

upper hunter country

Destination Management Plan

October 2013





Cover photograph: Hay on the Golden Highway
This page - top: James Estate lookout; bottom: Kangaroo at Two Rivers Wines

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Executive Summary

The Upper Hunter is a sub-region of the Hunter region of NSW and is located half way between Newcastle and Tamworth.

It is on the main inland route, the New England Highway, between destinations Sydney/Newcastle to Brisbane/Gold Coast passing through the NSW regions' New England/North West. The sub-region connects to Central West NSW through the Golden Highway and south to the National Capital through inland tourist routes.

The Upper Hunter has a number of Visitor Economy Strengths including Location, Environment, Rural Experience, and the Equine and Energy industries. These visitor strengths have produced Key Products and Experiences unique to the area's Key Markets.

The Upper Hunter sub-region is interconnected to the Hunter Region and the growth of the respective sub-region's visitor economies will rely on collaboration. The broader Hunter Destination Management Plan (HDMP), produced by Visitor Economy Hunter, profiles the Upper Hunter as a Destination and highlights the interconnectedness between sub-regions.

This Upper Hunter Country DMP, while focusing on the strategic direction for the sub-region and actions for local stakeholders, identifies opportunities for partnerships across regions and between agencies and stakeholders.

The Vision for Upper Hunter Country is to

Develop a sustainable and diverse Visitor Economy with investment and employment opportunities specific to the area's Visitor Economy Strengths.

This will be achieved through the following strategic objectives:

- Increase visitor numbers and dispersal in the region
- Extend visitors length of stay in the Upper Hunter
- Develop new products and experiences and support existing
- Grow the niche markets:
 - Short Break
 - Nature and Adventure
 - Equine
 - Arts and Culture (incl. film and music)
 - Food and Wine
 - Education and Travel for a Purpose (Business)

A total of 21 actions are identified within this DMP. The delivery of these actions over the next 5 years is a priority for the Upper Hunter and will only be achieved through collaboration between local Councils, National Parks and Wildlife Service, visitor economy operators and stakeholders, State Government and Visitor Economy Hunter.

Destination Analysis

The Upper Hunter sub-region conventionally has relied on the organic growth of the Visitor Economy. However, in recent years Councils (Muswellbrook Shire and Upper Hunter Shire), the Local Tourists Association (Upper Hunter Country Tourism) and regional government and industry organisations have become increasingly strategic in their focus and planning for the sub-region.

Alongside this strategic planning has been the development of a number of industry led products and experiences responding to markets, for example in Wine and Food, Arts and Culture, and Accommodation and Hospitality. This is combined with individual stakeholders creating Destinations in their own right. The Upper Hunter Destination Analysis identifies and groups the Key Products and Experiences and Key Markets.

Key Products and Experiences

- Nature Tourism and Outdoor Recreation
- Horse Country
- Festivals and Events
- Wine and Food
- Drives, Walks, and Trails
- Arts, Culture and Heritage
- Inland Adventure Trail

Key Markets

- Short Break
- Nature and Adventure
- Equine
- Arts and Culture
- Food and Wine
- Education
- Business

Revealed by the analysis of these Key Products and Experiences, and Key Markets are the identifiable Visitor Economy strengths of the Upper Hunter:

Location

The Upper Hunter's location and distance from Sydney and Brisbane and the convergence of transport options make the sub-region an ideal stopover point for many destinations.

Environment

The sub-region possesses one of the most diverse environments in Australia with a variety of climatic zones from Western Grasslands to Subtropical through to Alpine across national parks and wilderness.

Rural experience

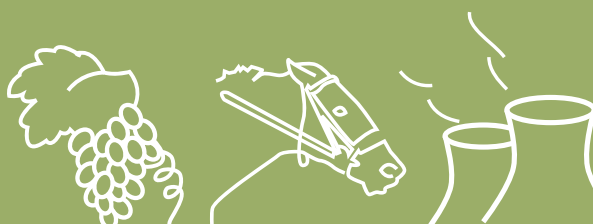
It is one of the closest, complete 'Rural' environments to Sydney, and provides an experience supported by a calendar of events and festivals.

Equine

The sub-region is home to the largest concentration of thoroughbred breeding businesses in Australia and is internationally recognised together with a vast representation of all horse breeds and equine activities.

Energy

The largeness of the sub-region's energy industry, which has a long history of energy extraction and generation together with recent expansion, provides strong business visitation including international visitors.



Destination Direction

By understanding and appreciating the strengths of the Upper Hunter Visitor Economy, an opportunity is created for stakeholders to focus together on developing and strengthening Key Products and Experiences and targeting Key Markets to grow the Visitor Economy.

The vision identified for the Upper Hunter Visitor economy is to:

Develop a sustainable and diverse Visitor Economy with investment and employment opportunities specific to the area's Visitor Economy Strengths.

The Mission identified is that:

Stakeholders will work together in developing and promoting the Upper Hunter Visitor Economy products and experiences.

From the Vision and Mission Statements, four (4) Goals are identified for the Upper Hunter Visitor Economy:

1. Increase visitor numbers and dispersal in the region
2. Extend visitors length of stay in the Upper Hunter
3. Develop new products and experiences and support existing
4. Grow the niche markets

From these 4 Goals, Strategic Priorities and Opportunities are identified and a succeeding twenty one (21) separate measurable Actions for stakeholders.

Destination Requirements

In order to grow the Upper Hunter Visitor Economy's stakeholders need most importantly to work together. By focusing resources, together stakeholders will be able to leverage greater returns on investment of resources and grow the Upper Hunter Visitor Economy.

1. Destination Analysis

The Upper Hunter includes the towns of Aberdeen, Denman, Merriwa, Murrurundi, Muswellbrook and Scone and the villages of Cassilis, and Sandy Hollow as well as a number of rural communities.

Murrurundi delineates the Upper Hunter Country area to the north; the Barrington Tops to the east, Goulburn River National Park and Cassilis to the west, and Wollemi National Park and Jerry's Plains to the south. The area covered is 11,502km² with an estimated population of 30,885 (ABS 2011).



1.1. Key Destination Footprint

Upper Hunter Country consists of Muswellbrook Shire and Upper Hunter Shire Local Government Areas.

- Muswellbrook Shire covers 3,402 square kilometres, which 1,455km (43%) is National Parks, and the estimated population is 16,694.
- Upper Hunter Shire covers 8,100 square kilometres and the estimated population is 14,206.

The Upper Hunter destination footprint combines the two LGAs and makes up the membership of Upper Hunter Country Tourism Association represented by Map 1.

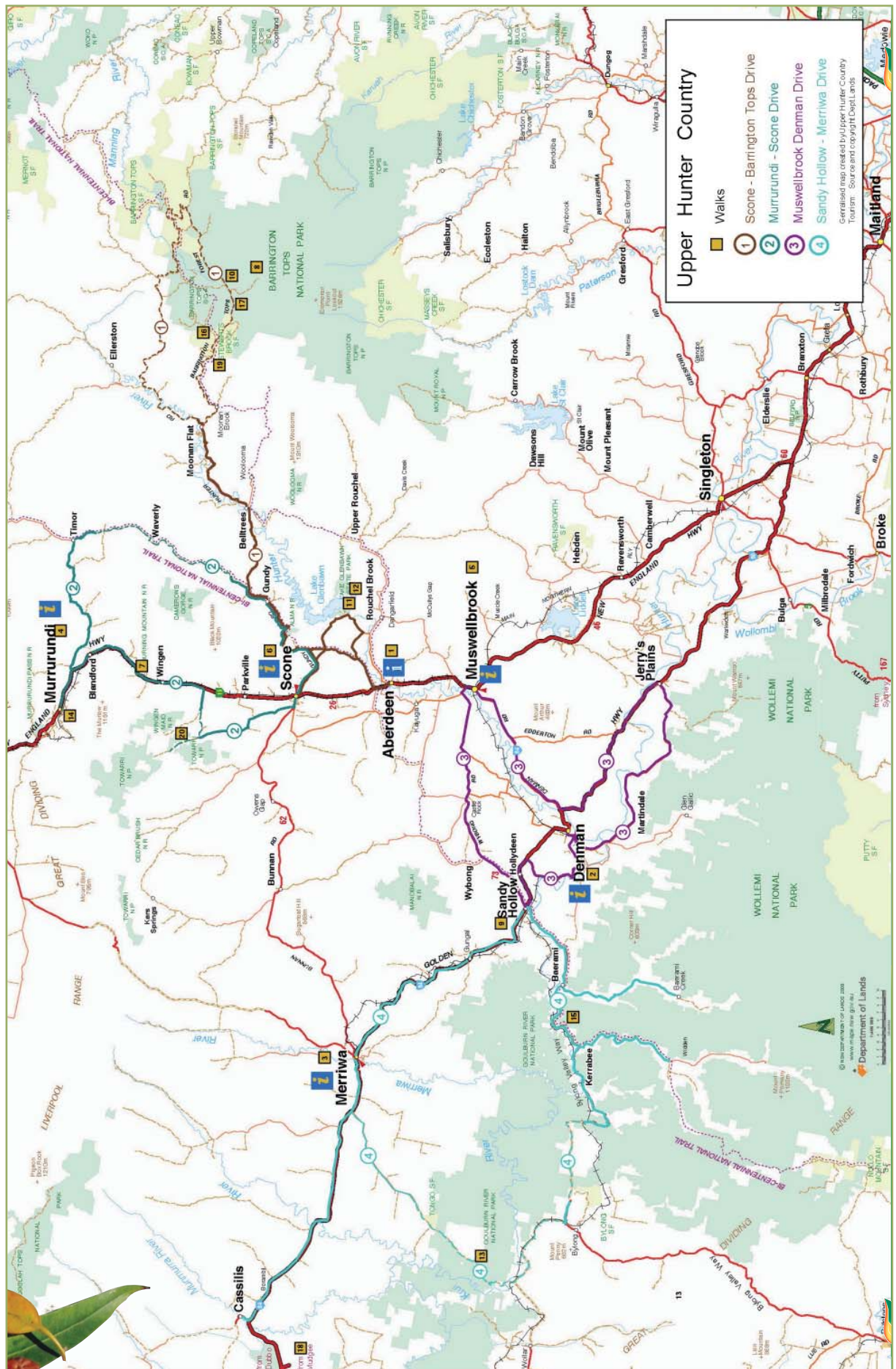
1.2. Key Stakeholders

In the development of the Destination Management Plan a wide-ranging number of our stakeholders were consulted including: arts organisations, chambers of commerce, events and festivals organisers, hospitality and accommodation providers, industry associations, progress associations, state government agencies, visitor attractions and visitor centres.

1.3. Key Data and Documents

Below the relevant Upper Hunter, Key Data and Documents have been identified from respective stakeholders:

Organisation	Strategies/Plans/Research
Destination NSW	State Tourism Warehouse Data Lists
Destination NSW	Visitor Economy Industry Action Plan
Muswellbrook Shire Council	Ecotourism Feasibility Study
Muswellbrook Shire Council	2012 Community Engagement Study
Muswellbrook Shire Council	2011 – 2021 Community Strategic Plan
Muswellbrook Shire Council	Integrated Planning Documents (Delivery and Operational Plans)
Muswellbrook Shire Council	Land Use Development Strategy
Muswellbrook Shire Council	Asset Management, Social, Walk and Cycle and Facility Plans
NSW Government	Hunter Regional Action Plan
Visitor Economy Hunter	Hunter Visitor Economy Destination Management Plan
Upper Hunter Country Tourism	Two Year Business Plan (2011 – 2013)
Upper Hunter Shire	Community Strategic Plan
Upper Hunter Shire	Economic Development and Tourism Strategic Plan 2010



Map 1: Upper Hunter Country

1.4. Key Products and Experiences

Below the Key Products and Experiences of the Upper Hunter have been identified and grouped under seven (7) headings including: Nature Tourism and Outdoor Recreation; Horse Country; Festivals and Events; Wine and Food; Drives, Walks, and Trails; Arts, Culture and Heritage; and Inland Adventure Trail.

Nature Tourism and Outdoor Recreation

- One of the most diverse environments in Australia with a variety of climatic zones from Western Grasslands to Subtropical through to Alpine
- 5 National Parks: Goulburn River, Scone Mountain, Towarri, and World Heritage Barrington Tops and Wollemi National Park
- Lake Glenbawn State Park and Lake Liddell Reserve
- Hunter River and Goulburn River
- Nature Reserves: Murrurundi Nature Pass, Burning Mountain, Cameron's Gorge, Woolloma, Manobalai, Cedar Brush, and Wingen Maid
- Giant's Leap providing access via Crown Land to Manobalai Reserve
- The Devil Ark (Tasmanian Devil) project in the Barrington Tops
- The Bylong Valley Way

Consumer appeal

The area provides unique opportunities for Nature-based experiences.

These experiences include camping, fishing, water sports, horse riding, driving, cycling and walking.

Gaps in the market

The Upper Hunter needs to be promoted and established further as the gateway to Nature Tourism and Outdoor Recreation. For e.g. Under promoted is the western access to the Barrington Tops, northern access to Wollemi, and the amenity of the Lakes.

Access for both pedestrians and vehicles is a blockage to some of the nature tourism and outdoor recreation assets.

An improved link road through the Barrington Tops is a necessary piece of infrastructure.

The development of a Devil Ark's interpretive centre would be a significant destination for visitors.



Fishing along the Hunter River near Jerrys Plains

Horse Country

- Upper Hunter Country supports the largest concentration of thoroughbred breeding enterprises in Australia
- Scone is the Horse Capital of Australia and Muswellbrook Shire is home to the largest critical mass of thoroughbred rearing in Australia, located in an arc from Widden Valley through Sandy Hollow to Jerry's Plains.
- The Upper Hunter Horse Studs have a calendar of events that attract visitors including Stallion Parades and Yearling Sales.
- Scone Race Club has 16 TAB meetings a year. The Scone Cup Carnival includes a Saturday standalone metropolitan race day, which is unique to country racing.
- Muswellbrook Race Club has 18 TAB meetings a year and hosts the Muswellbrook Carnival of Cups. Including the Muswellbrook Gold Cup on Melbourne Cup Day, this is a gazetted Local Government Area Public Holiday.
- Upper Hunter Country has the Scone and Upper Hunter Horse Festival, Camp drafting and Rodeos, Horse Field Days, and Charity Rides.
- The Australian Bicentennial National Trail traverses Upper Hunter Country through National Parks on which Horse Riding is permissible.
- The Upper Hunter can offer a complete rural experience within a day trip from Sydney. A number of large rural properties are open to the public at different times of the year.



A future champion - foal at local horse stud

Consumer appeal

It is a destination for equine lovers or visitors wanting to experience horse country.

Available are Thoroughbred Horse Studs self-drives and stud tours.

Gaps in the market

There are limited opportunities for the visitor to experience horse riding and limited facilities to view horses up close.

The Thoroughbred Studs face challenges in being a destination for visitors that is compatible with their business models, in particular risk associated with transmission of disease.

The development of easy access Stud Tours has significant consumer appeal.

The development of an Equine interpretive Centre would facilitate greater access for consumers to the Horse Industry. It could include the Australian Stock Horse Association as well as the Thoroughbred Industry.

Festivals and Events

Upper Hunter Country has a number of Festival and Events that draw visitors to the area. They reflect and celebrate the changes in season and the regions rich cultural heritage.

- April - Blue Heeler Film Festival
- March - Scone Professional Bull Ride
- April - Sandy Hollow Charity Horse Ride
- May - Scone and Upper Hunter Horse Festival (16 Day Program)
- May - King of the Ranges Stockman's Challenge and Bush Festival
- May - Upper Hunter Wine and Food Affair
- June - Merriwa's Festival of the Fleeces
- July - Aberdeen Highland Games
- August - St Heliers Heavy Horse Field Days
- August to December - Muswellbrook Carnivale in Spring
- September - Denman Charity Horse Ride
- September - Aberdeen Big Boys Toys
- October Long Weekend - Muswellbrook Creative Arts Fair
- October - Muswellbrook Charity Rodeo and Camp Draft
- November - The Global Village Motorfest and Fair
- Upper Hunter Country Tourism maintains a free listing of annual festivals and events across both Upper Hunter Shire and Muswellbrook Shire Local Government Areas via their website.

Consumer appeal

The festival and events while varied highlights the assets of Upper Hunter Country and is critical in attracting visitors.

The Scone and Upper Horse Festival attracted over 10,000 people in 2012.

The Upper Hunter Wine and Food Affair attracts over 5,000 people annually.

Merriwa Festival of the Fleeces and Aberdeen Highland Games attract over 3,000 people each annually.

Murrurundi King of the Range attracts over 3,000 people annually.

Beyond the major Festivals and Events, there are recreational activities that attract visitors. For e.g. the NSW Veterans Golf Association week of golf at Muswellbrook Golf Club. Other opportunities exist to attract significant sporting events on a sub-regional basis.

Gaps in the market

A concentrated positioning and marketing strategy in the Lower Hunter and NSW would support the Festival and Events Calendar.

These events require a joint marketing campaign to leverage marketing dollars for each event.

The Upper Hunter Visitor Economy needs to ensure Upper Hunter products and experiences are communicated to the consumer. An action could be the development of Upper Hunter Events Desk.

Wine and Food

- Grape growing in the Upper Hunter dates back to 1860. The region has international acclaim and a consumer expectation of quality.
- The larger Upper Hunter vineyards supply the grapes to the Lower Hunter.
- Denman is the Upper Hunter destination for Wine and Food Tourism.
- There is significant planned investment at the existing Arrowfield vineyard with redevelopment and Tourist Accommodation.
- At Denman is the renowned Two Rivers' vineyard and Cellar Door.
- On the beautiful Bylong Valley Way is James Estate winery with walking tracks and mountain bike trails.
- Along the Bylong Valley Way to Muswellbrook, there is Olive Groves to Cheese making.
- Pukara Estate located between Muswellbrook and Denman is Australia's best Olive Estate.
- Hunter Belle Cheese located at Muswellbrook produce handmade gourmet cheese.

Consumer appeal

Quality restaurants and pubs throughout the Upper Hunter support these prestigious brands.

The Wine and Food providers attract visitors as a destination and support the visitor economy with the provision of hospitality.

Gaps in the market

The Wine and Food attractions of the Upper Hunter are often dwarfed by Lower Hunter Wine Country marketing.

The strength of the Upper Hunter is as a more relaxed and rural destination and this needs to be promoted further.

The renewal of the Wine and Food trail across the Upper Hunter would benefit operators.



Olive Oils tasting table at Pukara Estate near Muswellbrook

Drives, Walks, and Trails

- Upper Country Tourism identify 4 best self-drives:
 - Aberdeen/Scone to the Barrington
 - Murrurundi to Burning Mountain
 - Muswellbrook to Denman
 - Sandy Hollow to Wollemi
- Within these drives, many inter-connecting routes include world famous thoroughbred studs and national parks.
- Upper Hunter Country Tourism identifies 21 graded walks including 6 town and heritage walks.
- The other 15 walks are inter-connected with the national parks and nature reserves.
- James Estate winery has walks and 12km of mountain bike trails to suit a wide range of skill levels
- The Australian Bicentennial National Trail across Upper Hunter Country is a horse riding trail.



Haydon Hall art gallery and cafe at Murrurundi

Consumer appeal

The Drives, Walks, and Trails provide the access for the visitors to nature based experiences.

Gaps in the market

Upper Hunter Country has even greater capacity to expand the offering of drives, walks and trails due to the intensity of Thoroughbred Studs and the significant Natural Assets.

Signage needs to be renewed and improved across both Local Government Areas. The emphasis should be on each area identifying and making connections as part of Upper Hunter Country at a sub-regional level and part of the Hunter at a regional level.



A scenic morning ride in the Upper Hunter

Arts, Culture and Heritage

- The Upper Hunter is home to significant Aboriginal and European heritage and has many practising artists, old homes and significant collections in galleries and museums.

- Murrurundi and Muswellbrook townships are the leading destinations for Arts and Culture. There is opportunity to extend this to other communities in Upper Hunter Country.

- The Upper Hunter has private galleries, artist run spaces, public art, and significant collections.

- Artists run spaces and artists in residency are becoming increasingly popular in the Upper Hunter.



Art on display at Sandy Hollow Tourist Park

- Both Wingen and Ellamara near Sandy Hollow are destinations for Antique lovers.
- The sub-region hosts major Art Prizes. Including the biennial Norvill Art prize and the Muswellbrook Open Art Prize.
- Muswellbrook Regional Arts Centre manages a large permanent collection with an excellent cross-section of mid-20th century Australian art.
- In 2004, a bequest by Max Watters of over 300 works drove the national significance of the Muswellbrook Regional Arts Centre. The Max Watters collection spans about 40 years of mid to late 20th century Australian art. The collection represents major developments in this period and includes work of artists such as Tony Tuckson, Ken Whisson, Danila Vassilieff, Grace Cossington-Smith, John Perceval, Jon Plapp, and Euan Macleod.
- Servicing the Upper Hunter is the Upper Hunter Conservatorium of Music, which not only teaches but also provides a calendar of events. There are also a number of amateur theatrical societies.
- Murrurundi host a biennial Opera.
- Kiora Stud hosts an annual eisteddfod
- The Upper Hunter has many unique sites of importance for Aboriginal and European history. The many Town and Heritage walks include this history.

Consumer appeal

Arts, Culture and Heritage in the Upper Hunter attract visitors who share these interests as both artisans and tourists.

Gaps in the market

The depth of the Arts in the Upper Hunter needs to be promoted further outside the region.

Access to historically significant sites could be further promoted and improved.

The significance of Aboriginal history to the region should receive greater importance.

Inland Adventure Trail

- Multi-LGA collaboration, cluster of self-drives through national parks offering outdoor activity and local experiences.

Consumer appeal

It provides connectivity for the inland visitor and a midpoint to many Inland and Coastal destinations.

Gaps in the market

The Inland Adventure Trail offers the potential for a greater collaborative marketing campaign.

The Bylong Valley Way has become increasing an important visitor route.



Widden Stud, off the Bylong Valley Way

1.5. Key Markets

Below Upper Hunter, stakeholders have identified the Key Markets.

Source Market	Consumer Segment	Reason for Visit
Australia and world-wide: rail and heavy industry driven by mining Thoroughbred Industry	Business	Workers, ecology, infrastructure development
European Union, Canada United Kingdom, America	International Leisure	Horse Studs, Nature Tourism, and passing through.
Sydney, North Coast, QLD and Brisbane, Western Australia	Domestic Leisure: VFR, Grey Nomads, families on school holidays and couples	Driving holidays, many passing through, some base themselves in Upper Hunter and do day trips.
NSW	Education	Work, study, tradesmen
NSW	Food and Wine	Country Cellar Doors and boutique food providers
NSW	Major Events	Upper Hunter Festivals and Events
NSW	Natural Adventures	Nature Tourism and Outdoor Adventure

These source markets, consumer segments and reasons for visits, have been identified and grouped into the following Key Markets for the Upper Hunter:

- Short Break
- Nature and Adventure
- Equine
- Arts and Culture
- Food and Wine
- Education
- Business

1.5.1. Visitors

Tourism Research Australia reports for the year ending 2012 that for the Upper Hunter 22% of visitors 89,000 are Sydney-based and 68% of visitors 273,000 are from regional NSW. That the Upper Hunter's biggest market is people visiting friends and relatives at 42%, with Leisure visitors at 35% and Business visitors at 21%.

Attached as **Appendix A** is Muswellbrook Visitor Information Statistics.

Attached as **Appendix B** is the Upper Hunter Shire Council's Visitor Centre Report.

Upper Hunter Accommodation operators report that approx. 30% of their visitors are from Sydney and surrounds, approx. 20% from Newcastle and Hunter, and approx. 15% from Queensland. Significant representation is also present from visitors from the Central Coast, Central West and New England combined totalling approximately 20%.

1.5.2. Accommodation Market

The accommodation demanded by the market in the Upper Hunter ranges from camping to five (5) Star accommodations. The region is unique for Business visitation related to the Equine and Energy industries. The Energy Industry visitation is responsive to fluctuations in the resources sector and the Equine Industry activities range from privately hosted stud events to public events such as the Country Racing calendar.

The equine industry sees visitation year round, but especially from May to November but the relatively constant flow of mid-week heavy industrial visitation means the equine community has found it difficult to accommodate their visitors. Some stud farms have built their own private accommodation facilities on their property to Service their visitors.

Compared to many regions the pricing of accommodation is relatively high. Particularly in Muswellbrook in recent years - due to the servicing of the mining sector. The market has responded with a number of motels, Serviced apartments and tourist accommodation with development approval or in construction.

The Upper Hunter serves as a stopover destination for people travelling through and for the meeting of government agencies across regions. Leisure visitation in Muswellbrook and the Upper Hunter is seasonal; with the majority of influx in the summer but May to August have a busy Festivals and Events calendar.

Age and condition of some accommodation is becoming an issue with many properties aged thirty (30) to forty (40) years plus. There are further opportunities to develop and diversify the types of accommodation e.g. Glamping, Four (4) Star, and Caravan Parks in some townships. There is also scope across the sub-region for associated Services in the hospitality sector including more



Tastings at Two Rivers Wines at Denman



Camping at Lake Glenbawn

restaurants and conference facilities.

With many visitors coming to the area for business purposes, there is significant demand for a variety of hospitality facilities and Services.

1.5.3. Market Growth Potential

- There is significant potential to further expand Nature Tourism and Outdoor Recreation products and enhance current product connectivity.
- There are also opportunities to collectively market the festival and events across the Upper Hunter sub-region.
- There are significant gaps in equestrian experiences as current options available for visitors to ride horses or have a real “horse” experience can be limited.
- The Scone Horse Centre is in a temporary location and planning needs to be undertaken and funds need to be secured in order to move it to permanent location, enabling future expansion.
- There is potential for increased marketing efforts and product development surrounding the Inland Adventure Trail a collaborative project across multiple Local Government Areas.
- Inconsistent branding, particularly signage is an issue throughout Muswellbrook and the Upper Hunter.
- The wedding market through October to April is a large target segment, but there are limited facilities available to accommodate this market.
- More facilities need to be developed for conferences and the business market. Existing business need to promote their facilities to a wider target group.
- There can be an insufficient number of beds for the current mid-week business market. Investment in new facilities is needed though is acutely sensitive to the Energy Industry.
- There is potential to turn the Energy Industry into a tourist experience for the local Visitor Economy (e.g. potential to develop mining tours).
- These opportunities are identified in detail in the Goals and Actions for the Upper Hunter Visitor Economy.

1.6. Visitor Strengths

The Key Products and Experiences of the Upper Hunter have evolved in response to the Key Markets and they reveal the sub-region's unique Visitor Economy Strengths. These visitor strengths include:

Location

The Upper Hunter's location is a mid-point from New England/North West and South East Queensland to Newcastle and Sydney making the sub-region an ideal 'stopover destination'.

The sub-region is connected west to the inland markets through the Golden Hwy and south to the National Capital through a network of inland tourist routes known as the Inland Adventure Trail, which includes the picturesque Bylong Valley Way.

The sub-region has a geographical advantage in the provision of government and industry Services. Located between Newcastle and Tamworth, the Upper Hunter serves as an air, rail, road and coach junction.

The Upper Hunter's location is part of the reason that the sub-region has emerged as a leading destination for Arts and Culture and increasingly as a technical education centre.

Environment

The Upper Hunter sub-region possesses one of the most diverse environments in Australia with a variety of climatic zones from Western Grasslands to Subtropical through to Alpine.

The Upper Hunter is rich in natural resources with National Parks including the World Heritage Wollemi National Park and Barrington Tops. The sub-region has valuable water resources including Lake Glenbawn and Lake Liddell. The productive agriculture land follows the Goulburn and Hunter rivers, which traverse the sub-region while the Upper Hunter energy resources are of national importance.

Devil Ark, the only Australian mainland wild breeding program for the critically endangered Tasmanian Devil has been established at the Barrington Tops.



Tasmanian Devil at Barrington Tops

Rural Experience

The Upper Hunter is one of the closest, complete 'Rural' environments to Sydney. The sub-region provides a rural experience supported by a calendar of events and festivals, premium wine offerings and boutique food providers.



King of The Ranges Stockmans Challenge in Murrurundi - photo by Tobie Hynes

Equine Industry

The Upper Hunter is home to the largest concentration of thoroughbred breeding businesses in Australia and is internationally recognised. The scale of the industry provides a unique opportunity for visitors to experience this industry first hand. The industry supports prominent racing calendars at both the Muswellbrook and Scone Race Clubs.

The town of 'Scone' is Australia's 'Horse Capital' and home to the Australian Stock Horse Society and Museum. Muswellbrook Shire represents the largest critical mass of thoroughbred rearing in an arc from Widden Valley through Sandy Hollow to Jerry's Plains.

Likewise, there is extensive representation of all horse breeds in the Upper Hunter including heavy horse, stock horse and warmbloods in a diversity of horse activities. A Horse Festival held each year in May celebrates the equine industry.

Energy Industry

The energy sector: both extractive and generation have had a long history in the Upper Hunter. Muswellbrook Coal the oldest operating mine celebrated its centenary in 2006 while 40% of the state's base-load electricity is generated from the sub-region. Over the last ten years, open-cut mining has rapidly increased and renewable energy projects continue to evolve.

The largeness of the sub-regions' equine and energy industries provide strong business visitation and tourism and hospitality opportunities. Further, regular international visitation is common to operation of both these industries.

1.7. Key Infrastructure

Below the key Upper Hunter, existing and needed infrastructure is identified.

Road	
Service	Muswellbrook and Scone Bypasses
Description	This planned million-dollar infrastructure to remove heavy industry vehicles from the town's main streets.
Why is it key?	It will allow the main streets of the Upper Hunter towns to retain their rural feel and be renewed as community and cultural precincts.
Rail	
Service	City Rail and Country Link
Description	A daily Service from Newcastle and Sydney to Murrurundi daily
Why is it key?	It is a link to Sydney and Newcastle markets
Air	
Service	Scone Airport
Description	<ul style="list-style-type: none"> Only registered airport north of Maitland in the Hunter Airspeed Aviation and Pays provide regular charter Services REX special flights for the Scone Cup
Why is it key?	Key link to Sydney for charter flights and group tours
Service	Newcastle Airport
Description	Provides flights from 6 airlines with plans to increase capacity
Why is it key?	1,100,000 passengers movements a year into Newcastle
Service	Runways
Description	Runways are located in Middlebrook, Coolmore and Widden as well as helicopter landing sites across both Shires.
Why is it key?	Accommodates private aircraft
Service	Tamworth Airport
Description	One of Australia's largest regional airports
Why is it key?	A significant regional airport located less than 2 hours from the Upper Hunter flying to both Brisbane and Sydney.
Visitor Infrastructure	
Service	Muswellbrook Race Club
Description	Race Day and Conference facilities
Why is it key?	Serves as an entertainment and conference facility
Service	Scone Race Club
Description	Race Day and Conference facilities
Why is it key?	Serves as an entertainment and conference facility
Service	Campbells Corner Muswellbrook
Description	Redevelopment of the iconic heritage building to house the Upper Hunter Conservatorium of Music
Why is it key?	This will create much needed performance space for the Upper Hunter.
Service	Accommodation
Description	Product type is various
Why is it key?	Provides a variety of accommodation for visitors
Service	Internet/mobile Coverage Limited Wi-Fi coverage
Description	Inconsistent across Upper Hunter Country
Why is it key?	A unique feature to this area of the region

Service Description Why is it key?	Mobile phone coverage Limited reception with the exception of Telstra and Optus Internet access and data usage is now an essential Service
Service Description	Visitor Information Centres Visitor Information Centres located at Denman, Merriwa, Murrurundi, Muswellbrook and Scone.
Why is it key?	They are staffed by qualified locals who provide quality information to visitors

1.8. Key Imagery

Upper Hunter Shire has photography of the key industries/activities however requires the production of a professional library. Muswellbrook Shire has an extensive photo library produced in 2012.

An opportunity exists for partnerships across organisations and industry for the development of photography and production of a video portfolio.

1.9. Key Communications

Below an analysis of the advantages and disadvantages of key Upper Hunter communications channels is provided.

Get Lost Magazine, Upper Hunter Horse Studs, Upper Hunter Guide, print run 60,000

Advantages	Disadvantages
<ul style="list-style-type: none"> Well accepted in the community 	<ul style="list-style-type: none"> Slow, expensive medium with limited reach. Good regional reach 50% of State through Visitor Information Centre network. Limited or none Sydney market penetration

Digital Media

Advantages	Disadvantages
<ul style="list-style-type: none"> Fast and inexpensive 	<ul style="list-style-type: none"> Questionable ROI because it is not effectively measured

Chamber and Council websites: muswellbrook.org.au, Muswellbrook.nsw.gov.au, upperhunter.local-e.nsw.gov.au (digital)

Advantages	Disadvantages
<ul style="list-style-type: none"> Fast and inexpensive 	<ul style="list-style-type: none"> Council websites are often overlooked by visitors for tourism information

upperhuntercountry.com (digital) maintained by third party.
Secondary: visitnsw.com, visithunter.com.au

Advantages	Disadvantages
<ul style="list-style-type: none"> Fast and simple to update information 	<ul style="list-style-type: none"> Not used and promoted by all stakeholders

Social Media (digital) Facebook, and minimal Twitter, Pinterest, Instagram, etc.

Advantages	Disadvantages
<ul style="list-style-type: none"> Communicate directly to Key Markets 	<ul style="list-style-type: none"> Fragmented to individual operators. Both Upper Hunter Country Tourism, Upper Hunter Shire and Muswellbrook Shire have Facebook pages Muswellbrook Shire Council is very active in Social media

Advertising incorporating QR codes (print/digital) placed by individual operators

Advantages	Disadvantages
<ul style="list-style-type: none"> Cost effective and provides statistical analysis 	<ul style="list-style-type: none"> Users currently represent a small percentage of the Upper Hunter market

Touring Maps (print) Visitor Economy Hunter and self-drive maps provided

Advantages	Disadvantages
<ul style="list-style-type: none"> Provide thorough information and are popular 	<ul style="list-style-type: none"> Out of date and expensive to maintain, produce and amend This channel type needs to be effectively integrated online

Television advertising

Advantages	Disadvantages
<ul style="list-style-type: none"> Wide reach 	<ul style="list-style-type: none"> Expensive

Shire Guides print run 5,000-10,000 and Town Guides, Horse Magazine

Advantages	Disadvantages
<ul style="list-style-type: none"> Provide thorough information and are popular Important to segment the area into regions as the Upper Hunter is a diverse Sub-region 	<ul style="list-style-type: none"> Only distributed in respective shires, competing with other print advertising e.g. Get Lost and duplication of material

Radio – Local ABC

Advantages	Disadvantages
<ul style="list-style-type: none"> Represents and communicates to the Upper Hunter sub-region 	<ul style="list-style-type: none"> Represents and small section of the market

Radio - Power FM and 2NM

Advantages	Disadvantages
<ul style="list-style-type: none"> Represents and communicates to the Upper Hunter sub-region 	<ul style="list-style-type: none"> Expensive

1.9.1. Communication Potential



- Communication is very fragmented with the majority of marketing and web efforts left to the individual operators, specifically in the digital sector. Further training is necessary, but also a more collaborative and researched approach is needed to unite the message, in particular branding which is confused by the existence of Upper Hunter Shire and the Upper Hunter Sub-region.
- There is a need/demand for printed national park walking maps, which are no longer provided by National Parks. There is potential to provide a cartoscope map or liaise with National Parks to receive the digital imagery necessary for Muswellbrook and Upper Hunter to produce in house.
- Improved brand consistency across all channels of communication is needed.
- Signage throughout Upper Hunter Country is not delivering a consistent message to consumers.
- There is room to do much more television PR and marketing (e.g. attracting popular television shows).
- Consolidation of Print advertising (Condense a number of current publications into one)
- The production of a digital video / slide show, featuring products and experiences could be used by operators.
- Collaboration in marketing the sub-region is needed.

These opportunities are identified in detail in the Goals and Actions for the Upper Hunter Visitor Economy.

Barbeque at Lake Glenbawn with kangaroos grazing in the background



2. Destination Direction

2.1. Focus

By understanding and appreciating the Upper Hunter Visitor Economy Strengths:

1. Location
2. Environment
3. Rural Experience
4. Equine Industry
5. Energy industry

The opportunity is created for stakeholders to focus collectively on developing and strengthening Key Products and Experiences and targeting Key Markets to grow the Upper Hunter Visitor Economy.

2.2. Vision

The Vision identified for the Upper Hunter Visitor Economy is to:

Develop a sustainable and diverse Visitor Economy with investment and employment opportunities specific to the area's Visitor Economy Strengths.

2.3. Mission

The Mission identified is that:

Stakeholders will work together in developing and promoting the Upper Hunter Visitor Economy products and experiences.

2.4. Goals

Below the Key Products and Experiences of the Upper Hunter have been identified and grouped under seven (7) headings including: Nature Tourism and Outdoor Recreation; Horse Country; Festivals and Events; Wine and Food; Drives, Walks, and Trails; Arts, Culture and Heritage; and Inland Adventure Trail.

1. Increase visitor numbers and dispersal in the region

Strategic Priorities and Opportunities	Action
<ul style="list-style-type: none">Stakeholders to cooperatively market and cross promote the Upper Hunter products and experiences	<ul style="list-style-type: none">Develop industry led branding and marketing that reinforces the strengths of Upper Hunter products and experiencesDevelop marketing campaigns that cross promote Upper Hunter products and experiencesStakeholders to support, market and cross promote Upper Hunter products and experienceSupport a leading destination visitor website for the Upper HunterRenew existing signage and visitor information under an Upper Hunter banner



Potential for hot air ballooning tours throughout the Upper Hunter.

2. Extend visitors length of stay in the Upper Hunter

Strategic Priorities and Opportunities	Action
<ul style="list-style-type: none"> • Build partnerships across destinations to cross promote products and experiences • Get locals more engaged in promoting the region to their friends and relatives 	<ul style="list-style-type: none"> • Develop cross-destination partnerships to promote rural and regional attractions/ events • Implement a local education and marketing campaign to promote local products and experiences

3. Develop new products and experiences and support existing

Strategic Priorities and Opportunities	Action
<ul style="list-style-type: none"> • Encourage and develop new nature-based and adventure experiences that increase connectivity with our National Parks and water resources • Create new and improve existing journeys to establish a number of iconic journeys including extended drives between Western Sydney, Blue Mountains and the Upper Hunter • Develop innovative Industry interpretative experiences for visitors (e.g. hot air ballooning over open cut coal mines) 	<ul style="list-style-type: none"> • Develop, expand and promote nature based and adventure opportunities (e.g. Lookouts, nature and river walks) • Encourage new eco-tourism accommodation adjacent to National Parks • Develop, expand and promote drives, tracks and trails • Create fly-drive and cruise-drive packages to leverage off Newcastle Airport and cruise growth, and Sydney Airport and Scone Airport to gain domestic and international visitation • Advocate for improvements to priority roads to the visitor economy including the Bylong Valley Way and the link road through the Barrington Tops • Develop a multi-media horse stud self-drive • Identify and deliver industry interpretative experiences for visitors (e.g. Equine Interpretive Centre and Energy Education Centre)

4. Grow the niche markets: Short Break, Nature and Adventure, Equine, Arts and Culture (incl. film and music), Food and Wine, Education and Travel for a Purpose (Business)

Strategic Priorities and Opportunities	Action
<ul style="list-style-type: none"> Promote the Upper Hunter as a short break destination (especially to people travelling between Sydney and Queensland) Build partnerships across Government to grow the visitor economy (especially with National Parks and Forestry) Increase access to horse experiences for visitors Promote the significance of the existing Arts and Culture product and experiences Develop Cultural and Entertainment Precincts Partner with industries to promote and further develop education pathways in the Upper Hunter Partner with industries to develop the business events market in the Upper Hunter 	<ul style="list-style-type: none"> Target and measure the success of marketing campaigns Develop a joint strategy with Hunter Region - National Parks and Wildlife Service to promote to increase visitor access to Nature destinations•Partner with Australian Reptile Park's 'Devil Ark' to develop a world class Tasmanian Devil experience Create a year-round bookable equine experience for visitors Identify and deliver infrastructure to support sub-regional events and festivals, for example - an undercover equine event. Deliver a regional cinema and performance space Develop strategies to promote existing Arts and Culture product and experiences

2.5. Action Plan

Below 21 Actions for Upper Hunter, stakeholders have been identified to drive the growth of the Upper Hunter Visitor Economy.

1	Action	Develop industry led branding and marketing that reinforces the strengths of Upper Hunter products and experiences	
	Timeframe	Lead Agency	Partnership Opportunity
	2013	Upper Hunter Country Tourism	Visitor Economy Hunter, Upper Hunter Shire Council and Muswellbrook Shire Council
2	Action	Develop marketing campaigns that cross promote Upper Hunter products and experiences	
	Timeframe	Lead Agency	Partnership Opportunity
	2014	Upper Hunter Country Tourism	Visitor Economy Hunter, Upper Hunter Shire Council and Muswellbrook Shire Council
3	Action	Stakeholders to support, market and cross promote Upper Hunter products and experiences	
	Timeframe	Lead Agency	Partnership Opportunity
	2013	Upper Hunter Country Tourism	Events and Festival Organisers, Operators, Visitor Economy Hunter, Upper Hunter Shire Council and Muswellbrook Shire Council

4	Action	Support a leading destination visitor website for the Upper Hunter	
	Timeframe	Lead Agency	Partnership Opportunity
	2013	Upper Hunter Country Tourism	Events and Festival Organisers, Operators, Visitor Economy Hunter, Upper Hunter Shire Council and Muswellbrook Shire Council
5	Action	Renew existing signage and visitor information under an Upper Hunter banner	
	Timeframe	Lead Agency	Partnership Opportunity
	2013	Upper Hunter Country Tourism	Visitor Economy Hunter, Upper Hunter Shire Council and Muswellbrook Shire Council
6	Action	Develop cross-destination partnerships to promote rural and regional attractions/events	
	Timeframe	Lead Agency	Partnership Opportunity
	2014	Upper Hunter Country Tourism	Visitor Economy Hunter, Upper Hunter Shire Council, Muswellbrook Shire Council, New England/North West, Central West, Blue Mountains and Southern Highlands
7	Action	Implement a local education and marketing campaign to promote local products and experiences	
	Timeframe	Lead Agency	Partnership Opportunity
	2013	Upper Hunter Country Tourism	Upper Hunter Shire Council, Muswellbrook Shire Council and Visitor Economy Hunter
8	Action	Develop, expand and promote nature based and adventure opportunities (e.g. Lookouts, nature and river walks)	
	Timeframe	Lead Agency	Partnership Opportunity
	2014	Muswellbrook Shire Council	Upper Hunter Shire Council, National Park and Wildlife Service, Upper Hunter Country Tourism and Visitor Economy Hunter
9	Action	Encourage new eco-tourism accommodation adjacent to National Parks	
	Timeframe	Lead Agency	Partnership Opportunity
	2016	Muswellbrook Shire Council/ Upper Hunter Shire Council	Land Owners, Upper Hunter Country Tourism, National Park and Wildlife Service and Visitor Economy Hunter
10	Action	Develop, expand and promote drives, tracks and trails	
	Timeframe	Lead Agency	Partnership Opportunity
	2014	Upper Hunter Country Tourism	Upper Hunter Shire Council, Muswellbrook Shire Council, National Park and Wildlife Service, Land Owners and Visitor Economy Hunter

11	Action	Create fly-drive and cruise-drive packages to leverage off Newcastle Airport and cruise growth, Sydney Airport and Scone Airport to grow domestic and international visitation	
	Timeframe	Lead Agency	Partnership Opportunity
	2015	Upper Hunter Country Tourism	Visitor Economy Hunter, Upper Hunter Shire Council, Newcastle Airport and Cruise Hunter
12	Action	Advocate for improvements to priority roads to the visitor economy including the Bylong Valley Way and the link road through the Barrington Tops	
	Timeframe	Lead Agency	Partnership Opportunity
	2016	Upper Hunter Country Tourism	Upper Hunter Shire Council, Muswellbrook Shire Council and Visitor Economy Hunter
13	Action	Develop a multi-media horse stud self-drive	
	Timeframe	Lead Agency	Partnership Opportunity
	2014	Upper Hunter Shire Council	Hunter Thoroughbred Breeders Association and Muswellbrook Shire Council
14	Action	Identify and deliver industry interpretative experiences for visitors (e.g. Equine Interpretive Centre and Energy Education Centre)	
	Timeframe	Lead Agency	Partnership Opportunity
	2016	Upper Hunter Country Tourism	Hunter Thoroughbred Breeders Association, National Park and Wildlife Service, NSW Minerals Council, Upper Hunter Shire Council and Muswellbrook Shire Council
15	Action	Target and measure the success of marketing campaigns	
	Timeframe	Lead Agency	Partnership Opportunity
	2013	Upper Hunter Country Tourism	Operators, Upper Hunter Shire Council and Muswellbrook Shire Council
16	Action	Develop a joint strategy with Hunter Region - National Parks and Wildlife Service to promote to increase visitor access to Nature destinations	
	Timeframe	Lead Agency	Partnership Opportunity
	2014	Muswellbrook Shire Council	Upper Hunter Shire Council, National Park and Wildlife Service, Upper Hunter Country Tourism and Visitor Economy Hunter
17	Action	Partner with Australian Reptile Park's 'Devil Ark' to develop a world class Tasmanian Devil experience	
	Timeframe	Lead Agency	Partnership Opportunity
	2014/15	Australian Reptile Park	Upper Hunter Shire Council, Muswellbrook Shire Council, National Park and Wildlife Service, Upper Hunter Country Tourism and Visitor Economy Hunter

18	Action	18.Create a year-round bookable equine experience for visitors	
	Timeframe	Lead Agency	Partnership Opportunity
	2014	Upper Hunter Country Tourism	Hunter Thoroughbred Breeders Association, Upper Hunter Shire Council, Muswellbrook Shire Council and Visitor Economy Hunter
19	Action	Identify and deliver infrastructure to support sub-regional events and festivals	
	Timeframe	Lead Agency	Partnership Opportunity
	2016	Upper Hunter Country Tourism	Upper Hunter Shire Council, Muswellbrook Shire Council and Visitor Economy Hunter
20	Action	Deliver a regional cinema and performance space	
	Timeframe	Lead Agency	Partnership Opportunity
	2016	Muswellbrook Shire Council	Upper Hunter Shire Council, Upper Hunter Country Tourism and Visitor Economy Hunter
21	Action	Develop strategies to promote existing Arts and Culture product and experiences	
	Timeframe	Lead Agency	Partnership Opportunity
	2014	Muswellbrook Shire Council	Upper Hunter Shire Council, Upper Hunter Country Tourism and Visitor Economy Hunter



Lake Glenbawn is a popular fresh water boating and fishing location

3. Destination Requirements

Both government and industry already invest resources into the Upper Hunter visitor economy, financial and human. What is needed most is collaboration between stakeholders (government at all levels, Visitor Economy Hunter, operators and local businesses) to focus these resources and leverage a greater return on investment.

3.1. Ten Points of Collaboration

To achieve the 21 Actions identified above in the Action Plan the following ten (10) points of collaboration are required:

1. Stakeholders to adopt industry led Upper Hunter branding;
2. Key Products and Experiences marketed together (e.g. Nature Tourism and Outdoor Recreation experiences across the Upper Hunter collectively marketed);
3. Stakeholders cross promote each other (e.g. Festivals and Events adjacent on the Upper Hunter calendar promote each other to extend visitor stays or encourage return visits);
4. Support for a leading destination website by directing visitors to and from other respective websites;
5. Street and visitor signage that recognises Upper Hunter branding;
6. Locals encouraged to recognise their ambassadorial role in promoting the Upper Hunter to visiting families and friends;
7. Stakeholders to collect and share visitors' statistics to measure the success of projects;
8. Regional and government organisations to form closer partnerships with local stakeholders;
9. Upper Hunter stakeholders to work together in advocating for infrastructure; and
10. Stakeholders advocating for facilities that Service communities of the Upper Hunter in a regional capacity.



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