainment.
- People visiting friends and relatives (VFR) – including coming into the Shire for social events such as weddings.

Secondary and minor markets include:

- Conference and meeting delegates
- Event Attendees
- Sporting event attendees and participants
- Coach tour groups
- Overflow from surrounding LGAs – eg during the Tamworth Country Music Festival.

Gunnedah Shire also attracts a range of special interest and activity-based markets. There is overlap between the primary and secondary markets and the special interest – activity based markets. The markets attracted to different localities within the Shire are summarised in Table 3.3.

Table 3.3 Market Mix by Locality - Gunnedah Shire

Locality	Primary Markets	Secondary / Minor Markets	Special Interest / Activity Based
Gunnedah	Highway travellers (transit) Busines & work related Touring travellers – including Caravanners & RVs Regional residents VFR	Conference & meeting delegates Festival & event attendees Sports participants Coach tour groups Overflow – surrounding areas Social groups eg car and motor cycle clubs	Motor sports enthusiasts – hill climb, karts, speed way, drag racing, dirt bikes. Golfers Bowlers Anglers History enthusiasts Family historians Arts-based workshop attendees

Locality	Primary Markets	Secondary / Minor Markets	Special Interest / Activity Based
			Equine sports Recreational fliers / learn to fly Cyclists Agricultural / Industrial
Curlewis	VFR Work-related	Kamilaroi Highway Travellers	Equine Sports - Camp Draft, Carriage Driving, Pony Club
Carroll	Oxley Highway Travellers Touring Travellers	VFR	
Mullaley	Oxley Highway & Black Stump Way Travellers (transit stop) Touring Travellers – primarily Caravanners & RV	VFR Work-related travellers	Equine Sports
Tambar Springs	Black Stump Way Travellers (transit stop) Touring Travellers	VFR	Bird watchers Bush walkers 4WD
Lake Keepit	Local & Regional Residents – primarily families and groups of families and friends.	Touring caravans & RVs Family groups Social groups Car, 4WD and motorcycle clubs Schools (Sport & Rec Camp) Function guests Event attendees Disability / Aged Care groups	Anglers Power boaters Water Skier / Wakeboarders Canoeists / Kayakers Sailors Gliders Mountain Bikers Photographers & Artists

Business and work-related travel is concentrated from Monday to Thursday nights from February through to November. Over the past few years, the main drivers of work-related travel have been coal mining and rail infrastructure projects.

The Oxley Highway primarily carries regional traffic accessing Tamworth and long-haul interstate traffic moving between the Newell and New England Highways. The Kamilaroi Highway attracts a significant proportion of coal mine related traffic as well as touring traffic, often travelling between Sydney/Hunter and Narrabri to join the Newell Highway, or further west to Lightning Ridge and/or Bourke. Touring traffic peaks in spring and autumn.

Visitation from families is concentrated in school holiday periods, and summer weekends with Lake Keepit being a popular destination for this market.

3.3 Awareness & Perceptions of Gunnedah Shire

In August – September 2012, Inland NSW Tourism commissioned MyTravelResearch.com to explore awareness and perceptions of, and intentions to visit 30 LGAs within Inland NSW. The main town in each LGA rather than the name of the LGA, was used to test awareness. The results were presented as ‘Tourism Dashboards’ for each LGA. Some of the findings for Gunnedah Shire are summarised below. Given the small sample sizes (around 3000 interviews), the data should be regarded as indicative only.

Based on this research, the Northern Inland Region DMP makes the following observations:

‘Gunnedah is moderately well known compared to most destinations across Inland. It is not a destination hub like Tamworth, but it is certainly a strong secondary town. A quarter of Australians have heard of it, rising to two fifths of those who live in NSW, and it is relatively strong in consideration in metro NSW⁵ making this a good target market. Its conversion to visitation once known is also fairly strong, perhaps due to its presence on a route corridor. It has above average recognition for its pioneer history and as a place where Australians can reconnect with their past, however despite its self-proclaimed title of “The Koala Capital of the World”, it is not widely recognised as a base for nature activities. Short-term growth can be built by giving the visiting

⁵ Metro NSW refers to the Sydney, Wollongong and Newcastle metropolitan areas.

friends and relatives market a reason to stay longer or come more often. Over the longer term, Gunnedah needs to work with other towns in the region to build a network that can generate mutual advantage’.

3.3.1 Awareness of Gunnedah

The data is segmented in terms of place of residence of visitor and age groupings.

Overall, 20% of total respondents knew something about Gunnedah, 39% of total respondents had heard of the name ‘Gunnedah’, while 27% had never heard of Gunnedah. Awareness of Gunnedah was significantly higher in Regional NSW within only 7% of respondents having not heard the name of the town, compared to 20% of respondents from the Sydney area and 32% from interstate.

People aged 55+ years had a far higher awareness of Gunnedah than other age groups, with only 12% having not heard the name ‘Gunnedah’. In contrast, 48% of respondents aged 18-34 years had not heard of Gunnedah.

Table 3.4 Awareness of Gunnedah – by Market Segment

Segment	Know Something About Gunnedah	Know Name Only	Never Heard of Gunnedah
Total Respondents	20%	39%	27%
Place of Residence			
Metro NSW	26%	37%	20%
Regional NSW	31%	39%	7%
Interstate	17%	40%	32%
Age Grouping			
18-34 years	18%	30%	48%
35-54 years	17%	47%	23%
55+ years	26%	39%	12%

Source: Inland NSW Tourism (2012) Inland NSW Regional Tourism Dashboard –Gunnedah Shire

3.3.2 Visitation & Intention to Visit

Respondents were asked whether they had visited Gunnedah and, looking forward, would they be likely to consider visiting Gunnedah. 53% of respondents had visited Gunnedah, with previous visitation to Gunnedah highest amongst respondents from Regional NSW; people aged 55+ years; True Travellers and Wanderers; and Empty Nesters.

Table 3.5 Previous Visit to Gunnedah and the Potential to Visit

Segment	Have Visited Gunnedah	Potential to Visit		
		Definitely Consider	Possibly Consider	Would Definitely Not Consider
All Respondents	53%	21%	40%	11%
Place of Residence				
Metro Area	54%	27%	36%	7%
Regional NSW	69%	19%	40%	12%
Interstate	50%	18%	42%	12%
Age Grouping				
18-34 years	34%	9%	54%	11%
35-54 years	44%	23%	38%	12%
55+ years	68%	24%	37%	9%
Travel Mindset				
Pampadours	35%	11%	44%	Not Published
Compatriots	56%	25%	37%	
True Travellers	61%	16%	40%	
Peer Group Travellers	54%	25%	36%	
Wanderers	57%	25%	44%	

Segment	Have Visited Gunnedah	Potential to Visit		
		Definitely Consider	Possibly Consider	Would Definitely Not Consider
Lifecycle Stage				
Single Income, No Kids	43%	22%	40%	Not Published
Double Income, No Kids	47%	15%	43%	
Families, Children <12 years	41%	27%	34%	
Families, Children 12-18 years	63%	22%	30%	
Empty Nesters	66%	22%	45%	

Source: Inland NSW Tourism (2012) Inland NSW Regional Tourism Dashboard – Gunnedah Shire

Overall, 24% of respondents said that they would definitely consider visiting Gunnedah, with Sydney-siders; people aged 35+ years; peer group travellers, compatriots and wanderers; DINKS and families with young children, having a higher propensity to ‘definitely consider’ visiting.

3.3.3 Perceptions of Gunnedah

To explore perceptions, survey respondents were asked to rank the ‘emotional’, ‘access and locational’ and ‘experiences and activities’ that were important to them in making travel decisions, in planning trips, and selecting destinations. Respondents were then asked to rank Gunnedah against each of these factors. The following Graphs are taken from the Inland NSW Regional Tourism Dashboard for Gunnedah Shire. The circles on the left, indicate the ‘importance’ of the statement to all respondents, while the bars on the right, compare how Gunnedah was perceived in comparison to all other LGAs within the Inland NSW Tourism Region.

The key factors that respondents are looking for from holidays / travel in Inland NSW need to be taken into consideration in both product development and designing and producing visitor information and promotional material.

Emotional Associations

The most important factor that respondents (82%) were looking for was a place to ‘relax and unwind’. 31% of respondents considered that Gunnedah offered this opportunity. The strongest ‘emotional’ perceptions that respondents had of Gunnedah Shire were that:

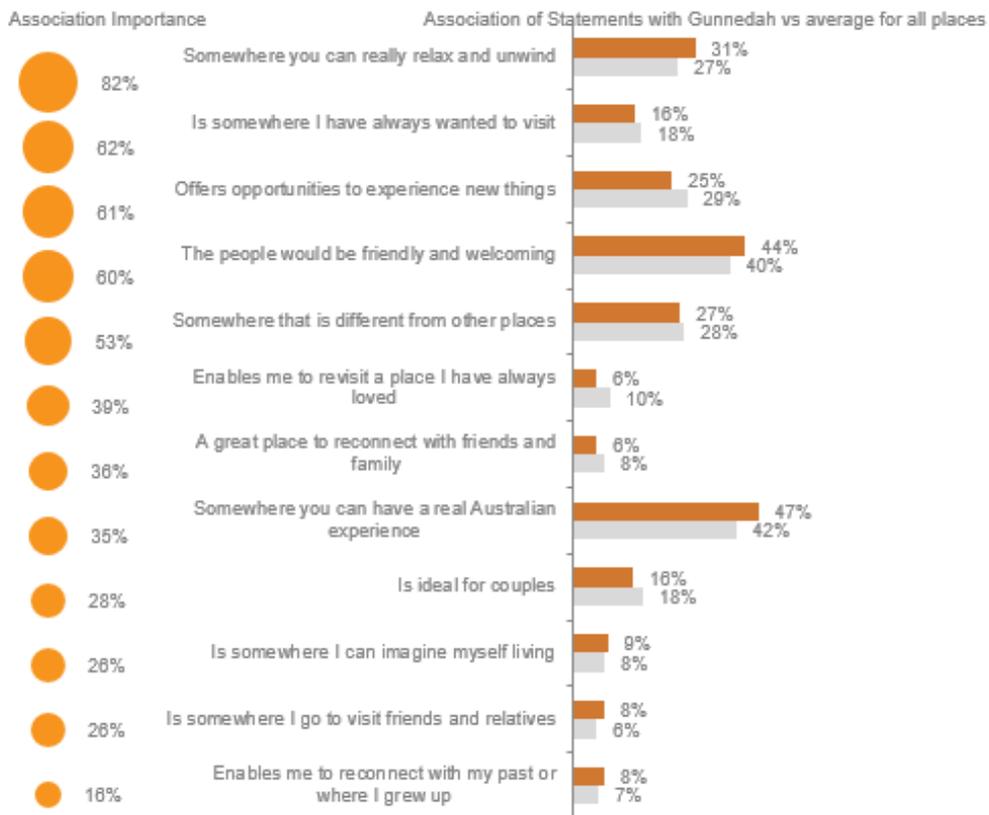
- It is somewhere where you can have a real Australian experience (47%)
- The people would be friendly and welcoming (44%)
- It is somewhere you can relax and unwind (31%)
- Somewhere that is different from other places (27%)
- Offers opportunities to experience new things (25%)

16% of respondents identified Gunnedah as a place that they has always wanted to visit.

Gunnedah Shire has a range of assets that can be used to deliver on the ‘real Australian Experience – the rural scenery – Dorothea Mackellar Country, koalas and other wildlife, Aboriginal sites and stories, and Lake Keepit (camping, boating, fishing etc).



Figure 3.8 Perceptions of Gunnedah – Emotional Associations



Source: Inland NSW Tourism (2012) Inland NSW Regional Tourism Dashboard – Gunnedah Shire

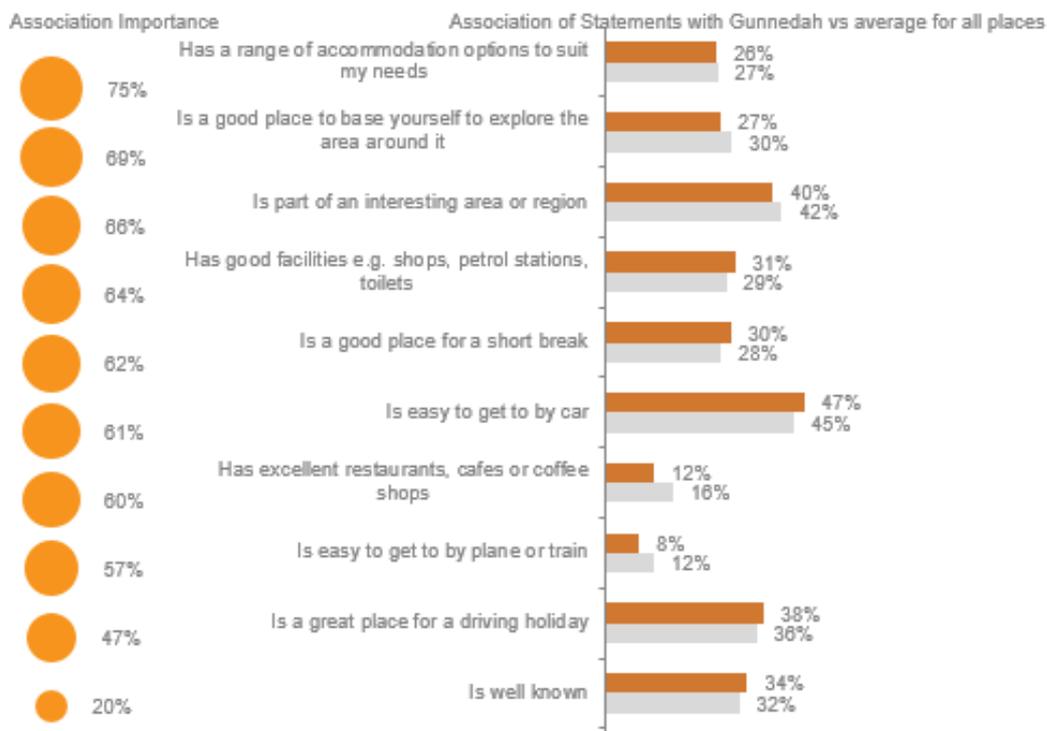
Access & Location Associations

Gunnedah was perceived as an interesting part of the region that is a great place for drive holidays and short breaks. Gunnedah was also perceived as easy to get to by car and a good place for a base to explore the surrounding area, as well as having good accommodation and offering ‘good facilities – shops, petrol stations, toilets.’

Gunnedah was not perceived as having excellent dining experiences. The dining scene in Gunnedah has improved in the past few years with the establishment of contemporary eateries and improvements in the pub hotel and club dining. There needs to be a focus on food and dining in the marketing and promotion of the Shire.



Figure 3.9 Perceptions of Gunnedah – Access and Location Associations



Source: Inland NSW Tourism (2012) Inland NSW Regional Tourism Dashboard – Gunnedah Shire

Experiences & Activities Associations

The three main factors that visitors are looking for ‘amazing or unusual landscapes’, a ‘great place for nature activities’ and a ‘great place for food and wine activities’.

While Gunnedah Shire has some ‘amazing and unusual landscapes’ as well the connection with Dorothea Mackellar’s ‘My Country’, this has a low level of recognition in the market place, with only 17% of respondents associating Gunnedah with amazing landscapes.

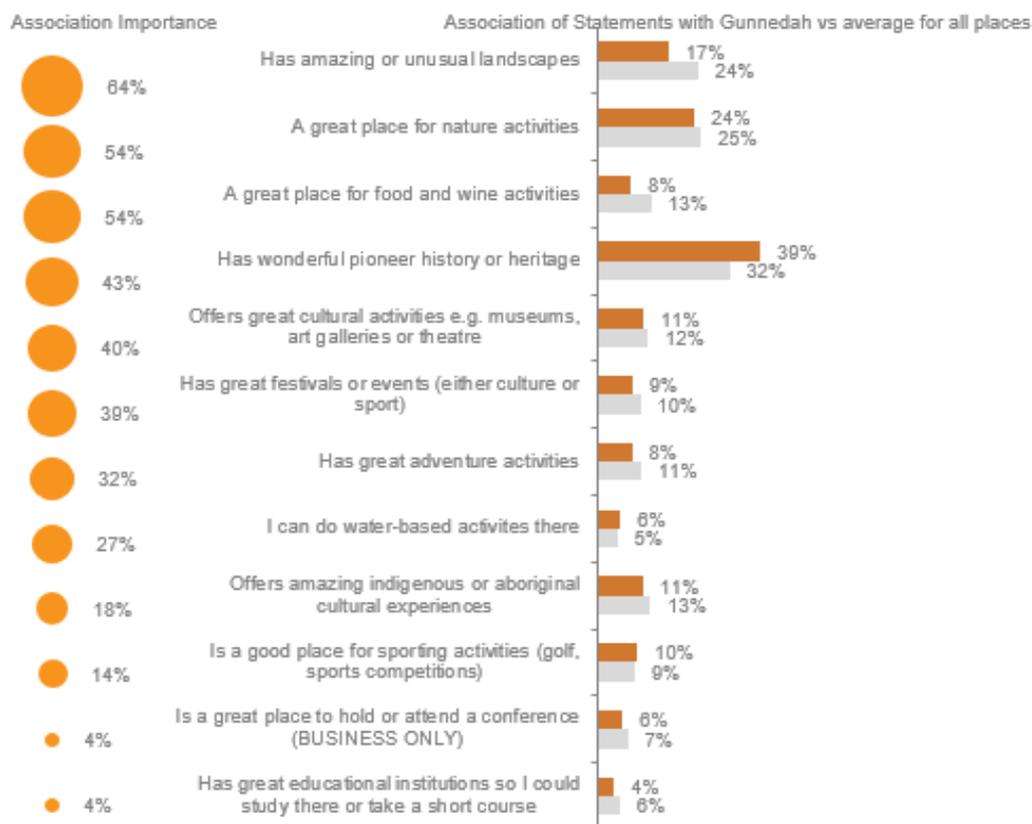
24% of respondents perceived Gunnedah as a great place for nature activities. LGAs that scored well (30+%) on this parameter had high profile National Parks. This result indicates that Gunnedah’s Koala branding may not have a high level of recognition in the market place.

Gunnedah was perceived as having ‘wonderful pioneer history or heritage’. The history and heritage attractions in Gunnedah Shire are relatively limited, however as most inland towns promote their history and heritage, there is probably an expectation amongst respondents that Gunnedah offers a similar experience.

There is a very low perception of the ability to undertake water-based activities in Gunnedah Shire, with only 6% of respondents perceiving that Gunnedah has this to offer. This implies a very low level of awareness of Lake Keepit, and/or a lack of association between Gunnedah and Lake Keepit in the market place.

Gunnedah Shire ranks slightly below the average for Inland NSW in terms of the perception of its food and wine experiences, cultural activities and museums, festivals and events, adventure tourism opportunities, indigenous experiences and as being a good destination for conferences. This reflects the lack of high profile products and experiences in these categories.

Figure 3.10 Perceptions of Gunnedah – Experiences and Activities Associations



Implications & Opportunities for Gunnedah Shire

- Consideration of what the market is looking for from a destination and the travel experiences offered, need to be factored in when preparing information, marketing and promotional collateral for Gunnedah Shire.
- Gunnedah is perceived as being able to deliver a real Australian experience, and it does have the assets to do this - the rural scenery / Dorothea Mackellar Country, koalas and other wildlife, Aboriginal sites and stories and Lake Keepit (camping, boating, fishing etc). The Shire needs to focus on raising the profile of these assets.
- Gunnedah is perceived as being an interesting place to visit, a good destination to include in a drive holiday and an easy place to get to, as well as having the accommodation and services that travellers are looking for. This supports Gunnedah continuing to target the drive tourism market and developing and promoting the Kamilaroi and Oxley Highways and the Black Stump Way as touring routes.
- Landscapes are important to the market – with Gunnedah Shire having significant landscape assets as well as the connection with Dorothea Mackellar’s ‘My Country’. More needs to be made of these assets.
- Nature-based activities are also important to the market place, and Gunnedah needs to further develop its nature-based products and experiences – koala viewing, the Namoi River corridor, Lake Keepit, Boonalla Aboriginal Area, Bindea Track etc.
- The market is looking for good dining experiences – restaurants, cafes, coffee shops, as well as ‘food’ experiences. Gunnedah can deliver on the cafes immediately and this needs to be included in the marketing and promotion. Gunnedah is a food producing area and there are a range of products produced locally that could be marketed to visitors.

3.4 Market Development – Directions & Opportunities

Marketing Focus – Target Markets

The primary target markets for Gunnedah should be:

- **Touring travellers**, including the caravan and RV markets. The focus needs to be on:
 - Developing and promoting the key touring routes that feed into Gunnedah Shire – the Kamilaroi Highway, Oxley Highway and the Black Stump Way (see Sections 6.3 and 6.4).
 - Convincing travellers who arrive in Gunnedah earlier in the day, to take the time to explore the town and then stay overnight in the area. The development and/or promotion of activities that require travellers to spend time in the area – for example - longer distance walks, cycleways and canoeing; a half day trip to Boonalla Aboriginal area; ‘night spotting’ of koalas, could encourage travellers to stay overnight.
- **Regional Residents** – Given accommodation capacity constraints mid-week and low propensity of work-related travellers to visit attractions and shop (shops often closed before the visitor finishes work), positioning Gunnedah as a day trip destination for residents from the surrounding region, will generate patronage for local businesses. Positioning Gunnedah as a ‘lifestyle’ destination will also encourage regional residents to bring and/or recommend Gunnedah to their visiting friends and relatives. Regional residents are also a potential market for events. Opportunities include:
 - Retail promotions – positioning Gunnedah as a lifestyle centre, with quality boutiques, home-maker shops, galleries, eateries and beauty shops. Specific promotions such as ‘Girls’ Days Out’ should be part of the marketing mix.
 - Direct marketing to social groups within the larger towns (eg Probus, walking clubs, retirement homes, social clubs, disability service providers etc) to organise trips / tours to Gunnedah.
 - Working with event organisers and/or venues, coach companies, accommodation and other operators to package and/or promote the larger entertainment, sporting and other events held in Gunnedah Shire, to the regional market.
 - Promoting the various arts-based workshops held in Gunnedah to the regional market, including direct marketing to arts-based groups in surrounding towns and the Upper Hunter.
- **Building the events sector** – focusing on business events and sports tourism – see Chapter 7.

Support Markets

While the focus and marketing dollars need to be invested in growing the target markets, there are a range of other market segments that can also be targeted relatively cost effectively through on-line marketing. These markets include:

- Visiting friends and relatives - providing ideas and incentives to local residents to showcase the Shire to their friends and relatives (see Section 4.2).
- Building rail tourism by endeavouring to have Gunnedah included as a Country NSW destination by NSW TrainLink and by developing and promoting (direct marketing) rail – accommodation packages targeted to seniors groups, such as Probus Club, (\$2.50 travel) in the Sydney, Central Coast and Hunter Regions.
- Specialist agricultural and technical tours – exploring opportunities for Gunnedah to be included in itineraries for visiting international ‘study’ tours. (eg Quadrant Tours – based in Armidale).

- Car Clubs and Motorcycle Clubs – direct marketing of the motor sports venues and opportunities in Gunnedah to car and motor cycle clubs – for touring, rallies and competitive activities (eg ability to hire the Showground, Airport and the Mount Porcupine Hill Climb for club activities). Clubs can be targeted by tailoring packages to different types of clubs and direct marketing on-line.
- Special interest and activity based markets – packaging the opportunities available in Gunnedah and the surrounding region and promoting these through targeted PR marketing, listing and exposure on activity based websites and direct marketing to organisations, clubs and associations. Product development and working with neighbouring LGAs will be required for some markets. Potential market segments include:

- Mountain bikers
- Water sports enthusiasts
- Canoe and kayakers
- Anglers
- Gliders
- History groups
- Family historians
- Arts groups – photography, painting, pottery, wood turning etc.
- Bird Watchers



Encouraging Spending

In addition to building visitation, Gunnedah Shire should be looking to encourage increased expenditure from business and work-related travellers, highway travellers (transit stop) and event attendees.

- **Business and work-related travellers** – While the volume of business and work-related travellers is determined primarily by economic activity within the Region, there are opportunities to increase the level of expenditure and encourage VFR and repeat visitation. Initiatives that can be put in place include:
 - Ensuring that workers have access to information on the Shire, particularly information on eateries and entertainment. The Gunnedah Visitor Guide and dining out guides should be available from accommodation properties and real estate agents that manage short term lettings.
 - Encouraging accommodation operators to display the visit Gunnedah website address in each of the guest rooms.
 - Ensuring that accommodation operators are kept up-to-date with changes in the dining sector in Gunnedah (eg through e.blasts or a newsletter).
 - Exploring with the Mine Operators, whether it is possible to post event fliers on notice boards at the mine sites. Event fliers should also be on display in reception at accommodation properties
 - Encouraging business and work-related travellers, particularly the longer stay mine-related workers, to bring their families to the Shire on weekends and/or during school holidays. Accommodation operators are in a position to offer promotional ‘deals’ and ‘packages’ to business / work-related guests to encourage repeat visitation. There may also be potential to work with Lake Keepit to offer promotional packages.
- **Highway Travellers** – In contrast to touring travellers, highway travellers are a direct travel market going from Point A to Point B, generally via the shortest route. Overnight stops are often pre-booked, with the traveller arriving late in the afternoon and then leaving early in the morning. ‘Pit stops’ along the route are often impulse stops. Regular Highway travellers often develop a ‘pattern’ stopping at particular eateries, toilets etc. As discussed in Section 5.1, presentation of localities and businesses plays a major role in attracting the impulse stop – it is important that eateries in particular have a strong street front appeal. Directional signage to facilities (eg toilets) can also trigger an impulse stop. For families with young children,

a quality playground is also a trigger, with repeat family travellers (eg regional residents moving through Gunnedah regularly) using a stop at the playground as an incentive for good behaviour. In Gunnedah, the focus should be on encouraging Highway travellers to stop in the Wolseley Park precinct, as this provides the strongest opportunity for them to spend money in town.

- **Event Attendees** – Strategies to grow the event market, need to include initiatives that will encourage expenditure and repeat visitation. Initiative could include:
 - Shopping Passports – with vouchers and offers
 - Attraction admission vouchers – discount or value add – valid for 3 months (to encourage repeat visitation to the town).
 - Dining vouchers – value add offers



4. TRENDS IN THE MARKET PLACE

Outlined below are some of the trends occurring in the market place that need to be taken into consideration by Gunnedah Shire in product development and marketing and promotion.

4.1 Generational Change

The population is often described in terms of generations, with generational analysis providing an insight into the attitudes and behaviours of different age groups. Generational change underlies the structural changes that are occurring in the market place. As such it is important to understand the aspirations and desires of the different generations as these drive attitudes to travel and travel behaviour.

Each generation has its own identity, attitudes and core values, with attitudes relating very strongly to the social, economic and technological conditions and events that occurred during the formative years. Research indicates that attitudes and core values do not change over time as the generations' age.

There are currently seven generational groupings:

- Seniors - born pre 1925 and are now aged 90+ years.
- Traditionalists or Builders – born between 1925 and 1945, and now aged between 70 and 89. (this generation is commonly referred to as the 'grey nomads', 'retirees', 'seniors')
- Baby Boomers – born between 1944 and 1965 and aged between 50 and 70.
- Generation X – born between 1965 and 1979 and now aged between 36 and 50.
- Generation Y – born between 1980 and 1991 and now aged between 24 and 35.
- Generation Z – born between 1991 and 2009 – now aged under 24 years.
- Generation Alpha – born after 2009.

The year of birth and age ranges are approximate with slight variations between these ranges used by different demographers. While it is important to understand the differences between generations, it is also important to be aware that the generations are not homogeneous with significant variations in attitudes and behaviours within one generation. It is also important to recognise that while core values are likely to endure, the characteristics of each generation will change as they progress through different life cycle stages.

Throughout Regional Australia traditionalists have been a dominant touring market for the past 20-30 years. This is however an aging market which in recent years has been largely replaced by Baby Boomers. The Baby Boomers are at or approaching retirement and are generally travelling as couples and groups of couples. There has also been strong growth in the Generation X market, which is predominately the family market – which in the past has been referred to as 'compatriots'. The characteristics and needs and expectations of these two generations are summarised below.

Across all leisure markets (international and domestic) and demographics, travellers are increasingly looking for 'learning' and 'immersion' activities and experiences - for example, attending fine art, wine making, textile, jewellery workshops or learning skills such as surfing.

4.1.1 Baby Boomers

Baby Boomers will be the primary off-season market for the area for the next 15-20 years

Baby Boomers were born and raised post WWII (1946 – 1965), in a period of relative stability and prosperity. The Baby Boomers, now aged between 55 and 70 years, account for around 24% of the population. The Boomers are better educated than previous generations. They are a cross-over generation, being the last link with the values of 'old Australia' forged prior to WWII. Boomers were part of the significant shift in society's attitudes in the 1960's and 70's. They also grew-up with the emergence and widespread application of technology. As a whole, the generation is individualist and optimistic.

Mid-life for the Baby Boomers has largely been a period of evaluation and re-direction. In their 40's, the Boomers became more focused on consumerism and self-indulgence, on personal and social improvement and the accumulation of wealth. They are a 'spending' generation, using both cash and credit to acquire what they want. They are the parents of Generation Y, and their attitude to child rearing has largely been lenient and indulgent.

The Baby Boomers are now at or approaching retirement age, with many of the older Boomers already semi-retired. Again, this is a time of re-evaluation, with lifestyle being the focus. The Boomers are leading the 'sea-change' and 'tree-change' movements, selling-up in the capital cities and downsizing and relocating to lifestyle locations.

As retirees, the Boomers are healthier and more active than the Traditionalists at the same age. They are being described as 'recycled back-packers'. Boomers are more likely to be actively involved in sport and recreation - cycling, jogging, swimming, golfing and visiting the gym. Rather than becoming grey nomads focused on domestic travel, this generation is more likely to become soft-adventure and eco-travellers, seeking out new places. Boomers have a strong interest in food and wine and patronise restaurants and contemporary eateries more so than the traditional pubs and clubs. They do not have the loyalty of the Traditionalists, seeking out new destinations rather than returning year after year to the same location.

Travel by the Over 55's

In 2008, Tourism NSW (now Destination NSW) undertook an in-depth study into the Over 55's Travel Market (Baby Boomers). The Research explored attitudes to travel and travel patterns of the Baby Boomer Generation, as they moved into semi-retirement and retirement. The market is moving from employment and family responsibilities into semi-retirement and retirement, with minimal family responsibilities – there is a strong sense of freedom and a desire to travel. The findings of the 2008 research were confirmed in further research into this market in 2014 (YE September 2014), with Destination NSW publishing a profile of 'Over 55's Travel to NSW.

The Research found that the attitudes to travel and travel expectations of the Baby Boomer generation were markedly different to the older Traditionalist generation, with Baby Boomers being:

- Fitter and more active than the traditional generation was at the same age - Boomers do not consider themselves as 'old' or 'aging' and are far more health conscious.
- More affluent and prepared to spend to achieve what they want. They are more interested in value for money than in the lowest price and have no hesitation in paying 'top dollar' for something that they really desire.
- Better travelled – generally having experienced overseas and interstate travel.
- More knowledgeable.
- Technologically capable – can and do use the internet to research and book travel.
- More sophisticated and demanding.



While the Research found different attitudes amongst different mindsets, the overall trends in this market that need to be taken into consideration are:

Expect	Seek / Appreciate
<ul style="list-style-type: none"> • To choose their own way. • Higher standards, with less willingness to compromise. • Higher standard of accommodation and are sensitive to and dissatisfied with dated or tired accommodation. They are aware of current decor trends. • Better food options – healthier options, contemporary, cosmopolitan cuisine 	<ul style="list-style-type: none"> • Tailored, personalised options – not a group or ‘follower’ mentality • Personalised service and ‘special touches’ • More experiential and active elements in their travel. • Stimulation • Value for money

The Baby Boomer market is an avid reader of travel sections in newspapers and magazines, with these generating ideas for travel. Word-of-mouth, past experiences and the internet are the main sources of information, with the internet used to research destinations, products and routes. The Research found that ‘deals’ and ‘discounts’ often act as triggers for travel and do influence destination choice.

The 2014 research found that domestic travellers aged 55+ years:

- Accounted for 30% of visits made to and within NSW. These travellers made 8.389 million trips to and within NSW in 2014.
- 6% of trips were made to the New England – North West Region – 503,340 trips.
- 71% of travellers were from NSW with 29% being from interstate. Sydney, the Hunter and the North Coast are the primary source intrastate market, with Queensland and Victoria being the primary interstate source markets.
- Mainly travelled to visit friends and relatives (45%) and for holiday and leisure purposes (27%).
- Primarily travelled as couples (45%), with 26% traveling alone and 18% with friends and relatives.
- Have a propensity to stay with friends or relatives (45%), in hotels – motels – resorts (33%) and in caravan parks (12%).
- Stayed on average 3.9 nights.

The most popular activities undertaken by this market while travelling were:

- | | |
|----------------------------------|-----|
| • Dining out | 61% |
| • Visiting Friends and Relatives | 57% |
| • Sight seeing | 29% |
| • Shopping | 25% |
| • Bushwalking | 9% |
| • Visiting Museums & Galleries | 9% |
| • Visiting National Parks | 8% |

The main information sources used by these travellers were:

- | | |
|--|-----|
| • Recommendations from friends and relatives | 35% |
| • Internet | 33% |
| • Travel agent | 22% |
| • Previous visit | 19% |
| • Travel guide or brochure | 11% |

4.1.2 Generation X

Generation X (born 1965 – 1979) has grown up in a period of relative prosperity, with technology and access to information. Generation X is better educated than previous generations, more internationally aware in their knowledge and outlook, and more critically attuned in their thinking. They have a strong environmental ethos (reinforcing the need for operators to improve environmental standards).

Generation X is now the main generation in the workforce, and will be for the next the twenty years. As the Boomers retire, this generation will move into senior management. Workers will be reaching the height of their careers and concentrating on wealth accumulation.

This generation differs considerably from the Baby Boomers. Their loyalty is primarily to themselves with the driving force being the work-life balance. Socially, Xers tend to have a large circle of acquaintances. They enjoy getting together and dining out. It is a generation that goes away together as informal social groups, for short breaks and long weekends. Having grown up with air travel and low cost airfares, holidays are more likely to be spent overseas or in resort and retreat locations, with Generation X also being 'comfortable' with health spas.

Generation X is far more health conscious than previous generations. Going to the gym, participating in team sports or individual physical activities (jogging, cycling, swimming, surfing) is generally part of the weekly routine. In comparison to other generations, alcohol consumption is moderate and closely aligned with socialising.

As this generation moves into the 'family' lifestyle stage, the focus appears to be on taking short holidays with the family (eg a weekly holiday twice a year). Trips are no longer defined by the preferences of the children (as was generally the case with previous generations) with the emphasis now being on destinations that offer a range of activities that are enjoyable for every member of the family.

Research undertaken by Destination NSW⁶ into the family market found that for the year ending September 2014:

- Families account for 23% of the travel market in NSW.
- 74% of families from Sydney and 77% of families from Regional NSW travel within NSW with only 30% and 26% respectively, travelling interstate. The most popular interstate destinations are Queensland and Victoria.
- The most popular intrastate destinations for Sydney families are the NSW South Coast (24%) and the NSW North Coast (18%), while Sydney (26%) and the North Coast (19%) are the most popular destinations for families from Regional NSW. The NE-NW Region attracted 4% of total visits made by families in NSW – 2% from Sydney and 7% from Regional NSW families.
- 54% of families travel for holiday and leisure purposes, with 39% travelling to visit friends and relatives.
- Families had a high propensity to undertake outdoor and nature-based activities (52%) and also participate in sports and active outdoor activities (29%) and visited local attractions (27%).
- The primary sources of information were the internet (37%), previous visit (32%) and friends or relatives (18%).
- The most popular forms of accommodation used were staying with friends and relatives (38%), hotel – motel – resort (22%), holiday rental house or apartment (14%) and caravan parks (13%).
- 79% of accommodation bookings were made on-line.

⁶ Information in this section is taken from DNSW (2015) NSW Family Travel Market, which draws on research undertaken by TNS Australia – Annual Domestic Survey.

Research undertaken by TNS Australian, found that for Generation X, domestic travel fulfils a key role in busy family lives by offering a chance for families to reconnect, recharge and have a break from normal routine. A domestic holiday is often a weekend break or a short break (2 to 4 days) providing an opportunity for families to relax and to open lines of communication between adults and children without time pressures. They are often a mix of planned and spontaneous trips, spread across the calendar to provide milestones to look forward to, and are often undertaken for social reasons such as visiting family and friends. The research identified road trips as providing a perfect opportunity for families to bond as a family unit.

The TNS Australia research highlighted the following opportunities for boosting domestic family travel in Australia:

- Create the imagery for “family reconnections”. These are not always overt opportunities sought out by families; rather they can be intangible benefits of a family holiday such as tapping into the emotions of re-connecting. Boost the appeal of road trips via nostalgia imagery to tap into the desire to “re-connect”.
- Cater to the needs of the entire travel party and that may include kids, teenagers, elderly or disabled family members, and the family pets. This means availability of a range of accommodation and dining options, entertainment and activities, technology devices and a Wi-Fi connection at the destination.
- Promote the value of domestic holidays by offering all-inclusive travel packages (e.g. accommodation, meals, and activities). Packages have a strong appeal as they offer ease and convenience, transparency and they also provide a sense of urgency for travel.
- Motivate families to travel now and to take short breaks during off-peak periods (for example, to attend a major event or a local festival). The need for immediacy and spontaneity is one that only domestic travel can offer. Authentic food and wine experiences, and events and festivals can generate the desire to travel.
- Make domestic holiday travel an easy experience. This includes availability and easy access to comprehensive information on accommodation, transport, food, shopping, tours and attractions, ease of booking and availability of a wide range of services.



4.2 The Visiting Friends & Relatives Market

The VFR Market is a significant market for both Gunnedah Shire and the NE-NW Region, with the potential to grow this market by raising the profile of what Gunnedah has to offer within the surrounding region. In 2014, Travel Research Australia undertook research into the characteristics and drivers of the VFR market. Some of the key findings of this research are summarised below:

- For the traveller, the VFR holidays is an opportunity to ‘reconnect’ both with their own family during the trip and with family and friends on arrival. VFR also generally offers ‘good value’ as well as the opportunity to enjoy different activities and to undertake activities with others. Most travellers on a VFR holiday are pre-disposed to spend money on activities, particularly if they are staying with friends or relatives.
- Around 50% of VFR travellers stay with their friends and relatives, with 50% staying in commercial accommodation. Those staying in commercial accommodation often ask their hosts for suggestions and recommendations on where to and not to stay.
- The primary activities undertaken are shopping for pleasure, dining out, walks and picnics. Visiting markets, National Parks, quality playgrounds, beach / river and lookouts are high on the list of places to go.
- The host is the main source of ideas of what to do while visiting – it is the host that either accompanies the visitors and sets the itinerary, or makes the recommendation on where to go and what to do. The host is generally looking to showcase their locality in the best possible light.
- Having friend and relatives coming to stay generally motivates the host to ‘reconnect’ with their community – they start thinking about what they can do to entertain their guests and plan activities. This is particularly the case with grandparents who are having the grand children to stay. Grandparents have often lost touch with what is available for children – what are the best playgrounds, where can the kids ride their bikes, what’s on at the movies, at the library etc.
- Hosts generally look to a number of sources for ‘inspiration’ – the Council website (often the first port of call), the local paper (What’s On) and regional television and radio. Some hosts will visit the local VIC to pick up information. Very few hosts went directly to their local tourism website and only found the site by linking through from the Council site.
- Hosts often balk at taking visitors to attractions that have an entry fee, particularly if the fee is relatively high and/or they have already seen the attraction. The research found that putting in place incentives for hosts increased the likelihood of visiting attractions with entry fees by 60%. Incentives that have been used successfully include:
 - Free or discounted entry for local residents when accompanied by visitors.
 - Flexible family rates.
 - Residents pay once a year and then can visit as many times as they like when accompanied by visiting friends and relatives.
 - Residents visiting attractions are given ‘vouchers’ with deals that can be redeemed when accompanied by friends and relatives.
 - Discount / value add vouchers – local and regional newspapers often run a ‘what to do with kids’ feature in the lead up to school holidays, with operators advertising in the feature often using redeemable vouchers.
- Initiatives that will help to build the VFR market and encourage increased expenditure during the stay include:
 - Having a highly visible link to the tourism website on the Council website home page – with a lead in statement and/or image along the lines of – top 10 things to do with visitors, top 10 things to do with kids.

- Having a coordinated weekly what's on – on Council and the tourism website, and in the local and regional media.
- Coordinating and promoting school holiday activities – on Council and the tourism website and also through local and regional media.
- Promoting the VIC and the tourism website to residents through Council newsletters, local media etc.
- Creating compelling content in promotional material – images that show people reconnecting and having a great time – bonding, celebrating, exploring.
- Providing 'selfie hotspots' – places where people want to take photographs and encourage people to hash tag their photos. 84% of people who have facebook, post 'selfies'.
- Providing incentives for locals to take their visitors out – eg free or discounted entry, free coffee or dessert, etc when accompanied by visitors.



4.3 Researching and Selecting Destinations – the Impact of Technology.

Over the past decade, the internet and digital technology has significantly changed the way in which consumers source information, select destinations and products, and book travel. This has implications for both Gunnedah as a destination, and attraction and accommodation operators in terms of information delivery and marketing and promotion. The Traveller's path to decision-making and the tools used is summarised in Figure 4.1.

Figure 4.1 The Traveller's Path to Decision Making & the Visitor Experience Cycle



Information Sources



INTERNET – internet search is the most constant tool that consumers look to for inspiration and planning at all stages in the Path to Purchase

Multiple Touch Points Highly Fragmented Sources	Traditional	Seek out local knowledge & unbiased, accurate information	Traditional
<p>Traditional Word-of-Mouth Brochures Newspapers / magazines Guide Books (eg Lonely Planet) Television / travel & lifestyle shows Consumer Shows Travel Trade / Travel Agents Transport Operators Accommodation Properties</p> <p>On-Line Internet searches / websites Apps Google Maps Travel sites – eg Trip Advisor Accommodation sites – eg Wotif Deal sites Social Media – Facebook, Twitter Travel videos & Instagram Blogs Pinterest & Itinerary Planners</p>	<p>Traditional Direct – Telephone / Fax Travel Agent Airline / Transport Operator VIC</p> <p>On-line Email Operator direct – website / App Accommodation sites (eg Wotif) Operator chains / Franchise sites Airline sites</p>	<p>Traditional VICs Maps Visitor Guides / Brochures Local Operators / Businesses Word-of-Mouth Guide books Signage</p> <p>On-Line Internet searches / websites Apps Google Maps Travel sites – eg Trip Advisor Accommodation sites – eg Wotif Deal sites Social Media Travel videos & Instagram Blogs / User Generated content</p>	<p>Traditional Word-of-mouth Photos & videos Postcards</p> <p>On-Line Social Media Blogs Travel sites (eg Trip Advisor) YouTube Instagram, Flickr etc Snap Chat</p>

Internet

The internet is now the primary tool used to source travel information. World-wide, on-line travel bookings have outpaced all other types of internet retail sales. In the YE December 2014, around 85% of Australian households had internet access⁷. Of the households with internet connections, 76% used the internet for online purchasing, with travel being the most popular item purchased (74% of users). Internet use and purchasing patterns vary with age, with Generation X and Y having the highest usage levels.

Table 4.1 Internet Use in Australia by Age and Use of the Internet for Purchasing

Age Group	Use of the Internet	On-line Purchase [#]	Purchase Travel On-line [*]
15-17 years	97%	57%	30%
18-24 years	96%	82%	69%
25-34 years	96%	85%	79%
35-44 years	94%	80%	78%
45-54 years	89%	75%	78%
55-64 years	78%	69%	76%
64+ years	46%	58%	67%

as a % of internet users * as % of internet users who purchase on-line.

Ways of using the internet and technology to access and disseminate tourist information are continually evolving and include:

- Google Maps and Google Earth – maps, satellite images, photographic images, routes, directions, distances and travelling times.
- Trip Itinerary planning programs.
- Pod casts and applications - which can be down-loaded onto MP3 players, smart phones and other hand-held digital devices
- User generated content (blogs, You Tube, Instagram) both on websites and through the networking sites,
- Social networking sites such as Facebook, Myspace, Bebo, Twitter etc.
- Travel specific networking sites – such as Trip Wotif, Virtual Tourist, Lonely Planet Thorn Tree and Trip Advisor. These sites not only advertise destinations, accommodation, attractions, tours, events etc, they also provide forums where travellers can discuss their experiences – providing a digital word-of-mouth referral system.
- Travel directories and booking systems.

While a website remains the main ‘tool’ to communicate with the market, website design is evolving rapidly. The latest changes have been in response to Google introducing the Hummingbird Search Platform to facilitate searches from different types of devices, including voice activated searches (smart phones and tablets). The Hummingbird algorithm replaced ‘key words’ with ‘semantics’ as the basis for searching. Semantics looks at the whole search sentence (or conversation for voice searchers), ensuring that the ‘meaning’ or ‘intent’ is taken into account rather than key words. Hummingbird retrieves pages that best match the meaning rather than pages that match just a few words. In determining ‘meaning’ Hummingbird takes into consideration a diverse range of factors including the characteristics of both the searcher and the publisher as well as external factors.

Rather than key words or paid content, website ranking is now determined by over 200 variables, including context, content, social media links, authority and trust-worthiness. In addition, Google is penalising websites that are not mobile optimised. Google has also introduced ‘Google Review’ which is very similar to Trip Adviser, with travellers able to go on-line and review travel activities including accommodation properties.

⁷ Australian Bureau of Statistics Household Use of Information Technology, 2012-13.

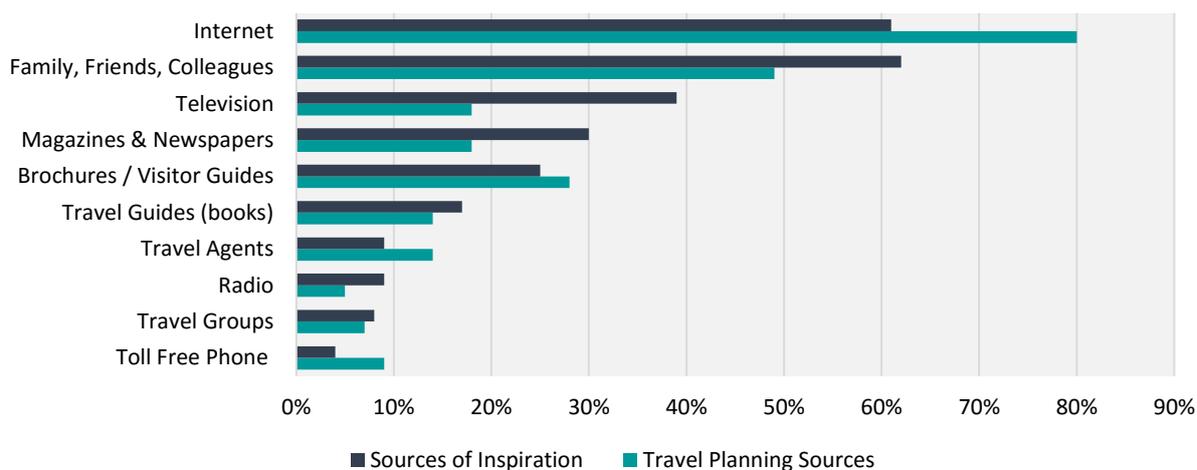
Sourcing Travel Information

The Google Travel Survey (2013) found that 85% of people use the internet to inspire, plan and book travel, with 68% of leisure travellers using the internet as the starting point for generating ideas about where to travel to. The Survey also found that the average traveller undertakes 9.5 research sessions and visits 22 travel related sites before making a booking⁸. Google, with over 70% of the market, is the most popular search engine.

As of 2015, mobile devices (smart phones and tablets) have replaced computers as the starting point to search for inspiration for travel. Mobile devices are also increasingly being used while travelling to access, download and upload information. Change is being driven by a combination of factors including:

- The development, enhanced capabilities (GPS enabled, camera, video etc) and uptake of smartphones, tablets and compact computers.
- Consumers are becoming increasingly 'tech savvy' and confident in using the technology to research, purchase and share.
- Significant improvements in internet coverage and speeds.
- Increasing availability of Wi-Fi hotspots as well as personal Wi-Fi hotspot devices.
- Proliferation of websites, apps and user generated content.
- The rise of social media.
- Significant improvements in the security and ease of on-line purchasing.

Figure 4.2 Sources of Inspiration and Travel Planning Information



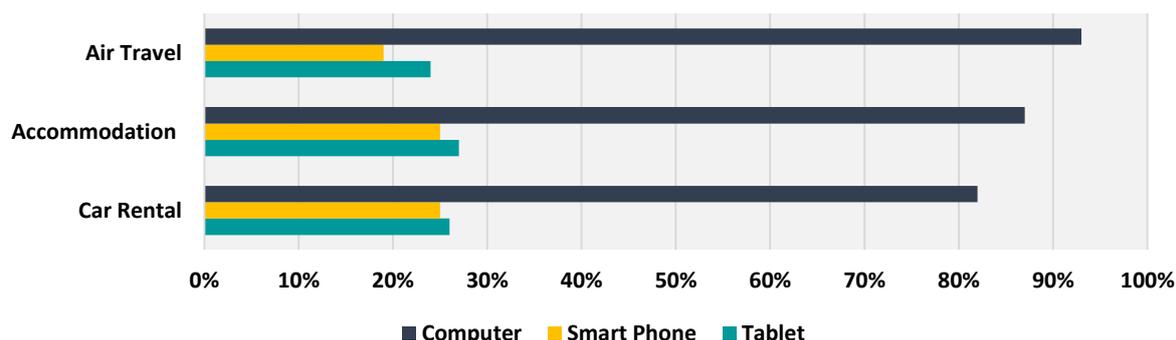
Source: Google The 2013 Traveler

Travellers use multiple devices (referred to as 'cross platform') to research travel, with 89% of activities started on one device (frequently a smart phone and tablet) and completed on another. Most of the search on mobile devices is 'micro minute' - short searches while people are waiting around (eg at the bus stop, on the train, in a cafe etc) with searchers looking for 'inspiration'. There is a very high propensity to view images, short videos (YouTube) and deals and offers.

The use of mobile devices for bookings is still relatively low, with the majority of travellers preferring to book via a computer as the screen is easier to view, there is less chance of making a mistake using a keyboard, the internet is unlikely to drop out, and security is higher.

⁸ Google – The 2013 Traveler

Figure 4.3 Devices used to Book Travel



Use of Social Media

The use of social media as a communication tool and to share travel experiences continues to increase and needs to form part of information delivery and marketing strategies, with social media activities designed to raise awareness and ‘drive’ consumers to the tourism website.

The following statistics for the number of unique Australian users who used social media sites in February 2015⁹, illustrates the significance of this sector.

Facebook	13,800,000
YouTube	13,500,000
WordPress.com	6,100,000
Tumblr	4,700,000
Instagram	4,000,000
LinkedIn	3,300,000
Blogspot	2,850,000
Twitter	2,791,300
TripAdvisor	2,000,000
Tinder	1,500,000
Yelp	1,500,000
Snapchat	1,070,000
Flickr	700,000
Pinterest	350,000

User Generated Content (USC)

Travel content is growing exponentially as travellers around the world share their travel experiences and seek inspiration for their trip. User generated content is broadly defined as any content (text, images, videos) posted on the web that is not published by a brand. It includes content such as blogs, comments, posts, forums, reviews, podcasts, videos and images, posted via on-line services, social media and content sharing sites. UGC provides another source of information, from a user perspective, with potential travellers interested in what other travellers have to say about a destination, activity, product or service.

Video Casting

The use of on-line videos as a source of information on destinations and products is increasing with 51% of leisure travellers and 69% of business travellers watching travel videos as part of the ‘Pathway to Purchase’. In 2014, the use of You Tube to research travel increased by 118%.

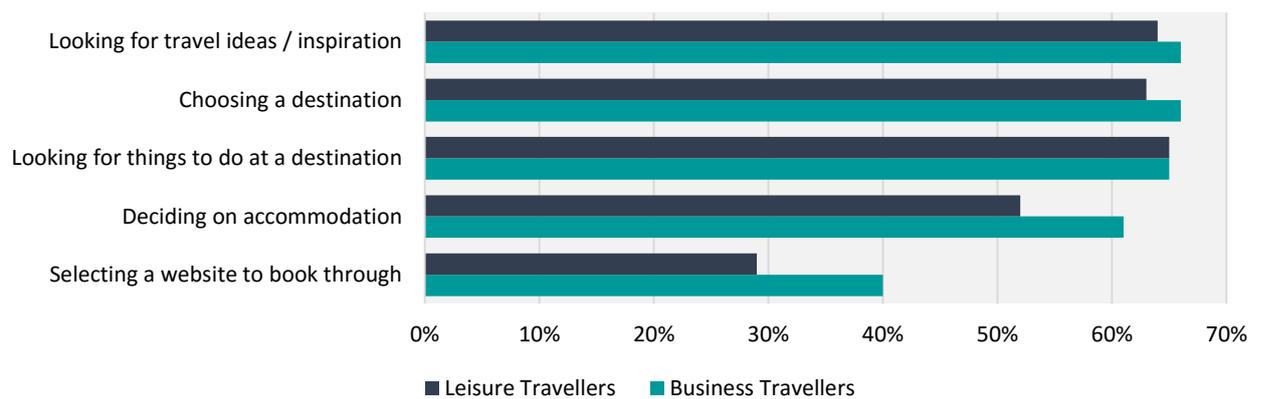
⁹ Social Media News.com – Social Media Statistics Australia – February 2015.

Destination videos are primarily used during the 'Dreaming' stage when travellers are searching for ideas and destinations. 85% of travel-related searches on YouTube focus on destinations, attractions, points of interest and general travel ideas¹⁰. Product videos are more likely to be viewed during the planning stage when travellers are comparing products and prices.

Travellers watch a mix of user generated content and professionally-made video clips. 58% of leisure travellers and 64% of business travellers advised that watching on-line videos influenced their choice of destination and/or products (eg accommodation, activities, tours) selected.

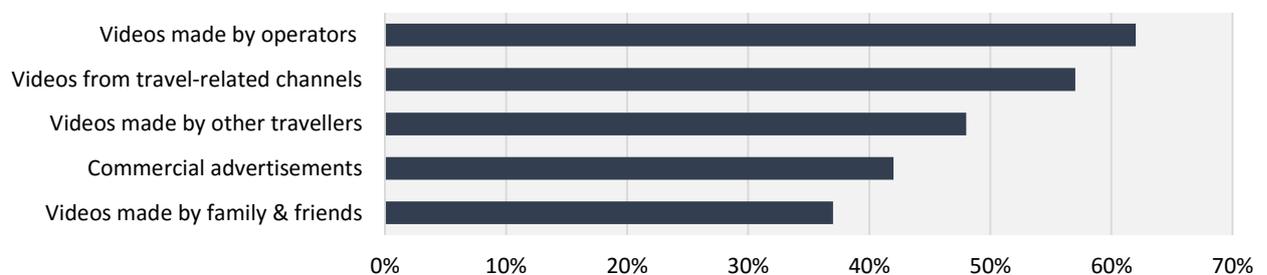
From 2012 to 2013, uploads of travel videos by destinations / operators and consumers sharing their experiences increased by 190%.

Figure 4.4 Use of On-Line Travel Videos as a Source of Information



Source: Travel Content Takes off on YouTube www.thinkwithgoogle.com.au

Figure 4.5 Source of Videos viewed by Travellers



Source: Travel Content Takes off on YouTube www.thinkwithgoogle.com.au

¹⁰ Travel Content Takes off on YouTube www.thinkwithgoogle.com.au

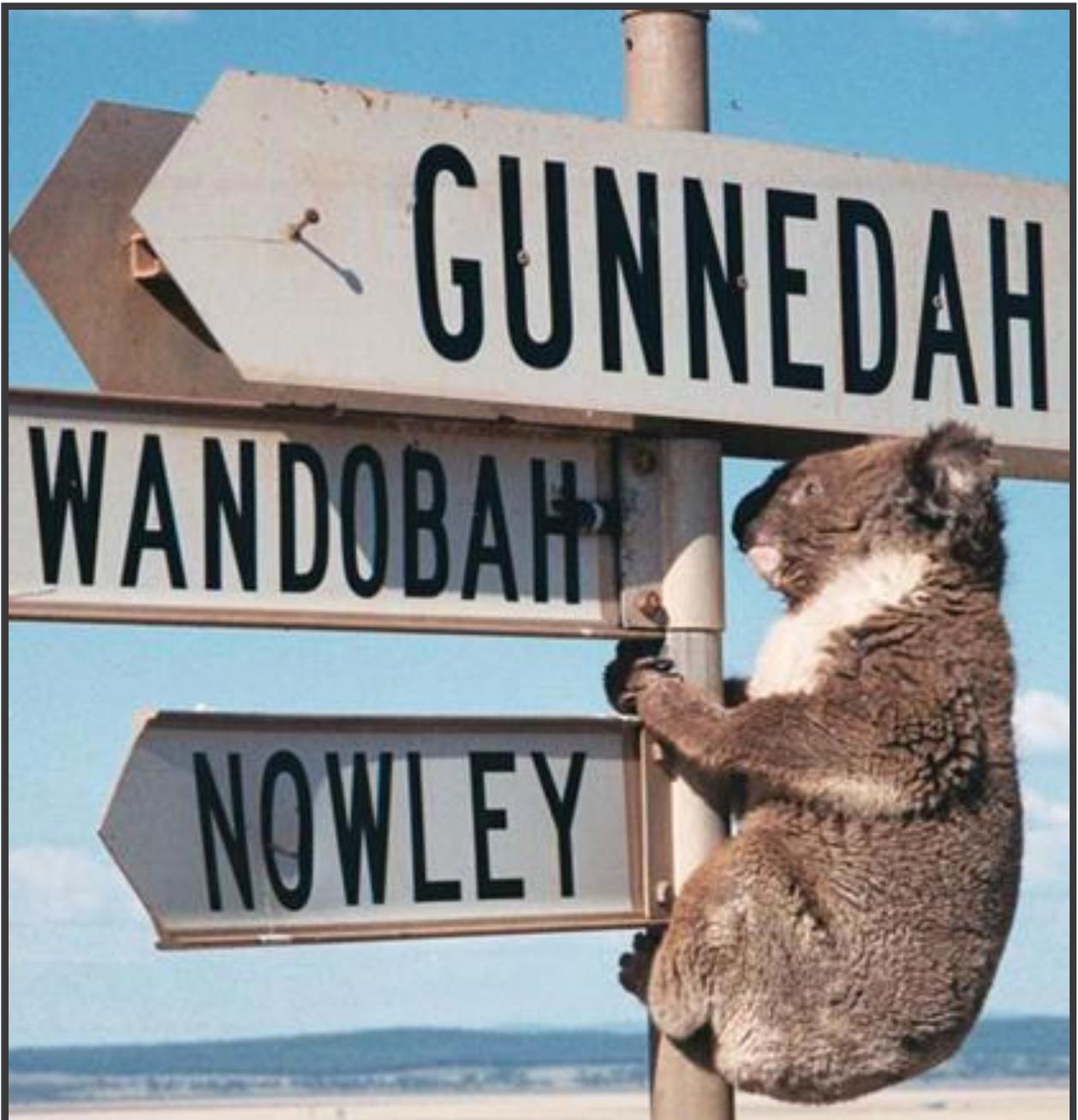
Implications for Gunnedah Shire

Gunnedah Shire and individual operators need to have strong on-line presence.

- Websites need to:
 - Be mobile optimised – for both android and apple (i platform) for both smart phones and tablets.
 - Be semantic search responsive not key word responsive – the focus has to be about **why** people are looking for something rather than what they are looking for. The content needs to provide answers and solutions to the questions being asked and each page needs to count – Google is now delivering users to the most appropriate page of the website, rather than to a home page or top level page.
 - Be supported by and fully integrated with social media, with social media activity now being one of the key variables driving website ranking.
 - Incorporate quality images and video footage (eg You Tube).
 - Provide opportunities to encourage and harness user generated content.
- For accommodation operators, websites also need to:
 - Have on-line, real-time reservations system (book now button)
 - Provide information and images on the destination – sell the destination first.
 - Provide quality images (essential) and a video walk through (desirable) of the accommodation.
 - Be linked to key tourism and travel websites.

Operators also need to:

- Claim their 'My Business Page' on Google.
 - Encourage guests to review the property on both Trip Advisor and Google Review
 - Ensure that their property is listed, via NSWConnect, on the Australian / State Tourism Data Warehouse data base, and that this content is updated regularly.
- Gunnedah Shire needs to embrace video casting as a tool for driving awareness and engagement, and generating interest and excitement. The LGA needs to explore opportunities for using both professional and user generated clips.
 - Product and service operators (attractions, accommodation, events etc) also need to be encouraged to include quality video clips as part of their on-line sales and marketing activities.
 - The VIC needs to identify and promote where free WiFi access is available within the Shire.



**DESTINATION ANALYSIS
PRODUCT ASSESSMENT**

**Localities, Attractions, Activities
& Experiences**

5. TOWNS & VILLAGES

The towns, villages and rural environments play a very significant role in the tourism industry. The towns and villages provide the services and infrastructure sought by visitors, and can become attractions in their own right. The quality and diversity of the built and rural environments also influences how a visitor reacts to and 'bonds' with the area.

Presentation and first impressions play a major role in the decision to stop in or visit a locality. While holiday destinations, overnight stops and visits to major attractions are generally planned in advance, the transit stop is generally an impulse decision. If an area presents well and looks interesting, travellers will often decide to stop and have a quick look around. If the experience gained is positive, there is a likelihood of repeat visitation and/or travellers recommending the area to other travellers (word of mouth, blogs etc). Regular travellers along a route will often develop 'favourite' places to stop. In addition, interest stimulated while passing through an area can often lead to a future visit, with a traveller returning to explore the area.

From a visitor perspective, the key areas that make an impression are the gateway entry points, routes through the area, appearance and presentation of the town centres, villages and the parks and gardens. The presentation of businesses, particularly in the smaller centres, is also critical to encouraging travellers to stop, with businesses that present as clean and vibrant more likely to attract patronage than those that appear dated, tired and/or run down. In the villages within the Shire, general stores tend to have minimal street appeal, limited visibility and /or ineffective signage.

Presentation is also important for the local community, building pride and confidence in the area. Good presentation is also an attribute for people who are looking to relocate to and/or invest in the area, with tourism being an important driver of the 'tree change' process.

5.1 Attributes and Services

The key attributes and services that visitors are generally looking for from towns and villages are:

- Modern, clean, safe public toilets – open 24 hours per day. Toilets are available in Gunnedah and each of the villages, with the village toilets being basic but clean. Signage to some of the toilet blocks need to be improved, with the preference being to move to the internationally recognised icons rather than 'public toilet' fingerboard signs.
- Information on the town, surrounding region and route ahead – Map / Directory and/or a Visitor Information Centre. While information on the Shire is available in Gunnedah, information available in the villages is absent or very limited.
- Good signage – Improvements are needed in directional and facility signage throughout Gunnedah Shire.
- Attractive parks with picnic facilities – playgrounds are also important for the family market. These are available in Gunnedah and each of the villages within the Shire.
- A safe, clean environment - Gunnedah and the villages present as safe, with the villages also being well maintained. While most of Gunnedah is clean and well maintained, there are litter and graffiti issues along the Namoi River foreshore and at Porcupine Hill Lookout.
- Food and beverage outlets – clean, contemporary and inviting. Gunnedah has a range of appealing eateries, with the main issue being lack of cafes open at night and at times on the weekends. The food offering in the villages is limited. Meals are available at the hotels in Curlewis, Mullaley and Tambar Springs. The general stores / post offices in Curlewis, Carroll, Mullaley and Tambar Springs provide refreshments and some takeaway food. While these stores are primarily servicing the local market, there is opportunity to build patronage from travellers. This will require the stores to improve their street appeal, increase their visibility and/ or improve signage.

- For the market towing caravans / trailers – a place to park their vehicle legally and safely close to services. There is adequate parallel parking available around Wolseley Park and along Bloomfield Street in Gunnedah, with caravans and long rigs also able to pull up close to toilets in the villages.
- Mobile network and Wifi access. Most of the accommodation properties in Gunnedah offer WiFi access.

5.2 Gunnedah

Gunnedah is both a sub-regional centre and a highway service centre, and is the focal point for business, shopping, services, sport, and entertainment within the Shire as well as the focal point for visitation.

The attributes / strengths of Gunnedah and the weaknesses / challenges from a tourism perspective are summarised in Table 5.1

Table 5.1 Strengths & Weaknesses – Gunnedah

Strengths / Attributes	Issues / Challenges
<ul style="list-style-type: none"> • Cross road of the Oxley and Kamilaroi Highways and a logical place for Kamilaroi Highway travellers and for travellers coming from Coonabarabran and Coolah from the south and west to stop and have a break. • Proximity to Tamworth – providing opportunities to build the day trip market for shopping, dining, sport, events etc. • Attractive setting – flanked by hills to the south and overlooking the Namoi River flood plain to the north. • The town presents as clean, green and safe – particularly when arriving via the Oxley Highway from the west, with the corridors of trees. The various grain mills and silos create an attractive and interesting skyline. • The shopping centre has a growing number of good boutiques and lifestyle shops, an emerging cafe and dining scene, cinema, a large licensed club and a number of heritage hotels. • Wolseley Park is an activity node, with travellers gravitating to the Park due to ease of parking, access to toilets, close to supermarkets (3) and shops and close to the Visitor Information Centre. The Park also provides an outdoor venue for events and activities. • VIC in the town centre which encourages travellers to stop in the shopping centre. The flags and activity in the Civic Precinct has added colour and movement to the area. • The services and facilities that visitors are generally seeking are available. • Quality public toilets are available in Wolseley Park (poetry toilets) and on the Oxley Highway in the Wandobah Reserve. Dump points are available at the Lions Club toilets in the Wandobah Reserve and at the Showground. 	<ul style="list-style-type: none"> • Proximity to Tamworth – west bound Oxley Highway travellers may have already stopped in Tamworth and may not be ready for a ‘pit’ stop. Likewise there is potential for east-bound travellers on the Oxley Highway to push on to Tamworth rather than stop in Gunnedah. The challenge for Gunnedah is to ‘catch the attention’ to attract the impulse stop. • Parts of the town centre presents as ‘staid’ and ‘conservative’ and lack visual impact. This is slowly changing as businesses move to footpath trading and introduce ‘colour’ and ‘movement’. • Lack of a strong visual and physical link between the town centre and the river corridor. • With the mining boom and major infrastructure projects, is it sometimes difficult to get accommodation in Gunnedah from Monday to Thursdays, with work related travellers displacing other markets. • Service stations are not located on the main street – rendering them difficult for visitors to find. • Ineffective directional signage to the Gunnedah Tourist Park (particularly in Bloomfield Street which is truck route) • A limited number of cafes open after hours and on weekends, with the majority of main street traders also closing Saturday afternoon and Sundays. • A number of the attractions in town present as tired and run-down (see Sections 6.2 and 6.3). • Limited / no directional signage to some of the attractions in and around Gunnedah. • Litter issues along the Namoi River corridor and at Porcupine Hill, which detract from the presentation and appeal of these areas.

Strengths / Attributes	Issues / Challenges
<ul style="list-style-type: none"> • Proximity of the town centre to the Namoi River corridor providing options for linking the shopping centre and riverside walk. • Koala habitat with koalas able to be sighted around the town. • Range of accommodation available – from budget through to 4.5 star, with most of the accommodation within walking distance of the town centre. • A number of conference, meeting and entertainment venues. • Range of quality sporting facilities, parks and reserves. • Rail access, with the railway station within walking distance of the town centre. • Association with AgQuip – providing Gunnedah with a high profile throughout Rural Australia. 	

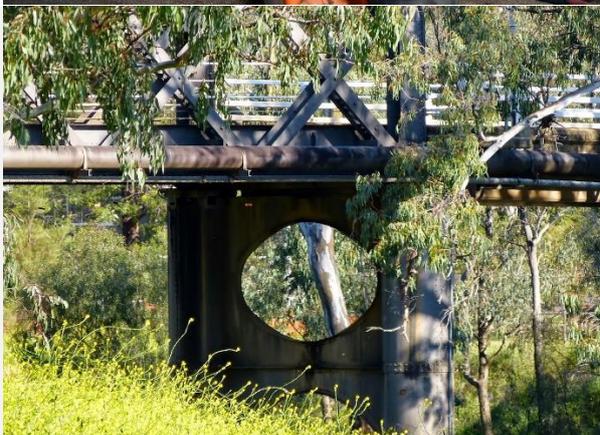
Place Making – Directions Forward for Gunnedah

From a tourism perspective, initiatives that would further improve the presentation and appeal of Gunnedah and/or enhance the visitor experience include:

- Continued improvements to the presentation of the arrival points and entry corridors – through landscaping, removal of poorly presented signage, and use of colour and movement (eg flags).
- Introducing more colour and movement into the town centre – increasing the vibrancy and attracting attention through public art, landscaping, flags and banners, on-street trading and activating ‘dead spots’, laneways etc.
- Improving directional signage to tourist attractions, toilets and off-street car parking areas. Signage is also needed from Gunnedah to the Boonalla Aboriginal Area, and from Gunnedah (intersection of the Kamilaroi and Oxley Highway) to Lake Keepit.
- Ensuring that the town is ‘caravan friendly’ – improving directional signage to the Gunnedah Tourist Park; continuing to provide parallel parking areas suitable for long rigs close to the VIC and town centre - with these spaces effectively signposted, and signage put in place to direct long rigs to these spaces; and directional signage to the dump points.
- Providing an information directory at the public toilets / caravan rest area at the Wandobah Reserve, with the rest area connected to the Blackjack Creek cycleway.
- Increasing access to the Namoi River, for a range of activities – walking, cycling, canoeing, koala spotting etc, with the River linked to the town centre. The touring market is increasingly travelling with bicycles and canoes, and the availability of cycleways along the river and in other attractive locations and options to launch and retrieve canoes, will encourage travellers to stay longer in town (see Table 6.7).
- Providing Signage / markers delineating koala habitat areas – to reinforce the ‘koala’ theme (see Table 6.7).



- Improving the presentation and experience offered by attractions (see Table 6.3).
- Developing the proposed playground in Wolseley Park.



5.3 Curlewis

Curlewis is located on the Kamilaroi Highway, 16 kilometres south of Gunnedah. The village has a General Store – Post Office, the historic Commercial Hotel and an attractive sport and recreation ground. The main visitor markets are people visiting friends and relatives, work related travellers, highway travellers and competitors and spectators for the Curlewis Campdraft and other events held in the village. The Commercial Hotel and the Camp Draft arena are the primary tourism assets. The entry signage for the village features a koala, with koalas often being sighted in the cemetery area and the bushland along the Kamilaroi Highway.

Table 5.2 Strengths & Weaknesses – Curlewis

Strengths / Attributes	Issues / Challenges
<ul style="list-style-type: none"> • Attractive setting – hills behind Curlewis and the plains to the north. • Attractive town entry – paddocks, corridor of trees and old buildings which, although in poor condition, add character to the arrival corridor. • The historic Commercial Hotel with the building being visible from the Kamilaroi Highway. The Hotel has some accommodation and allows caravans to park on site. • Very attractive Sport & Recreation Ground, with a high standard Camp Draft Arena and support facilities. The Recreation Ground is ideal for a range of horse sports, a staging area for events and for potentially for camping. • Koala colony, with koala sightings being relatively frequent. • Attractive park with playground, picnic facilities, skateboard ramp and toilets. • Curlewis Common – prolific bird life. 	<ul style="list-style-type: none"> • Only one entry point to the village from the Kamilaroi Highway. By the time the Commercial Hotel attracts the interest of west-bound travellers, they are already past the access road into the village. • Proximity to Gunnedah – east bound travellers are likely to have already has a pit stop in Gunnedah and it is too early to stop again, while west bound travellers are continue driving as it is only another 15 minutes into Gunnedah. • Very limited accommodation. • The Post Office – General Store has limited street appeal and from the outside is not ‘inviting’ to visitors. The signage is primarily Post Office related, providing no indication of the other goods and services offered (eg takeaway food). • The land tenure arrangements within the Sports Ground, with the area divided between a number of different organisations. Some of the groups have folded, with their buildings and facilities falling into disrepair. This detracts from the overall appeal of venue, is becoming a WHS issue, and limits how the Sports Ground can be used.

Place Making – Directions Forward - Curlewis

From a tourism perspective, initiatives that could encourage travellers to stop in Curlewis and/or enable Curlewis to attract activity-based groups include:

- Erection of a white on blue services sign on the Kamilaroi Highway on the approach to the village – with icons for accommodation, camping, food, toilets and picnic facilities.
- Creating a point of interest - A number of the older buildings in Railway and Goran Street still have their original advertising signs, with these signs being barely legible. There may be opportunity to restore these signs. Portland in Lithgow LGA has been very successful in attracting visitors through its ‘signs of yester year’ renovation program.
- Continued improvement of the Sport and Recreation Ground – resolving tenure issues, removing disused buildings and structures and additional tree planting, with the Ground promoted to horse and dog groups, and other potential users. Approval should also be sought to allow primitive camping at the Ground both for groups and independent travellers, with Curlewis being an ideal location for free or

low cost camping for the RV / Touring caravan market, with the Sport and Recreation Ground being a potential site.

- Promoting the Curlewis Common (and possibly other sites around Curlewis) as a bird hot spot and the Curlewis Cemetery as an area where koalas are often seen, in information and promotional material for both the Shire and the Kamilaroi Highway. There may also be potential to promote the Curlewis – Tambar Springs Road as a bird route with Curlewis Common, Goran Lake and Trinkey State Conservation Area identified as bird ‘hot spots’.
- Encouraging the owner of the PO to increase the street appeal of the building and promote the availability of food and other goods and service through signage. Painting the picnic tables and undertaking some landscaping on the median strip opposite the shop would encourage use of both the shop and this area.
- Promoting a scenic route from Gunnedah to Curlewis – go to lunch at the Commercial Hotel – Wandobah + Preston Road, Commercial Hotel returning via the Kamilaroi Highway (sealed) or via The Curlewis Common Road and Pullaming Road (gravel – soft adventure). When there is water in Goran Lake, it may also be possible to promote a touring route that takes in Curlewis.



5.4 Breeza

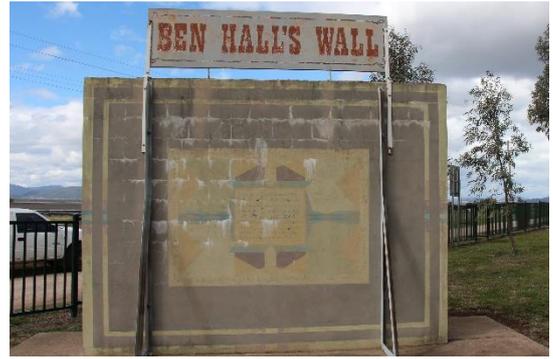
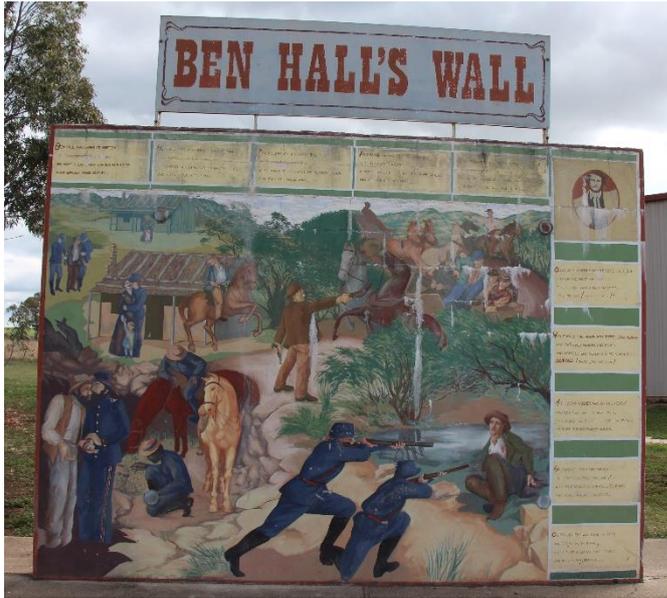
The small village of Breeza is located on the Kamilaroi Highway approximately 43 kilometres south of Gunnedah and 40 kilometres north of Quirindi. It is the south eastern gateway to Gunnedah Shire. The village has an attractive park and village hall, but no general store or hotel. The park is located just off the Highway and provides views of the grain silos and the Breeza Plains. Ben Hall's Wall is located in the Park, with other facilities including a modern playground, public toilet and picnic facilities. There is also an interesting War Memorial. Breeza is the closest settlement to the proposed Shenua Open Cut Coal Mine.

Table 5.3 Strengths & Weaknesses – Breeza

Strengths / Attributes	Issues / Challenges
<ul style="list-style-type: none"> • Very Attractive setting – forested ridge rising from the Breeza Plains, Mooki River (ephemeral), the views across the Plains and the silos. • Attractive park with well-maintained facilities and off highway parking. • One of the few areas along the Highway where travellers can pull off and take in the view. • South eastern gateway to the Shire and closest settlement to the proposed Shenua Coal Mine. • Black Mountain (6km north-west of Breeza) provides one of the best views of the Liverpool / Breeza Plains. 	<ul style="list-style-type: none"> • No shop or accommodation. • Ben Hall's Wall in the Park is in poor condition and becoming difficult to read, with the directional signage to the wall in very poor condition. • Character of the village and the surrounding area could be threatened by the coal mining.

Place Making – Directions Forward - Breeza

- As the southern gateway to the Shire, Breeza provides the opportunity to welcome and orientate visitors. It is a logical place for an information directory which provides a map of the Shire and surrounding region as well as information on the history of the area, the Breeza Plains, agriculture etc. Breeza is also a good location to introduce the Dorothea Mackellar – My Country theme. The information directory needs to be signposted (advanced warning signs and directional arrows with the official blue and yellow 'i' sign.
- The future of the Ben Hall Wall needs to be determined – whether it can be refurbished or whether it needs to be replaced or removed. If the wall is to be retained, the directional signage to the wall also needs to be replaced. There may be opportunity to use the back of the wall to display other points of interest or 'stories' about the Shire – eg Thunderbolt at Carroll, the Diprotodon at Tambar Springs etc.
- If the Shenua and/or Caroona Coal Mines are visible from Breeza, Breeza could be a logical place for some interpretation of the coal mining in the Gunnedah Basin, with this working in with the coal mining interpretation proposed by Liverpool Plains and Narrabri Shire (Boggabri) as part of product development along the Kamilaroi Highway. There may be opportunity to incorporate some form of 'attention-catcher' (eg display of mining equipment or large tyres off different types of machines)
- The road reserve at Black Mountain would be an ideal place to create a low key viewing area for travellers to pull over and take in the landscape.



Left: Ben Hall's Wall is faded and difficult to read.
Above: The back of the wall (as viewed from the toilets). This space could be used for information and interpretation.
Below: Signage to the wall is virtually unreadable



Left: Breeza Park is a popular rest stop for Kamilaroi Highway travellers.
Below Left: View north from Black Mountain.
Below Right: Breeza War Memorial



5.5 Carroll

Carroll is located on the Oxley Highway approximately 20 kilometres east of Gunnedah and 56 kilometres west of Tamworth. It is the closest settlement to Lake Keepit, with the Lake Keepit State Park being around 20 kilometres north of the village. Carroll has a general store which sells both takeaway food and petrol. There is also a flower stall and market garden vegetable stands, all of which operate seasonally. The village also has a small park with playground and public toilets. Carroll is home of the Kibah Horse Stud which bred two eventing horses (Kibah Tic Tic and Kibah Sandstone) that have won Olympic Gold Medals, with this featured on the village entry signs. Carroll is located on the bank of the Namoi River, with informal recreation areas along the river corridor. The Carroll Cotton Gin is located 13 kilometres south of Carroll, with the Gin providing the occasional tour by appointment.

Table 5.4 Strengths & Weaknesses – Carroll

Strengths / Attributes	Issues / Challenges
<ul style="list-style-type: none"> • Highway location with exposure to passing traffic. • General store with petrol and takeaway food. • Proximity to the Namoi River. • Availability of public toilets and a small park. • Cotton Gin – potential attraction. 	<ul style="list-style-type: none"> • Proximity to Gunnedah – east bound travellers are likely to have already had a pit stop in Gunnedah and it is too early to stop again, while west bound travellers are likely to continue driving as it is only another 15 minutes into Gunnedah. • Presentation of the General Store has limited street front appeal which could deter some travellers. • The access points to the River are not signposted, with travellers likely to be unaware that the river exists.

Place Making – Directions Forward - Carroll

From a tourism perspective, initiatives that could encourage travellers to stop in Carroll include:

- Erection of a white on blue services sign on the Oxley Highway on the approach to the village – with icons for food, petrol, toilets and picnic facilities.
- Signposting the river access points from the Oxley Highway. This may need to be accompanied by some improvements to / clean-up of the riverbank area.
- Cotton Gin Tours (during the processing season).
- Encouraging the owner of the General Store to improve their street appeal.



Carroll Cotton Gin

5.6 Mullaley

Mullaley is located at the crossroads of the Oxley Highway and two regional roads – the Mullaley Coolah Road which is also known as the Black Stump Way, and Grain Valley Road which links Mullaley to Boggabri. Mullaley lies 37 kilometres south-west of Gunnedah and 69 kilometres north-east of Coonabarabran. It is the western gateway to Gunnedah Shire and also a gateway to the NE-NW Region, with a ‘Welcome to the New England North West Region’ sign located on the western edge of the village. Sunflowers are featured on the village entry signs.

Mullaley has a general store – post office, service station (currently closed) and the Post Office Hotel, with the Hotel providing cabin accommodation and powered caravan sites. The village also has an attractive park with a mix of ‘yester year’ and contemporary playground equipment, picnic facilities and public toilets, a village hall and a sports ground (located in Warrumbungle Shire) which is well maintained and used for horse sports. The ‘yesteryear’ playground equipment and the collection of historic milestone markets are ‘quirky’ features of the village. Mullaley is also home to ‘Lively Linseed’ which produce a variety of premium linseed products for the health food market.

The Hotel’s caravan park is popular with the touring caravan market, with these visitors arriving in the village on both the Oxley Highway and the Black Stump Way. The cabins attract both the touring market and people working in the Mullaley area (eg harvesters and pickers). The Park is a popular ‘pit stop’ for Highway travellers.

Just south of Mullaley on the Black Stump Way are a number of points of interest:

- Historic gates of Bando Station. Travellers often stop here to take a photo of the gates.
- Oxley Memorial – 9km south of Mullaley.
- Mt Nombi Volcanic landscape.

These points of interest are ‘shared’ with Tambar Springs.

Table 5.5 Strengths & Weaknesses – Mullaley

Strengths / Attributes	Issues / Challenges
<ul style="list-style-type: none"> • Gateway village for both Gunnedah Shire and the NE-NW Region. • Intersection of two touring routes – the Oxley Highway and the Black Stump Way with exposure to passing traffic. • Well located for ‘pit stops’ and for overnight stays. • Attractive and unusual setting – the flat plains with the triangular hills created by volcanic intrusions. • Mullaley Park – well maintained with good facilities, with the historic milestones and playground equipment of ‘yesteryear’ being quirky features. • The historic Post Office Hotel – providing cabin accommodation and powered sites in an attractive setting with views out over the plains. • The General Store – Post Office has recently been painted and presents well. It is well located opposite the Park. • Sports ground is well maintained and presented. 	<ul style="list-style-type: none"> • Grain Valley Way between Mullaley and Boggabri is not fully sealed. This deters some travellers, particularly caravanners from using this route. • The General Store – Post Office is set back off the Highway and is not visible to approaching traffic. The signage, which is visible, advertises ‘North West Hobby Supplies’ rather than the General Store. • Lack of an information directory - no information available on the Shire or the Region.

Place Making – Directions Forward - Mullaley

From a tourism perspective, initiatives that could encourage travellers to stop in Mullaley include:

- Erection of a white on blue services sign on the Oxley Highway and Black Stump Way on the approach to the village – with icons for accommodation (bed + caravan,) food, petrol (if open), toilets and picnic facilities.
- Information directory in the Mullaley Park car park, with information on the Mullaley area, Gunnedah Shire and the NE-NW Region. The information directory needs to be signposted (advanced warning signs and directional arrows with the official blue and yellow 'i' sign). An information board should also be located at the Caravan Park and local businesses should be encouraged to display and distribute the Gunnedah Shire Visitor Guide.
- Encourage the PO-General Store to increase their visibility to approaching traffic – this could include the use of colourful flags or advertising signage or other visual 'statement'.
- Explore options for acquiring more 'yesteryear' playground equipment as an unusual feature for Mullaley Park.
- Explore the possibility of acquiring additional milestones and other items (eg historic post boxes) that have / are disappearing from Australian road corridors, as points of interest for the Park.
- With the sunflowers featuring on the village entry signage, explore opportunities for strategic planting of sunflowers (all varieties) in the village – eg outside the Hall and General Store, in the Park, School, around the village entry signs etc and/or including sunflower inspired public art.
- Explore opportunities to promote Mullaley as the home of 'Lively Linseed'.



Examples of sunflower sculptures



There may be opportunity to develop Mullaley Park into a 'park of yesteryear' through 'old fashioned' playground equipment, milestones and other items that are disappearing from the Highway corridors.



Mullaley General Store is not visible to approaching Oxley Highway travellers, with travellers only seeing the 'Hobby Supplies' sign. Travellers are likely to be looking for refreshments.



Mullaley is the south western gateway for the NE-NW Region. The small caravan park at the Mullaley Hotel is popular with both Oxley Highway and Black Stump Way travellers.

5.7 Tambar Springs

The village of Tambar Springs is located on the Black Stump Way, approximately 65 kilometres south west of Gunnedah, 58 kilometres north of Coolah and 70 kilometres east of Coonabarabran. Tambar Springs forms the south western gateway for both Gunnedah Shire and the New England North West Region. The village is located on the eastern edge of the Warrumbungle Range, at the base of Tambar Mountain and has extensive, spectacular views to the north-east over the Liverpool Plains.

For travellers arriving on the Black Stump Way from the south, Tambar Springs marks the transition from the Western Slopes to the Western Plains – the introduction to ‘My Country’. Since leaving Mudgee travellers have come through grazing land and timbered hills with little variation in the scenery. As the traveller comes over the top of the ridge into Tambar Springs, the view is superb, with the Plains extending to the north to the Nandewar Range on the horizon, the Mountain rising to the west and the village tucked into the base of the Mountain.

Tambar Springs has a cluster of historic weatherboard buildings – the Royal Hotel, cottages, village hall, churches, police station, school and former bowling club. A number of these buildings have recently been painted, creating a vibrant impression of the village. Tambar Mountain, rising abruptly above the village to a height of 806 metres, is a dominant and impressive feature of the landscape.

Tambar Springs has two ‘claims to fame’ – the Diprotodon and the first World War 1 Memorial to be constructed in Australia. In 1979 a diprotodon skeleton was discovered at Tambar Springs, with the skeleton on display as part of the Australian Museum Mega Fauna display at the VIC at Coonabarabran. Tambar Springs has embraced the Diprotodon in its village entry signage and as a trail marker for its scenic drive. The WW1 Memorial is located in Memorial Park in the heart of the village, with the Park also having a Gallipoli Pine Tree, historic tractor, play equipment, picnic facilities and public toilets. The Park is a popular place for travellers to stop. Businesses include the historic Royal Hotel (bar, food and accommodation), General Store – Post Office and Tamba Industrial, with petrol being available at both the General Store and Tamba Industrial. Tambar Springs has a showground, which is in very poor condition.

There are a number of attractions and points of interest in the area around Tambar Springs and along the Black Stump Way, including:

- The Trinkey State Conservation Area - located approximately 6 kilometres east of Tambar Springs, Trinkey State Conservation Area is considered one of the most important habitats for avifauna in the North West Region. More than 100 bird species have been identified in the area, including 8 endangered species. Activities undertaken in the forest include camping, picnicking, bush walking, bird watching, wild flower viewing and 4 wheel driving. The Forest would also be ideal for mountain-biking.
- Goran Lake – The Lake lies between Curlewis and Tambar Springs. When the Lake does have water, it attracts birds and bird watchers.
- Mt Nombi area volcanic landscape – located between Tambar Springs and Mullaley to the west of the Black Stump Way, this area has a mass of volcanic cores, plugs and remnants that rise above the fertile farming land. The scenery in this area is relatively unique and very attractive and has the potential to become a 'signature' drive for the Shire and surrounding region.

The simplest route through this area, is the Wyuna Road - Oxley Road - Mt Nombi Road loop. There are also a number of other roads that lead off this loop that link through to the Oxley Highway to the north and to Coonabarabran via either Ulamabri or Purlewaugh to the west. Attractions along the Wyuna Road - Oxley Road - Mt Nombi Road loop include views of the northern escarpments of Tambar Mountain, views north and east over the Liverpool Plains from the intersection of Wyuna Road and Mitchell Springs Road, the volcanic landscape and very attractive rural scenery. This route is not sealed and is not suitable for caravans beyond the Wyuna Road section.

- Tinkrameanah National Park – located 10 kilometres west of Tambar Springs in Warrumbungle Shire. The Park is very small and has no visitor infrastructure. It attracts minimal use, with the used being limited to bushwalking, wild flower and bird viewing and scientific research.
- Oxley Memorial – Memorial to the explorer John Oxley, located 20 kilometres north of Tambar Springs on the Black Stump Way.
- Bomera historic cemetery – located on the Black Stump Way 13 kilometres south of Tambar Springs.

Table 5.6 Strengths & Weaknesses – Tambar Springs

Strengths / Attributes	Issues / Challenges
<ul style="list-style-type: none"> • Gateway village for both Gunnedah Shire and the NE-NW Region – with a stunning views of the Plains, greeting travellers arriving in the village from the south. • Located on the Black Stump Way which is popular touring route for the caravan and RV market. • Very attractive setting – nestled in to the base of Tambar Mountain, with the Mountain rising abruptly above the village and the Plains to the north east. • Stunning, extensive views of the Plains, volcanic remnants and the Nandewar Range in the far distance. For a large part of the year, the Plains are a patchwork of colour – a great introduction to the North West and ‘My Country. • Cluster of historic weatherboard buildings, which, with the restoration of a number of the cottages and churches, combined with the Royal Hotel, Police Station, School and former bowling club, are eye catching and create a vibrant impression of the village. • Diprotodon connection with the Diprotodon ‘art’ signs. • Memorial Park – featuring the WWI Memorial and Gallipoli Pine, with well-maintained visitor facilities. • Services available for visitors – Hotel and Post Office – food, beverage, petrol, ATM, pub accommodation. • A number of attractions and points of interest in and around Tambar Springs and along the Black Stump Way. • A number of photo opportunities – Diprotodon signs, views, WWI memorial, Royal Hotel, Bando Gates etc. 	<ul style="list-style-type: none"> • Lack of an orientation point for the Diprotodon and the Diprotodon trail – there is no information directing travellers to the Visit Gunnedah website to download the Diprotodon Drive Brochure. There is also no information / images telling the story of the ‘find’ and the archaeological dig. • No public access to Tambar Mountain – there is no walking or driving track from the former bowling club to the top of the mountain. • No information on the Springs – it is understood that there is a spring on the Common (TSR) within the village. • No gateway information – eg no Welcome to NE-NW Region or Welcome to Gunnedah Shire signs, or a local and regional information directory. • Limited signage on the General Store – PO signs and an a-frame ice cream sign neither of which are highly visible to travellers. • Directional and facility signage is limited. • No visitor facilities or orientation maps at the entrance to the Trinkey State Conservation Areas. • The points of interest in and around Tambar Springs are not well signposted.

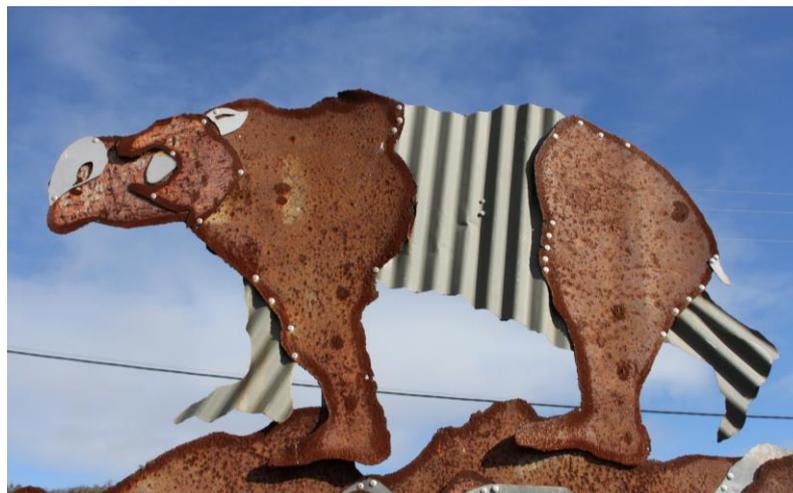
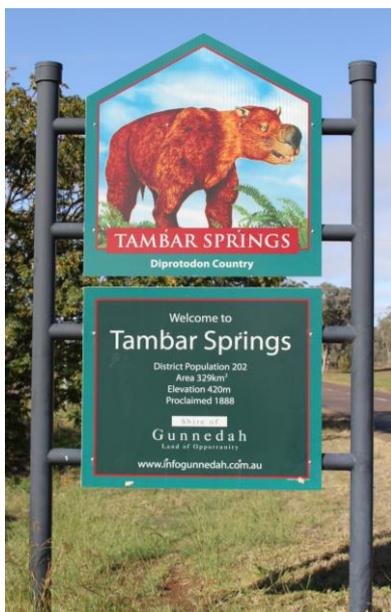
Place Making – Directions Forward – Tambar Springs

From a tourism perspective, initiatives that could encourage travellers to stop and spend time exploring Tambar Springs include:

- Erection of a white on blue services sign on the Black Stump Way on the approach to the village – with icons for accommodation (bed), food, petrol, toilets and picnic facilities.
- Provision of information including an information directory in the Memorial Park car park (or other strategic location), with information on the Tambar Springs area, Gunnedah Shire and the NE-NW

Region. The information directory needs to be signposted (advanced warning signs and directional arrows with the official blue and yellow 'i' sign. Businesses in the villages should also be encouraged to display information on the village and also distribute the Gunnedah Shire Visitor Guide.

- Formalisation and signposting of a viewing area (or areas) where travellers can stop safely and take in the view. The viewing area needs to be accessible to caravans, and be effectively signposted, including advanced warning signs and the use of the 'camera icon'.
- Providing information on the Diprotodon discovery and archaeological dig.
- Encourage the General Store - PO to increase its visibility to approaching traffic – this could include the use of colourful flags or advertising signage or other visual 'statement'.
- Continue to encourage the painting / refurbishment of the historic weatherboard cottages.
- Village-wide coordinated plantings to bring more colour into the village and create another point of interest (eg Daffodils of Rydal, Roses in Goulburn) at specific times of the year.
- Product development to capitalise on the potential attractions and points of interest around Tambar Springs:
 - Viewing area/s – Tambar Springs and along the Black Stump way between Tambar Springs and Mullaley.
 - Developing a feature / walk around the spring in the Common – possibly making this the 'Diprotodon Walk'.
 - Exploring opportunities to provide a walking track to the top of Tambar Mountain.
 - 'Track head' orientation at the entrance to the Trinkey State Conservation Areas, with information on the Forest available from businesses in the village.
 - Mt Nombi scenic drive.
 - Developing and promoting the Curlewis – Tambar Springs Road as a bird route, with Trinkey State Conservation Area, Goran Lake and Curlewis Common promoted as bird 'hot spots'.
- Assess the potential to use the Trinkey State Conservation Area for a range of events and activities – 4WD, equestrian, motorsports, orienteering, mountain biking, with the Tambar Springs Recreation Ground upgraded and used as staging area for these activities.



The Diprotodon is one of Tambar Springs claim to fame. Information is needed on the discovery and the archaeological dig.



1914 1918
 THE TAMBAR SPRINGS CENOTAPH IS CLAIMED TO BE THE OLDEST IN AUSTRALIA FOR SERVICE MEN FROM WW1. IT HAS BEEN RESTORED BY THE EFFORTS OF DEDICATED LOCAL PEOPLE, AND WILL BE REDEDICATED ON REMEMBRANCE DAY NOVEMBER THE 11TH 2008



Tambar Springs War Memorial and Lone Pine – the oldest WW1 cenotaph in Australia



The renovated weatherboard public buildings and cottages are a point of interest and contribute to the character and appeal of Tambar Springs.

6. ATTRACTIONS, ACTIVITIES & ASSETS

The attraction and activity base of Gunnedah Shire and the surrounding region forms the backbone of the visitor economy. Attractions and activities have a major influence on trip behaviour, providing a reason for visiting the area and/or in encouraging people to stay longer.

6.1 Propensity to Visit Attractions

The propensity to visit attractions depends on the type and purpose of the trip. Touring travellers and VFR visitors have the highest propensity to visit attractions. Touring Travellers generally allow more time to explore an area and are interested in the range of attractions and activities on offer. This market has a stronger likelihood of setting up a 'base' to explore the surrounding area and a greater propensity to visit neighbouring towns and villages. The product available in Gunnedah Shire is ideally suited to the Wanderer Market.

Activities undertaken by the VFR market are strongly influenced by the local host. Research into the VFR market (see Section 4.2) has found that the main activities undertaken are dining out, shopping and visiting parks and reserves. Hosts are more likely to take visitors to 'free' attractions, rather than 'paid' attractions, particularly if the entry fee is relatively high. The research found that incentives such as free or reduced entry for locals when accompanied by visitors, or a local resident pays admission price once a year and then after this has free admission when accompanied by visitors, results in a 60% increase in the likelihood to visit a paid attraction.

Coach tour and other organised groups also have a high propensity to visit attractions, however these visits are programed into the itinerary at the trip planning stage and there is limited room for deviation.

Through traffic (transit market), particularly transit repeat visitors, have a considerably lower propensity to visit attractions than the touring and destination markets. The transit market generally has a limited time-frame and tends to 'program' visits to attractions into their trip itinerary. They are more likely to visit the higher profile attractions or attractions that they have a specific interest in. These travellers are less likely to deviate from their route. Business and work-related travellers have a low propensity to visit attractions.

Activities also play a significant role in generating visitation. In this sense, the destination becomes the 'venue', the place people go to pursue a particular interest or participate in a specific activity. It is the access to facilities and/or the quality of, the experience being sought that is the driver. In selecting destinations, the range of activities available plays a major role in influencing the decision – 'we'll go there because there are lots of things for the kids to do' / 'I have always wanted to try that' / 'that looks interesting' etc.

There is a strong trend across all market segments for 'learning' and 'immersion' activities, with consumers travelling to undertake workshops (eg art, photography, textiles), become involved in research programs (eg archaeological digs, bush regeneration, bird and wildlife counts), or develop their skill base (eg learning to surf, fly, mountain bike etc. They will also travel to participate in both competitive and community events – cycling, running, mountain biking etc.

6.2 Attraction & Activity Base of Gunnedah Shire

Gunnedah Shire has a diverse range of attractions and activities, with the key activity nodes being Gunnedah and Lake Keepit. The attractions and activities Gunnedah and each of the villages and their surrounding districts are summarised in Table 6.1.

The highest profile attractions are Lake Keepit State Park and the Koalas in Gunnedah. While these attractions have a high level of recognition regionally, the awareness in the broader market appears limited. It would also appear that the perceptual link between Lake Keepit and Gunnedah is weak. To date, the koala experience has been limited to viewing koalas in the trees in and around Gunnedah, with the option to see a koala close up at the Waterways Wildlife Park. The decline in the number of koalas in the area as a result of extreme weather events, renders it more difficult to see koalas in the wild.

The scenery in parts of the Shire is stunning. The Liverpool Plains offers a patchwork of colour with the contrast between the ploughed black soil paddocks and the variety of crops with different colours and textures. For travellers entering the Shire via Breeza, the Oxley Highway from the north, and via Tambar Springs, the beauty and extent of the plains has a 'wow' factor. Likewise, the volcanic remnants rising from the plains around Mt Nombi – Mullaley, is also unique with travellers often stopping to take photos. Lack of viewing areas along the highway / touring route corridors makes it difficult for travellers to stop and appreciate the landscape.

The connection with Dorothea Mackellar and her poem 'My Country' and the discovery of the Diprotodon skeleton at Tambar Spring are points of difference to other localities in the NE-NW Region. There is opportunity to build on both these assets. Dorothea Mackellar, in particular has opportunity to provide a focal point for a range of activities – capitalising on the scenery, the art galleries with the Isherwood collection being a potential drawcard, the arts sector (particularly the visual arts) and local produce (the Plains of Plenty), as well as the physical links between the Dorothea Mackellar precinct, the Pensioner's Hill sculptures and the Museums.

The recently opened Boonalla Aboriginal Area in the Kelvin Valley, has the potential to become a 'must see' tourist attraction for the Shire and also a focal point for building Aboriginal cultural tourism. Gunnedah has a very rich Aboriginal heritage as well as cluster of Aboriginal sites, stories and experiences. Gunnedah has the potential to be a focal point for Aboriginal tourism along the Kamilaroi Highway and within the NE-NW Region.

The Namoi River has been an under-recognised and under-utilised asset. Council has begun to address this with improving access to the riverbank and the development of the riverside walk and cycleway. The river corridor provides the opportunity for visitors to learn about and appreciate the beauty of the inland rivers, and undertake a range of activities including walking, cycling, fishing, canoeing, camping, picnicking, and koala and bird spotting. It also provides the opportunity for interpretation of the history and culture of the Kamilaroi people, the history of Gunnedah, the riverine environment, flooding and koalas and their habitat.

The remainder of the attractions in Gunnedah are primarily local attractions which travellers visit while in the Shire, rather than being 'signature' or 'iconic' attractions which draw visitors into the area. Through product development there is potential to enhance the experience offered and increase visitation.

In terms of activities:

- Gunnedah is becoming increasingly attractive for shopping and dining, with a range of boutiques, lifestyle shops and cafes and eateries.
- Lake Keepit provides the opportunity for a range of activities, including water-based, passive, nature-based, outdoors and soft adventure.
- Gunnedah has a strong and vibrant arts scene – with the potential to increase the range of activities and events within this sector.
- The Shire has a cluster of equine based facilities (including the Showground and racecourse in Gunnedah, and the campdraft facilities at Curlewis and Mullaley) and events.
- Gunnedah has a cluster of motorsports facilities (speedway, hill climb, drag strip (Airport), kart track and flat track) and events.
- Gunnedah Shire has the potential to offer a range of nature-based and outdoor soft adventure activities.

The Shire has a good program of events which help to drive visitation, particularly on weekends. AgQuip is one of the largest events in Australia, bringing over 100,000 visitors into the Shire.

Possible Changes

There are a number of proposals which will expand the attraction and activity base of the Shire. These include:

- Namoi River corridor – Council has plans in place to extend the shared pedestrian – cycleway along the Namoi River foreshore, and to link this cycleway into the Blackjack Creek cycleway. There is also potential for public art and interpretation (koalas, riverine environment, Aboriginal heritage and lifestyle, history of Gunnedah, and flooding) within the River precinct.
- Rehabilitation of Cushman’s Reserve. Located on a river bend, this is a very attractive area that has the potential to become a popular recreation reserve and tourist area.
- Proposed adventure playground in Woseley Park – targeting the family market.
- Lake Keepit – progressive upgrade of the facilities, including a new café, possible function centre and the development of mountain bike tracks.
- Interest by the Gunnedah Aboriginal Community to develop Aboriginal tourism in the Shire. As part of this, there are plans to improve the Cumbo Gunnerah Keeping Place.

Other Assets

Gunnedah has a number of industries and agricultural activities that are not open to the public but would be of significant interest. These assets include:

- Namoi Brickworks
- Grain Mills – Namoi Flour Mills (Manildra) and the Whole Grain Milling Company
- Feed Mills – Paradise Farms and Prydes Easifeed
- Gunnedah Leather Processors
- Namoi Gold – Olive press and processing
- Carroll Cotton Gin
- Coal Washery
- Coal Mines
- Agricultural properties – broadacre farms, irrigated areas, orchards, olive groves etc

There may be potential to provide limited access to some of these assets through:

- Inclusion in specialist agricultural and industrial tours. There are a number of inbound operators who run agricultural, technical and research based tours, bringing small groups of farmers and specialists from overseas to Australia to view best practice operations.
- Pre-booked group tours.
- Open day – eg ‘Gunnedah on Display’, with residents and visitors able to book onto tours.
- Tours as an extension to an event held in Gunnedah (eg Boggabri Drivers Campfire event has a tour program which includes guided tours of different activities including a coal mine, Santos gas operations, cotton farm, cotton gin, long horn cattle property and the Civeo Village).

Meeting Consumer Expectations

The Consumer Research undertaken by the Inland RTO identified a number of expectations and perceptions that consumers have with the product and experience offered in Inland NSW (see Section 3.3). The ability and potential for Gunnedah Shire to provide the products and experiences to meet the different ‘product, activities and experience’ expectations are summarised in Table 6.2.

Table 6.1 Attractions & Activity Base by Locality - Gunnedah Shire

Attraction	Gunnedah	Breeza	Curlewis	Carroll & Lake Keepit	Kelvin	Mullaley	Tambar Springs
Natural Areas, Waterways & Wildlife							
Lakes & Rivers	Namoi River		Goran Lake (ephemeral)	Lake Keepit Namoi River	Access to Lake Keepit		Goran Lake (ephemeral)
Bush Reserves (with visitor facilities & walking &/or 4WD trails)	Porcupine Hill – Bindea Track Namoi River Corridor / Cushans Reserve		Curlewis Common		Boonalla Aboriginal Area		Trinke State Conservation Area
Landscapes & Landforms	Nandewar Range Namoi River Skull Rock	Liverpool / Breeza Plains	Liverpool Plains	Liverpool Plains	Boonalla Aboriginal Area / Cave Nandewar Range Volcanic intrusion – crossing the Kelvin Road Birthing Women	Mullaley Mountain Volcanic Cores Mt Nombi Area Liverpool Plains	Tambar Mountain Mt Nombi Area Liverpool Plains
Lookouts	Porcupine Hill Pensioners Hill						Former Bowling Club
Wildlife & Bird Watching	Koala viewing Waterways Wildlife Park		Koala Viewing Bird Watching – Common & Goran Lake		Bird watching - Boonalla		Bird Watching – Trinkey State Conservation Area
History, Heritage, Arts, Culture							
Aboriginal Attractions and Experiences	Cumbo Gunnerah Keeping Place Red Chief story & monuments Wallaby Trap area Pensioners Hill Totem Poles Porcupine Lookout + numerous sites – not promoted				Boonalla Aboriginal Area (Cave & Interpretation)		
Museums	Rural Museum Watertower						
Historic Buildings / Sites / Interpretation	Breaker Morant Mining Statue 150° Meridian Cohen’s Store Site	Ben Hall’s Wall	Commercial Hotel			Milestones PO Hotel Playground equipment	Diprotodon Trail Royal Hotel
Galleries	Plains of Plenty						

Attraction	Gunnedah	Breeza	Curlewis	Carroll & Lake Keepit	Kelvin	Mullaley	Tambar Springs
	Work of Art Community Gallery Creative Arts Gallery Jean Isherwood Gallery						
Public Art	Pensioner Hill Sculptures						Diprotodon Signs
War Memorials	Eighth Division Memorial Avenue	War Memorial – Gun	Memorial Gates				WWI War Memorial Gallipoli Lone Pine
Poetry	MAAS Walk & Statue – Dorothea McKellar Poets’ Drive Poetry Awards Poetry Toilet – Wolseley Park						
Food, Dining, Local Produce							
Eateries	Numerous – cafes, restaurants, takeaway, fast food		General Store	General Store (Carroll) Kiosk (Lake Keepit)		Road House	General Store
Pub Hotels	Club House Commercial Court House Gunnedah Imperial Railway		Commercial Hotel			Post Office Hotel	Royal Hotel
Licensed Clubs	Services & Bowling Club Golf Club						
Local Produce	Plains of Plenty VIC Butchers – Gunnedah Pork / Sausages					Lively Linseed	
Sporting, Outdoor Activities, Soft Adventure							
Air Sports / Activities	Gunnedah Airport			Lake Keepit - gliding			
Swimming / Water Play	Gunnedah Pool			Lake Keepit – beaches & water play area			
Boating / Water Sports	Namoi River			Lake Keepit – sailing, waterskiing, boating			
Fishing	Namoi River			Lake Keepit Namoi River			

Attraction	Gunnedah	Breeza	Curlewis	Carroll & Lake Keepit	Kelvin	Mullaley	Tambar Springs
Agricultural Shows / Horse events	Gunnedah Show Horse events Horse Racing		Curlewis Campdraft Carriage Driving Pony Club	Home of Kibah Tic-Tic & Kibah Sandstone		Occasional horse event	
Cycling & bike sports	Cycle ways			Lake Keepit – Mountain Biking & BMX			
Walking / Bushwalking	Bindea Track Riverside Track				Boonalla Aboriginal Area		Trinke State Conservation Area
Golf	Gunnedah Golf Course						
Motor Sports / 4WD	Drag Strip Hill Climb Kart Complex Speedway Motorcycle Flat Track Week of Speed Swap Meets Car Shows						4WD - Trinkey State Conservation Area
Other							
Tours	Town Tour Poets Drive			Carroll Cotton Gin – by appointment			Diprotodon Drive
Industry	Gunnedah Sale Yards			Carroll Cotton Gin – by Appointment			



Table 6.2 Ability to Meet Consumer Expectations

Expectation / Perception	Gunnedah Shire
<p>Amazing or Unusual Landscapes</p> <p><i>64% of respondents</i></p>	<p>Gunnedah Shire and the surrounding area have some amazing and unusual landscapes. Given the consumer interest in landscapes, Gunnedah Shire needs to capitalise more effectively on the Liverpool Plains – the ‘My Country’ images.</p> <ul style="list-style-type: none"> ○ Liverpool Plains – patchwork of colour at different times of the year. Views from the Kamilaroi and Oxley Highway and the Black Stump way. Significant views – Black Mountain near Breeza and from Tambar Springs looking north east. ○ Namoi River corridor – River, billabongs, lagoons etc. ○ Boonalla Aboriginal Area – the cave, rugged ranges and the views out over the plains. ○ Mt Nombi area – Mullaley to Tambar Springs – the volcanic cores rising from the plains. ○ Goran Lake – when it has water. ○ Skull Rock. ○ Landforms close-by at Boggabri – Gins Leap, Dripping Rock and Barbers Lagoon (can be linked with Boonalla Aboriginal Area).
<p>A great place for Nature-Based Activities</p> <p><i>54% of respondents</i></p>	<p>Gunnedah needs to continue to promote its koalas, but change the focus from ‘viewing’ to ‘understanding’ – providing more ‘depth’ to the experience by delivering information on koala characteristics, behaviour and habitat and also on the threats to the koala population through climate change and urbanisation as well as the ‘Koala Project’.</p> <p>The focus also needs to be on providing opportunities for a range of outdoor and activities and experiences utilising the hills surrounding Gunnedah, the Bindea Walking Track, Namoi River corridor, Lake Keepit, Curlewis Common, Goran Lake (when it has water), and the State Conservation Areas and State Forests.</p> <p><u>Activities to include:</u></p> <ul style="list-style-type: none"> ○ Koala viewing and interpretation ○ Other wildlife viewing & encounters – eg the kangaroos at Lake Keepit ○ Bushwalking & short walks ○ Scenic driving / lookouts / 4WD ○ Bird watching / Bird Routes & Hot Spots ○ Camping ○ Fishing ○ Canoeing / Kayaking ○ Cycling – along the creek and river corridor ○ Mountain biking
<p>Food & Wine Experiences:</p> <ul style="list-style-type: none"> ○ A great place for food and wine activities. ○ Has excellent restaurants, cafes or coffee shops <p><i>54% and 60%, respectively of respondents</i></p>	<p>The food and dining sector is an emerging sector in Gunnedah. There are no wineries or distilleries. There is not sufficient depth of product to promote the Shire as a food and wine destination, however there is enough to cluster in order to raise the profile of this sector. The assets that the Shire has to work with include:</p> <ul style="list-style-type: none"> ○ Liverpool Plains as a significant food producing area. ○ Emerging cafe scene in Gunnedah – with the town now having a number of contemporary cafes. ○ Plains of Plenty Gallery – sale of local produce & products. ○ Gunnedah Butchers - specialising in locally produced pork and award winning sausages. ○ Food related festivals – Porchetta.

Expectation / Perception	Gunnedah Shire
	<ul style="list-style-type: none"> ○ Emerging pub hotel cuisine – with the potential to develop this further. <p>Initiatives that could help to raise the profile of food and local produce in Gunnedah Shire include:</p> <ul style="list-style-type: none"> ○ Cafe / good food promotion in the VIC ○ Encourage any local hotels that offer a quality dining experience to enter the ‘Good Food Pub Guide – Schooner Awards’. ○ Encourage the Chamber to run a coffee competition – who makes the best coffee in Gunnedah / the Shire ○ Growing Porchetta Day ○ Promoting Lively Linseed at Mullaley ○ Ensure that Gunnedah Shire / operators participate in the Food and Wine development activities and marketing and promotion undertaken at the Regional level through Inland Tourism, Trade and Investment NSW and RDA Northern Inland.
<p>Has a wonderful pioneer history or heritage</p> <p><i>43% of respondents</i></p>	<p>While Gunnedah Shire has a rich pioneer history, the products and experiences on offer are limited and by no means unique to Inland NSW. Gunnedah has two local history museums – Rural Museum & the Water Tower Museum, historic buildings in Gunnedah and the villages – which is similar to most inland towns and villages. There is potential to do more with the Rural Museum.</p>
<p>Offers great cultural activities eg Museums, art galleries or theatre.</p> <p><i>40% of respondents</i></p>	<p>Gunnedah has two local history museums – Rural Museum & the Water Tower Museum plus the Cumbo Gunnerah Keeping Place, four galleries, the Dorothea Mackellar statue, walk and poetry festival, and the Pensioners Hill Sculptures. Gunnedah also has a strong local arts scene, with a range of activities and workshops in both performing and visual arts.</p> <p>There is opportunity to:</p> <ul style="list-style-type: none"> ○ Continue to develop and enhance the Rural Museum and the Cumbo Gunnerah Keeping Place. ○ Package and promote the arts and performance based workshops regionally and potentially in the Hunter and Central Coast areas. ○ Raise the profile of the art galleries and exhibitions (eg quilting, photography, wood turning) in Gunnedah. ○ Continue to build the profile of Dorothea Mackellar – through poetry, art (Isherwood Collection) and also look to photographic and film exhibitions / festivals to celebrate ‘My Country’. ○ Incorporate more public art in the Gunnedah town centre and other strategic locations. ○ Introducing innovative Arts-based events - eg a Chalk Festival, Laneway Arts.
<p>Has great adventure activities</p> <p><i>32% of respondents</i></p>	<p>There is potential for Gunnedah Shire to offer some soft adventure activities however the Shire is unlikely to become an adventure-based destination.</p> <p>Soft adventure products that could be developed and/or promoted include:</p> <ul style="list-style-type: none"> ○ Canoeing – Namoi River & Lake Keepit ○ Water Sports – Lake Keepit ○ Gliding – Lake Keepit ○ Mountain Biking – development of tracks at Lake Keepit, in the Hills around Gunnedah and in the Trinkey State Conservation Area + promotion of tracks in the Boonalla Aboriginal Area. ○ Bushwalking & Wildflower Viewing – Bindea Track, Boonalla Aboriginal Area and Trinkey State Conservation Area ○ 4WD - Trinkey State Conservation Area ○ Motor Sports activities ○ Learn to Fly

Expectation / Perception	Gunnedah Shire
<p>I can do water-based activities here</p> <p><i>27% of respondents</i></p>	<p>Both Lake Keepit and the Namoi River are significant assets for Gunnedah Shire.</p> <p>There is opportunity to:</p> <ul style="list-style-type: none"> ○ Develop and promote canoe trails – Namoi River & Lake Keepit – for Gunnedah Shire and potentially as part of the product development of the Kamilaroi Highway. ○ Work with the Lake Keepit State Park to promote the Lake and water-based activities. ○ Promote fishing along the Namoi River and at Lake Keepit, for Gunnedah Shire and potentially as part of the product development of the Kamilaroi Highway. ○ Explore options with Tamworth LGA for raising the profile of the three water storage dams within the sub-region – Chaffey, Split Rock and Keepit.
<p>Offers amazing indigenous or aboriginal cultural experiences</p> <p><i>18% of respondents</i></p>	<p>Gunnedah Shire has a cluster of Aboriginal products, sites and stories, with key assets being the Cumbo Gunnerah Keeping Place, Red Chief Story and the Boonalla Aboriginal Area. There are also a variety of sites that could be interpreted to tell the story of the Gun-a-daar Tribe and the Kamilaroi People. There is potential for Gunnedah Shire to become a focal point for Aboriginal Tourism both along the Kamilaroi Highway corridor and within the NE-NW Region.</p>



6.2 Improving Existing Attractions

A number of the existing attractions within Gunnedah Shire need refurbishment, improved presentation and/or investment in infrastructure to increase their appeal and to build visitation. Suggested improvements are summarised in Table 6.3.

Some of the issues with Pensioner's Hill are illustrated in the following images.



The street presentation is poor, with no 'Pensioner's Hill' signage on the gates or walls, with the area appearing closed. The position of the garbage bin obscures the pedestrian entry from view. The car park is eroding.



The blank walls of the building provide the opportunity for signage and/or public art. There is also opportunity to capitalise on the view from the end of Lloyd Road



Out of date signage

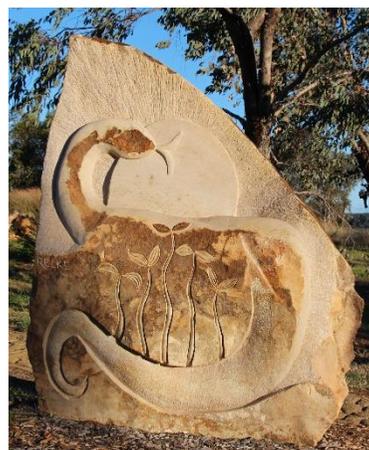


No interpretation of the significance of the totem poles.

Table 6.3 Opportunities to Improve Existing Attractions & Assets

Note: These opportunities are in addition to the place-making suggestions discussed in Chapter 5).

Attraction	Description / Issues / Improvements Needed	Opportunities / Actions
<p>Gunnedah</p> <p>Pensioners Hill</p>	<ul style="list-style-type: none"> • Visitors sometimes have trouble finding the entrance to Pensioners Hill Lookout as there is no signage at the entrance, the gates are closed, the small building looks like a substation, and there is no defined parking area. Visitors often drive to the end of Lloyd Road, look at the view and then turn around and drive off. • Allied to the above, the first impressions at the entrance to the Reserve are not positive. • There is no interpretation of the Aboriginal totem poles. • The information on the history of Pensioners Hill (Changing Times sign) is limited and positioned at the top of the Hill rather than at the entrance. • The Rotary Club sign, explaining what <u>is going</u> to happen on the site, is out of date. 	<ul style="list-style-type: none"> • Improve the entrance to Pensioners Hill Reserve: <ul style="list-style-type: none"> – Large, eye-catching ‘Pensioners Hill Reserve’ sign on the gate - Formalising the parking - Relocating / Screen the garbage bins - Possibly providing a sculpture in the parking area, highly visible from Lloyd Road. - Possibly provide some landscaping to soften the brick structures and enhance ‘first impressions’. • Utilise the sides of the brick building for public art and/or interpretation. • Provide orientation / interpretative signage at the entrance to the Reserve - explaining the history and significance of the reserve, as well as the background to the sculpture project and to each of the sculptures. • Improve to the Aboriginal totem pole area including interpretation, and a walking track to enable the poles to be viewed. • Formalise the end of Lloyd Road as a viewing area: <ul style="list-style-type: none"> • Restrict development to retain the view. • Foot path between the parking area and the viewing area. • Interpretation / information on the key elements of the view. • Consider some kind of feature – eg the ‘Priscilla Bench’ at Broken Hill



Attraction	Description / Issues / Improvements Needed	Opportunities / Actions
<p>Porcupine Hill / Bindea Walking Track</p>	<p>Porcupine Hill provides extensive views of Gunnedah, the Nandewar Range and the Liverpool Plains. It is great location for visitors to get their 'bearings' and take in the landscape. The Reserve is also popular with local residents, with the Bindea Track and walking trails used for exercising. There are a number of memorial plaques including one telling the story of the Red Chief. Both the lookout and Bindea Track are tired with the key issues being:</p> <p><u>Porcupine Hill Lookout</u></p> <ul style="list-style-type: none"> • Interpretative information at each of the viewing areas and the information on flora has been vandalised. • Trees and regrowth are obscuring the view in most directions. • Weed infestation. • Litter – although the parking area appears to be cleaned regularly, there is a lot of litter that has blown or been thrown into the surrounding bush. • Visitors are not attracted to the memorial stone with the plaques that provide information on the Reserve and tell the Red Chief story. This may be due to its location and/or dated presentation, with visitors not identifying it as an information / interpretative sign. • Erosion and degradation where the Bindea Track enters the Lookout (both entry points). <p><u>Bindea Track</u></p> <ul style="list-style-type: none"> • No track head orientation signage (map of the track, distances, degree of difficulty). • The Track is not marked – there are a number of tracks criss-crossing the Reserve, with the potential for visitors to become lost or disoriented. • There is no interpretation at Avard's Lookout. 	<ul style="list-style-type: none"> • Porcupine Hill is a strategic location providing the opportunity to make visitors aware of some Gunnedah's key assets – Aboriginal culture and heritage, the surrounding landscape and agricultural activities, and the Namoi River corridor, and to link key product themes. • Clean up and improve the presentation of Porcupine Hill Lookout, progressively replacing the damaged signs and improving interpretation as funds become available. • Upgrade the Bindea Track to become a signature walk for Gunnedah – with improved signage, information at the track heads, trail markers and development / interpretation of points of interest along the Trail. 
<p>Wallaby Trap</p>	<p>While the Wallaby Trap area has a good 'story' to tell, the experience offered is limited. The area is often poorly maintained with the walking track over-grown.</p>	<p>The Wallaby Trap needs to be better integrated with Porcupine Hill and connected by well-defined walking tracks. Signage needs to be improved and the area regularly maintained. This is an area that would lend itself to a 'soundscape' or an 'App' describing the hunting process.</p>
<p>Wandobah Reserve / Blackjack Creek Corridor</p>	<p>The shared pathway along the eastern side of the creek corridor is not linked to the Lion's Club picnic and toilet facilities on the western side of Wandobah Reserve.</p>	<p>This is a significant 'green corridor' which forms part of the koala habitat area. As part of the development of the cycleway network, the shared pathway will link to the Namoi River corridor. As the Lions Club rest area is becoming a popular stopping place for caravanners and other travellers, it is important that this area is linked to the existing cycleway. There are also opportunities to:</p>

Attraction	Description / Issues / Improvements Needed	Opportunities / Actions
		<ul style="list-style-type: none"> • Provide an information directory at the Rest Area – local and regional maps, cycleway map and information on points of interest, top 10 things to do in Gunnedah and what to see in the villages, koalas – habitat and what to look for. • Undertake ‘feature’ planting within the reserve – flowering natives and/or ‘bird’ plants, koala trees etc – with the goal that these plantings become an attraction and/or part of the product and experience of the koala experience. • Extend the cycleway along the Oxley Highway to the Rural Museum, with information provided on the Namoi Brickworks (including times for ‘cracking’ the kilns – which can be viewed from the footpath), the Solar System Model and the Rural Museum. • Signpost Pensioner’s Hill as both a walk and drive from the Rest Area.
Rural Museum	<p>The Gunnedah Rural Museum is one of the largest local history museums in NSW, with a diverse range of interesting exhibits. The key issues are:</p> <ul style="list-style-type: none"> • Limited visibility - The Museum is set-back from the Oxley Highway and is not highly visible, with the corridor of mature street trees along the Highway further restricting views. The advanced warning sign on the Highway for vehicles coming from the Gunnedah town centre, is in very poor condition and difficult to read. • Mediocre external presentation - the signage at the entrance and the external presentation of the Museum and the entry area lacks a ‘wow’ factor, with the first impression not ‘capturing’ the attention or imagination nor conveying the diversity and quality of the internal exhibits. The mediocre first impression coupled with the entry fee, is likely to be deterring some travellers. • Highly competitive environment with most rural towns have a local history / rural museum, the majority of which have similar themed exhibitions. The Rural Museum lacks a strong ‘point of difference’ or a ‘must see’ attraction to generate interest and bring visitors through the door. • The Rural Museum is featured on the Water Tower Museum website, rather than having a stand-alone site. The header for website features the Water Tower Museum image and the opening hours for the Water Tower (10am to 2pm). The website does not make it really clear that there are two different museums. The Rural Museum has a page on the website which lists its collections and opening hours, however most viewers would read the opening hours on the header and think that they are the opening hours for the Rural 	<ul style="list-style-type: none"> • Increase the visibility and enhance the external presentation of the Museum: <ul style="list-style-type: none"> - Repaint / replace the advanced warning signs. - Erect a large directional tourist sign on the Highway at the entry to the Museum (Western side of the Oxley Highway pointing into the entrance). - Encourage the Museum to improve its external presentation – providing a ‘wow’ factor that attracts interest and creates a sense of anticipation – ‘this is worth looking at’. • Undertake a competitive assessment of local history / rural museums in country NSW and identify the Rural Museum’s competitive strengths – what makes it unique or different, what does it have that is ‘rare’ or ‘usual’, what is the compelling reason for travellers to stop and visit. Once the unique selling points are identified, these need to be featured prominently in the marketing and promotion of the Museum. • Endeavour to restructure the Gunnedah Museum’s website, giving equal coverage to both Museums, with both Museums and their opening hours featured in the header. It is also important to feature the collections and provide images of both Museums. If this is not possible, develop a separate website for the Rural Museum.

Attraction	Description / Issues / Improvements Needed	Opportunities / Actions
	<p>Museum. The 'visit us' page only provides information on the Water Tower Museum, while the 'Collections' and Gallery pages do not state which collection and images (respectively) belong to which Museum</p>	



Road signs for the Museum have faded and are becoming difficult to read.

The entry signs into the Museum are not effective and are partially obscured by trees, particularly for travellers coming out of Gunnedah.

The entrance to the Museum lacks street presence and does not reflect the quality and diversity of the displays.

Attraction	Description / Issues / Improvements Needed	Opportunities / Actions
Kelvin		
<p>Boonalla Aboriginal Area</p>	<p>The Boonalla Aboriginal Area is a quality attraction that has the potential to become a high profile attraction for the Shire, the Northern Inland and NE-NW Regions and the Kamilaroi Highway corridor – ‘ticking a number of boxes’ in terms of what travellers are looking for – unusual landforms and landscapes and nature, outdoors and aboriginal tourism experiences.</p> <p>The key issues are:</p> <ul style="list-style-type: none"> • Lack of directional signage from Gunnedah town centre and also to the entrance of the Reserve from the Kelvin Road. • Limited information and promotional material available on the area. 	<p>There is opportunity to develop and promote scenic drives from:</p> <ul style="list-style-type: none"> • Gunnedah to Boggabri – linking Boonalla Aboriginal Area, Dripping Rock, Barbers Lagoon and Gins Leap. • Manilla to Gunnedah – drawing south-bound traffic on the Fossickers Way into Gunnedah Shire via Boonalla Aboriginal Area. • Lake Keepit State Park – across to Kelvin (Bulga Road) to Boonalla, back to Gunnedah and returning to the Park via the Oxley Highway or Orange Grove Road. <p>Actions needed:</p> <ul style="list-style-type: none"> • Provide directional signage to Boonalla Aboriginal Area from Gunnedah, the Kamilaroi Highway at Boggabri and the Manilla Road. • Produce promotional material on the Reserve and update content and images on relevant tourism and locality websites. • Organise a famil of the area for Tourism / VIC Managers and staff from surrounding LGAs.
Red Bank		
<p>Rest Area</p>	<p>The Red Bank Rest Area is a popular pit stop location for Oxley Highway travellers as well as a free camping area, used by caravans and motorhomes. The Rest Area has picnic facilities and toilets.</p> <p>While the Rest Area is adjacent to the Namoi River, there is no formal track between the Rest Area and the water. There are a number of informal tracks with these being eroded and overgrown with weeds. The riverbank adjacent to the rest area is also weed infested making it difficult to access the river.</p>	<p>Suggested improvements:</p> <ul style="list-style-type: none"> • Erection of an information directory – for the Shire and the surrounding region. • If koalas are present along this corridor – some basic information on the habitat and how to spot a koala. • Formalise and stabilise the track down to the river. • Remove weeds and improve access to the river bank. • Gravel capping for the area to prevent vehicles getting bogged when the ground is wet. • Repair or removed the damaged barbeque.



6.3 Regional Context

The attractions and activities of Gunnedah Shire need to be considered in the context of the attraction and activity base of the surrounding region and the Highway / Touring Route corridors. In particular, how the products, activities and experiences offered in Gunnedah Shire:

- Complement and strengthen other attractions in the Region and along the Touring Routes.
- Compare to other parts of the Region and along the Touring Routes - are they competitive?
- Differentiate Gunnedah Shire from other localities - What does Gunnedah Shire have that is 'iconic' or unique?

As visitors do not recognise LGAs boundaries, it is important that Gunnedah 'claim' and promote attractions that are accessible to its visitors, even though these attractions may lie in adjoining LGAs. Gunnedah Shire also needs to work with adjoining localities that have similar or complementary attractions and activities to build critical mass, product awareness and visitation. The Northern Inland Region DMP stresses the importance of cooperation between Tamworth, Gunnedah and Liverpool Plains LGAs to develop and strengthen the product base and raise the profile of the area. It is equally important that Gunnedah Shire work with the LGAs along the touring routes that feed into the Shire – the Kamilaroi and Oxley Highways and the Black Stump Way.

The main attractions and experiences within the NE-NW Region and along the highway and touring routes that feed into Gunnedah Shire are summarised in the following sections.

New England – North West Region

The NE-NW Region extends west from the eastern escarpment of the Great Dividing Range, incorporating the New England Tablelands, western slopes and the black soil plains of Gunnedah, Narrabri and Moree Plains Shires. The Region is broadly divided into three sub-regions – New England in the east, the Northern Inland Region and the North West. Common 'themes' across the Region include:

- The scenic beauty of the area coupled with spectacular landforms and landscapes.
- The National Parks, State Forests and major reserves – lookouts, bushwalking, camping, fossicking, nature & adventure based activities.
- The dams and rivers - fishing, camping, boating and water sports.
- Food, wine, local produce and quality art / craft.

Table 6.4 Attractions & Activity Base – New England - North West Region

	New England	Northern Inland	North West
LGAs	Armidale, Guyra, Glen Innes - Severn, Inverell, Tenterfield, Uralla Walcha,	Liverpool Plains, Gunnedah Tamworth	Narrabri, Moree, Gwydir
Main Routes	New England Highway Gwydir Highway Bruxner Highway Thunderbolts Way	New England Highway Oxley Highway Kamilaroi Highway Fossickers Way	Newell Highway Kamilaroi Highway Gwydir Highway
Landscapes	Escarpment – cliffs and gorges New England Tablelands	Western slopes – ridges, rolling hills and the headwaters of the Namoi River. Liverpool Plains – Patchwork of Colour.	Nandewar Range Western Plains / River Country Fertile agricultural plains – Patch work of Colour Pilliga Forest
Key Attractions, Activities, Themes	Escarpment National Parks Escarpment Lookouts Waterfalls & mountain streams Four Distinct Seasons – autumn colours & winter fires. Food & Wine, Cafes Historic towns & villages	Country Music Gold Heritage – Nundle Rail Heritage – Werris Creek Food & Wine Water storage dams – Chaffey, Split Rock, Lake Keepit. Soft adventure – air sports, water sports.	Agriculture – grains, canola, cotton Mt Kaputar National Park Pilliga Forest Hot Artesian Baths Namoi, Gwydir Rivers – lagoons, billabongs & wetlands Wildlife & birdlife

	New England	Northern Inland	North West
	Arts & Craft / Speciality Shopping Country Music (Tamworth) Fly / trout fishing	Horse sports & events Agriculture – grains, canola, oil seeds, cotton Koala - Gunnedah	Camping, Soft Adventure Local produce

The New England sub-region is focusing on its 'high country' location and climate, with Armidale, Uralla, Guyra and Walcha marketing under the branding of 'Experience the Highs'. Further north, Glen Innes is promoting 'Celtic Country', while Tenterfield is focused on its escarpment and granite belt National Parks.

Tamworth dominates the Northern Inland Region and tends to be Tamworth 'centric'. While the main focus is country music, Tamworth has broadened its scope to promote the Tamworth Region, focusing on the Nundle, Manilla and Barraba areas. Tamworth has emerging food and wine, soft adventure, horse sports and arts sectors. While Liverpool Plains has had a relatively low profile in the market place, it is growing its profile by promoting sunflowers as a 'lead in' to the crops of the Liverpool Plains.

In the North West, the iconic attractions are Sawn Rocks – Mt Kaputar National Park, Cranky Rock at Warialda and the hot artesian spas, focused on Moree (Rest, Relax, Rejuvenate) with 'bush' baths at Pilliga and Burren Junction. The development of the Pilliga Forest area and the Gwydir Wetlands National Park is strengthening and diversifying the range of National Park product in this part of the NE-NW Region.

Within the Region, Gunnedah is known primarily for its koalas and Agquip. Being on the northern edge of Gunnedah Shire, Lake Keepit has links with Gunnedah, Tamworth and Manilla rather than a strong 'association' with Gunnedah. Boonalla Aboriginal Area has the potential to become a high profile attraction for the region, adding another 'national park' experience.

Neighbouring LGAs

There are a range of similarities and synergies between the attractions, activities and experiences in Gunnedah Shire and those in the neighbouring LGA, with this potentially providing opportunities to work cooperatively in product and/or market development. Possible opportunities are summarised in Table 6.5. A list of the attractions and activities in each LGA is provided in Appendix 2.

Table 6.5 Synergies and Opportunities to work with Neighbouring LGAs

Attraction / Activity	Synergies & Opportunities	Potential Partners
Aboriginal Tourism	Warrumbungle Shire, through the work of National Parks, has established, high profile Aboriginal attractions, activities and experiences in both the Warrumbungle National Park and the Pilliga Forest. The Pilliga is promoted as part of the Kamilaroi Highway corridor. There is also the Oxley Highway link between Gunnedah & Coonabarabran. Both Liverpool Plains and Narrabri Shires are developing Aboriginal products and experiences as part of the product development of the Kamilaroi Highway touring route.	Kamilaroi Highway Member Councils plus Warrumbungle Shire through activities in the Pilliga.
Koalas	The Oxley Highway connects three localities with established Koala colonies – Port Macquarie, Gunnedah and Pilliga. There is potential to develop a 'storyline' and cross promotion between these centres.	Port Macquarie, Gunnedah and Warrumbungle (Pilliga)
Namoi River	Opportunity to promote the Namoi River as part of the Kamilaroi Highway touring route – identifying opportunities for camping, fishing, canoeing, boating, bird watching, Aboriginal sites etc.	Narrabri Shire / Kamilaroi Highway
Landforms and Landscapes	Potential Landscape Links: <ul style="list-style-type: none"> Liverpool Plains – the Liverpool Plains VIC at Willow Tree provides information on the crops of the Liverpool Plains and also has 'sunflower' and 'crop' alerts identifying on-road localities where travellers can view specific crops, harvesting and other activities. 	Liverpool Plains

Attraction / Activity	Synergies & Opportunities	Potential Partners
	<ul style="list-style-type: none"> • Significant rock formations – working with Narrabri Shire to develop a scenic drive that links Gunnedah to Boggabri via Kelvin and the Boonalla Aboriginal Area, Dripping Rock, Barbers Lagoon and Gins Leap. There is also potential at Gins Leap to interpret the underground geology and aquifers of the Liverpool Plains, with the Gins Leap area being the ‘dam wall’ that holds the water in the aquifers. • Volcanic rocks formations – linking the volcanic remnants in the Mullaley – Mt Nombi area with those of the Warrumbungle National Park and possibly with Coolah Tops – as part of developing and promoting the Oxley Highway as a touring route. 	Narrabri Shire
Water Storage Dams	Water storage dams are very popular for a range of camping, fishing and boating activities, with both regional residents and the touring market (particularly caravans). The three dams in the Northern Inland area are relatively close to each other, enabling touring travellers to move between the three localities. Lake Keepit and Split Rock could also be used to draw travellers south from Copeton Dam in Inverell Shire.	Tamworth Regional Council and potentially Inverell through the State Parks.
Visual and Performing Arts.	Both Gunnedah and Tamworth have relatively strong arts scenes. There is potential to develop an arts based trail and to jointly promote the various workshops and arts events held in the two LGAs. There is also potential arts trail / theme along the Oxley Highway.	Tamworth Regional Council
Food, Wine & Local Produce	While Gunnedah has some food and wine product, it is not sufficiently strong to stand-alone. The New England area has a relatively strong food and wine sector, while Tamworth has an emerging sector. There is a NE-NW food and wine trail which provides an opportunity for Gunnedah producers to gain market exposure.	Tamworth, New England LGAs, NE-NW Food and Wine Trail
Equine Sports	The establishment of AELEC in Tamworth has provided a focal point for a range of equine sports, with AELEC attracting the ‘elite’ events. AELEC and the various Equine Sports Associations need a secondary tier of venues and events to foster the growth and development of the various sports and also provide opportunities to qualify for the major events. Gunnedah, Liverpool Plains, Warrumbungle and Narrabri Shires are seeing an increase in equine sports events and there may be opportunity for the LGAs to work together to improve coordination and grow participation.	Tamworth, Liverpool Plains, Narrabri, Warrumbungle Shire
Air Sports	There is a cluster of air sports in the Tamworth – Gunnedah area, incorporating Manilla (paragliding, hang gliding, sky surfing), Lake Keepit (gliding) and Tamworth (microflights) plus aero clubs and learn to fly programs at Tamworth and Gunnedah airports. Tamworth Regional Council has identified the growth of the aviation sector as one of its core economic strategies.	Tamworth
Motor Sports	There is a diverse range of motorsports undertaken in the NE-NW Region, with both Tamworth and Gunnedah have a concentration of motor sports venues. There may be opportunities for joint marketing of venues, activities and events and for attracting State and National events.	Tamworth and other venues / clubs in the NE-NE Region.



Kamilaroi Highway

The Highway is promoted as a touring route under the banner – from the ‘Great Divide to the Great Outback’. One of its key strengths and points of difference is that it traverses a cross section of the landscapes of NSW – the western slopes, the highly productive western plains (patch-work of colour at different times of the year), the inland river country and the start of the outback. The other significant point of difference is that the Kamilaroi is the only highway in Australia with an Aboriginal Name. The Kamilaroi follows the Namoi River to Walgett and then the Barwon - Darling River to Bourke. Along the route, the main ‘destinations’ are Lightning Ridge and Bourke, with Gunnedah, Narrabri, Burren Junction / Pilliga being popular places to break the journey.

The ‘images’ and ‘activities’ associated with the various localities along the route are:

- Liverpool Plains – extensive broad acre cropping – wheat, sorghum, canola, cotton, sunflowers.
- Werris Creek – rail heritage. It is also the location for the film ‘Unbroken’ directed by Angelina Jolie.
- Gunnedah – koalas, and more recently coal mining
- Narrabri – Sawn Rocks, cotton, telescopes
- Hot artesian spas – Burren Junction, Pilliga, Lightning Ridge
- Lightning Ridge – Opals & quirky people / lifestyle
- Brewarrina – Aboriginal heritage and culture
- Bourke – the outback – the ‘red’ country.

The main attractions along the route are:

- Lake Keepit, Gunnedah
- Mt Kaputar / Sawn Rocks, Narrabri
- Australia Telescope, Narrabri
- Artesian bore baths (Burren Junction, Pilliga, Lightning Ridge)
- Lightning Ridge
- Fish Traps, Brewarrina
- Bourke, the Back of Bourke Centre and Gundabooka and Toorale National Parks

The Highway has a range of Aboriginal products and experiences, most of which are in the emerging / developing stage. The Aboriginal Product Development Scoping Study (2012) undertaken for the Highway corridor identifies the opportunities for additional product development as well as ‘themes’ and ‘story-lines’ that could be adopted to ‘tie’ the corridor together. To mark the ‘start’ of the Highway and provide travellers with an introduction to the Kamilaroi nation, Liverpool Plains Shire Council has recently established a Kamilaroi Exhibition (The Kamilaroi – A Highway, A People) at the Visitor Information Centre at Willow Tree. Boonalla Aboriginal Area has the potential to become a ‘must see’ attraction along this route.

The Kamilaroi Highway Promotions Group is also exploring a range of product development concepts including:

- Capitalising more effectively on the Namoi River corridor – camping, bird watching, fishing, boating / canoeing and mountain biking trails and opportunities.
- Telling the coal story – Liverpool Plains is exploring the feasibility of establishing an interpretative display about mining in the Gunnedah Valley with the display to include real time tracking of the coal trains in the region and the ships that leave from the Port of Newcastle. Narrabri Shire Council is in discussion with the coal mining companies to establish a viewing platform at Gins Leap, with interpretation about the mining and the coal washing and loading facilities in the Boggabri area.
- Bush larrikins, quirky attractions and stories – adding bush humour to the travel experience.

Oxley Highway

The Oxley Highway links Port Macquarie to the Newell Highway at Coonabarabran via Walcha, Tamworth and Gunnedah LGAs and then continues west through Gilgandra and Warren to the Mitchell Highway at Nevertire. The Highway carries a significant volume of touring traffic including:

- Travellers moving between the coast and the tablelands.
- Long haul travellers, primarily from Queensland and Victoria – moving between the New England and Newell Highways.
- Long haul travellers from South Australia – travelling via Broken Hill to Warren and Coonabarabran – at Coonabarabran, the decision is made to take either the Newell or Oxley Highway.
- Motorcycle groups – with the Oxley being very popular for motorcycle touring.

The Highway has been marketed for as a route for motorcycle touring, with the section between Port Macquarie and Tamworth being very popular with motorcyclists. The Highway has sufficient diversity and depth of product to be developed and promoted more widely as a touring route.

The Highway connects three areas known for their koalas – Port Macquarie, Gunnedah and Warrumbungle Shire (the Pilliga). Port Macquarie has well developed koala products and experiences including the Koala Hospital, Billabong Wildlife Park and the 'Hello Koala' sculptures. The koalas at Port Macquarie are very popular with both domestic and international visitors. There is opportunity to use the Highway connection to promote koalas, cross-promote the three localities and tell different aspects of the koala 'story'. In Port Macquarie, the koalas are under threat from loss of habitat and urbanisation (dogs, cats, cars etc), with this being a very significant part of the 'story' that is told. In Gunnedah, the koala population is declining due to climate change (global warming) while in Warrumbungle Shire, bushfires have been largely responsible for the demise of the koala population.

There is also a number of product themes that could be promoted along the Highway:

- National Parks – coastal and escarpment parks, connecting to the Warrumbungle National Park and Pilliga or south to Coolah Tops.
- Wildlife viewing opportunities – targeted to the international self-drive visitors – koalas, kangaroos, wallabies, platypus, echidnas etc.
- Arts trail – each of the LGAs along the Highway have galleries as well as public art, with Walcha having a sculpture walk, Gunnedah having the sculptures at Pensioners Hill, and Warrumbungle Shire having the Sculptures in the Scrub at Dandry Gorge as well as Pilliga Pottery.
- Aboriginal – Port Macquarie and Warrumbungle Shire offer established Aboriginal products and experiences, with Gunnedah having the potential to become a focal point for Aboriginal heritage and cultural experiences.
- Poetry – connections with two renown Australian poets – Henry Kendall in Port Macquarie and Dorothea Mackellar in Gunnedah.
- Food and Wine – Port Macquarie and Tamworth both have emerging food and wine products and experiences with sufficient product to create 'nodes'. Gunnedah, Walcha and Coonabarabran also have products that can carry the theme through along the Highway corridor.

The higher profile products and experiences available along the Oxley Highway corridor are listed given in Appendix 3.

Black Stump Way

The Black Stump Way links the Golden Highway near Dunedoo to the Oxley Highway at Mullaley via Coolah and Tambar Springs. South of the Golden Highway, the Black Stump Way links with the Castlereagh Highway (Mudgee to Lithgow), with the Castlereagh Highway linking with the Great Western Highway at Lithgow (access to Sydney) and the Tablelands Way (touring route south through Oberon to join the Hume Highway at Goulburn). To the north, the Black Stump Way links Mullaley to the Kamilaroi Highway at Boggabri via Grain Valley Road. Sections of Grain Valley Road are not sealed with this being a deterrent to some travellers, particularly caravanners.

Black Stump Way is popular with the caravan and RV market, providing a low traffic / low truck alternative to the Newell Highway. Travellers often come off the Newell at Dubbo and make their way north via Coolah.

The main attractions along the Black Stump Way are summarised in Table 6.6.

Table 6.6 Attractions and Activities along the Black Stump Way

	Coolah	Tambar Springs / Mullaley	Boggabri
Icons	Coolah Tops National Park	Diprotodon	Drovers Campfire Event
Natural Attractions	Coolah Tops National Park / Pandora's Pass Liverpool Range Coolaburragundry River	Trinke State Conservation Area Mt Nombi Volcanic Area Goran Lake Liverpool Plains	Gins Leap Dripping Rock Namoi River Barbers Lagoon
Bird / Wildlife Viewing	Coolah Tops National Park – Wedge Tail Eagles	Trinke State Conservation Area	Barbers Lagoon
Heritage & Culture	Heritage buildings – Coolah shopping centre Coolah Vietnam Memorial Avenue (Battle of Long Tan) Black Stump Pandora Gallery	Diprotodon Trail Heritage buildings Royal Hotel WWI Memorial / Lone Pine Oxley Memorial Bando Gates Mullaley Milestones Bomera Cemetery Post Office Hotel Mullaley	Boggabri Museum
Sight Seeing, Shopping, Family Fun	Coolah Shopping Centre	Mullaley Park – playground equipment of yester year	Boggabri Shopping Centre Cotton Gin – Tours by Appointment Coal Mine – Open Day Tours
Food, Wine, Local Produce	Coolah Bakery		Boggabri Honey Shed
Activities	Bushwalking Bird Watching Scenic Drives 4WD (Pandora's Pass)	Horse Sports	Fishing Horse Sports
Events	Hartwood Country Music Festival		Drovers Campfire



6.4 Directions Forward – Product Development Priorities

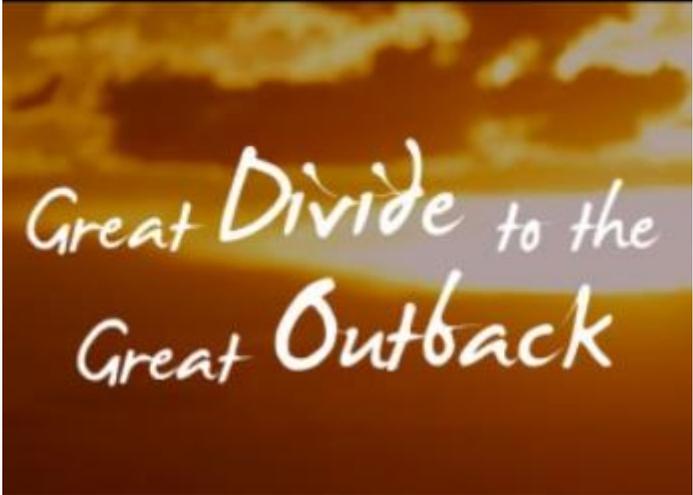
Based on the assessment of the attractions and activities available in Gunnedah Shire and in the surrounding region and along the Highway / touring route corridors, product development in Gunnedah Shire needs to focus on:

- Place-making – improving the presentation of the Gunnedah and the villages and capitalising on the local assets available in and around the villages. (See Chapter 5). As part of this, Gunnedah needs to be positioned and promoted as a lifestyle destination – shopping, dining, recreation, arts and entertainment, including positioning Gunnedah as a day trip destination for residents of surrounding LGAs.
- Improving existing attractions – Porcupine Hill, Bindea Track, Wallaby Trap, Pensioners Hill, Wandobah Reserve – Blackjack Creek, Rural Museum, Red Bank, as well as the signage to these attractions as well as to Boonalla Aboriginal Area and Lake Keepit (see Section 6.2).
- Developing and promoting touring routes through the Shire – Kamilaroi Highway, Oxley Highway, Black Stump Way, as well as scenic drives.
- Establishing the Namoi River corridor as a quality attraction and experience.
- Re-inventing the koala experience.
- Continuing to build on the Dorothea Mackellar – My Country connection.
- Growing Aboriginal cultural tourism.
- Growing special interest and activity-based tourism – building on the diverse range of activities undertaken in the Shire.

Product development opportunities and directions are summarised in Table 6.7.



Table 6.7 Product Development Themes and Directions

Product	Direction / Initiatives	Assets to work with
<p>Touring Routes & Scenic Drives</p>	<p><u>Touring Routes</u></p> <p>Visitation in Gunnedah Shire is largely ‘drive-based’, with the majority of leisure travellers visiting Gunnedah as part of longer journey. Being located between the Newell and New England Highways with no exposure to either, Gunnedah is dependent on travellers choosing to take lesser known routes – the Kamilaroi Highway, Oxley Highway the Black Stump Way, and, for a very small proportion of travellers, the local roads coming across from Manilla via Lake Keepit or the Kelvin Valley. For travellers, particularly those who have the flexibility to wander and explore, decisions are made on what they perceive the route and the towns and localities along the routes can offer. The decision points to take the routes that lead into Gunnedah Shire are often made at Dubbo (Black Stump Way), Willow Tree, Narrabri, Coonabarabran, Manilla and Tamworth.</p> <p>Awareness of the routes and access to information will influence decisions. Information is available for the Kamilaroi, with the Kamilaroi Highway Promotions Group also having in place marketing initiatives to raise awareness. It is important that Gunnedah remains part of this Group and works with the Group to continue to build product and raise awareness.</p> <p>The Oxley Highway is not marketed as a touring route with travellers having no access to information about what they can ‘see and do’ along the route. There is opportunity for the LGAs along the Highway to position the Highway as a touring route and to produce information and promotional material, including a Highway website.</p> <p>For the Black Stump Way there is a need to work with Warrumbungle Shire and the Coolah Development Group to produce a low cost map / brochure for the route, with this downloadable from the Warrumbungle and Gunnedah Tourism websites and the Coolah town website and distributed through VICs that feed into the Golden, Castlereagh and Oxley Highways.</p>	<p>The assets to work, and possible opportunities and synergies are discussed in Section 6.3.</p>  
	<p><u>Scenic Drives</u></p> <p>There is potential to develop and promote a number of scenic drives within the Shire and surrounding area:</p> <ul style="list-style-type: none"> • Gunnedah to Boonalla Aboriginal Area and through the Kelvin Valley to link with the landforms around Boggabri – Dripping Rock, Gins Leap, Barbers Lagoon. 	<p>The assets to work, and possible opportunities and synergies are discussed in previous sections.</p>

Product	Direction / Initiatives	Assets to work with
	<ul style="list-style-type: none"> • Links between Manila and Gunnedah – via Lake Keepit and via the Boonalla Aboriginal Area and the Kelvin Valley. • Lake Keepit – Gunnedah loop incorporating the Kelvin Valley (Boonalla) and returning via Gunnedah on either the Orange Grove Road or Oxley Highway. • Mt Nombi detour – scenic loop coming off the Black Stump Way between Tambar Springs and Mullalay. • Gunnedah to Curlewis on the Wandobah - Preston Roads, returning via the Kamilaroi Highway or the Curlewis Common - Pullaming Roads. • Curlewis to Tambar Springs Road – as a bird route, linking bird hotspots at Curlewis, Goran Lake and TrinkeyState Forest. 	
<p>Namoi River Corridor</p>	<p>From a tourism perspective, the Namoi River is a significantly under-utilised asset. Travellers naturally gravitate to water bodies – with something inherently attractive about the sounds and sights.</p> <p>Council has implemented the first stage of developing the river foreshore with a shared pathway and picnic facilities around the Cohens Bridge area. There are plans to extend the pathway and to link the pathway with other shared pathways in Gunnedah, including the pathway along the Blackjack Creek – Wandobah Reserve area.</p> <p>The River corridor is intricately linked with other product themes and experiences in Gunnedah:</p> <ul style="list-style-type: none"> • Significant koala habitat area and corridor – ideal for interpretation. The tree planting in Cushman’s Reserve, could also become part of the koala ‘story’ and experience. • Lifeblood of Aboriginal communities in the area pre white settlement. • History of the opening up of the region, the settlement of Gunnedah and the development of the agricultural sector – linking in with some of the themes and collections at the Rural and Water Tower Museums. <p>The river and river corridor offers a range of opportunities for fishing, canoeing, camping, bird watching, koala spotting, photography, walking, cycling and interpretation and public art. Capitalising on these opportunities will encourage visitors to stop and explore Gunnedah and spend more time in the town.</p> <p>The Namoi River is also a ‘link’ through the Kamilaroi Highway corridor, with the Highway following the river from Gunnedah, through Narrabri Shire to Walgett where it joins the Darling River which flows through Brewarrina and Bourke – opportunities for developing routes and experiences along the corridor – riverside</p>	<ul style="list-style-type: none"> • Attractiveness of the river corridor and the different ‘environments’ and experiences along the river. • Within Gunnedah, proximity of the river to the town centre and ability to link the River with the VIC – Wolseley Park precinct. • The connection with other products and experiences in Gunnedah, providing opportunities for story-telling and interpretation – Aboriginal history, koalas, pastoral history, the riverine environment, flooding etc. • A number of river access points – Lake Keepit area, Carroll through to Gunnedah, Blue Vale Road and Gulligal Lagoon (note: these points need to be identified, mapped and signposted). • Cushman’s Reserve – one of the most attractive locations (that can be accessed) along the river corridor – with the area potentially suitable for camping, picnicking, interpretation and public art (eg sculptures on the riverbend at Hay) as well as a potential event venue – eg Music by the river.

Product	Direction / Initiatives	Assets to work with
	camping, fishing spot, canoe trails, bird routes and hot spots, aboriginal heritage. Etc.	
Koala Experience	<p>Gunnedah has positioned, branded and promoted itself as the 'Koala Capital of the World', with the experience offered being to view koalas in the wild and also to view them close up at the Waterways Wildlife Park. With the reduction in koala numbers, it is becoming increasingly difficult to see koalas around town, with Gunnedah struggling to 'deliver' on this experience.</p> <p>Koalas are a strong point of difference for Gunnedah, with the sighting of a koala being a 'wow' experience for all visitors. Rather than move away from promoting koalas, Gunnedah needs to re-invent the experience, to move from just 'viewing' to 'learning' and 'helping'. This is in-line with market trends where visitors are increasing looking for 'learning' and 'immersion' activities and experiences.</p> <p>The experience needs to be expanded to tell the 'story' of the impact of climate change and severe weather events on the koala habitat and population. There is considerable interest in climate change and the impact on the koalas is a visible example – Climate changes is real, it is happening now and it is threatening a much-loved Australian icon. Linking this with Project Koala and other initiatives will provide visitors with tangible 'actions' that they can undertake to help.</p> <p>The 'story' should be told in the Visitor Centre using digital technology, with the VIC linked to the koala habitat areas (Namoi River corridor and Blackjack Creek) with these locations having additional information on koala habitat, koala characteristics and how to spot koalas.</p>	<ul style="list-style-type: none"> • Existing branding – 'Koala Capital of the World'. • Koalas can still be sighted around Gunnedah and Curlewis. • Material on the koala being produced by North West Local Land Services • Corridors of koala habitat that can be linked by shared pathways – Namoi River corridor and Blackjack Creek, with these areas also having other attributes that will draw visitors. These corridors provide the opportunity for interpretation and, if the visitor is lucky, spotting a koala. Learning about what to look for and the 'search' becomes part of the experience. • The information available from the research that has been undertaken, Council's koala plan plus the media coverage – including television stories that could be included as part of the VIC presentation. • Oxley Highway link – to the koalas of Port Macquarie and to the koalas of the Pilliga. Part of the Port Macquarie story is the impact of urbanisation on koala populations. In the Pilliga there is potential to talk about the impact of fire. • Habitat restoration project stories – Land Care in action can potentially be seen at Wandobah and/or Cushman's Reserve. • Project Koala – part of the 'call to action' – something that visitors can participate in.
Dorothea Mackellar – My Country	<p>The connection with Dorothea Mackellar and the well known 'My Country' poem is a point of difference for Gunnedah Shire. This connection has been kept alive by the Dorothea Mackellar Society primarily through the Dorothea Mackellar National Poetry Competition. This Competition, ensures that Australian school students have a base level of awareness of both Mackellar and the 'My Country' poem – providing a 'market' for the future. Existing markets, particularly Baby Boomers, will have a relatively high level of awareness of the 'My Country' poem and can, when arriving in the area, make the connection between the second stanza of the poem and the Gunnedah landscape. There are also other poems, eg Dawn and Colours of Light that are also 'celebrate' the Gunnedah landscape as well as poems such as 'Australia's Men' that link with other assets and experiences available within the Shire.</p>	<ul style="list-style-type: none"> • Dorothea Mackellar statue, MAAS walk and poets drive. • National Poetry competition. • Isherwood collection. • Audio and film resources. • Historic homestead (not open to the public). • Water Tower Museum - Mackellar collection. • Strong arts scene in Gunnedah across a number of media. • Stunning landscapes – that reflect the poetry – what is missing is areas for travellers to stop and enjoy the view and take the photograph.

Product	Direction / Initiatives	Assets to work with
	<p>There is opportunity to build on the Dorothea Mackellar – My Country Theme on a number of levels:</p> <ul style="list-style-type: none"> • The narrow context of Dorothea Mackellar and her poetry – through the MAAS Walk, Statue, poetry competition, the place she resided etc. This is largely in place. • To take ‘My Country’ (and other poems that refer to the beauty and colours of the area) in the broadest context across a number of ‘experiences’: <ul style="list-style-type: none"> - Providing an added dimension to showcasing and appreciating the Shire’s landscapes. - Art – with the Isherwood collection as a focal point, but also being able to link other arts based activities and events that celebrate the beauty of the area and its lifestyle – film, photography, textiles (quilting), pottery etc. - Local produce – the ‘Plains of Plenty’. - My Country – from an Aboriginal perspective – the interpretation and use of the landscape. <p>The Mackellar connection to the landscapes is a theme that applies across the LGA – with stunning views at the Shire’s gateways – Breeza, Tambar Springs, Mullaley and Oxley Highway north of Carroll, as well from the Highway corridors and touring routes and from the lookouts in Gunnedah.</p> <p>In going through the Mackellar poems, there may also be connections with other themes, assets and stories in Gunnedah – eg the poem Australia’s Men, diary entries on WW1 conscription and significance of ‘My Country’ in relation to war and post-war nationalism, that could potentially be woven together with the various war memorials within the Shire.</p>	
Aboriginal Cultural Tourism	<p>Gunnedah has a rich Aboriginal heritage and a range of historic and cultural assets and ‘stories’. There is the potential to bring these assets together, in an coordinated manner to:</p> <ul style="list-style-type: none"> • Provide an insight into the history and culture of the Gunn-e-daar people and the Kamilaroi Nation – past and present – there are a multitude of locations around Gunnedah where different parts of the ‘story’ can be told eg the summer camp at Mullabah Lagoon, Boonalla and other caves for winter, the use of the wallaby trap for hunting etc. 	<p>Assets to work with include:</p> <ul style="list-style-type: none"> • The Red Chief story, Cumbo Gunnerah Gallery and Keeping Place, Porcupine Lookout, the Wallaby Trap, Red Chief Memorial, Pensioner’s Hill, Mullibah Lagoon, Boonalla Aboriginal Area, Gulligal Lagoon and the landforms around Gunnedah. • Contemporary projects such as the ‘possum cloak’ and the ‘mourning caps’ will also be of interest. • Aboriginal Art - Gunnedah has a number of Aboriginal artists, with the potential to exhibit and promote local work as part of the Gunnedah ‘arts’ scene.

Product	Direction / Initiatives	Assets to work with
	<ul style="list-style-type: none"> • Explore the landforms and landscapes of the Gunnedah Region, from an Aboriginal perspective – their names, significance, and the role they played – a theme strand of 'My Country'. • Contemporary Aboriginal Artists and their Art. • The relationship (if any) with koalas. 	
Special Interest & Activity Based Tourism	With the trend towards 'learning' new skills and immersion activities, there is opportunity to promote the workshops and activities held in Gunnedah Shire and potentially to offer additional programs, particularly in the creative arts.	Activities that could be promoted include: visual arts workshops, quilting, wood turning, photography, pottery etc.



7. EVENTS

7.1 Overview

The events sector includes:

- Festivals and community based events
- Business events – conferences, meetings, exhibitions, business-related functions
- Functions – corporate, community, social – eg weddings, celebrations, awards etc
- Sporting events

Events form part of the attraction and activity base of the Shire and are a significant generator of weekend visitation. Locally they are also part of the cultural and social fabric of the area, providing an opportunity to bring visitors and residents together, 'tell the stories', and create memorable experiences. For visitors, events provide a reason to visit – they are essentially a 'call to action' that generates publicity and focuses attention on the area. Events can be a key driver in the economic, social and cultural development of an area and play a role in the 'tree change' process.

Benefits generated by events typically include:

- Economic – money coming into the community with event organizers and visitors spending money in the area (eg venue and equipment hire fees, accommodation, food and beverage, transport and fuel, local services etc). Through the multiplier effect, this money works its way through the community.
- Social – opportunity for the local community to interact with other community members and visitors to the area, participate in activities and be exposed to new ideas and concepts. Events can strengthen the community spirit and build pride.
- Cultural – adds another dimension to the lifestyle of the area, provides opportunities for creative and cultural expression as well as the opportunity to show-case the area, its people and its skills.
- Environmental – places a value on environmental assets and increases the utilization of these assets.
- Publicity – generates increased awareness of the area both directly (ie to the participant) and more broadly through media coverage (regional, national, international), digital mediums (eg internet, social networking) and word-of-mouth. The dollar value of the publicity generated can be far more than the LGA's annual marketing and promotional budget.

On the downside, events are demanding and resource intensive to organize and host. Most events are generally looking for some form of sponsorship from the host community. Many events rely on volunteers, with volunteer burnout being a significant issue in local communities. Volunteers often do not have the skills and resources to 'grow' the event, nor to effectively market and promote. The localities that have been the most successful in growing their events sector are those where the event organisers work very closely with the Tourism Unit, with the Tourism Unit providing specialist skills, eg event planning, business planning, marketing and promotion, and has in place 'infrastructure' eg manuals, planning templates etc, to 'streamline' the planning and approval process. Gunnedah Shire has in place an Events Manual, a Conference & Meetings Directory and an Events Calendar.

There are three broad types of events, each of which has different implications in terms of the demands on Council and the Community, and the funds and resources required.

- **Multi-faceted events** (range of activities) that are organised locally by Council and/or an Event Committee, generally relying on volunteers – eg Porchetta, Eisteddfod. These events are generally the most resource and funding intensive, requiring coordination of a range of venues, facilities and activities.

- **Sporting & sports related events** – eg rugby carnival, golf tournament, campdraft. While these events are often organised or hosted by local volunteers, the organisational process is generally not as complicated (although still demanding), with these events using purpose-built venues, having relatively set formats and procedures, and generally not requiring planning approval. Many of the sporting events held in Gunnedah Shire fall into this category.
- **Events organised by external parties that use the Shire as a venue** – eg. Agquip, Dirty Tri, Keepit Real 100. These events generally come with their own event organiser / organising committee. They have minimal impact on local resources with the main demands being on the venue manager to ensure that the venue is adequately prepared in accordance with the event specifications.

Events organised by external parties are usually the most cost and resource effective events for an area to host.

7.2 Business Events – Conferences & Meetings

Business Events include meetings, conferences, exhibitions and corporate-industry-association based functions. Business events, particularly conferences, are a very high yielding sector. Conferences also provide ‘exposure’ of the area to a wide range of people and organisations.

Gunnedah hosts a range of business events, with AgQuip being the largest, attracting over 100,000 attendees and 3,000 exhibitors, over 3 days. The majority of business events held in the Shire are small meetings and training seminars and workshops (generally less than 30 delegates). Gunnedah Shire attracts a share of regional meetings. The Shire has also successfully attracted a number of larger association conferences including the CWA conference (1000+ delegates), the Local Government Tourism Conference (around 160 delegates) and the Grasslands Society Conference. Gunnedah will be hosting the Australian Local Government Women’s Association Conference in 2016 which will bring around 150-200 delegates into Gunnedah.

Many of the State Association Conferences held in NSW rotate the conferences between different regions with towns having to bid to host the event. The competition to host events in the NE-NW Region is strong. Both Tamworth and Armidale actively target this market, with both towns having a range of quality conference and meetings facilities, a good supply of accommodation and commercial air services. Narrabri, through the Crossing Theatre, is also active in this market, however the loss of air services has impacted on the ability of the town to attract some events. Gunnedah is also competing with Moree and Inverell, both of which have suitable venues, with Moree also having a commercial air service. Distance to both these centres is however a deterrent for some conferences where delegates are primarily driving. In comparison to Narrabri, Moree and Inverell, Gunnedah has the advantage of being more accessible by road. Gunnedah is also a ‘compact’ centre, with the main conference and meeting venues (Civic Precinct and Services Club) being located within walking distance of accommodation properties. The accommodation available in Gunnedah can comfortably service events of up to 300 delegates.

Venues suitable for corporate conferences, meetings and functions are given in Table 7.1.

Table 7.1 Conference, Meetings and Function Venues – Gunnedah Shire

Venue	Capacity		Facilities
	T=theatre style	B= Banquet	
Venues with Accommodation			
Mackellar Motel	Meeting room 60T		4 star motel
	Board room 10		AV Equipment + Catering
Venues without Accommodation			
Civic Precinct:			
Gunnedah Town Hall	Auditorium – 550T / 350B 138T tiered seating gallery		Full stage, portable AV
The Civic	Theatre – Tier seating – 134T Mooki Room – 100T		Small stage, state of the art audio visual facilities, breakout rooms, adjacent to Town Hall and Smithurst Hall
Smithurst Hall	250-300T, 150B		Basic hall adjacent to the Town Hall

Venue	Capacity T=theatre style B= Banquet	Facilities
Creative Arts Centre	Meeting room 50T / 30 classroom	Contemporary meeting room
Wolseley Park	Oval with facilities	Could be used as outdoor exhibition space or a marquee in conjunction with the use of the meeting facilities within the Civic Precinct.
Other Venues suitable for the Corporate Market		
Gunnedah Services & Bowling Club	Five function rooms + Outdoor BBQ area Auditorium 350T 280B Function Room 120T 90B Meeting Room 30T 20B Board Room 15 board room Bowls Bar 120T 80B	Onsite catering and full bar facilities. Audio visual equipment
Germaine House	Meeting room 12 board room Training room 15	State of the art AV, Video Conferencing
Wild Orchards	Function Room 40B Outdoor Courtyard 40B Grassed area for marquee	
Quirang Country Garden Function and Conference Centre	Function room 60B Marquee space	Landscaped gardens Rural views
Gunnedah Golf Club		Function rooms with views over the golf course Catering and bars a
Basic Venues that could be used for some activities.		
Gunnedah Band Hall	Auditorium 200T 150B	Stage, kitchen & bar. Opens onto lawns
Red Chief Land Council	Auditorium 300T	Basic Auditorium – within 100m of Civic Precinct.
Gunnedah PCYC	Auditorium 500T Meeting Room 50T	Basic venue with small stage, kitchen, small bar.
Gunnedah Rugby Club		Kitchen and bar.

The two main venues suitable for larger conferences are the Civic Precinct which incorporates the Town Hall, Civic Theatre, Creative Arts Centre and Smithurst Hall, and the Gunnedah Services and Bowls Club which has 5 function and meeting rooms. The Town Hall can accommodate up to 688 theatre style and the Services Club up to 350 for meetings. For conferences that require separate spaces for the plenary session, banqueting and breakout rooms, the Civic Precinct is suitable for events of 200-300 delegates, while the Services Club is suitable for around 150-200 delegates. The Town Hall and Smithurst Hall are basic venues and have to be 'made to work', with the organiser bringing in equipment and catering. Wolseley Park could potentially be used in conjunction with the Civic Precinct for outdoor exhibitions and/or to erect a marquee. The auditorium at the Red Chief Land Council is located within a 2-3 minute walk of the Civic Precinct and could potentially be used as break out space to support the Civic Centre. The Services Club is a traditional club venue suitable for the budget – mid market events.

Gunnedah has a number of venues suitable for small meetings and functions. There is only one accommodation property, the Mackellar Motel, which has in-house meeting facilities.



The Mackellar Motel Meeting Room is ideal for small meetings and training courses.

Directions Forward

Conferences

With the venue and accommodation infrastructure available, Gunnedah's focus should be on targeting budget to mid-range conferences of up to 300 delegates, which have a 'connection' with the Shire, for example:

- Local and State Government conferences
- Agriculture / Agricultural Research
- Land and Water Management
- Coal Mining
- Service Clubs – Rotary, Lions etc
- Social Services – Community Health, Aboriginal
- Heritage, arts and cultural

Developing the conference market will be dependent in part on Council providing resources to bid for and sponsor events, coupled with effective marketing and promotion. Most association and government conferences have a bid process with a lead time of 1-2 years. The bid process can be resource intensive with the bidder required to submit quotes etc as well as host the organising committee for one or more site visits. Conferences generally look for some form of sponsorship from the host area – eg reduction in venue hire fees, or contributing to the cost of some of the conference activities, eg dinner, cocktail party etc.

There is opportunity for Council to work with local businesses, service providers and organisations, to identify potential 'leads' – associations that local people belong to that hold conferences and other events that could be held in Gunnedah.

Given the availability of quality venues within the NE-NW Region, Council will also need to continue to improve the Town and Smithurst Halls to remain competitive.

Meetings

There are a lot of government and corporate (eg financial institutions, franchise chains etc) meetings held within the NE-NW Region. While some of these meetings are rotated between towns, there appears to be an increasing trend to hold the meetings in Tamworth and to a lesser extent in Armidale. Gunnedah, potentially in conjunction with the 'second tier' towns, needs to be advocating for these meetings to be rotated throughout the Region.

7.3 Annual Events

Gunnedah Shire hosts a range of annual events. The larger events that bring visitors into the Shire and/or generate publicity for the LGA are given in Table 7.2. The majority of the events are held in Gunnedah, with the Showground being a significant venue. Lake Keepit also hosts a number of events - sailing, fishing, soaring, off-road triathlon and mountain bike.

The majority (48 out of 58) of the annual events held in the Shire are sporting related with a concentration of motor sports and horse sports. Of the remaining 10 events, 4 are dog and poultry events and 3 are arts events.

The highest profile event is AgQuip, which is considered as Australia's premier agricultural field day. Other events include the Gunnedah Show, Porchetta Day, and the Week of Speed. Around 700 schools participate in the Dorothea Mackellar National Poetry Competition, with the competition attracting more than 10,000 entries – creating awareness of both Mackellar and Gunnedah. Only the finalists travel to Gunnedah. Gunnedah Shire Council is actively involved in coordinating the Week of Speed and sponsors a number of the Shire's events.

Annual events can be used effectively to build the VFR market, with local and regional residents encouraged to use the event to invite friends and relatives to visit.

Table 7.1 Annual Events held in Gunnedah Shire that attract Visitors

Month	Event	Location	Duration
January	Speedway	Gunnedah Speedway	1 day
	National Tomato Day	Gunnedah	1 day
	Horse Racing	Riverside Race Track	1 day
	Kelly Campbell Fishing Competition	Lake Keepit	1 day
February	Keepit Gliding Regatta	Lake Keepit	1 day
	Hack & All Breeds Show	Gunnedah Showground	2 days
March	Week of Speed (includes the events below)	Gunnedah	Week
	Gunnedah Aero Club Air Show Spectacular	Gunnedah Airport	2 days
	Gunnedah Speedway	Gunnedah	3 days
	Drag Racing	Gunnedah Airport	1 day
	Hill Climb	Porcupine Hill	1 day
	Porcupine Hill Fun Run	Porcupine Hill	1 day
	Horse Racing	Riverside Race Track	1 day
April	Gunnedah Show, Rodeo & Camp Draft	Gunnedah Showground	3 days
	Championship Dog Show	Gunnedah Kennel Clubb	1 day
	Speedway	Gunnedah Speedway	1 day
	Gunnedah Bird Sale & Expo	Gunnedah Showground	1 day
	Dirty Tri	Lake Keepit	1 day
	Gunnedah 600 Sprint Title	Gunnedah Airport	1 day
	Mens' Easter Bowls Carnival	Gunnedah Services & Bowls Club	2 days
May	Gunnedah Eisteddfod	Gunnedah	3 days
	Gunnedah Cup - Horse Racing	Riverside Race Track	1 day
	Koala Country Quilt Show	Gunnedah	1 day
	Mens' Autumn Bowls Carnival	Gunnedah Services & Bowls Club	1 day
	Pure Breed Poultry Auction	Gunnedah Showground	1 day
June	Show Jumping Festival	Gunnedah Showground	1 day
	Aero Club Fly-In Day	Gunnedah Airport	1 day
	Curlewis Cup - Horse Racing	Riverside Race Track	1 day
	Keepit Kool Regatta	Lake Keepit	3 days
	Gunnedah Poultry Show	Gunnedah Showground	1 day
July	Drag Racing	Gunnedah Airport	2 days
	Horse Racing	Riverside Race Track	1 day
	Gunnedah NBA Cup – Go Karting	Gunnedah Go Kart Track	1 day
	Womens' Bowls Carnival	Gunnedah Services & Bowls Club	2 days
August	Agquip	Gunnedah	3 days
	Agquip Rodeo	Gunnedah Showground	1 day
	Camp Draft	Gunnedah Showground	2 days
	Rose Show	Gunnedah	2 days
	Aero Club Fly-In Day	Gunnedah Airport	1 day
	Drag Racing	Gunnedah Airport	2 days
	Gunnedah Pro-Am	Gunnedah Golf Club	1 day
Gunnedah Polo Tournament	Gunnedah Polo Fields	2 days	
September	Annual Porchetta Day	Gunnedah Kennel Club	1 day
	North West Swap Meet	Gunnedah Showground	2 days
	Gunnedah Seniors Tennis Tournament	Gunnedah Tennis Complex	2 days
	Dorothea Mackellar Poetry Competition Awards Presentation	Gunnedah	1 day
	Gunnedah Gallop	Gunnedah Showground	1 day
	Dogs NSW Regional Championship Show, Obedience & Rally Trials	Gunnedah Kennel Club	3 days
October	Curlewis Camp Draft	Curlewis	2 days
	Gunnedah Camp Draft	Gunnedah	2 days
	Mullaley Camp Draft	Mullaley	1 day
	Drag Racing	Gunnedah Airport	2 days

Month	Event	Location	Duration
November	Gunnedah Burn Out Challenge	Gunnedah Speedway	1 day
	Manilla Cup - Horse Racing	Riverside Race Track	1 day
	NW Zone Sailing Regatta	Lake Keepit	2 days
	Speedway	Gunnedah Speedway	1 day
	Open Gymkhana	Gunnedah Showground	1 day
December	Keepit Real 100 Mountain Bike	Lake Keepit	1 day
	Australian Women MTB Forum	Lake Keepit	1 day

7.4 Sporting Events & Venues

Gunnedah Shire has quality sporting facilities and a relatively strong sporting community, with teams in many of the regional competitions. The majority of annual sporting events (see Table 7.2) are organised by local sporting clubs and associations. In addition to these events, the Shire also attracts a number of one-off sporting events including:

- Regional, State and National tournaments / titles.
- Regional selection trials and training camps.
- Inter-club series (eg Tri Dirt Track Motorbike Series between Gunnedah, Taree and Kempsey)
- Venue hire from external clubs and associations (eg hire of the Kennel Grounds, use of the Airport by the Tamworth Drag Racing Association).
- Events that come through the Shire (eg former Santos North West Tour cycle race).

State and National Sporting events held in the Shire in recent years include:

Venue	State / National Event
Blue Vale Speedway	Australian Formula 500 Title – Heats and finals Australian Senior Solo Championships NSW Super Sedan Series NSW Litre Sprint Car Title NSW Junior Title NSW Wingless Title AMCA Country Cup
Balcary Park – Dirt Track Racing	Australian Dirt Track Titles (2000) Australian Senior Dirt Track Titles (2000, 2013, 2015) NSW Senior Dirt Track Titles (2006, 2010, 2012, 2013) NSW Junior Titles (2007, 2015)
Lake Keepit	National Club, Standard and Sports Class Championships NSW State Gliding Championships

Outlook for Sports Tourism

Like conference organisers, sporting event promoters, particularly for State events, are increasingly looking for Local Councils to 'buy' the event. Some of the larger Councils in regional areas have allocated budgets for sponsorship and are prepared to waiver or reduce venue hire fees to 'buy' these events. State events are increasingly becoming concentrated in these localities.

Regionally, Gunnedah Shire competes with a number of centres that also have high quality sporting facilities, in particular Tamworth and Armidale for field and court sports, and Inverell for tennis. Tamworth Regional Council is aiming to become a 'Centre of Sporting Excellence', with Council working with a number of clubs and associations to provide high quality sporting venues. Venues include Tamworth Sports Dome, Skully Park Oval, Australian Equestrian and Livestock Events Centre (AELEC), Riverside Sporting Complex (fields), Tamworth Hockey Complex, Oakburn Park Motorsports Complex and Tamworth Mountain Bike Park. Council is also proposing to expand the sporting precinct around the Sports Dome, with the development to include the expansion of AELEC

and the Hockey complex, a regional sports stadium, additional playing fields (including synthetic fields), aquatic centre, athletics track and cycling facilities including a criterion track.

Areas where Gunnedah Shire can complement and/or capitalise on the opportunities being created by Tamworth are in the areas of horse sports, motor sports, air sports and potentially mountain-bike and associated adventure racing.

Horse Sports

The establishment of the Australian Equestrian and Livestock Events Centre (AELEC) at Tamworth provides international standard facilities for a range of equestrian and livestock related events. This venue has provided a catalyst for the development of the equine industry and competitive events within the Region. Tamworth is concentrating on attracting State, National and International events and is looking to centres in the surrounding region to provide the regional and zone events that provide the 'points' needed for competitors to qualify for State and National events. Within the Region, Narrabri, Liverpool Plains, Warrumbungle and Coonamble Shires are seeing strong growth in horse sports – both in terms of the number and type of events, and the number of competitors.

Venues available in Gunnedah Shire include:

- Gunnedah Showground Precinct – Arena, Rodeo Ground, Pony Club area, Stables with the Showground being used for a variety of horse sports including breed show, show jumping, dressage, pony club, camp draft and rodeo.
- Gunnedah Riverside Race Course
- Gunnedah Polo Grounds
- Curlewis Sport & Recreation Ground – Camp Draft Arena
- Mullaley Sports Ground - Camp Draft Arena (in Warrumbungle Shire)

Private properties are also used occasionally pony club and riding club social rides.

The Gunnedah Shire Economic Development Strategy identifies the potential to grow the equestrian sector in Gunnedah Shire, with the Gunnedah Showground Masterplan identifying opportunities to diversify and grow horse sports. This would be dependent on replacing the stables, improving support infrastructure (fencing, lighting, PA system, seating at the rodeo ground etc) and addressing issues associated with the potential loss of the TAFE land. The Masterplan also identified the possibility of developing a covered dressage arena and an eventing / cross country course in Wandobah Reserve.

The Curlewis Campdraft Club have established a very high quality campdraft arena at the Curlewis Sport and Recreation Ground. Facilities include a canteen with an undercover seating area. The Club hosts two events a year – Open Gymkhana and the Curlewis Campdraft. The Sport and Recreation Ground has also been used by Pony Club and a Carriage Club as a staging / camping area for rides / drives. The current land tenure arrangements and resultant 'red tape' in gaining approval to use the area combined with the poor quality of some of the buildings and facilities, are deterrents to using the Ground.



The Trinkey State Conservation Area has the potential to be used for horse riding (social groups) and horse events. The Tambar Springs Sports Ground could be an ideal location as a staging area and campground.

Motor Sports

Gunnedah has a cluster of motor sports activities and facilities:

- Blue Vale Speedway – car and cycle events – hosts club, interclub, State and National titles
- Balcary Park – Motorcycle Dirt Track – hosts club, interclub, State and National titles
- Gunnedah Kart Track – go karting – three open events per year
- Gunnedah Airport – used for drag racing and Sprint series (Gunnedah 600).
- Mount Porcupine – Hill Climb
- Gunnedah Showground – Speedway (Week of Speed), North West Swap Meet and The Gunnedah Ute Show and Motor Racing Simulators as part of the Gunnedah Show.

Blue Vale Speedway is one of three speedway circuits in the NE-NW Region, with circuits located at Narrabri and Tamworth. Blue Vale appears to attract the higher profile events, including State and National titles.

Gunnedah Airport is used for both Drag Racing and Sprint Car Racing. The Drag Racing is conducted by the Tamworth Drag Racing Association, with around 4 events each year. There is a proposal to establish a drag strip at Oakburn Park in Tamworth, however there are noise issues that need to be resolved. The Airport is not listed as an ANDRA track. The Airport has also been used for a Sprint Car event (Gunnedah 600). There are only 5 sprint car venues in NSW, with these being located at Bathurst (Mt Panorama), Raleigh, Temora, Tamworth and Cooma, with the Temora and Cooma being annual events held on the local airstrip. There is potential to increase the number of drag and sprint events held at the Airport. Extending the runway to provide an 800 metre sprint track would increase the appeal of the venue. Purchase of timing equipment, that can be used at the Airport and Mt Porcupine Hill Climb would assist in running events as well as attracting external 'hirers'.

Mount Porcupine (Apex Drive) is one of 14 hill climb venues in NSW, with the Mount being considered one of the most challenging and adrenalin pumping courses. Gunnedah Motoring Enthusiasts (GME) run 1-2 hill climb events per annum. There are issues with the barrier fencing and road surface, which impact on set-up times and limit the type of vehicles that can compete. Council is progressively improving the road. GME would like to conduct 4 events per year, including one round of the NSW Hill Climb Championships. Upgrading the road could also enable Open Wheelers to compete. It may also facilitate hosting of other events such as drift trikes and cycling hill climb time trials.

The network of unsealed roads within the Shire and the fire trails in the Trinkey State Conservation Area could potentially be used for Rally Sprint events. Rally Sprint events within the NE-NW Region are currently held on gravel roads in the Armidale area.



Balcary Park Flat Track Motorcycle (Photo: Namoi Valley Independent)

Mountain Biking and Adventure Racing

Adventure racing and mountain bike events are very popular with many of the events in NSW having to cap numbers. Mountain-biking is a growth sport within the NE-NW Region. Tamworth has a mountain bike park with a number of trails and a pump track. Purpose-built trails are also available at Copeton Dam, Armidale (State Forest – the Pineys, UNE and Fat Tyre Farm, Walcha Mountain Track, and at Manilla (River Trail and Mt Borah – private property). A number of the tracks are on private property and only accessible to local MTB Club members.

There are a number of high profile mountain bike events held in the Region including:

- Tour de Warrumbungles – in the Warrumbungle National Park
- Tour de Gorges – in the Pilliga Forest from Baradine to Dandry Gorge
- Northern Inland Cross Country Series – 8 races using 7 venues
- Vertical Horizon Gravity Enduro, Mt Borah (Switchback Events)
- Attitude @ Altitude GnaTPack Series, Armidale
- EvoCities MTB Series – Tamworth (hosts 1 round) – 5 hour race

The two newest events are the Dirty Tri and the Keepit Real 100 held at Lake Keepit. These events are organised, Switchback Events, who also run the Vertical Horizon Gravity Enduro at Mt Borah. Lake Keepit State Park is planning to develop a permanent MTB track.

Track in the hills around Gunnedah are used informally for mountain-biking. Some of the trails on Porcupine Hill Reserve could be suitable for down-hill and possibly cross country tracks. The trails in the Boonalla Aboriginal Area and in the Trinkey State Conservation Area are also suitable for social / recreational mountain biking.



Air Sports

Tamworth LGA is promoting air sports as part of its 'adventure' tourism product, with the products being paragliding and hang gliding at Mt Borah near Manilla and Freedom Flights (micro-lights) at Tamworth and the flight schools at Tamworth Airport. The Soaring (Gliding) at Lake Keepit could be promoted as part of this adventure product. Gunnedah Shire should also be promoting both the Gunnedah Aero Club flight training and the soaring at Lake Keepit and potentially the paragliding near Manilla. There may also be opportunity to offer boat-drawn paragliding on Lake Keepit.



Directions Forward – Sporting Events / Sports Tourism

Sporting events are a significant generator of visitation to the Shire, with visitation concentrated on weekends. There is opportunity to continue to build the sports tourism market through:

- Encouraging and working with local clubs and associations to bid to host regional, state and national events.
- Assisting event organisers, clubs and associations to grow their events, and to introduce additional events where feasible.
- Ensuring that the Shire’s venues are listed in the State and National Association directories, and where relevant promote the venues that are available for hire.
- Direct market venues that are available for hire, to clubs, associations and commercial event promoters.

Horse Sports

- Progressively upgrade the Gunnedah Showground as per the recommendations of the Showground Masterplan.
- Explore the feasibility of establishing an eventing course in Wandobah Reserve and a covered dressage arena at the Showground.
- Explore with the Gunnedah Jockey Club and the Polo Club, opportunities for increased use of their venues for a range of horse sports and other activities.
- Position and promote the Curlewis Sport and Recreation Ground as a venue for horse and livestock events, and a staging area for social rides. This will require resolving land tenure issues and some improvements to the Ground.
- Explore the potential of holding horse events / social rides in the Tambar Springs / Trinkey State Conservation Area area, using the Tambar Springs Sports Ground as a staging area.

Motor Sports

- Explore options for re-inventing the ‘Week of Speed’ to increase both participation and spectator numbers.
- Work with clubs, associations and venue owners to build the profile of Gunnedah as a destination for motor sports, and to bid for State and National titles.
- Promote Gunnedah Airport as a venue for motor sports. Seek grant funding to purchase timing equipment and potentially to extend the length of the strip.
- Continue to upgrade Apex Drive to establish ‘Mount Porcupine’ as a premier hill climb venue for a range of users – cars, motorcycles, cycling, drift trikes, fun runs etc.
- Explore options for increasing the use of the Go Kart Track, including use of the track for other activities such as track cycling and remote controlled car racing.
- Explore the feasibility of hosting rally sprint events on the gravel roads within the Shire and/or in Trinkey State Conservation Area.

Mountain Biking & Adventure Racing

- Encourage Lake Keepit State Park to establish permanent mountain bike trails and possibly a pump track.
- Explore options for mountain biking in Porcupine Hill reserve and /or on other hills around Gunnedah and possibly along the Namoi River corridor.
- Promote the fire trails in Trinkey State Conservation Area and Boonalla Aboriginal Areas as suitable for Mountain-bikes – recreational / family rides.
- Approach Switchback Events to explore the possibility of a downhill MTB event utilising the trails on Porcupine Hill.

Airsports

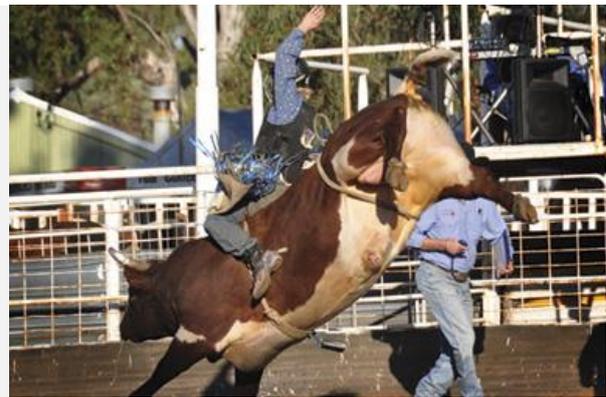
- Promote air sport activities - 'Try Gliding' and 'Learn to Fly' – as part of the activity base of Gunnedah Shire.
- Encourage the Lake Keepit Soaring Club to approach Destination Tamworth to be included as an 'Adventure' attraction. Destination Tamworth promotes Lake Keepit as an attraction.

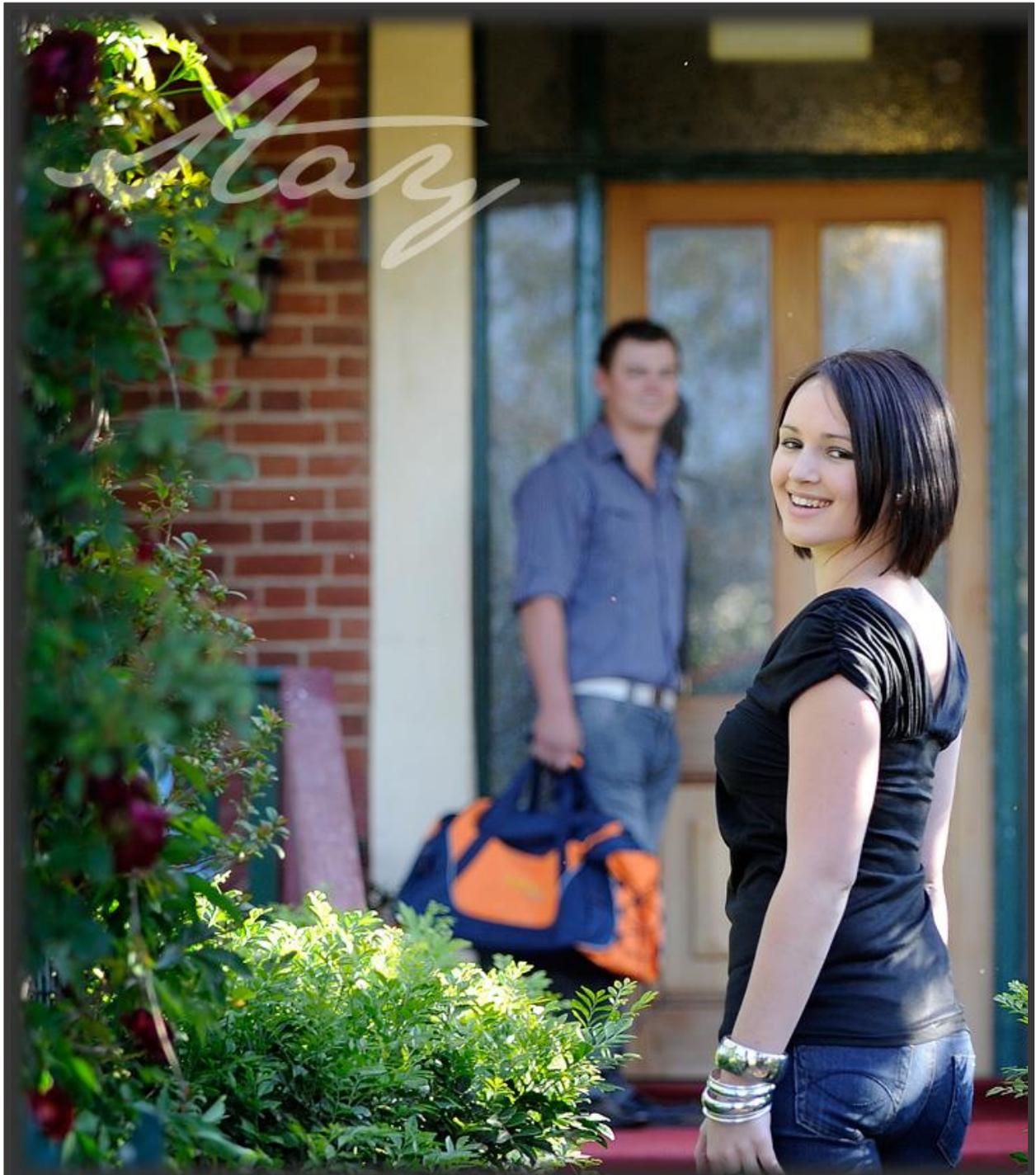
7.5 Growing the Events Sector and Encouraging Expenditure

In addition to the opportunities identified in the preceding sections, other initiatives that can be put in place to grow the events sector and encourage event attendees to spend money in the Shire include:

- Encouraging all event organisers to list their events with the Gunnedah VIC, for inclusion on the VIC website. Also encourage organisations looking to hold new events, to check the event calendar to minimize 'clashes' with other events.
- Include an event banner on the Gunnedah Shire Council website (What's on this week) with a link to the Gunnedah Tourism Events Calendar. Relevant events could also be mentioned in the Mayoral / Council column in the local media.
- Encourage accommodation operators to include an event banner / section on their websites, plus a link to the Gunnedah Tourism Events Calendar.
- Encourage event organisers (including the sporting clubs) to include a link to the Gunnedah Tourism Website on the event web and/or facebook page, and also as part of the information that goes out with any entry forms.
- Gunnedah VIC to send out a weekly 'what's on' e.blast to accommodation operators, local and regional media and other interested parties.
- Gunnedah VIC to work with event organisers to provide information and promotional offers to event attendees. For example:
 - Shopping Passports – with vouchers and offers
 - Attraction admission vouchers – discount or value add – valid for 3 months (to encourage repeat visitation to the town).
 - Dining vouchers – value add offers

- Gunnedah Tourism to work with Tourism Managers from the surrounding LGAs to develop data-bases for direct marketing of events – for example, building a data base of people who participated in fishing competitions throughout the Region and direct mailing to them a fishing events calendar for the region, with an e.blast prior to each event. This approach can be used for a range of activities.





DESTINATION ANALYSIS
Infrastructure, Facilities & Services to Support
the Visitor Economy

8. ACCOMMODATION

8.1 Existing Supply of Accommodation

The accommodation base of Gunnedah Shire includes:

- Motels – 10 motels (213 rooms) all located in Gunnedah. There are three 4 star motels (60 rooms), two 3.5 star motels (40 rooms) and five 3 star properties (113 rooms). Gunnedah has a mix of contemporary, quality motels, mid-market properties and basic properties that are tired and dated.
- Serviced apartments – 9 properties providing a mix of one, two and three bedroom apartments. The properties range from 3 to 4 star in standard, with most of the properties being relatively new and well appointed.
- Pub Hotel accommodation – 9 hotels, 6 of which are located in Gunnedah, with the hotels in Tambar Springs, Mullaley and Curlewis also providing accommodation. The hotel accommodation is basic, with most properties having shared bathrooms.
- Caravan & RV Parks – There are two commercial Parks in Gunnedah – the Gunnedah Tourist Park (3.5 star) which provides powered sites and cabins, and the South Street RV Park which provides powered and unpowered sites and basic facilities. The Mullaley Post Office Hotel provides a number of powered and unpowered caravan sites and three on-site cabins. Lake Keepit also has a large caravan park with cabins, powered sites and on-site tents. Camping is permissible around the Lake Foreshore.
- Free camping – free camping areas for short stay RVs and caravans are located near Cohen’s Bridge in Gunnedah and at the Redbank Rest Area on the Oxley Highway, approximately 10 kilometres east of Gunnedah. There is opportunity to provide free or low cost sites in Curlewis and possibly Tambar Springs.
- One Bed & Breakfast property – Roseneath Manor in Gunnedah.
- Home Hosting – The Gunnedah VIC coordinates a home hosting program during AgQuip.

With the recent mining boom and associated infrastructure projects, Gunnedah Shire has experienced a shortage of accommodation, with most accommodation properties operating at or close to capacity from Monday through to Thursdays nights. Occupancy rates on Friday and Saturday nights are generally low, and dependent on work schedules and events being held in the area. Accommodation starts to fill again on Sunday nights as workers come back into Gunnedah. Many of the serviced apartments and hotel rooms have been booked on a semi-permanent basis, often for months at a time. Over the past few years, the strong weekday demand from the business and work-related travel markets has largely displaced the leisure travel markets.

Over the past 8 months, the move from mine construction to mine operations in the Boggabri area, the expansion of the Boggabri Civeo Village (800+ beds) and the completion of a number of road and rail infrastructure projects has resulted in a reduction in demand for accommodation in Gunnedah, with a resultant decrease in occupancy rates. Looking forward, there will be bridge construction and rail infrastructure projects over the next 2 years that will generate demand for accommodation. The construction of the proposed Shenua Coal Mine near Breeza will result in an influx of construction workers into the Region. A Civeo Village (1,500 beds) has been approved for Werris Creek and if this proceeds could accommodate many of the Shenua mine workers and contractors. Gunnedah will also be competing with Tamworth and Quirindi for a share of this market. Longer term, if the proposed BHP Caroon Mine proceeds, it will also generate some demand for accommodation in Gunnedah.

8.2 Performance of the Motel Sector

8.2.1 Gunnedah Shire

Until June 2013, the Australian Bureau of Statistics (ABS) published monthly performance statistics on a Local Government Area (LGA) basis for hotels, motels, guesthouses that have more than 15 rooms with ensuite facilities. Data for Gunnedah Shire is available from 2000 to 2012. In 2013 the data for the March and June Quarters was published for statistical subdivisions rather than by LGA. In 2014, Destination NSW published limited data collected by the ABS, for 2012/13 and 2013/14, for the larger LGAs within the NE-NW Region.

Annual performance data for 2000 to 2012 is summarised in Table 8.1. In 2000, 5 establishments (113 rooms) were surveyed, with the number of establishments increasing in 2003 to 6 establishments. Between 2006 and 2012, the number of rooms increased by 14 to 138 in 2012.

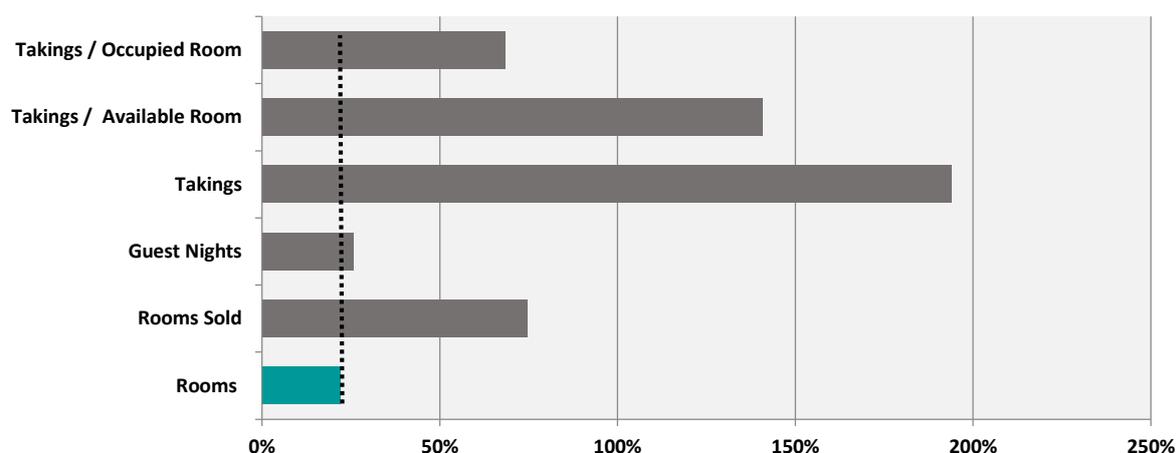
Table 8.1 Performance of Motels, 15+ rooms –Gunnedah Shire, 2000 -2012

Year	Est	Rms	Rooms Sold	Av. Occ	Guest Nights	Guest Arrivals	Length of Stay	Takings '000	Average Rate per	
									Occupied Room	Available Room
2000	5	113	18114	43.9%	32670	27046	1.21	1023	\$ 56.48	\$ 24.80
2001	5	113	17613	42.8%	33522	27372	1.22	1078	\$ 61.20	\$ 26.21
2002	5	113	19318	47.0%	33561	26259	1.28	1175	\$ 60.82	\$ 28.57
2003	6	124	20258	44.8%	33994	25240	1.35	1370	\$ 67.63	\$ 30.28
2004	6	128	21181	45.5%	37412	29681	1.26	1456	\$ 68.74	\$ 31.25
2005	6	128	21928	46.9%	38029	30188	1.26	1633	\$ 74.47	\$ 34.95
2006	6	128	25561	54.7%	45999	30617	1.50	1994	\$ 78.00	\$ 42.67
2007	6	128	29793	63.8%	42277	27482	1.54	2168	\$ 72.77	\$ 46.40
2008	6	128	23698	50.7%	39453	26992	1.46	2223	\$ 93.81	\$ 47.58
2009	6	130	27998	59.0%	42601	23691	1.8	2406	\$ 85.93	\$ 50.71
2010	6	136	30751	61.9%	41947	28833	1.80	2811	\$ 91.41	\$ 56.63
2011	6	139	34703	68.4%	46021	24296	1.90	3179	\$ 91.61	\$ 62.66
2012	6	138	31620	62.8%	41116	24428	1.70	3008	\$ 95.13	\$ 59.72
Change 2000-12	20%	22.1%	74.6%		25.9%	-9.7%	40.7%	194.0%	68.4%	140.8%
Break in Data Series										
2012/13	6	138	30,251	60.1%	np	np	np	3053	\$100.92	\$60.61
2013/14	6	138	28,158	55.9%	np	np	np	2708	\$ 96.18	\$53.79
Change	-	-	-6.9%		np	np	np	-11.3%	-4.7%	-\$11.3%

Source: Australian Bureau of Statistics: Tourist Accommodation NSW 8635.1.40.001

From 2000 to 2012 the number of rooms surveyed increased by 22.1%. Over the same period the number of rooms sold increased by 74.6%, indicating strong growth in the market. Takings also increased by 190%, with the average rate achieved per available room increasing by 140.8% and per occupied room by 68.4%. The strong growth in takings and room rates was due to the high occupancy rates (strong demand), enabling the properties to charge a premium.

Figure 8.1 Comparison of Growth Rates in Performance Indicators – % change 2000-2012

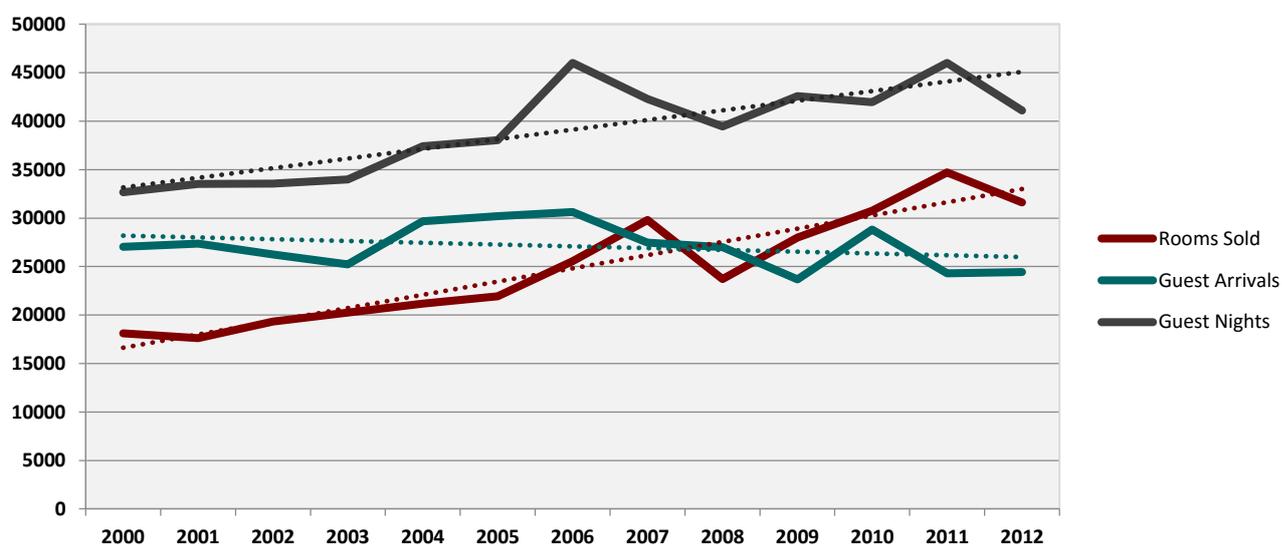


Source: Australian Bureau of Statistics: Tourist Accommodation NSW 8635.1.40.001

Rooms Sold, Guest Arrivals and Guest Nights

From 2000 to 2011, the number of Rooms Sold and Guest Nights spent in Gunnedah Shire was been trending up, with the strongest growth occurring in 2005-06 and 2010-11. In 2012, the number of rooms sold and guest nights spent in the area declined by 8.9% and 10.7% respectively. The number of guest arrivals increased between 2000 and 2006, then declined, recovered marginally in 2010, then declined in 2011, with a slight increase (0.5%) between 2011 and 2012. The downturn in rooms sold and guest nights in 2012 appears to reflect the contraction of the mining sector. The opening of the Civeo Village in Narrabri may have also had an impact on mine-related travellers. Contracts are in place between the mining companies and the Civeo Village (pre-purchased rooms) and the mining companies could be putting their workers and contractors working in the mines north of Boggabri into the Village.

Figure 8.2 Change in Guest Arrivals, Guest Nights & Rooms Sold –Gunnedah Motels, 2000-2012



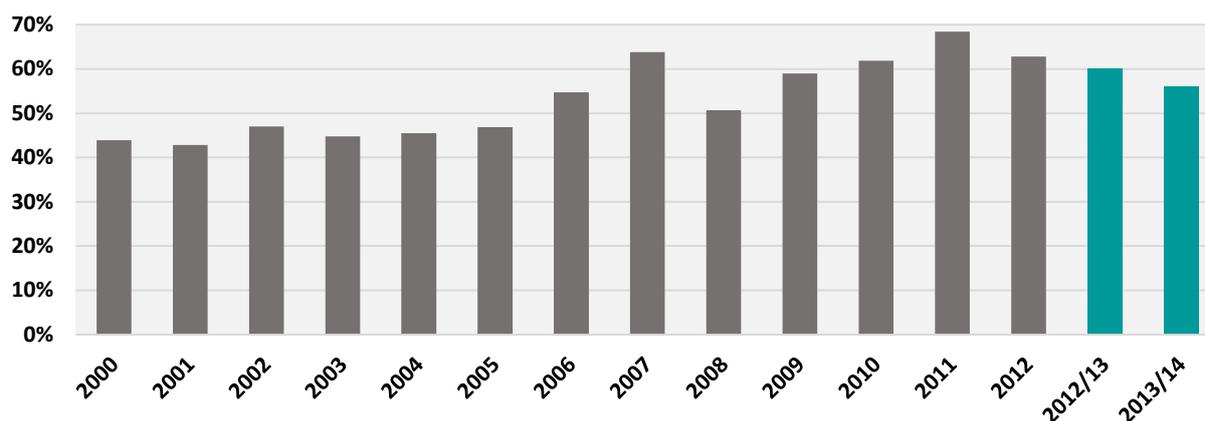
Source: Australian Bureau of Statistics: Tourist Accommodation NSW 8635.1.40.001

In 2012-13 a total of 30,251 rooms were sold, continuing the downward trend shown above. Demand continued to contract in 2013-14, with 28,158 rooms sold, down 6.9% on 2012-13.

Occupancy Rates

From 2000 to 2012, occupancy rates in Gunnedah were trending up, peaking at 68.4% in 2011 before declining to 62.8% in 2012. The growth is attributed to the influx of workers and contractors involved in developing coal mines in the Boggabri area, major rail infrastructure and building projects (eg Hospital). Occupancy rates declined to 60.1% in 2012-13, dropping a further 4.2 percentage points to 55.9% in 2013-14. The decline over the last 2 years is due in part to the opening of the Civeo Village in Boggabri.

Figure 8.2 Change in Average Annual Occupancy – Gunnedah Motels, (2000-2012 and 2012/13 – 2013/14)



Source: Australian Bureau of Statistics: Tourist Accommodation NSW 8635.1.40.001

Average monthly occupancy rates for the period 2008 to the June of 2013 are given in Table 8.2. Occupancy rates in excess of 70% are indicative of properties being at or close to capacity 3-4 nights per week, during which time the Shire is probably 'turning away' business. In 2011, occupancy rates exceeded 70% in 7 months. In five of the first 6 months of 2013, the monthly occupancy rate were lower than the corresponding rates in 2012. Occupancy is seasonal with rates falling significantly in December and January, which is traditionally a low period for business and work-related travel.

Table 8.2 Average Monthly Occupancy Rates – Gunnedah Motels, 2008-June 2013

Month	2008	2009	2010	2011	2012	2013
January	46.6%	59.3%	48.0%	54.2%	55.7%	52.2%
February	41.2%	49.5%	56.1%	71.7%	56.8%	50.5%
March	50.8%	59.2%	57.0%	74.7%	70.4%	66.2%
April	59.7%	61.8%	52.5%	73.0%	61.5%	65.4%
May	55.6%	66.7%	61.4%	75.3%	74.7%	62.0%
June	58.4%	62.7%	61.5%	79.6%	74.5%	66.2%
July	68.5%	62.4%	70.9%	71.6%	60.1%	Not published
August	69.3%	67.5%	72.4%	75.6%	70.1%	Not published
September	73.2%	71.2%	80.3%	66.4%	61.6%	Not published
October	84.3%	56.5%	72.0%	67.4%	56.7%	Not published
November	69.2%	51.5%	69.7%	61.0%	56.7%	Not published
December	49.0%	36.7%	46.1%	46.6%	52.2%	Not published
Annual	57.8%	59.0%	61.9%	68.4%	62.8%	

Source: Australian Bureau of Statistics: Tourist Accommodation NSW 8635.1.40.001

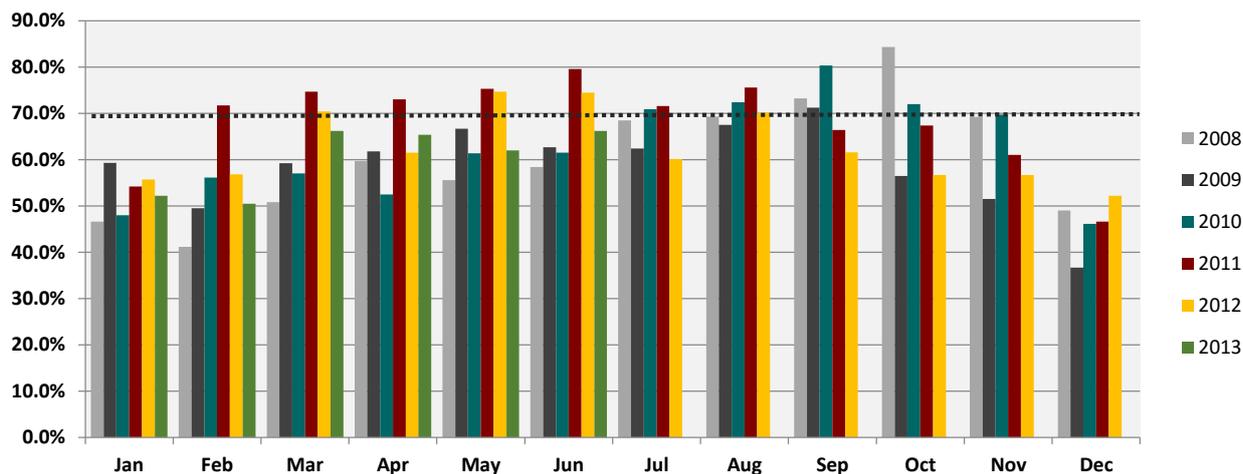
In 2012-13 and 2013-14, the occupancy rates in the September, December and March Quarters in 2013-14 were lower than the corresponding quarters in 2012-13, with the June Quarter occupancy rates being marginally higher.

Table 8.3 Quarterly Occupancy Rates – Gunnedah Shire 2012-13 and 2013-14.

Quarter	2012-13	2013-14
September	64.0%	59.5%
December	55.2%	43.8%
March	56.5%	55.6%
June	64.5%	64.8%
Annual	60.1%	55.9%

Source: Destination NSW Tourist Accommodation Profile – Gunnedah Shire

Figure 8.3 Comparison Monthly Occupancy Rates (%), Gunnedah Motels, 2008 - June 2013



Source: Australian Bureau of Statistics: Tourist Accommodation NSW 8635.1.40.001

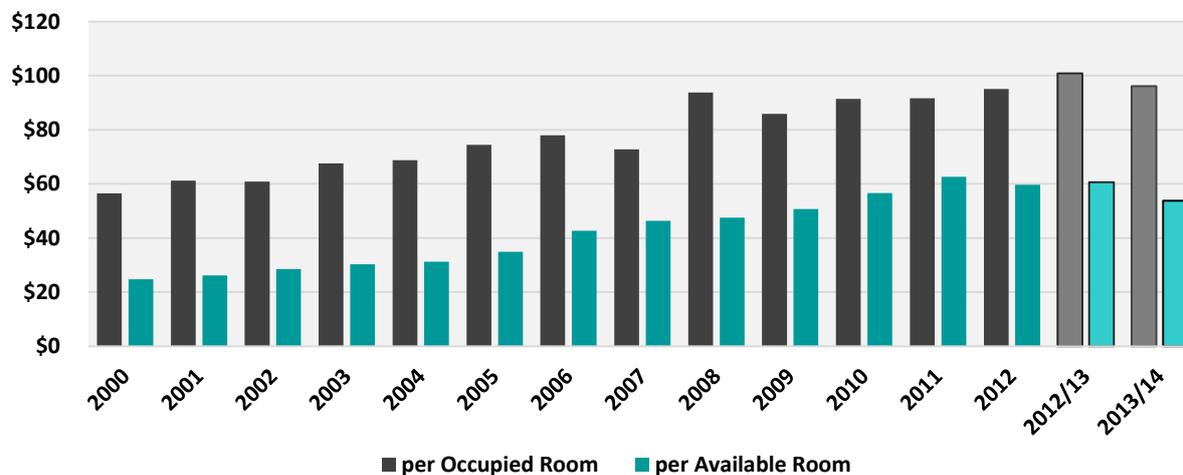
Takings from Accommodation

In 2013-14, takings from accommodation from the six motels surveyed was \$2.708 million, down 11.3% from \$3.053 million in 2012-13.

Average Room Rates

The average rates achieved per available room and per occupied room increased by 140.8% and 68.4% respectively between 2000 and 2012. In 2012, the rates per available and per occupied rooms were \$59.73 and \$95.14, respectively. The rate per occupied room peaked in 2012-13 at \$100.92, before falling by 4.7% in 2013-14 to \$96.18. From 2012-13 to 2013-14, the rate per available room declined by 11.3% from \$60.61 to \$53.79.

Figure 8.4 Average Annual Achieved Room Rates, Gunnedah Motels



Source: Australian Bureau of Statistics: Tourist Accommodation NSW 8635.1.40.001

8.2.2 Comparison – Performance of Motels in Gunnedah Shire to the NE-NW Region

Limited performance data is available for 2012-13 and 2013-14 for eight of the thirteen LGAs within the NE-NW Region. In 2013-14, Gunnedah Shire (138 rooms) accounted for 5.0% of motel rooms¹¹ within the Region, ranking 7th in the Region.

In both 2012-13 and 2013-14 Gunnedah Shire achieved marginally more than market share in terms of the number of rooms sold within the Region (Figure 8.5). From 2012-3 to 2013-4, Narrabri was the only LGA to experience an increase in the number of rooms sold, up 4.1% up (Figure 8.6).

In both years, Gunnedah Shire achieved the second highest occupancy rate in the Region, with Narrabri Shire achieving the highest rates (Figure 8.7). Both Gunnedah and Narrabri Shires benefit from work-related travel generated by the coals and mine related infrastructure projects. In 2012-13 Gunnedah Shire ranked 4th in the Region in terms of revenue generated per available room and 5th in terms of revenue per occupied room. In 2013-14 Gunnedah had dropped to 5th in terms of revenue per available room and 7th of revenue per occupied room (Figures 8.8 and 8.9).

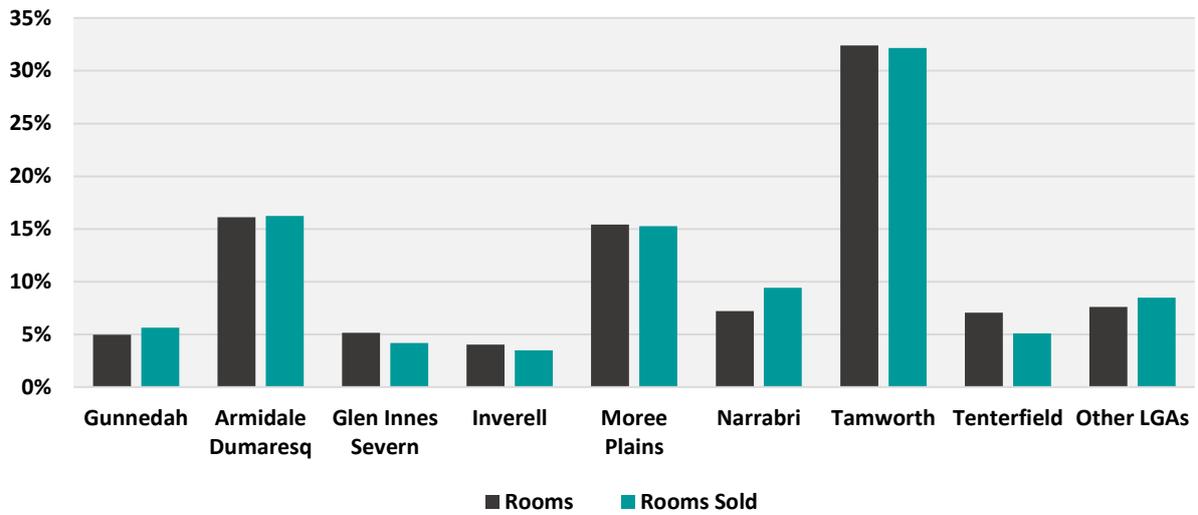
Table 8.4 Comparison – Motel Performance – LGAs in the NE-NW Region

LGA	Est	Rooms	Rooms Sold	Occ	Takings	\$ / Room Sold	\$ / Available Room	Share	
								Rooms	Rooms Sold
2012-13									
Gunnedah	6	138	30251	60.1%	\$ 3,052,813	\$ 100.92	\$ 60.61	5.2%	5.9%
Armidale	17	442	94411	60.0%	\$ 11,107,478	\$ 117.65	\$ 70.63	16.6%	18.4%
Glen Innes	6	143	24130	47.4%	\$ 2,153,155	\$ 89.23	\$ 42.78	5.4%	4.7%
Inverell	5	111	18770	47.5%	\$ 2,029,611	\$ 108.13	\$ 51.39	4.2%	3.7%
Moree Plains	12	424	86944	57.6%	\$ 8,088,377	\$ 93.03	\$ 53.16	16.0%	17.0%
Narrabri	8	189	45215	67.2%	\$ 5,083,958	\$ 112.44	\$ 75.51	7.1%	8.8%
Tamworth	26	895	166957	52.4%	\$ 22,200,256	\$ 132.97	\$ 69.72	33.7%	32.6%
Tenterfield	9	193	25697	37.4%	\$ 2,496,186	\$ 97.14	\$ 36.33	.3%	5.0%
Other LGAs	6	122	20299	45.6%	\$ 1,792,043	\$ 88.28	\$ 40.24	4.6%	4.0%
NE-NW Region	95	2657	512673	54.2%	\$ 58,003,876	\$ 113.14	\$ 61.34		
2013-14									
Gunnedah	6	138	28158	55.9%	\$ 2,708,282	\$ 96.18	\$ 53.79	5.0%	5.6%
Armidale	17	447	80998	50.9%	\$ 9,701,153	\$ 119.77	\$ 60.99	16.1%	16.2%
Glen Innes	6	143	20923	41.1%	\$ 1,973,894	\$ 94.34	\$ 38.81	5.2%	4.2%
Inverell	5	112	17384	43.6%	\$ 1,827,948	\$ 105.15	\$ 45.87	4.0%	3.5%
Moree Plains	12	428	76184	50.0%	\$ 8,051,887	\$ 105.69	\$ 52.87	15.4%	15.3%
Narrabri	8	200	47063	66.1%	\$ 5,303,552	\$ 112.69	\$ 74.45	7.2%	9.4%
Tamworth	26	899	160342	50.1%	\$	\$ 136.88	\$ 68.57	32.4%	32.2%
Tenterfield	9	196	25398	36.4%	21,947,619	\$ 97.08	\$ 35.63	7.1%	5.1%
Other LGAs	7	211	42258	54.9%	\$ 2,465,683	\$ 104.21	\$ 57.18	7.6%	8.5%
					\$ 4,403,930				
NE-NW Region	96	2774	498710	50.5%	\$ 58,383,947	\$ 117.07	\$ 59.09		
% Change 2012-13 to 2013-14									
Gunnedah	-	-	-6.9%		-11.3%	-4.7%	-11.3%		
Armidale	-	1.1%	-14.2%		-12.7%	1.8%	-13.6%		
Glen Innes	-	-	-13.3%		-8.3%	5.7%	-9.3%		
Inverell	-	0.9%	-7.4%		-9.9%	-2.8%	-10.7%		
Moree Plains	-	0.9%	-12.4%		-0.5%	13.6%	-0.5%		
Narrabri	-	5.8%	4.1%		4.3%	0.2%	-1.4%		
Tamworth	-	0.4%	-4.0%		-1.1%	2.9%	-1.6%		
Tenterfield	-	1.6%	-1.2%		-1.2%	-0.1%	-1.9%		
Other LGAs	16.7%	73.0%	108.2%		145.7%	18.0%	42.1%		
NE-NW Region	1.1%	4.4%	-2.7%		0.7%	3.5%	-3.7%		

Source: Destination NSW LGA – Tourist Accommodation Profiles.

¹¹ Performance data relates only to properties with 15 or more ensuite rooms.

Table 8.5 Market Share – % of Rooms Available compared to Rooms Sold in the NE-NW Region, 2013-14



Source: Destination NSW LGA – Tourist Accommodation Profiles.

Figure 8.6 Comparison - Rooms Sold – NE-NW LGAs

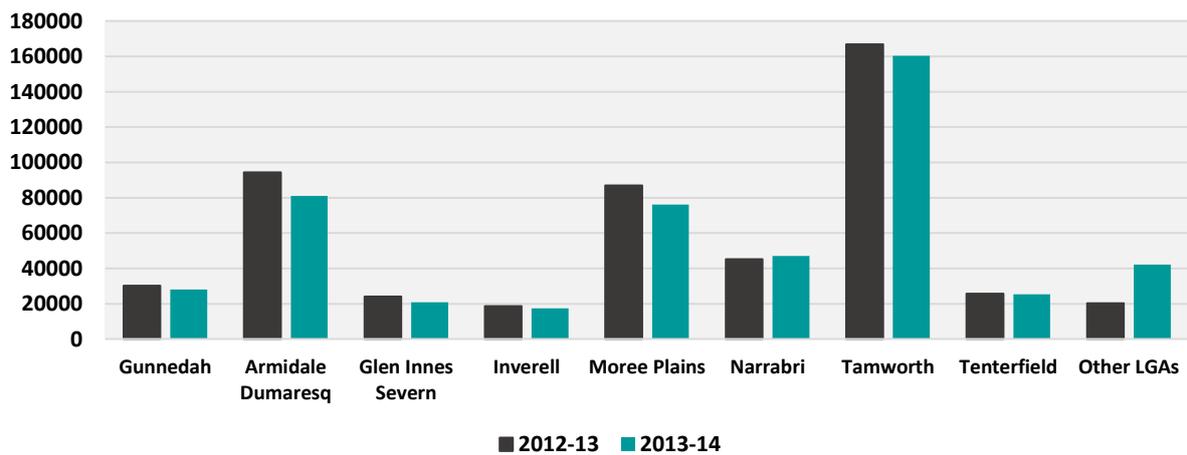


Figure 8.7 Comparison - Occupancy Rates - NE-NW LGAs

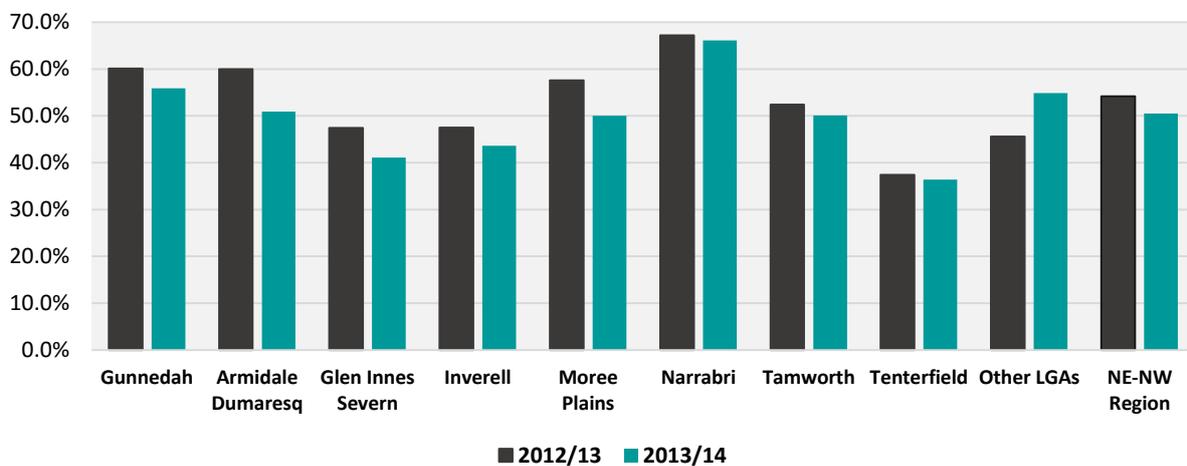


Figure 8.8 Comparison - Rate per Available Room - NE-NW LGAs

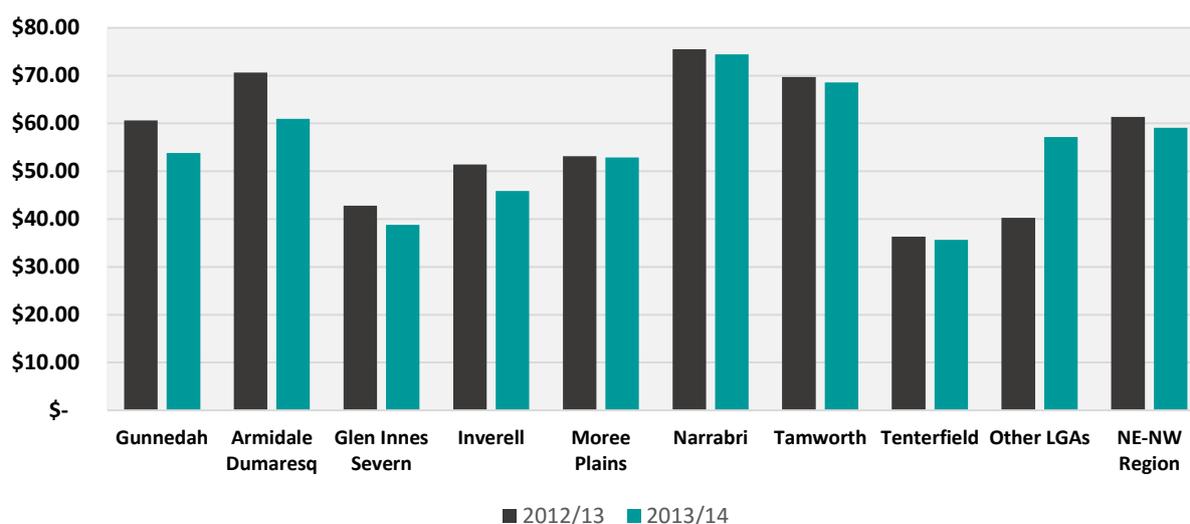
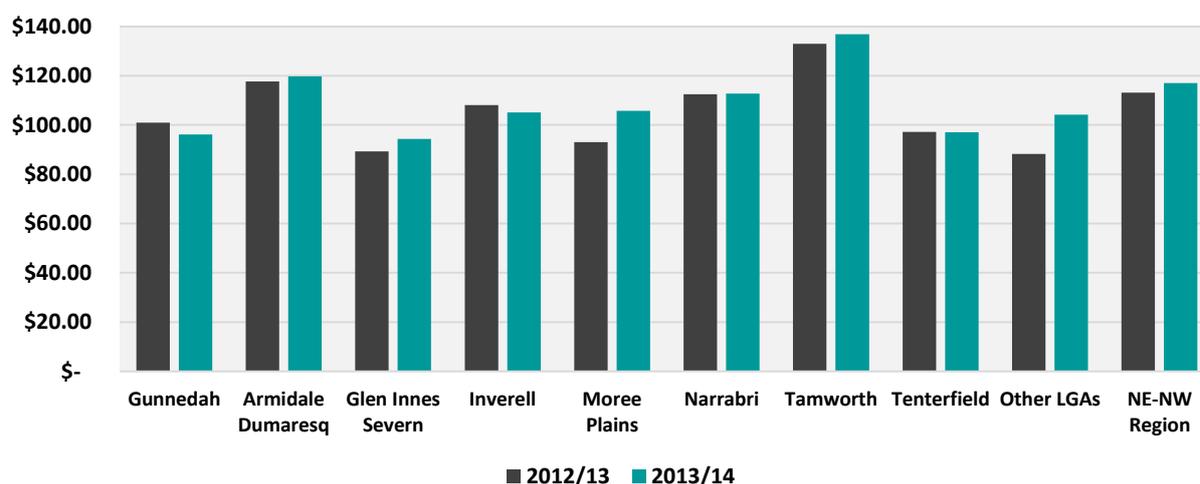


Figure 8.9 Comparison - Rate per Occupied Room – NE-NW LGAs



8.3 Market Needs & Expectations – from Accommodation

For Gunnedah Shire to remain competitive in the medium to longer term, accommodation operators need to keep abreast of the changing needs and expectations of the marketplace and market trends. The main factors that influence the choice of accommodation properties are:

- Presentation and standard of properties is a major factor in selecting properties both on-line (ie. trip planning stage) and for ‘walk-in’ business when travellers arrives at a destination.
- Word-of-mouth referrals and past experience are also major factors in the decision-making process.
- Quality customer service – this is critical to building good ‘word of mouth’ referrals and repeat visitation.
- Ease of access to on-line information on the property and ability to book on-line.

Presentation & Standard of the Properties

Travellers are increasingly viewing accommodation images on-line before they book, with the presentation of properties often a significant factor in influencing decisions. For travellers on-the-road, the presentation of accommodation properties is also a significant factor in influencing the decision to stop overnight in an area. For travellers passing through, if a property presents well then there is a strong chance that travellers will notice the property and give consideration to stopping there when next in town.

Presentation (coupled with professional, friendly service) also contributes positively to the guest's experience and will assist in encouraging repeat visitation as well as 'word-of-mouth' recommendations. The market is becoming less tolerant of mediocre or sub-standard accommodation.

Older style accommodation and tired product is a problem throughout regional Australia. Research¹² into consumer expectations of motels found that 'consumers felt that many of the mid-market motels available in Australia were dated and did not meet the needs of the market'. Most indicated that they were looking for something akin to their own home in terms of the experiences that they were seeking in a motel stay. A spacious feel, light colours, good linen, comfortable furniture and a modern feel were seen as the key drivers of a motel stay.' (These research findings are equally as relevant to the older types of accommodation). Access to free WiFi has also become a consideration in recent years.

A number of the motel properties in Gunnedah are tired and dated. In recent years, the strong demand for accommodation from work-related travellers has resulted in relatively high occupancy rates, with operators attracting business regardless of the presentation of the rooms. With constant bookings, there has been limited opportunity to take rooms out of circulation for refurbishment. With demand from coal mining and infrastructure workers contracting, occupancy rates are declining, which appears to be putting downward pressure on room rates. If this continues, the older, tired properties may become increasingly un-competitive.

Customer Service Standards

The market is becoming increasingly sophisticated and demanding, and service levels in Gunnedah Shire need to be continually improved to meet market expectations. The Baby Boomers and Generation X, (now the main travel markets) are not tolerant of poor customer service. These markets expect professional, efficient service and appreciate personalised service.

The ability to establish a rapport with guests plays a significant part in building customer loyalty and attracting repeat visitation, as well as ensuring positive feedback and good word-of-mouth and on-line referrals.

A high level of familiarisation with and the ability to promote what Gunnedah Shire has to offer – things to see and do, places to eat, services available etc, should also be part of the service delivery. Visitors frequently ask accommodation staff for recommendations on what to do, where to go, where to eat etc. This provides the opportunity for staff to actively 'sell' Gunnedah, not only in answering the specific inquiry but also to introduce guests to other opportunities available in the town. Owners and staff need to be well informed about the Shire and town and kept up-to-date with any changes.

Accommodation Bookings

The internet is now the main tool used in researching and booking accommodation properties (see Section 4.3)

As of 2015, mobile devices (smart phones and tablets) have replaced the computer, as the place where people start their travel search. Most of the search undertaken on mobile devices is described as 'micro minute' – short searches (eg while waiting to be served in café, at the bus stop etc), with the searcher looking for 'inspiration'. There is a high propensity to view images, short videos / You Tube, user generated content (eg Travel Blogs, Trip Advisor) and deals and offers.

¹² Sustainable Tourism CRC (2005) Motel Make-Over Guide – Renovating 3-4 Star Motels in Regional Australia

While most searches are started on mobile devices, searchers generally move to their computer to undertake more detailed searches into 'short listed' accommodation, check availability and make a reservation. Consumers use a range of sites to research accommodation options including official destination sites (eg visitgunnedah), the visitnsw, on-line accommodation directories (eg wotif, expedia), trip advisor and property websites.

The on-line platform has undergone significant changes in the past 2 years, with the expectation that it will continue to evolve rapidly over the next few years as Google moves more into the travel market.

To be effective in the market place, accommodation properties need a strong on-line presence with this including:

- A contemporary website incorporating:
 - Mobile optimisation – for both android and apple (i platform) for both smart phones and tablets:
 - Semantic search responsive not key word responsive.
 - On-line, real-time reservations system (book now button)
 - Information on the destination.
 - Quality images of both the accommodation and the destination.
 - Ideally, video footage – a walk-through of the property.
- Utilising a range of tools to drive business to their website, including:
 - Claiming the property's 'My Business Page' on Google.
 - Encouraging guests to review the property on both Trip Advisor and Google Reviews.
 - Developing and implementing a social media strategy utilising facebook and possibly twitter and Instagram.
 - Ensure that the property is listed in the NSW State Tourism Data Warehouse (visitnsw website) data base through NSWconnect.
 - Listing the property on relevant third party destination, travel and accommodation websites, linking through to the property website where possible.
- Listing on a range on accommodation booking websites.

A preliminary assessment of the online listings for commercial accommodation properties in Gunnedah Shire indicated that only a few of the properties have a strong on-line presence. The assessment indicated:

Visit Gunnedah Website

- The Visit Gunnedah website is not listed on the first page of a google search for 'Accommodation Gunnedah'.

Motels – 10 properties

- 9 of the motels had their own website.
- 6 of the properties have a link to their website from the Visit Gunnedah website.
- 6 of the properties are listed on the visitnsw website, with 5 having a link through to the property website.
- Only 5 properties had on-line direct booking facilities.
- Only 5 properties were listed on one or more accommodation booking websites (eg Wotif).
- Only 2 properties included an 'About Gunnedah' button on the page menu, with one property providing content as part of the description of the property.
- A number of the websites are dated in their presentation and are not optimised for mobile devices.
- While all properties included photos of their rooms, very few of the websites incorporated quality images and none included video footage.

Hotels – 9 properties

- 2 hotels had their own website, with a few having facebook pages.
- Only 1 hotel had a link through to their website from the Visit Gunnedah website – with this going to a page that no longer exists.
- 3 of the properties are listed on the visitnsw website, with none having a link to their own website.
- None of the hotels had online booking facilities.
- Only one hotel included images of its accommodation on its website.

Serviced Apartments – 10 properties

- All properties had their own website.
- All of the properties had a link to their website from the Visit Gunnedah website.
- 6 of the properties are listed on the visitnsw website, with 5 having a link to their website.
- None of the properties had on-line booking facilities.
- None of the properties appear to be listed on accommodation booking websites.
- Only two of the properties provided information on Gunnedah. One of these websites listed forthcoming events on their home page and also provided a link to download the Gunnedah Visitor Guide.
- A number of the sites provide limited information, and do not appear to be optimised for mobile devices.
- While all properties included photos of their rooms, very few of the websites incorporated quality images and none included video footage.

Caravan Parks – 4 properties

- 2 of the parks have websites, however the sites are very limited.

With the strong demand for accommodation in recent years, it would appear that operators have not ‘needed’ to maximise their on-line presence. With the changes occurring in the market place, building a strong on-line presence is a priority. With demand from work-related travellers contracting, ‘promoting’ the destination and forthcoming events will assist properties in attracting non-work related market segments.

Directions Forward – Implications and Opportunities

- With the contraction of demand for accommodation from work-related travellers, it is important that Gunnedah looks to rebuild markets that have been displaced in recent years and also diversify into new markets.
- It is important the accommodation operators are aware of and responsive to changing market needs and expectations. There are a number of on-line information sources available on market trends.
- Accommodation operators need to be encouraged to have a strong on-line and digital presences (see factors listed in the Accommodation booking section). There are a range of resources available on the Inland NSW, Destination NSW and Tourism Australia websites relating to web-based / digital marketing. If there is sufficient interest, Council could approach the Inland NSW RTO and/or DNSW to run a workshop for operators.
- The Gunnedah VIC should explore opportunities for offering a ‘module’ of information and professional images on Gunnedah Shire that operators can use on their websites to more effectively sell the destination and the experiences and activities available.
- Operators should be encouraged to include a link to the Visit Gunnedah Tourism Website and/or be able to download a copy of the Gunnedah Visitors Guide (may need to be amended to exclude accommodation) and other relevant information (eg dining guide) from the accommodation property’s website. Ideally the visitgunnedah website address should also be on display in each guestroom.
- Operators should be encouraged to include information on forthcoming events as a banner on their website and also to promote events at reception and through on-line marketing to past guests.
- There is opportunity to provide additional accommodation in Curlewis, including camping at the Curlewis Sport and Recreation Ground.

9. ACCESS & TRANSPORT

9.1 Road

Gunnedah Shire is located at the cross-roads of the Kamilaroi and Oxley Highways. Approximate distances and driving times between Gunnedah and the main source markets and surrounding towns is given in Table 9.1.

Table 9.1 Approximate Distance & Driving Time between Gunnedah & Population Centres

Population Centres	Distance	Driving Time
Sydney via Hunter Valley – New England & Kamilaroi Highways	425km	5 hours
Sydney via Blue Mountains, Castlereagh Highway & Black Stump Way	490km	6.5 hours
Brisbane	650km	7.5 hours
Newcastle	307km	3.5 hours
Dubbo	265km	2.5 hours
Tamworth	77km	50 minutes
Port Macquarie via Oxley Highway	350km	4.25 hours
Narrabri	96km	1 hour
Moree	196km	2.25 hours
Coonabarabran	106km	1.25 hours
Quirindi	83km	45 minutes

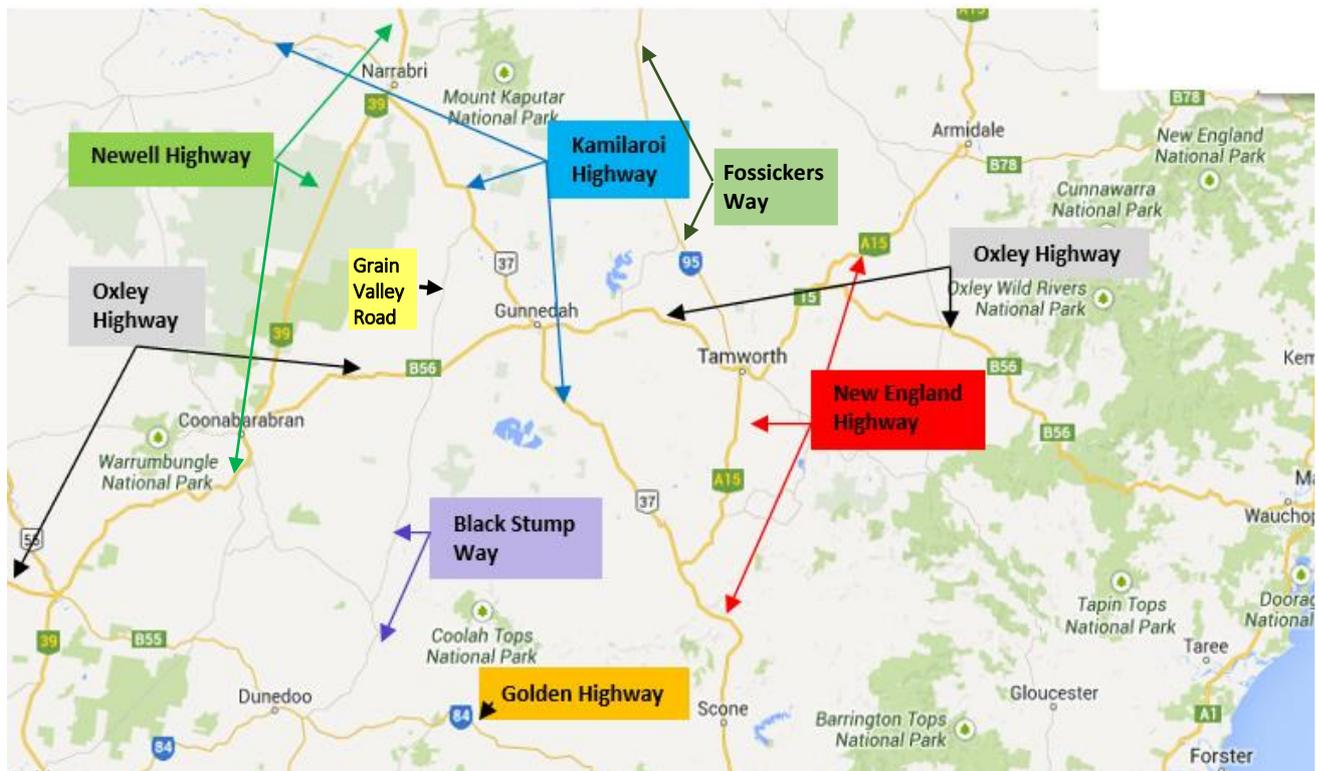
The Kamilaroi Highway connects the New England Highway at Willow Tree and the Newell Highway at Narrabri, and continues west to Bourke via Walgett. The Kamilaroi Highway is part of the National (NH37) and State (SH29) networks. The Highway is promoted as a touring route connecting the 'Great Divide to the Great Outback', with Gunnedah Shire being a member of the Kamilaroi Highway Promotions Group.

The Oxley Highway is an east-west route that connects the Pacific Highway near Port Macquarie (NSW Mid-North Coast) to the Mitchell Highway at Nevertire, via Tamworth, Gunnedah and Coonabarabran. The Oxley Highway intersects with the New England Highway in Tamworth, the Kamilaroi Highway in Gunnedah, and the Newell Highway at Coonabarabran. The Oxley and Newell Highway become one between Coonabarabran and Gilgandra. The Oxley Highway is a popular route for long-haul travellers moving between the New England and Newell Highways, with this route carrying a relatively high proportion of travellers from Queensland and Victoria.

The 'Black Stump Way' provides access to the south western and western area of the Shire. The Black Stump Way is a north-south route which links the Golden Highway near Dunedoo to the Oxley Highway at Mullaley, via Coolah and Tambar Springs, and then north, via Grain Valley Road to join the Kamilaroi Highway at Boggabri. A section of Grain Valley Road is not sealed, which deters some travellers from moving between Mullaley and Boggabri. To the south of the Golden Highway, the Black Stump Way links with the Castlereagh Highway to Mudgee and south to Lithgow, with links into Western Sydney by the Great Western Highway and the Bells Line of Road, and further south via the Tablelands Way to join the Hume Highway near Goulburn.

The towns to the north of Gunnedah Shire lie on the Fossickers Way touring route. The Fossickers Way starts in Nundle and continues north-west through Tamworth to Manilla, Barraba and Bingara to join the Gwydir Highway. The route continues east along the Gwydir Highway to Inverell to join the New England Highway at Glen Innes. Fossickers Way is promoted as 'one of the oldest and most picturesque routing routes in NSW, providing an alternative route between Sydney and Brisbane for those who enjoy an easy, more leisurely scenic drive, on sealed roads. For south-bound traffic, some travellers leave this route at Manilla to access Lake Keepit (Rushes Creek Road). There is also potential to promote the Boonalla Aboriginal Area to draw southbound travellers into Gunnedah Shire via the Boggabri-Manilla Road and Kelvin Road. Sections of the Boggabri-Manilla Road are not sealed which will deter some travellers. Sealing of this road has been identified as a priority within the Region, to improve access between Tamworth and the coal mines in the Boggabri area. Strategically, the sealing of this road would benefit tourism, facilitating access between Manilla and Gunnedah via the Kelvin Valley, and developing a scenic route linking Gunnedah – Boonalla Aboriginal Area to the attractions in the Boggabri area – Dripping Rock, Gins Leap and Barbers Lagoon.

Figure 9.1 Highway & Regional Road Network.



Within the Shire, roads that have the potential to be promoted as scenic drives include:

- Loop Drive from Gunnedah to Curlewis via Wandobah and Prestons Road, returning via the Kamilaroi Highway or the Curlewis Common and Pullaming Roads.
- Curlewis – Tambar Springs Road – promoted as a bird route, connecting three bird hot spots – Curlewis Common, Goran Lake and Trinkey State Conservation Area.
- Wyuna Road - Oxley Road - Mt Nombi Road loop – providing access to the volcanic landscape between Tambar Springs and Curlewis.

9.2 Air

For commercial passenger flights, Gunnedah Shire is serviced by Tamworth Regional Airport. Qantaslink operates 5-6 return RPT¹³ flights to Sydney per day, Monday to Friday, with 3 return flights on Saturdays and 4 on Sunday. Virgin Airlines provides one return service per day between Tamworth and Sydney from Sunday to Friday. Jetco operates return services to Brisbane, with 2 services per day on Monday, Wednesday and Friday and a daily service on weekends. Air services are used primarily by the business – work related travel market and regional residents. The lack of direct air services to Gunnedah is a constraint to for growing business events in Gunnedah.

Gunnedah Airport is available for charter flights and general aviation.

¹³ Regular Passenger Transport (scheduled commercial flights)

9.3 Rail

The North West Rail Line traverses Gunnedah Shire. The North West Explorer, operated by NSW TrainLink provides daily passenger rail services between Sydney and Moree via Gunnedah. The journey between Gunnedah and Sydney takes around 6.25 hours. It is possible to travel on the North West Explorer from Gunnedah to Werris Creek and change to the Northern Tablelands Explorer to access Tamworth and Armidale, with Coach Link services through to Tenterfield.

Under the banner 'Visit Country NSW by Train', NSW TrainLink promotes a number of regional destinations, with Armidale, Moree and Tamworth, listed for the New England – North West Region. Rail access provides Gunnedah with opportunities to build the rail tourism market.

9.4 Local Transport

Weekdays during school terms, school bus services operate between Gunnedah and Boggabri, the outlying villages and Tamworth, and between Breeza and Werris Creek. These services are not used by travellers. For groups that arrive by train, or for conferences needing to transport delegates, coaches are available for charter in Gunnedah and surrounding region.

Gunnedah also has a taxi service, and two rental car outlets – Hertz and Europcar.

Opportunities & Directions Forward

Road

- Continued development and promotion of the Kamilaroi Highway and Black Stump Way as touring routes.
- Development and promotion of the Oxley Highway as a touring route (see Sections 6.3 and 6.4).
- From a tourism perspective, completing the sealing of Grain Valley Road and Rangari Road are strategic projects that would generate increased visitation to Gunnedah Shire, with the sealing of Grain Valley Road directly benefiting Mullaley and Tambar Springs. The sealing of Rangari Road, would provide the opportunity to pull travellers from Fossickers Way into the Shire and also facilitate the development of a scenic drive linking Gunnedah to Boggabri via Boonalla Aboriginal Area.

Rail

- Endeavour to have Gunnedah included as a Country NSW destination by NSW TrainLink.
- Develop rail – accommodation packages targeted to seniors groups (\$2.50 travel) in the Sydney, Central Coast and Hunter Regions.

10. INFORMATION SERVICES & SIGNAGE

Information services and signage are integral parts of the infrastructure needed to support tourism. Information services provide the communication link between the locality, the tourist trade and the visitor. These services support the area's marketing and promotion, provide a direct service to both the tourism trade and visitors and, most importantly, make a visitor feel welcome in the area and ensure that they are aware of the area's products and services.

10.1 Information Services - Overview

Information services in Gunnedah Shire are co-ordinated by the Gunnedah Shire Council Tourism Unit through the Gunnedah Visitor Information Centre (VIC). Services include:

- Gunnedah Visitor Information Centre.
- Official tourism website for the LGA – www.visitgunnedah.com.au tourism website. The Tourism Unit also manages the Gunnedah content on ATWD and a range of third party websites.
- Civic Guide – outside the Post Office in Gunnedah (commercially managed)
- Event calendar and electronic event signage at Kitchener Park.
- Providing information to the tourism industry and operators.
- Gunnedah Shire Visitor's Guide (print and online) and town and district map.

Visitor Information Centre

In 2014, Council undertook a review of information services in Gunnedah, which resulted in the relocation of the VIC from Anzac Park to the Civic Precinct within the town centre. The rationale behind the move was to increase the visibility of the Centre, particularly with the changes in traffic flow that will occur once the Oxley Highway is re-routed, and to encourage travellers to stop in the town centre, providing greater opportunity for spending money in town.

The relocation of the Centre has resulted in a 30.8% increase in visitation, in comparison to the same period in 2013-14.

As discussed in Sections 3.1 and 3.2, visitation to Gunnedah Shire is increasing, with further growth expected, in-line with market growth (in particular 'baby boomers' moving into retirement), product development in Gunnedah and along the Kamilaroi Highway corridor, and the promotion of the Kamilaroi Highway. The re-routing of the Oxley Highway (from 2016 onwards), the establishment of a quality playground in Wolseley Park and ongoing improvements to the River Precinct will also bring more travellers in the town centre.

The area currently occupied by the VIC is relatively small, but adequate for current visitor numbers. As visitation grows, the Centre is likely to encounter capacity constraints. Display space within the Centre is also limited, and restricts the ability to provide interpretative displays and information, other than possibly in digital format. In the medium to longer term, Council should be looking to provide a new VIC as part of the development of Wolseley Park, with this potentially including a koala exhibition. In the short term, there may be opportunity to tell the koala story using another digital screen supported by print information. There may also be opportunity for temporary exhibits when the Mooki Room is not needed for other activities, and also utilising the blank walls in the laneway between the Civic Theatre and the town hall, for an outdoor information display / story telling.

Given the increasing propensity for visitors to take 'selfies' and post images on social media, consideration should also be given to providing a 'photo opportunity'. This could be achieved by some form of koala sculpture / public art located outside the VIC, or as part of the redevelopment of Wolseley Park, or on the link between the VIC and the river bank, with travellers encouraged to take photos and hash tag them to Gunnedah.

Information Directories

There is a need for quality information directories at strategic locations throughout the Shire, with these directories providing information on the local area, Gunnedah Shire and the surrounding region, as well as the address for the Visit Gunnedah website. Potential locations for directories include:

- Civic Precinct – to provide information when the VIC is closed.
- Lions Rest Area at the Wandobah Reserve.
- Breeza Park
- Mullaley Park
- Memorial Park, Tambar Springs
- Lake Keepit – with this directory potentially being a joint venture between Tamworth and Gunnedah.
- Redbank Rest Area.

Information directories need to be signposted using the blue and yellow ‘i’ signs, with advanced warning signs also in place.

Pop-up information stands should be used at events held throughout the Shire. These stands could be manned or unmanned depending on the scale of the event.

Visitor Information

Gunnedah Shire has recently launched a new website and Visitor Guide, with these being the main promotional tools for the Shire. Both the website and the Visitor Guide are colourful and vibrant, depicting the scenery of the area, people having fun, and the lifestyle attributes of the Shire. The images position the Shire as both a ‘drive’ and a ‘family friendly’ destination, with a variety of things to see, do and experience. The Visitor Guide plus extracts from the guide relating to accommodation, eateries and attractions are downloadable from the website.

The website needs to be continually developed in response to changes in the market place and the product and activity base of the area.

Possible additions could include:

Menu / Page	Possible Addition / Change
Welcome	Home Page – feature the Top 10 things to do in Gunnedah Shire
	Home Page – include a Banner – What’s on this week in Gunnedah – with a click through to the events page and /or event website if one is available.
	E.brochures – produce and include an information sheet on ‘how to spot a koala’. Also consider producing an information sheet on crops of the Gunnedah Shire or Liverpool Plains or Kamilaroi Highway - this could be produced jointly with Liverpool Plains Shire Council or with the Kamilaroi Highway Promotions Group.
	Include a link to the Events & Conference Directory
Discover	Include Lake Keepit in the drop down menu.
	Oxley Highway and Black Stump Way as touring routes.
Play	<u>Koalas</u> – progressively develop this page in line the product development undertaken. Include information on how to spot a koala (with a downloadable information sheet) as well as information on the impact of climate change – ideally with a link to the Catalyst story, as well as information on Project Koala and a call to action – how visitors can help.
	<u>Dorothea Mackellar</u> – include an image from the Isherwood collection under the link – to raise awareness and generate interest. Also identify viewing areas throughout the Shire where travellers can stop and appreciate the ‘My Country’ scenery.

Menu / Page	Possible Addition / Change
	<p><u>Land of the Kamilaroi</u> – Boonalla Aboriginal Area needs to be given a far higher profile, including a quality image. In the click through to the Map, the colourful promotional material should feature first, followed by the Map.</p> <p><u>Art Galleries</u> – Possibly broaden the name – and include the Plains of Plenty Gallery and the sculpture walk at Pensioners Hill. Replace the photos of the buildings (particularly for the Creative Arts Centre and the Isherwood Gallery) with inspirational ‘art’ images. Also include information in banner format on current exhibitions, competitions and upcoming workshops.</p> <p><u>Cycleways, Walks and Tours</u> – Consider splitting this section into Cycling & Mountain Biking and Walks and Tours. Under Cycling & Mountain biking, include the cycleways, longer road based scenic circuits around Gunnedah, the BMX track at Lake Keepit, and areas suitable for mountain bikes – Boonalla, Trinkey State Conservation Area and the MTB track at Lake Keepit when developed. Also include the Mountain Bike events at Lake Keepit.</p> <p>Under Walks, also include Boonalla. For tours, include scenic drives if they are developed.</p> <p><u>Playgrounds, Parks & Gardens</u> – consider including:</p> <ul style="list-style-type: none"> • Namoi River picnic area • Mullaley Park – featuring the playground equipment of ‘yesteryear’. <p><u>Markets – Food – Produce</u> – Include on this page, general information about the fertility of the plains and the crops produced. Showcase local brands (eg olives, pork, lively linseed etc). Include information on local ‘Provedores’ – businesses that sell local produce – eg the Doyles Meats for Gunnedah Pork, and Namoi River Meats for gourmet sausages</p> <p><u>Heritage & History</u> – replace the building image of the Rural Museum with a ‘motivational’ image from the collection – something that has a ‘wow’ factor.</p> <p><u>National Parks</u> – Include Boonalla Aboriginal Reserve and potentially Trinkey State Conservation Area if access and signage are improved – featuring the birds and the wildflowers.</p> <p>Include additional pages:</p> <ul style="list-style-type: none"> • <u>Lakes & Rivers</u> – which provides information on Lake Keepit – featuring the water sports, boat ramps, learn to sail programs etc, and the Namoi River – for canoeing, fishing and birdwatching – provide information on river access points in Gunnedah and Carroll. Also include Goran Lake – its size and ephemeral nature + places to view when it does have water. • <u>Take to the Skies</u> – Include the ‘Try Gliding’ opportunities at Lake Keepit and the ‘Learn to Fly’ offered by Gunnedah Aeroclub. The Parasailing School at Manilla could also be included.
Stay	<p>Consider including an additional heading – Travelling with Animals – within information provided on:</p> <ul style="list-style-type: none"> • Pet friendly accommodation properties and areas. • Travelling with horses and livestock – access to yards, stable, camping etc.
Events	<p>The Events & Conference Directory should be included in the E.brochures (accessed from the home page).</p> <p>The Directory also needed to be developed including:</p> <ul style="list-style-type: none"> • Providing the seating capacity at all venues. • Providing floor plans of the main venues – the Civic Precinct & the Services & Bowling Club. <p>Include additional pages relating to:</p> <ul style="list-style-type: none"> • Motor Sports Venues • Showground / horse sports venues

Accommodation properties should be encouraged to provide a link to the Visit Gunnedah website on their website and also to have a link to download the Visitor Guide and e.brochures. Consideration should also be given to producing information sheets / brochures on a range of topics and activities – for example:

- How to spot a koala
- Crops of the Shire / Liverpool Plains
- Cycling & Mountain biking – cycleways, scenic road routes, trails suitable for mountain bikes, BMX track.
- Fishing – Lake Keepit & Namoi River, access points, type of fish, licenses etc.
- Things to do with Children
- Travelling with Pets
- Picnic areas & playgrounds

Information sheets supplement the information available in Visitor Guide and are easy to up-date and cost effective to produce.

Social Media

Social media is increasingly being used as a marketing and communication tool and to ‘drive’ consumers to websites. At present, the Visit Gunnedah Website has links to Council’s Facebook and Twitter Pages. A lot of the information provided on these pages is not relevant to visitors. It could however be useful as a tool for communicating with local residents. This needs to be reviewed as part of marketing the Shire.

10.2 Signage

Signage plays a very significant role in how an area presents. It also forms part of the visitor information services infrastructure and is a significant marketing and promotional tool. To be effective, the signage needs to be comprehensive and integrated at all levels. Within the Shire, Council is responsible for signage on Council controlled roads and in the public domain, while Roads & Maritime Services (RMS) is responsible for signage on the Oxley and Kamilaroi Highways.

The re-routing of the Oxley Highway through Gunnedah provides the opportunity to review tourism signage in Gunnedah, including:

- Rationalising / updating signage in the entry corridors, and enhancing the visual impact of the brick / koala gateway entry signs, possibly through landscaping.
- Ensuring that the VIC is effectively signposted from all arrival points.
- Updating facility signs, with the preference being to use the internationally recognised icons rather than the text-based finger boards.
- Improving signage for caravans including directional signage to long rig parking spaces in the town centre and to the Gunnedah Tourist Park, particularly along Bloomfield Street, where there is potential for ‘conflict’ between caravans, trucks and school access.
- Improving directional signage to attractions, including providing signs the Namoi River within the town, Lake Keepit (from the roundabout at the intersection of the Kamilaroi and Oxley Highway to the east of Gunnedah) and the Boonalla Aboriginal Area (from the Oxley Highway and Bloomfield Streets and at the access point from Kelvin Road).

In addition, there is a need to:

- Replace damaged interpretative signs at Porcupine Hill and improve signage and provide track markers for the Bindea Track.
- Ensure that the town tour and Poets Drive markers are all in place and visible.
- Improve the entrance and interpretative signage at Pensioner’s Hill.
- Put in place koala habitat signage as part of further developing the koala product.
- Signpost river access points, in and around Gunnedah and at Carroll.
- Replace faded and damaged signs in the villages.

Consideration should also be given to installing the blue and white facility services signs on the approach to each of the villages.

11. DIRECTIONS FORWARD

11.1 Directions

Growing the visitor economy in Gunnedah Shire will require:

- Increasing the appeal of Gunnedah as a destination - progressively enhancing presentation and improving and expanding the range of tourism attractions, activities, experiences, infrastructure and services available within the Shire.
- Protecting and preserving the natural, historic, cultural and lifestyle assets of the Shire which form the basis for visitation (ie the appeal of the destination) and influence with how visitors react to and bond with the Shire.
- Market development – focusing on growing and strengthening primary (touring travellers, regional residents, business and sporting events) and secondary markets, developing special interest and activity based markets and encouraging highway and business and work related travellers to spend more money in the Shire. As part of this, there is a need to understand and meet the changing needs and expectations of the market place.
- Continuing to expand and enhance Gunnedah Shire’s online presence, capitalising on emerging opportunities for digital and web-based information delivery, communicating with the market place, and marketing and promotion.
- Strong leadership and direction from Gunnedah Shire Council through its Tourism Unit, coupled with building and maintaining effective strategic partnerships, with all levels of Government, other LGAs and tourism organisations within the surrounding region and along the Highway and touring route corridors, land management agencies, tourism and business operators and the Shire’s communities and community, sporting and land care organisations.
- Having the funds and resources available to build the product base, service visitors and effectively market and promote the Shire.

11.2 Core Product Themes

In developing products and experiences, Gunnedah needs to focus on:

- Gunnedah – the Koala Capital of the World
- Dorothea Mackellar – My Country – celebrated through poetry, landscapes, visual arts, produce
- Lakes and Rivers – Lake Keepit, Namoi River + Goran Lake
- Gunnedah Lifestyle – shopping, dining, playing, celebrating
- Events

11.3 Destination Development Priorities

The priority projects, activities and actions are:

Partnerships

- Continue to work cooperatively with the Kamilaroi Highway Promotions Group.
- Continue to build strategic relationships and partnerships with surrounding LGAs, Oxley Highway, Land Management Agencies, community and sporting organisations to develop product and experiences and build visitation.

Market Development

- Focus funds and resources on consolidating and building the Shire's primary target markets:
 - Touring markets - baby boomers and families
 - Regional resident (and their VFR) market
 - Events market – business (conferences and meetings) and sporting events.
- Capitalise on cost effective opportunities to build secondary markets:
 - Visiting friends and relatives
 - Rail tourism – targeting social groups
 - Specialist agricultural and technical tours
 - Car and Motorcycle Clubs
 - Special interest and activity based markets – cyclists, mountain bikers, water sports enthusiasts, anglers, gliders, history enthusiasts, motor sports enthusiasts, golfers, bird watchers, arts groups.
- Put in place strategies to encourage highway travellers, business and work-related travellers and people attending events, to spend more within the Shire.

Product Development

The priority product development projects that will increase visitation, encourage travellers to stay longer and/or enhance the visitor experience are:

- Developing and promoting the touring routes that feed into Gunnedah Shire – Kamilaroi Highway, Oxley Highway and Black Stump Way.
- Place-making in Gunnedah - continued improvement of the presentation of the Gunnedah, focusing on the gateway arrivals points and main routes through Gunnedah, the town centre, Namoi river corridor, Wolseley Park and the Lookouts – connecting activity nodes, improving signage, activating the shopping centre through public art and activities and developing a regional playground in Wolseley Park.
- Place-making in the Villages – focusing on increasing the visibility and street appeal of the village businesses, ongoing improvements to the Parks and Reserves, improving signage and access to information and capitalising more effectively on points of interest.
- Strengthening and diversifying the koala experience – providing a 'learning' experience (habitat, impact of climate change etc), a 'doing' experience (koala spotting) and a 'helping' experience – providing options (eg Project Koala) for visitors to assist.
- Developing the Namoi River corridor through Gunnedah as a visitor activity node – for walking, cycling, picnicking, canoeing, camping, koala interpretation and spotting, bird watching, fishing etc – with a strong physical and visual link to the VIC and the town centre.
- Work with the Dorothea Mackellar theme in the broadest context – to link landscapes, arts, history, events and food / local produce – and build a strong and diverse arts and cultural 'layer' that adds to the vibrancy of Gunnedah and the Shire.
- Developing Aboriginal Cultural Tourism.

Sitting below these projects are a second tier of projects that would diversify the product and experience base of the Shire and impact locally on visitation, including:

Shire-wide

- Developing a number of scenic routes and themed and activity trails – koala, bird, fishing, canoe, walking, cycling, mountain biking etc.

Gunnedah

- Continuing to develop Pensioners Hill as an attraction for Gunnedah - improving the presentation and visibility of the entrance, and enhancing the interpretation.
- Continuing to develop Porcupine Hill as a visitor activity node – improving the presentation; upgrading and signposting the walking tracks and providing track head signage; improving interpretation and 'story telling

with links to the key themes – koalas, Dorothea Mackellar country, Aboriginal heritage and culture; and upgrading Anzac Road for hill climb events across a range of sports.

- Upgrading the Bindea Track, positioning it as a signature walk for Gunnedah.
- Enhancing the Wallaby Trap area and improving linkages to the cycleway network and to Porcupine Hill.
- Explore options for mountain bike trails (eg Porcupine Hill for down-hill tracks).
- Developing the Wandobah Reserve area – for horse events, walking and cycling, koala interpretation and spotting etc.
- Completing the cycleway along the River corridor and the link to the Blackjack Creek / Wandobah Reserve corridor cycleway – linking koala habitat and koala spotting locations.
- Capitalising more effectively on the Rural Museum – increasing its visibility and ‘street’ appeal, identifying and capitalising on a ‘wow’ factor / point(s) of difference and improving its web presence.
- Further developing and/or promoting Gunnedah’s motorsports and horse sports venues and events.

Curlewis

- Development and promotion of the Curlewis Sport and Recreation Ground as a venue and staging area for a variety of events.
- Promotion of Curlewis Common as a bird ‘hotspot’.

Carroll

- Developing cotton gin tours.
- Improving and signposting access to the Namoi River.

Mullaley

- Developing and promoting Mullaley Park as a ‘Park of Yester-year’ – collecting and showcasing memorabilia that is disappearing from playgrounds and road corridors.
- Exploring options to capitalise on sunflowers through sculpture, public art and mass plantings.

Tambar Springs

- Further developing the Diprotodon ‘story’ and experience.
- Exploring the potential to develop a ‘springs’ experience.
- Exploring options to provide access to Tambar Mountain – walking trail and possibly a mountain bike trail.
- Promoting Trinkey SCA as a bird ‘hotspot’ and for a range of activities and event.
- Establishing a scenic drive through the Mt Nombi area.

Infrastructure, Facilities and Services

Infrastructure, facility and service priorities to support and sustain growth of the visitor economy include:

Accommodation

- Encourage and facilitate improvements to and expansion of the accommodation base in Gunnedah and the Villages.
- Provide an area for caravans and RV vehicles in Curlewis.
- Work with accommodation operators to encourage them to improve their websites and digital presence, introduce on-line bookings and more effectively market and promote Gunnedah Shire (the destination) on their websites.
- Encourage operators to continually improve customer service standards.

Access

- Support the sealing of Grain Valley Road and the Boggabri – Manilla Road as feeder roads into the Shire.
- Improve access to the Namoi River in Gunnedah, Carroll and at Red Bank, and signpost river access points.
- As part of the re-routing of the Oxley Highway, ensure good visual links with the new route and the Gunnedah Shopping centre – defining shopping centre access points through landscaping, public art and signage.
- Provide access to views – explore options for low key viewing areas on the Kamilaroi Highway at Black Mountain (Breeza), Oxley Highway north of Carroll, Tambar Springs and other strategic locations. Identify a viewing area for when Goran Lake has water.

Signage

- Landscape / enhance the presentation of the Gunnedah town gateway entry signs (brick signs with the koala icon) and revitalise / revamp the Dorothea Mackellar signs.
- As part of the development of the re-routing of the Oxley Highway, update signage (including signage to the VIC and Gunnedah Tourist Park), particularly along Bloomfield Street.
- Sign-post Boonalla Aboriginal Area from the Gunnedah town centre and from the Boggabri-Manilla Road, with the entrance signposted from Kelvin Road.
- Signpost Lake Keepit from the Kamilaroi Highway – Oxley Highway Roundabout to the east of Gunnedah. Explore options with Lake Keepit to erect bill board signage for the State Park on the Kamilaroi Highway approaches to Gunnedah and on the Oxley Highway
- Erect blue icon service signs on the approaches to the villages.
- Progressively replace fingerboard facility signs with international icons.
- Provide caravan and long-rig parking signs in Gunnedah, including directional signs and signs designating the parking spaces.
- Ensure that walking, cycling and other trails are effectively signposted – including where needed, track head information, interpretative information and track markers.

Venues

- Continue to improve the Town Hall, Smithurst Hall and the Civic Precinct.
- Continue to improve the Gunnedah Showground through the implementation of the Masterplan.
- Resolve tenure issues with the Curlewis Sport and Recreation Ground, continue to improve facilities, allow camping, and promote the venue for external hire.
- Explore options for the use of the Tambar Springs Sports Ground as a staging area for possible events in the Trinkey State Conservation Area.
- Support the development of a function centre at Lake Keepit, and continue to promote the Park as a venue for water sports, mountain biking and gliding.
- Continue to upgrade 'Mount Porcupine' and promote as a hill climb venue for a range of motor, bicycle and other events.
- Work with operators of the motor sports venues to promote their venues and attract external hirers.

Visitor Facilities

- Continue to develop Wolseley Park as a visitor precinct – including the development of the proposed regional playground.

Information & Promotional Collateral & Services

- Explore options for a purpose-built VIC and koala interpretation centre in the Wolseley Park Precinct – medium to long term.
- Erect information directories at strategic locations throughout the Shire – Lions Toilet Block in Wandobah Reserve, Red Bank Rest Area, Lake Keepit, Breeza, Mullaley and Tambar Springs, with these signposted using the blue and yellow 'i' sign.
- Continue to improve the Shire's web and digital presence including the on-going development and enhancement of the visitgunnedah website, effective use of social media, development of Apps and improving Gunnedah Shire content on third party websites and Apps.
- Expand the range of information and promotional material available to support marketing and promotion, including producing information on koalas and koala spotting.
- Encourage on-going training in web, digital and social network media for Gunnedah Tourism staff, attraction and event operators and event organisers.
- Continue to acquire quality images, video footage and display material on the Shire with this material updated regularly. Incorporate video clips into the VisitGunnedah website and other relevant sites.

Telecommunications

- Advocate for the continued improvement of internet and mobile network coverage.

Marketing & Promotion

- Continue to improve and expand Gunnedah's marketing and promotional collateral.
- Ensure that Gunnedah is represented at strategic caravan, camping and lifestyle shows.
- Continue to market and promote as part of the Kamilaroi Highway Promotions Group.
- Explore options for cooperative development and marketing of the Oxley Highway and Black Stump Way touring routes.
- Develop and implement an on-line communications and marketing strategy, harnessing social media and user generated content.



APPENDICES

APPENDIX 1 Visitation Statistics

Gunnedah Shire is part of the New England North West (NE-NW) Tourism Region. Travel within the Region tends to be concentrated north-south along the New England Highway in the east and Newell Highway in the west. The main east-west routes are the Kamilaroi, Oxley and Gwydir Highways.

Destination NSW publish profiles of visitation to the Region, with the most recent statistics being for the year ending December 2014. In 2014, the Region attracted 1.192 million domestic and 30,800 international visitors who stayed one or more nights in the Region. In addition, the Region attracted 1.617 million day trippers. Visitation figures for the period 2002 to 2014 are given in Table A1. Over the past decade visitation to and within the Region has been trending down (Figures A1 and A2).

In 2014, total visitors to the Region spent in the order of \$762 million. Domestic overnight visitors spent on average \$136 per night, down 0.2% on 2013. The average expenditure of domestic day visitors was \$155 per visit, up 32% on 2013, while the average expenditure by international overnight visitors was \$65 per night.

Tourism Research Australia (TRA) also publishes Regional Profiles, with the most recent profile for the NE-NW Region being for 2013-14. In addition to the data published by DNSW, TRA also publishes age and activity undertaken data.

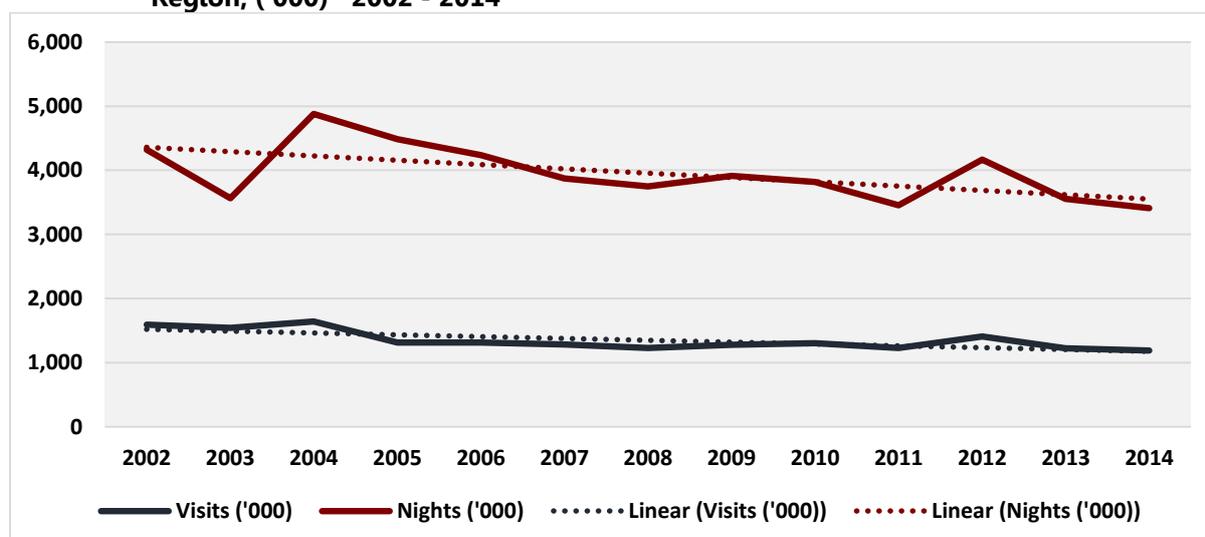
Unless stated otherwise, all years given in the following section, are for the YE December in the year specified.

Domestic Overnight Visitation

Visits & Nights

In 2014, the NE-NW Region attracted 1.192 million domestic visitors who spent 3.410 million nights in the Region. This represents 6.3% of total domestic overnight visits made in NSW and 5.3% of nights spent in NSW by domestic visitors. From 2002 to 2014, the number of overnight visitors and nights spent in the Region has fluctuated significantly, with the overall trend being down. From 2013 to 2014 the number of visitors to and nights spent in the Region declined by 2.9% and 4.0% respectively. In contrast the number of visitors to Regional NSW increased by 5.5% during this period. In 2014 the average length of stay was 2.86 nights, which was marginally lower than the State average of 3.33 nights and the average length of stay in Regional NSW of 3.36 nights.

Figure A1: Domestic Overnight Visits to and Nights Spent in the New England North West Region, ('000) 2002 - 2014



Source: Destination NSW – Travel to the New England North West Region – Time Series Data YE December 2002-2014

Table A1 Visitation to the new England North West Region, 2002 - 2014

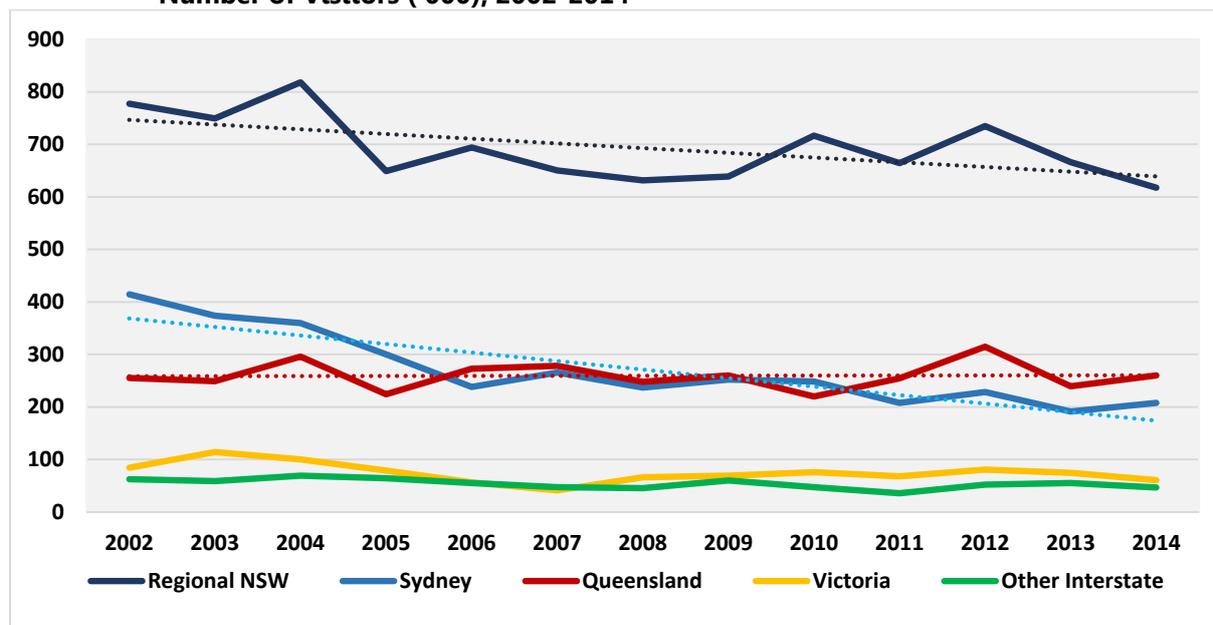
	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	% change 2002-14
Domestic Overnight Visitors														
Visits – Number ('000)	1,593	1,545	1,642	1,317	1,317	1,283	1,228	1,280	1,307	1,230	1,410	1,227	1,192	
% change pa		-3.0%	6.3%	-19.8%	0.0%	-2.6%	-4.3%	4.2%	2.1%	-5.9%	14.6%	-13.0%	-2.9%	-25.2%
Nights – Number ('000)	4,321	3,563	4,879	4,485	4,238	3,873	3,750	3,911	3,820	3,456	4,168	3,554	3,410	
% change pa		-17.5%	36.9%	-8.1%	-5.5%	-8.6%	-3.2%	4.3%	-2.3%	-9.5%	20.6%	-14.7%	-4.1%	-21.1%
Domestic Day Trippers														
Visits – Number ('000)	1,960	2,324	1,754	1,884	2,007	1,817	1,777	1,931	1,920	1,701	1,719	1,531	1,617	
% change pa		18.6%	-24.5%	7.4%	6.5%	-9.5%	-2.2%	8.7%	-0.6%	-11.4%	1.1%	-10.9%	5.6%	-17.5%
International Overnight Visitors#														
Visits – Number ('000)				52.9	53.1	58.6	40.3	50.4	38.3	36.0	34.0	35.6	30.8	
% change pa				0.4%	10.4%	-31.2%	25.1%	-24.0%	-6.0%	-5.6%	4.7%	-13.5%		
Nights – Number ('000)				458.2	552.7	523.3	428.9	520.8	605.3	567.1	775.6	991.1	751.5	
% change pa				20.6%	-5.3%	-18.0%	21.4%	16.2%	-6.3%	36.8%	27.8%	-24.2%		

Source: Destination NSW – Travel to the New England North West Region – Time Series Data 2002-2014 # Visitor Numbers are very small and may not be statistically valid.

Origin of Visitors

In 2014, 69.2% of visitors to the NE-NW Region were from NSW, with 51.8% being from Regional NSW and 17.4% from Sydney. 30.8% of visitors were from interstate, primarily from Queensland (21.8%) and Victoria (5.1%). Since 2002, Queensland is the only source market that has been trending up, with the other source markets either relatively static or trending down. Over the period 2002 to 2014, visitation from Regional NSW and Sydney has declined by 20.6% and 49.9% respectively. From 2013 to 2014 the number of visitor from Regional NSW declined by 7.3% while the number of visitors from Sydney and Queensland increased by 8.4% and 8.6% respectively.

Figure A2 Place of Residence of Domestic Overnight Visitors to the NE-NW Region. Number of Visitors ('000), 2002-2014



Source: Destination NSW – Travel to the New England North West Region – Time Series Data YE Mar 2001-YE Mar 2013

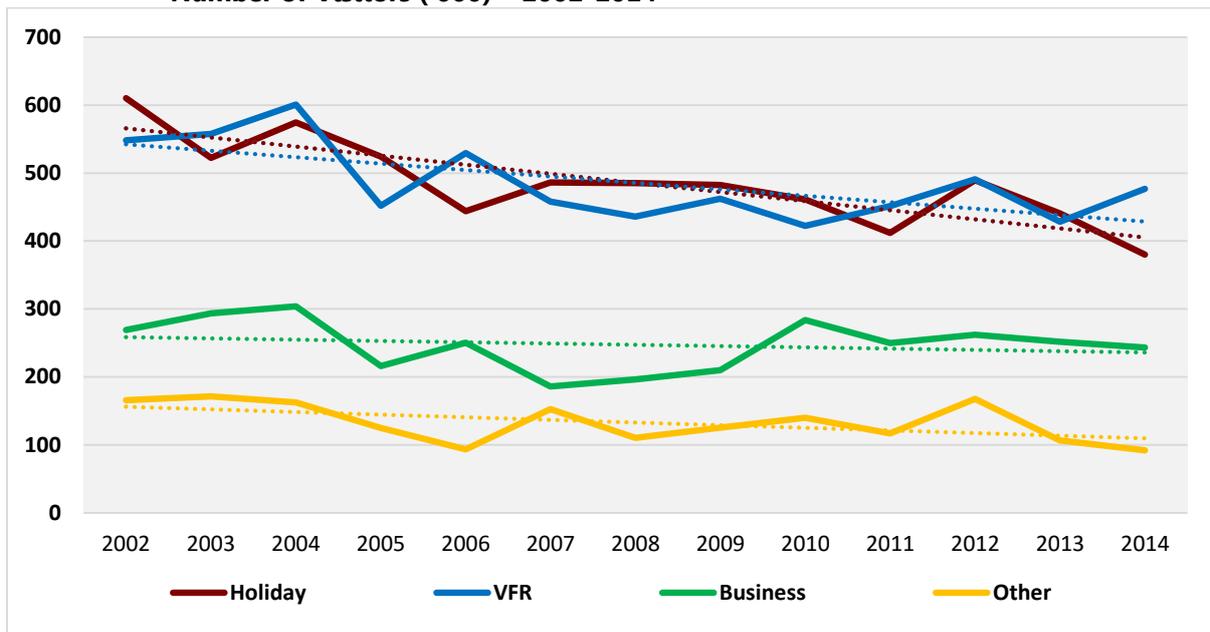
Purpose of Visit

In 2014, 40% of visitors to the Region were visiting friends and relatives (VFR), 31.9% were holiday and leisure travellers, 20.4% were business travellers and 7.1% were travelling for other reasons. From 2013 to 2014, the number of VFR visitors increased by 11.3%, while the number of holiday and leisure (-13.7%), business (-3.3%), and other travellers (-14%) decreased.

From 2002 to 2014 the number of nights spent by holiday and leisure travellers declined by 28.7%, with a 13.8% decline from 2013 to 2014. The number of nights spent by VFR travellers declined by 13.8% from 2002 to 2014, with the number of nights up by 8.7% from 2013 to 2014. From 2002 to 2014, the number of nights spent by business travellers increased by 3.7%, with the expansion of coal mining and infrastructure projects in the Region primarily responsible for this growth. From 2013 to 2014 the number of nights spent by business travellers in the Region increased by 3.8%.

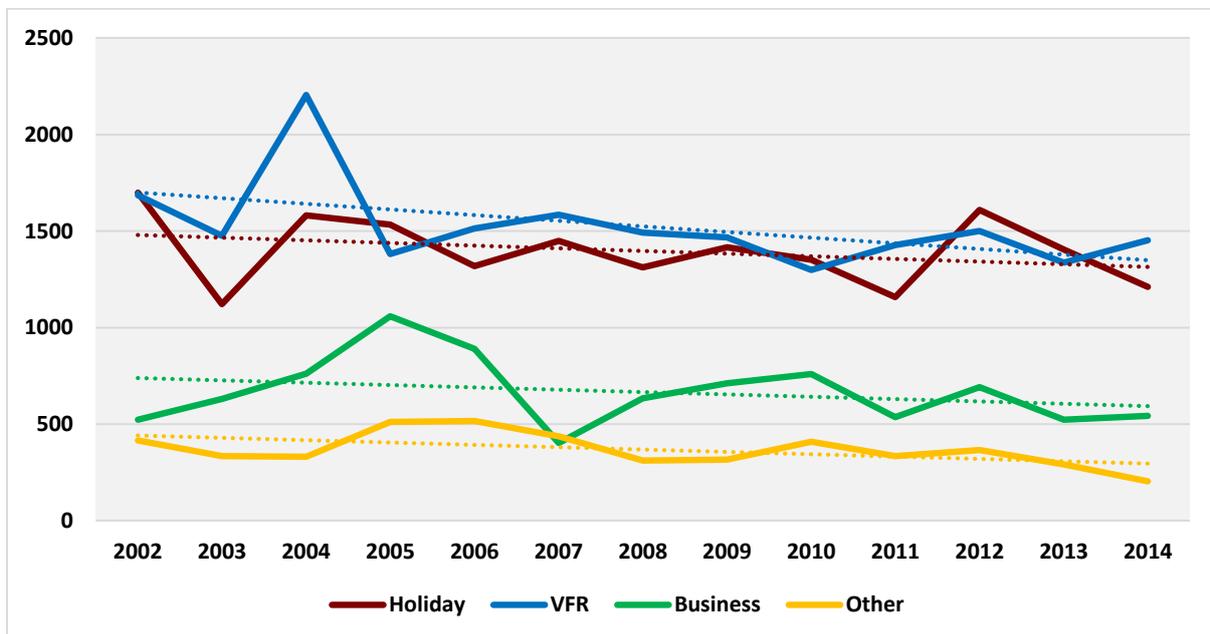
In 2014, holiday and leisure travellers had the longest length of stay within the Region, (3.18 nights) followed by the VFR market (3.05 nights). Business and other travellers spent on average 2.23 nights within the Region.

Figure A3 Domestic Overnight Visitors to the NE-NW Region– Purpose of Visit. Number of Visitors ('000) 2002-2014



Source: Destination NSW – Travel to the New England North West Region – Time Series Data YE Dec 2002-2014

Figure A4 Nights Spent by Domestic Visitors in the NE-NW Region – Purpose of Visit. Number of Nights ('000) 2002-2014

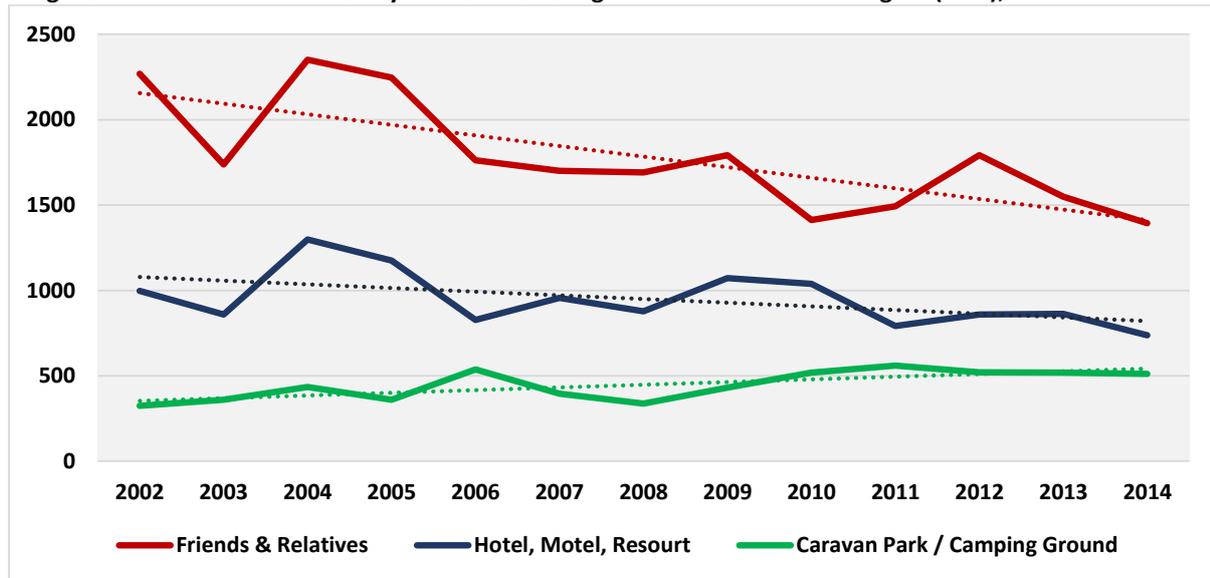


Source: Destination NSW – Travel to the New England North West Region – Time Series Data YE Dec 2002-2014

Accommodation Used

In 2014, 40.9% of visitor nights spent in the Region (1.395 million) were spent in the homes of friends and relatives. The next most popular form of accommodation was hotels and standard motels (21.6% of nights – 736,560 nights), followed by staying in commercial caravan parks and camping grounds (15% of nights – 511,500 nights). From 2002 to 2014 the number of nights spent with friends and relatives and in hotels and standard motels has been trending down, declining by 38.5% and 26.2% respectively over the period. In contrast the number of nights spent in caravan parks and commercial camping areas has increased by 57.8%. In the past 12 months (2013-14), there has been a decrease in nights spent in all types of accommodation.

Figure Accommodation used by Domestic Overnight Visitors. Number of Nights ('000), YE March 2002-2014



Source: Destination NSW – Travel to the New England North West Region – Time Series Data YE Mar 2001-YE Mar 2013

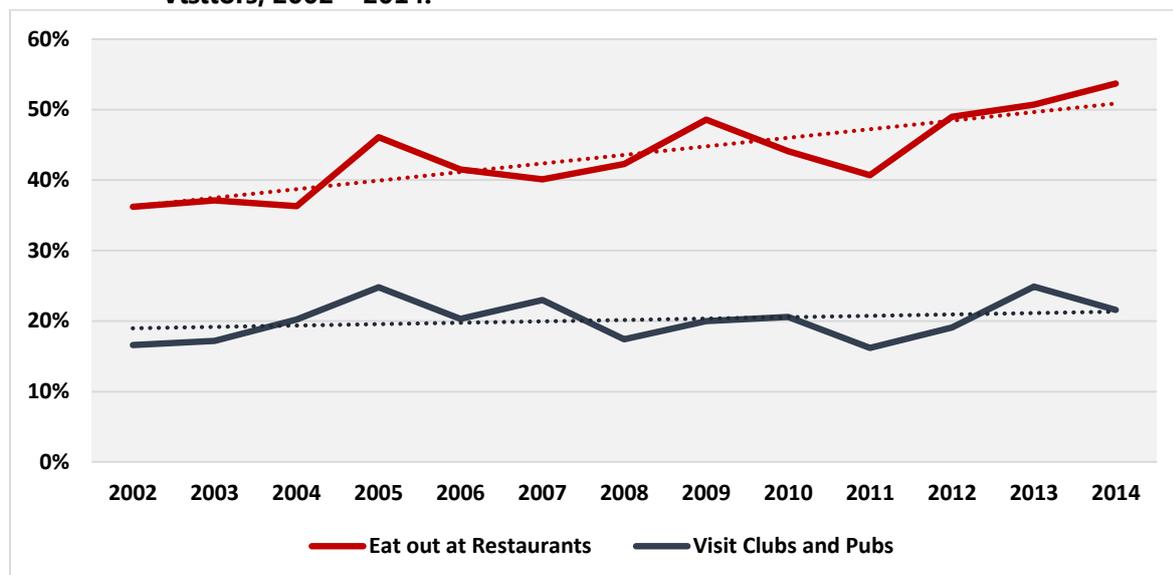
Travel to the Region

The majority of visitors (85.3% - 1.017 million) travel to the NE-NW Region by car. Around 8.3% of visitors arrive in the Region by air (98,936 visitors), with 1.9% arriving by rail (22,648 visitors).

Dining Out

Dining out is the most popular activity undertaken by visitors to the Region, with 53.7% of visitors dining out. 21.6% of visitors visited Clubs and Pubs during their stay in the area. Since 2002, there has been strong growth in the proportion of visitors dining out at restaurants, with 36.2% of visitors dining out in 2002, increasing to 53.7% in 2014. There has also been an increase in the propensity to visit Clubs and Pubs, from 16.6% of visitors in 2002 to 21.6% of visitors in 2014.

Figure A5 Propensity of Visitors to Dine out at Restaurants and to Visit Clubs and Pubs. % of Visitors, 2002 – 2014.



Source: Destination NSW – Travel to the New England North West Region – Time Series Data YE Dec 2002-2014

Activities Undertaken

According to the TRA Profile for the NE-NW Region (2013/14), the most popular activities undertaken by domestic overnight visitors to the Region were food and wine (63%), culture and heritage (24%) and nature-based (23.8%).

Age Structure

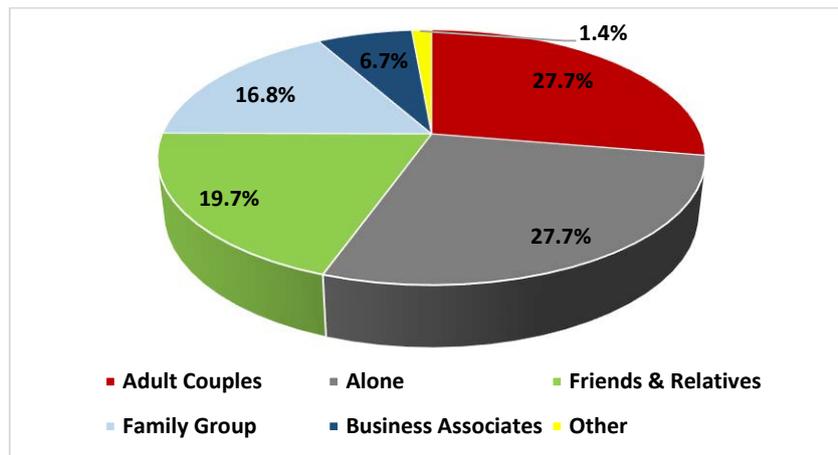
According to the TRA Profile for the NE-NW Region (2013/14), the majority (41.5%) of visitors were aged 55+ years. The age breakdown was:

15-24 years	7.3%
25-24 years	14.7%
35-44 years	19.1%
45-54 years	17.4%
55+ years	41.5%

Travel Groups

According to the NE-NW Regional Profile, 27.7% of visitors were travelling as adult couples, with 27.7% travelling alone, 19.7% with friends and relatives (no children), 16.8% as part of family groups and 6.7% with business associates.

Figure A6 Travel Groups - % of Visitors, 2014

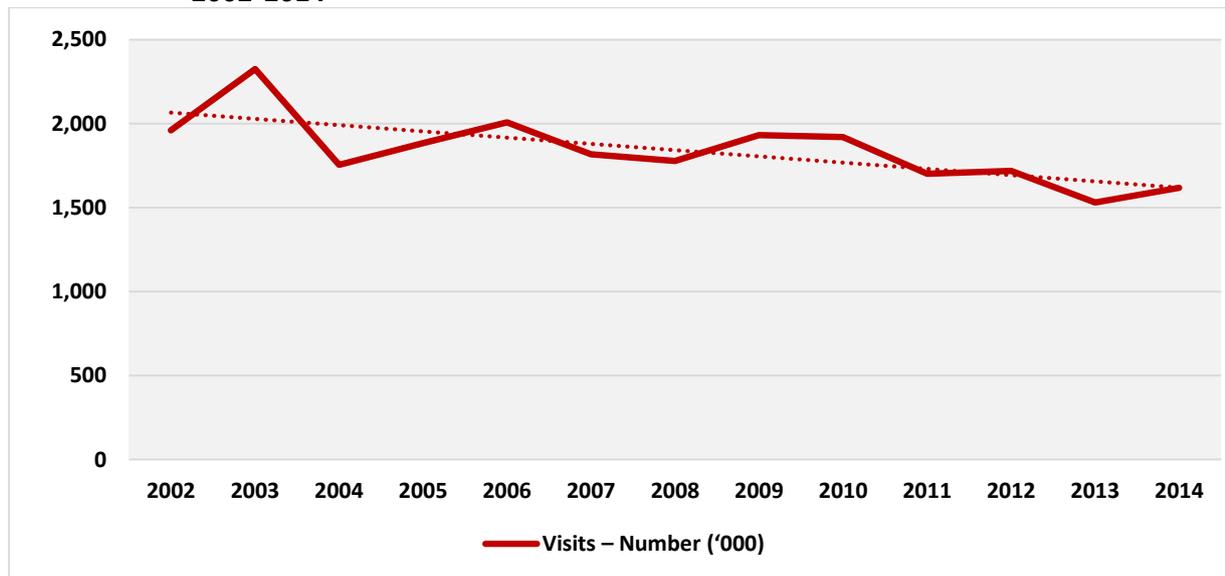


Source: Tourism Research Australia – Regional Profile, NE-NW Region NSW, YE December 2014

Daytrips by the Domestic Market

In 2014, the New England – North West Region attracted 1.617 million domestic day-trippers. The number of day trippers was up 5.6% on 2013. The majority of the day trips were generated internally within the Region.

Figure A7 Domestic Day Visits to the NE-NW Region. Number of Day Trippers ('000). 2002-2014



Source: Destination NSW – Travel to the New England North West Region – Time Series Data YE December 2014

42.4% of daytrips were made for holiday and leisure purposes (includes trips made for shopping and sporting activities). Business travel accounted for 16.7% of trips, with visiting friends and relatives accounting for 16.6% of trips.

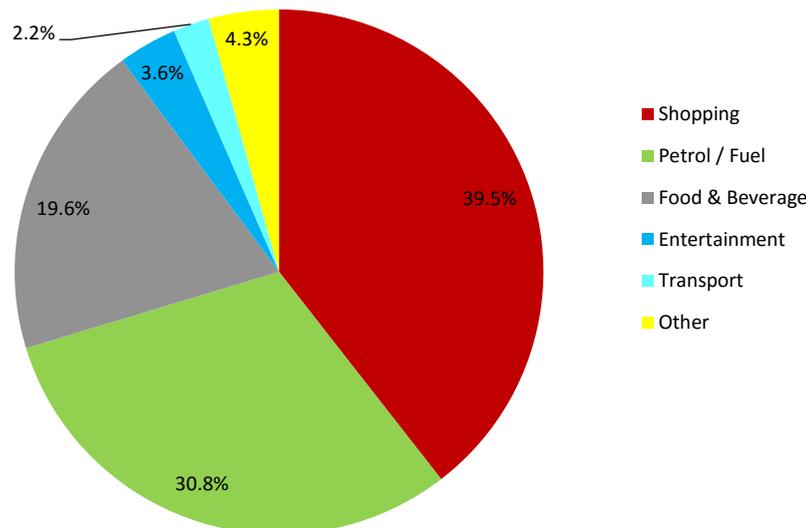
The main activities undertaken by day trippers were dining out (33.6%), visiting friends and relatives (24.8%), shopping for pleasure (44%). According to the TRA Profile (2013/14), 36.1% of day trippers undertook food and wine activities while in the Region.

In 2014 daytrip visitors spent on average \$155 per person per trip.

Date on expenditure breakdown is available for 2013, with the breakdown being:

- Shopping 39.5%
- Petrol / Fuel 30.8%
- Food & Beverage 19.6%
- Entertainment 3.6%
- Transport 2.2%
- Other 4.3%

Figure A8 Expenditure Breakdown – Domestic Day Trippers



Source: TRC New England North West – Regional Profile 2013

International Overnight Travel

In 2014 the NE-NW Region was visited by 30,800 international visitors, down 13.3% on visitation in 2013. International visitors spent 751,500 nights in the Region.

The majority of international visitors to the Region were from western countries with the United Kingdom (14.9%), New Zealand (14.2%) and the USA (13.4%) being the main source markets. Asia (all countries) accounted for 15.1% of visitors.

57.9% of international visitors travelled to the region for holiday/pleasure purposes, with 28.1% visiting friends and relatives and 9.5% coming into the area for business. From 2013 to 2014, the number of visitor coming into the region for holidays and to visit friends and relatives declined by 9.8% and 13.8% respectively, while the number of business travellers increased by 33.5%. International visitors were more likely to stay in rented accommodation (43.9% of nights) and with friends and relatives (26.2%).

It is estimated that international overnight visitors spent on average \$65 per person per night in the Region.

APPENDIX 2 Attraction & Activity Base – Gunnedah & Surrounding LGAs

The following Table provides a list of attractions and activities promoted by the LGAs surrounding Gunnedah Shire.

Attraction / Activity	Gunnedah	Tamworth	Narrabri	Liverpool Plains	Warrumbungle
Icons / high profile attractions	Koala Capital	Country Music Festival	Sawn Rocks Mt Kaputar NP	First & Second Fleet Memorial Gardens	Siding Springs Observatory Warrumbungle NP
Natural Attractions					
Lakes & Rivers	Lake Keepit Namoi River Goran Lake (ephemeral)	Chaffey Dam Split Rock Dam	Namoi River Yarrie Lake Barbers Lagoon Wee Waa Lagoon		Castlereagh River (dry bed – flows underground)
National Parks / Nature Reserves (with visitor facilities & walking &/or 4WD trails)	Boonalla Aboriginal Area	Warrabah National Park	Mt Kaputar National Park Deriah Aboriginal Area Pilliga National Parks		Warrumbungle NP Pilliga NPs Pilliga Forest Discovery Centre – Baradine Salt Caves & Fire Tower Coolah Tops National Park
State Forests	Trinkey SF Numerous small forests		Pilliga & surrounding State Forests		Pilliga & surrounding State Forests
State Parks / Water Storage Dams	Lake Keepit State Park	Chaffey Dam Split Rock Dam			
Waterfalls		Horton Falls, Barrabra	Dripping Rock		
Rock Formations			Sawn Rocks Gins Leap Dripping Rock		Warrumbungle National Park – Breadknife
Aboriginal Areas	Boonalla Aboriginal Area		Deriah Aboriginal Area		Dandry Gorge Sandstone Cave Willa Knobs
Wildlife Viewing and Bird Watching					
Wildlife Park	Waterways Wildlife Park (Future of the Park uncertain)	Marsupial Park & Bird Aviary			
Koalas	Around town – In the wild Waterways Wildlife Park		Pilliga Forest		Warrumbungle NP Pilliga Forest
Kangaroos	Lake Keepit State Park	Marsupial Park	Pilliga Forest		Warrumbungle NP Pilliga Forest
Bird Hot Spots	Namoi River corridor	Tamworth Bird Route Barraba Bird Routes	Bird Routes of the Pilliga Yarrie Lake Namoi River corridor	Quipolly Dam Bird Hide	Pilliga Forest
Other			Brumbies – Pilliga		Brumbies - Pilliga

Attraction / Activity	Gunnedah	Tamworth	Narrabri	Liverpool Plains	Warrumbungle
			Mt Kaputar National Park		
Heritage, Arts & Cultural Activities					
Aboriginal Attractions and Experiences	Cumbo Gunnerah Keeping Place Red Chief story & monuments Boonalla Aboriginal Area (Cave & Interpretation) Wallaby Trap area Pensioners Hill Totem Poles Porcupine Lookout + numerous sites – not promoted		Deriah Aboriginal Area Kamilaroi Touch Screen Numerous sites including former Pilliga Mission	Kamilaroi exhibit – VIC Limited exhibits – Rural Museum & Quirindi Museum	Coonabarabran– Keeping Place & ‘King’ Tommy of Bungabah Breastplate display. Dandry Gorge – Sculptures Pilliga Forest Discovery Centre Sandstone Cave NPWS Tag-along & Discovery Tours Baradine LALC Keeping Place King Togee’s Grave, Coolah
Museums, Historic Houses & Heritage Sites	Gunnedah Rural Museum Water Tower Museum Tambar Springs – Diprotodon Ben Hall Wall – Breeza Breaker Morant Drive War Memorial Sites – Breeza, Curlewis, Gunnedah, Tambar Springs Mining Statue - Gunnedah	Country Music Hall of Fame Walk A Country Mile Museum Nundle – Village, Woollen Mill, Gold Festival Manilla Heritage Museum	Narrabri Old Gaol Museum Namoi Echo Wee Waa Boggabri Local History Museum	Quirindi Rural Rural Heritage Village and Museum Quirindi Historical Cottage Museum Werris Creek Rail Journeys Museum and Monument First and Second Fleet Memorial Gardens Bob’s Shed	Diprotodon Exhibition – Coonabarabran VIC Dunedoo Local Museum
Galleries	Plains of Plenty Work of Art Community Gallery Creative Arts Gallery Jean Isherwood Gallery	Tamworth Regional Art Gallery Weswel Gallery Claycraft Gallery – Fred Hillier Ceramics, Moonbi Tamworth Regional Arts Centre Fuller Gallery - Barraba			Pilliga Pottery & Bush Café Warrumbungle Arts & Crafts Gallery Crystal Kingdom Pandora Gallery Coolah Dunedoo Arts & Crafts
Sculpture & Public Art Festivals, Markets	Pensioners Hill – 6 sculptures Dorothea Mackellar Statue	<u>Festivals</u> Frost over Barraba Colours in Autumn – Bendemeer	Cotton Fibre Expo	First and Second Fleet Gardens Currabubula Art Show Art & all That Jazz Festival & Workshop Wallaby Art Workshops	Dandry Gorge – Aboriginal sculptures Mendooran – Murals Art Unlimited Art Show Dunedoo Warrumbungle & Pilliga Forest Art Exhibition
Poetry	MAAS Walk & Statue – Dorothea McKellar Poets’ Drive Poetry Awards Poetry Toilet – Wolseley Park				Dunedoo Bush Poetry Festival

Attraction / Activity	Gunnedah	Tamworth	Narrabri	Liverpool Plains	Warrumbungle
Sight Seeing, Shopping, Family Activities					
Family Fun	Cinema Waterways Wildlife Park Lake Keepit – skate park, BMX, tennis, water park, playground	Cinema Adventure Playground	Cinema Fish Farm 10 pin bowling ATV & Dirt Bike Territory	Royal Theatre Movie Weekends Miniature Train Rides – Rural Museum	
Shopping & Markets	Gunnedah – Lifestyle & Boutiques Gunnedah Country Markets Sunday Sessions	Regional Shopping Centre Nundle – lifestyle shops Barraba Artisan & Farmers Markets (monthly) Peel Street Monthly Market	Narrabri District Centre – boutiques and cafes Boutiques – Wee Waa and Boggabri	Quirindi – small town centre Quota Saturday Markets	Coonabarabran Coolah Dunedoo Coonabarabran Town Life Monthly Markets Bunny Bazaar - Easter
Lookouts	Porcupine Hill Pensioners Hill	Moonbi Lookout Tamworth Oxley Lookout	Mt Kaputar (numerous)	Who'd A Thought It	Fire Tower Pilliga Forest Warrumbungle National Park Coolah Tops National Park
Scenic Drives	Diprotodon Drive Tambar Springs Poets Drive Gunnedah Town Tour		Numerous roads and circuits	Quirindi Country Drives	Numerous routes
Hot Artesian Springs			Pilliga Bore Baths		
Villages with Tourism Product	Tambar Springs – Diprotodon Curlewis – historic hotel	Nundle Manilla	Pilliga Wee Waa Boggabri		Coolah Mendooran Dunedoo Baradine
Food, Local Produce	Plains of Plenty Ian Doyle Meats – Local Pork Namoi River Meats – Sausages <u>Festivals</u> Porchetta Day <i>Locally produced products sold through local retailers (no farm gate sales)</i> - Leon's Pork - Olives – Namoi Gold, Isaac Grove, Delvan Grove - Lovely Linseed - Local Beef Carroll Cotton Gin – Tours by Appointment	Koolkuna Berries, Niangala Regional Farm Gate Trail Belwood Grove Olives Baiadia Poultry Factory Australian Bush Honey Coffee Beans Roasting House Tintinhull Turkeys Barraba Beef Company Bellata Gold Pasta Factory La Pruneau French Organic Market Arc-en-ceil Trout Farm Nundle <u>Festivals & Events</u> Taste Tamworth Ocktoberfest Barraba Farmers Market	<i>Locally produced products sold through local retailers (no farm gate sales)</i> - Cotton oils and products - Olives Narrabri Fish Farm <u>Festivals</u> Nosh on the Namoi		Warrumbungle Food Festival

Attraction / Activity	Gunnedah	Tamworth	Narrabri	Liverpool Plains	Warrumbungle
Wineries, Distilleries		Kitty Crawford Estate, Dungowan Lazy Poet Wine Company Maher's Fine Wine Melville Hill Estate Millie Park Vineyard Eagle Mount Wines, Manilla Banalasta Vineyard, Bendemeer Warrina Wines Tangaratta Vineyard <i>Most have limited opening hours or open by appointment only</i>	Seplin Estate Winery – Wee Waa		Coonandry Wines Wattagen Estate Winery Black Gate Distillery Mendooran
Astronomy			CSIRO Australia Telescope		Siding Springs Observatory Coona Astro Adventures Milroy Observatory World's Largest Virtual Solar System Model Star Fest Baradine Under the Stars Festival
Other			Coal Seam Gas Tours (Open Days) Coal Tours (Open Days) Cotton Gin Tours – by Appointment	Brands of the Liverpool Plains Sunflowers of the Liverpool Plains	Newcastle Hat Factory
Outdoor Activities / Sports / Soft Adventure					
Air Sports / Activities	Lake Keepit - gliding	Manilla – hang gliding, sky sailing, paragliding Freedom Micro flights – Tamworth Learn to Fly - Tamworth	Learn to Fly		
Swimming	Lake Keepit – beaches	Bendemeer – McDonald River	Yarrie Lake		
Boating / Water sports	Lake Keepit – sailing, waterskiing, boating	Split Rock Dam Chaffey Dam Manilla Ski Gardens	Yarrie Lake		
Kayaking / Canoeing	Lake Keepit Namoi River	Chaffey Dam Split Rock Dam	Yarrie Lake Narrabri Lake		
Fishing	Lake Keepit Namoi River	Chaffey Dam Split Rock Dam Arc-en-ceil Trout Farm	Yarrie Lake Namoi River		
Fossicking		Nundle - Gold			

Attraction / Activity	Gunnedah	Tamworth	Narrabri	Liverpool Plains	Warrumbungle
Agricultural Shows / Horse events	Gunnedah Show Curlewis Campdraft Horse events Horse Racing	AELEC – horse and bull events Nundle Campdraft Barraba Show Barraba Race Days Manilla Show	Narrabri Show Wee Waa Show Numerous Horse Events Horse Racing Wean Picnic Races	Quirindi Camp Draft Wallabadah Picnic Races 3 racing carnivals – Quirindi Numerous Polocrosse, Polo, Pony Club, Eventing, Show Jumping and Harness Club Events.	Coonabarabran Show Baradine Show Warrumbungle Eventing Trials Coolah Campdraft Coonabarabran Cup Horse Racing Polocross
Cycling & bike sports	Cycle ways	Cycle ways	Cycle ways	Quirindi Cycleway	Tour de Gorge Mountain Bike Event Tour de Warrumbungles Mountain Bike Event
Walking / Bushwalking	Bindea Track		Mt Kaputar National Park Yarrie Lake Pilliga Forest		Dandry Gorge Warrumbungle NP
Golf	Gunnedah Golf Course	Tamworth Golf Course Longyard Golf Course	Narrabri Golf Course		Coonabarabran Golf Course
Horse Riding		Leconfield Jackaroo & Jillaroo School			
Abseiling / Rock Climbing	Warrabah National Park		Mt Kaputar National Park		Warrumbungle NP
Motor Sports	Drag Strip Hill Climb Kart Complex Speedway Motorcycle Flat Track Week of Speed Swap Meets and Car Shows	Oakburn Park racing complex	Newtown Motor cycle complex – motorcross and speedway ATV & Dirt Bike Territory – motorcycle park Skid N Cruz Car Show	ABR Xtreme 4x4 Winch Challenge	Goona Tracks MotoX & Enduro Complex
4WD Tours / Trails	Trinkey State Conservation Area		Pilliga		Pilliga Forest NPWS Tag a Long Tours
Skate Boarding	Skate Park	Skate Parks		Quirindi Skate Park	
Festivals & Events					
	AgQuip Porchetta Dorothea Mackellar Poetry Awards National Tomato Day Week of Speed	Country Music Festival Hats off to Country Taste Tamworth AELEC Events Expos & Entertainment events Fiesta La Peel Multicultural Great Nundle Dog Race Nundle Go For Gold Easter Festival	Nosh on the Namoi Cotton Fibre Expo Cotton Industry Trade Show Boggabri Drivers Campfire Music events – Crossing Theatre	Who'd A Thought It Quirindi Country Music Festival Premier Farms Field Day Dog Trials Vintage machinery Swap Meets ABR Xtreme 4x4 Winch Challenge	Star Fest Hartwood Country Music Festival Crooked Mountain Concert Warrumbungle Food Festival International Festival Coolah Veterans Touch Football Carnival

APPENDIX 3 Attraction & Activity Base – Oxley Highway Corridor (2 tables)

Table A3.1 Port Macquarie to Coonabarabran

Attraction / Activity	Port Macquarie	Wauchope	Walcha	Tamworth	Gunnedah	Coonabarabran
Icons / high profile attractions	Koala Hospital Beaches	Timbertown Billabong Koala Park	Oxley Wild Rivers National Park	Country Music Festival	Koala Capital	Siding Springs Observatory Warrumbungle NP
Natural Attractions						
Beaches & surf breaks	Port Macquarie					
Lakes & Rivers	Hastings River	Wilson River	Headwaters of Hasting River (draining east) and Namoi River (Peel & McDonald Rivers) draining west.	Chaffey Dam Split Rock Dam	Lake Keepit Namoi River Goran Lake (ephemeral)	Castlereagh River (dry bed – flows underground)
National Parks / Nature Reserves (with visitor facilities & walking &/or 4WD trails)	Sea Acres Rainforest Centre – tree tops walk, interpretation, bush tucker tours Lake Innes Nature Reserve Numerous Coastal National Parks & Reserves	Willi Will National Park – Wilson River Reserve WHL Cottan Bimbang NP – Forest Drives Werrikimbe NP – 4WD trails, 5 visitor areas, Aboriginal & European heritage sites. WH listed. Bago Bluff	Oxley Wild Rivers – Apsley Falls, Tia Falls + 2 visitor areas. World Heritage. Green Gully Track Werrikimbe NP – 4WD trails, 5 visitor areas, Aboriginal & European heritage sites. WH listed. Mummel Gulf NP – 1 visitor area, forests drives, endangered animals. Cottan Bimbang NP – Forest Drives	Warrabah National Park	Boonalla Aboriginal Area	Warrumbungle NP Pilliga NPs Pilliga Forest Discovery Centre – Baradine Salt Caves & Fire Tower
State Forests		Kerewong Cairncross Mt Boss Bellangry			Trinkey SF Numerous small forests	Pilliga & surrounding State Forests
State Parks / Water Storage Dams				Chaffey Dam Split Rock Dam	Lake Keepit State Park	
Waterfalls		Waterfall Walks – Wilson River Reserve Willi Willi National Park	Apsley Falls OWR NP Tia Falls OWR NP			

Attraction / Activity	Port Macquarie	Wauchope	Walcha	Tamworth	Gunnedah	Coonabarabran
		Ellensborough Falls, Eland Rawson Falls – Boorganna Nature Reserve, Comboyne				
Aboriginal Areas					Boonalla Aboriginal Area	Dandry Gorge Sandstone Cave Willa Knobs
Bird / Wildlife Viewing (Localities that promote wildlife viewing as an attraction)						
Wildlife Park		Billabong Wildlife Park		Marsupial Park & Bird Aviary	Waterways Wildlife Park	
Whales / Dolphins / Marine Life	Camden Haven area Whale Watching Tours Mangrove & Wildlife Kayak Tours					
Koalas	In the wild Koala Hospital – tours	Billabong Wildlife Park – Breeding Centre	Mummel Gulf NP / Ngulin Nature Reserve		Around town – In the wild Waterways Wildlife Park	Warrumbungle NP Pilliga Forest
Kangaroos			Werrikimbe NP	Marsupial Park		Warrumbungle NP Pilliga Forest
Rock Wallabies			Oxley Wild Rivers NP Werrikimbe NP			
Platypus			Platypus Pool Werrikimbe			
Echidnas			Oxley Wild Rivers NP			
Wombats			Mummel Gulf NP / Ngulin Nature Reserve			
Bird Hot Spots		Kooloonbung NP – 165 species – coastal wetland	Mummel Gulf NP – Sooty, Powerful & Masked Owls	Tamworth Bird Route		Pilliga Forest – Baradine bird routes
Other			Mummel Gulf NP – Spotted Tail Quolls, Yellow Belly glider			
Heritage & Culture						
Aboriginal Attractions and Experiences	Bush Tucker Tours – Sea Acre Spirit of the Land – Sea Acres Three Brother Mountain		Aboriginal sites – Apsley Falls OWR NP & Werrikimbe NP		Cumbo Gunnerah Keeping Place Red Chief story & monuments Boonalla Aboriginal Area (Cave & Interpretation) Wallaby Trap Pensioners Hill Totem Poles Porcupine Hill	Coonabarabran VIC – Keeping Place Dandry Gorge – Sculptures Pilliga Forest Discovery Centre Sandstone Cave NPWS Tag-along & Discovery Tours

Attraction / Activity	Port Macquarie	Wauchope	Walcha	Tamworth	Gunnedah	Coonabarabran
Museums, Historic Houses & Heritage Sites	Historic Settlement – colonial history Lake Innes Ruins Tours Tacking Point Lighthouse The Convict Trail – Self Guided Tour Historical Society Museum Lake Innes Ruins Mid North Coast Maritime Museum Roto House	Timbertown Heritage Park	Pioneer Cottage Werrikimbe NP	Country Music Hall of Fame Walk A Country Mile Museum	Rural Museum Water Tower Museum War Memorials Breaker Morant Drive	Diprotodon Exhibition – Coonabarabran VIC
Galleries	Glass House Arts & Cultural Centre – exhibitions, tours, performing arts Arthouse Industries Little Frog Galleries Habitat Antiques & gallery Hastings Fine Art Rod Page Crystalline Pottery Long Point Vineyard Gallery			Tamworth Regional Art Gallery Weswel Gallery Claycraft Gallery – Fred Hillier Ceramics, Moonbi Tamworth Regional Arts Centre	Plains of Plenty Work of Art Community Gallery Creative Arts Gallery Jean Isherwood Gallery	Pilliga Pottery Crystal Kingdom
Sculpture & Public Art Festivals, Markets	Hello Koala 40+ public artworks The Artist Market in the Vines		Walcha – Sculpture Wall – 27 sculptures	<u>Festivals</u> Frost over Barraba Colours in Autumn – Bendemeer Currabubula Art Show	Pensioners Hill – 6 sculptures Miners Memorial Dorothea Mackellar Statue	Dandry Gorge – Aboriginal sculptures
Poetry	The Poets Walk – Kendall (Henry Kendell)				MAAS Walk & Statue – Dorothea McKellar Poets’ Drive	
Sight Seeing, Shopping & Family Activities						
Family Fun	Bago Vineyards Hedge Maze Indoor Go karts Hydro Golf & Putt Putt Mini Golf Jumbo’s Indoor Play Centre Centre of Gravity – Indoor Rock Climbing & Dark Zone Laser Skirmish			Cinema	Cinema Lake Keepit – skate park, BMX, tennis, water park, playground Waterways Wildlife Park	

Attraction / Activity	Port Macquarie	Wauchope	Walcha	Tamworth	Gunnedah	Coonabarabran
	Ten Pin Bowling Cinema PM Camel Rides North Coast Paintball PM Camel Safaris					
Shopping	Regional Shopping Centre			Regional Shopping Centre	District Centre – Lifestyle & Boutiques	
Lookouts			Apsley Falls OWR NP Tia Falls OWR NP Riverside OWR NP	Moonbi Lookout Tamworth Oxley Lookout	Porcupine Hill Pensioners Hill	Fire Tower Pilliga Forest Warrumbungle National Park
Villages (on the Oxley Highway)			Walcha Road Hotel – Woolbrook – hamlet – historic buildings, sandstone architecture, access to river – swimming hole & fishing	Bendemeer – historic hotel, riverside picnic areas & swimming holes	Carroll Mullaley	
Village (off Highway) – with tourism product				Nundle Manilla	Tambar Springs – Diprotodon	Baradine Dunedoo Coolah Mendooran
Astronomy	Observatory					Siding Springs Observatory Coona Astro Adventures Milroy Observatory World’s Largest Virtual Solar System Model
Other					Carroll Cotton Gin – Tours by Appointment	Newcastle Hat Factory
Food, Wine & Local Produce						
Food, Local Produce	Near River Organic Produce Burkhardt’s Organic Bakery Growers Market Gourmand Ingredients Organic Belly Port Fresh Seafoods The Other Chef Fine Foods <u>Tours</u>	Hastings Farmers Market	Walcha Dairy New England Cheese Mountain Fresh Berries Walcha Honey	Koolkuna Berries, Niangala Regional Farm Gate Trail Belwood Grove Olives Baiaadia Poultry Factory Australian Bush Honey Coffee Beans Roasting House Tintinhull Turkeys Barraba Beef Company Bellata Gold Pasta Factory	Plains of Plenty Ian Doyles Meats – Local Pork Namoi River Meats – Sausages <u>Festivals</u> Porchetta Day	Warrumbungle Food Festival Taste Buds on Dalgarno

Attraction / Activity	Port Macquarie	Wauchope	Walcha	Tamworth	Gunnedah	Coonabarabran
	Bush Tucker Tours – Sea Acres June Long WE Farm Gate Tour Ricardoes Tomatoes & Strawberries Farm Tours Wine Lovers Guide – Lets Go Travel <u>Festivals</u> Bago Vineyards Annual Grape Stomp Slice of Haven F&W SBS Feast tastings on Hastings Oysters in the Vines The Foreshore Market			La Pruneau French Organic Market Arc-en-ceil Trout Farm Nundle <u>Festivals</u> Taste Tamworth Ocktoberfest	Sunday Breakfast at Porcupine Hill <i>Locally produced products sold through local retailers (no farm gate sales)</i> - Leon’s Pork - Olives – Namoi Gold, Isaac Grove, Delvan Grove - Lovely Linseed - Local Beef	
Wineries, Distilleries	Bago Vineyards & Tour Cassegrain Winery Douglas Vale Historic Vineyard Innes Lake Vineyard Longpoint Vineyard Roses Vineyard The Little Brewing Company Black Duck Brewery & Tour			Kitty Crawford Estate, Dungowan Lazy Poet Wine Company Maher’s Fine Wine Melville Hill Estate Millie Park Vineyard Eagle Mount Wines, Manilla Banalasta Vineyard, Bendemeer Warrina Wines Tangaratta Vineyard <i>Most have limited opening hours or open by appointment only</i>		Coonandry Wines Wattagen Estate Winery
Activities						
Air Sports / Activities	HV Helicopter scenic flights Jetfighter joy flights Paragliding Sea Plane Sky Diving			Manilla – hang gliding, sky sailing, paragliding	Lake Keepit - gliding	

Attraction / Activity	Port Macquarie	Wauchope	Walcha	Tamworth	Gunnedah	Coonabarabran
Swimming	Beaches Hastings River Lake Cathie	Willi Willi National Park – Waterfall & Swimming Hole	McDonald & Peel Rivers, Escarpment National Parks – headwater streams	Bendemeer – McDonald River	Lake Keepit – beaches	
Boating / Water sports	Port Jet – jet boat rides Jet skiing Scuba Diving Snorkelling Stand-up Paddle boards Surf lessons (2 schools) Surfing Stoney Park Water Ski Park Boat & Kayak hire			Split Rock Dam Chaffey Dam Manilla Ski Gardens	Lake Keepit – sailing, waterskiing, boating	
Cruises	Cruise Adventures PM Venture Junk Cruises					
Kayaking / Canoeing	Mangrove & Wildlife Kayak Tours			Chaffey Dam Split Rock Dam	Lake Keepit Namoi River	
Fishing	Beach & River Charter Operators (5) Golden Lure Fame Fishing Tournament		Trout & Fresh Water Fishing	Chaffey Dam Split Rock Dam Arc-en-ceil Trout Farm	Lake Keepit Namoi River	
Fossicking			Tableland River Gullies	Nundle		
Agricultural Shows / Horse events	Camden Haven Comboyne				Gunnedah Show Curlewis Campdraft	Coonabarabran Show Baradine Show Warrumbungle Eventing Trials Coolah Campdraft Coonabarabran Cup Horse Racing Polocross
Cycling & bike sports	Grahame Sees Bike Hire					Tour de Gorge Mountain Bike Event Tour de Warrumbungles Mountain Bike Event
Walking / Bushwalking	Coastal Walk (9km)	Wilson River Reserve	Green Gully Track NP Walking trails		Bindea Track	Dandry Gorge Warrumbungle NP
Golf	Emerald Downs Golf Course Kew Country Club PM Golf Course			Tamworth Golf Course Longyard Golf Course	Gunnedah Golf Course	Coonabarabran Golf Course

Attraction / Activity	Port Macquarie	Wauchope	Walcha	Tamworth	Gunnedah	Coonabarabran
	PM Golf Driving Range Seaside Classic Week of Golf					
Horse Riding	Bellrowan Valley HR PM Horse Riding Centre			Leconfield Jackaroo & Jillaroo School		
Abseiling / Rock Climbing	Indoor			Warrabah National Park		Warrumbungle NP
Motor Sports			Geraldine 4WD Park	Oakburn Park racing complex	Drag Strip Hill Climb Kart Complex Speedway Motorcycle Flat Track Various car shows and swap meets Week of Speed	Goona Tracks MotoX & Enduro Complex
4WD Tours / Trails	Bago 4WD Adventures		Werrikimbe National Park & other National Parks Geraldine 4WD Park		Trinkey State Conservation Area	Pilliga Forest NPWS Tag a Long Tours
Skate Boarding	Skate Park		Skate Parks	Skate Parks	Skate Park	

Table A3.2 Gilgandra to Nevertire

	Gilgandra	Collie	Warren	Nevertire
Icons	Home of the Coo-ee Town of Windmills		Macquarie Marshes	
Natural Attractions	Warrumbungle National Park Flora Reserve		Macquarie Marshes Macquarie River / Warren Weir 1000 year old red gum	
Bird / Wildlife Viewing	Warrumbungle National Park		Macquarie Marshes Tiger Bay Wetlands	
Heritage & Culture	Coo-ee Heritage Centre (Aboriginal, Pioneer & WW1 Memorabilia Rural Museum The Hitchen House – War memorabilia Berida Woolshed Tours Art Gallery	Collie Hotel	Warren Heritage Walking Tours Aboriginal Art	Nevertire Hotel

	Gilgandra	Collie	Warren	Nevertire
Sight Seeing, Shopping, Family Fun	Gilgandra Observatory Gilgandra Shopping Centre Windmill Walk Windmill Crafts Shelly Mae Antiques & Collectables Orana Cactus Garden Grandma's Dolls		Warren Shopping Centre	
Food, Wine, Local Produce	Gilgandra CWA Markets		Tillies Wines	
Activities	Skate Park Horse Sports Speedway		Golf Fishing Bird Watching Cycling – Cycle ways Shooting / Hunting Horse Sports	
Events	Gilgandra Cup Rodeo & Tractor Pull Coo-ee Festival Gilgandra Show Champion Dog Show		Warren Show Warren Campdraft Race Meetings (4) Polocross Carnival Macquarie River Fishing Classic	Nevertire Family Muster

