HUNTER VALLEY

DESTINATION MANAGEMENT PLAN / PART B

SITUATIONAL ANALYSIS 2022

CESSNOCK CITY COUNCIL

SINGLETON COUNCIL

CONTENTS

INTRODUCTION

Cessnock City Council Community Strategic Plan 2036

Objectives:
2.3 Increasing tourism opportunities and visitation in the area.
2.3.1 We have a range of diverse visitor experiences across the entire local government area .
2.3.2 Our local government area is attractive to visitors.

Singleton Community Strategic Plan Create Singleton 2022-2032

Objectives:
Our Economy will demonstrate diversity, resilience and innovation. Our Economy will be smart, embrace growth and provide security for the future.

4.1 Attract new investment to increase the diversity and resilience of the Singleton economy.
4.3 Continue to support local tourism operators to encourage Singleton LGA as a tourism destination.

In true **"Living the good life"** form, the Hunter Valley offers an amazing array of events and experiences for visitors. Dinners, children's entertainment, divine dining establishments, dessert bars, cheese, chocolate, beer and spirit vendors, stunning natural outdoor attractions, and activities such as segways, horse riding, cycling and hot air ballooning just to name a few. All this on offer to complement our world class vineyards and cellar doors, for which the Hunter Valley is synonymous. With so much to see and do, overnight stays are highly recommended at one of over 200 accommodation establishments.

There is also a great range of retail shops in the main Cessnock and Singleton CBDs as well as in local villages and vineyard areas.

The Hunter Valley is made up of two local government Areas (LGAs) Singleton and Cessnock City with a combined population of 88,801 residents.

The Hunter Valley welcomes 1.5 million visitors each year. The main reasons for visiting the Hunter Valley are for a holiday, to visit friends and relatives (VFR), and for business.

Development of the Hunter Valley Destination Management Plan (DMP) supports Cessnock City and Singleton Councils objectives of increasing tourism opportunities and yield, building resilience and supporting tourism operators as well as attracting new investment and encouraging product diversity. It also ensures the region continues to be a highly sought-after destination by visitors.

The Hunter Valley Destination Management Plan (DMP) has been developed to align with the NSW Visitor Economy Strategy 2030 guiding principles:

1. Put the visitor first
2. Lead with our strengths
3. Accelerate digital innovation
4. Collaboration between Councils and Industry
5. Agility to respond and support our industry together
6. Best practice DMP planning and engagement

As well as the principles of:

- Whole region and community inclusivity
- Informed (evidence-based)
- Future-focused
- Measurable in terms of both deliverables and outcomes

This Situational Analysis provides a background in understanding the area and factors that will be taken into consideration during preparation of the Hunter Valley DMP.

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PROJECT BACKGROUND

As a visitor destination the Hunter Valley is NSW's most visited and the oldest surviving commercial wine region.

Located in the heart of the New South Wales' Hunter Region, it is made up of two prominent local Government areas - Cessnock and Singleton. The Hunter Valley is surrounded by World Heritage National parks and boasts a rich heritage of colonial, Indigenous and industrial history.

CESSNOCK LGA POPULATION
64,082

SINGLETON LGA POPULATION
24,719

National and International Visitor Surveys, Tourism Research Australia, Year ended December 2019
Census Data 2021 and ABS ERP Population Data 2021

	Rural	Residential	Environment	Industrial	Commercial + business	Forestry	Tourism
CESSNOCK LGA	103,084 HA	5,246 HA	57,826 HA	25,630 HA	669 HA	1198 HA	405 HA
SINGLETON LGA	287,960 HA	1,965 HA	181,779 HA	419 HA	194 HA	28,466 HA	NA

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LAND + COMMUNITIES

The Hunter Valley has the advantage of being geographically close to two of the largest urban populations of NSW - Sydney and Newcastle, yet is seen by it's visitors as a natural, scenic country escape.

This advantage combined with prominent wine and food experiences, has created a mature visitor economy driven by a large day trip market and a reputation for major events.

The strong visitor profile has underpinned the progressive development of a large and diverse asset base for visitors - a large range of wineries, many with cellar door experiences; a strong accommodation base, from small B+Bs to large resorts, a number with conference and meeting facilities; along with several quality golf courses and an increasing range of diverse product development. These visitor experiences are supported by the main service hubs of Cessnock and Singleton towns.

CESSNOCK LGA

The Cessnock LGA with a total population of 64, 082 people is currently enjoying substantial growth. Cessnock LGA delivers $5.66 B economic output to the Hunter Region across industries including manufacturing, mining, construction, tourism, ownership of dwellings and healthcare amongst others. Urban development is rapidly expanding within a growth corridor between Cessnock, Kurri Kurri and Maitland, and between Branxton, Greta and Rutherford.

Cessnock LGA has multiple tourism hubs, an established professional services network, strong retail and food sector, is on the doorstep of Hunter Valley Wine Country and offers big town living in a rural setting. Cessnock City generates an impressive $2.05B in annual economic outlook. Kurri Kurri has an industrial heart, is located on regional transport links, has a growing population, an impressive series of murals, and has been identified for additional residential and industrial growth within the Hunter Regional Plan 2036.

Pokolbin, Lovedale, Hermitage, Mt View areas are focused on tourism, business conferences, food and entertainment but behind the sophisticated façade produces an impressive economic output of $968.9 M each year. Hunter Valley Wine Country will continue to grow into a seven day a week diversified economy with nature and open space as the main attraction. Branxton, Greta and Huntlee are growth areas with 7,500+ new homes approved for development. In an area where the Hunter's newest town of Huntlee meets the retro feel of Branxton and Greta, there is more than 100 hectares of greenfield business zoned land available. Wollombi Valley has a strong tourism and organic food brand and marketplace awareness, and is an established destination for the Sydney drive market. New high speed satellite internet services make Wollombi Valley a viable and attractive location for people looking to stay and work remotely.

Cessnock City, Economic Output. Remplan. 2021 Release 1

SINGLETON LGA

Located centrally in the Hunter region Singleton LGA is rich in natural resources and landscapes with excellent road and rail links, a strong economy and thriving communities across Singleton, Branxton, Bulga, Broke, Jerry's Plains and Glendonbrook. Significant development land is available across the LGA making it well positioned for growth.

Singleton blends rural living with city convenience. It's economy delivers $14.96B economic output to the Hunter Region across industries including mining, defence, manufacturing, agriculture, viticulture, emerging renewable energy and a growing visitor and tourism industry.

Singleton LGA has several tourism hubs. Broke Fordwich, Milbrodale and Around Hermitage (Pokolbin) offer boutique wineries, high quality restaurants, diverse accommodation options, conferencing, cultural and heritage, and natural and outdoor experiences. Lake St Clair recreational park is developing as a leading primitive camping site with outdoor activities in a stunning setting, which complements short term camping at McNamara Park, Jerry's Plains, Bulga and Singleton Showground. 40% of the Singleton LGA is made up of the Wollemi, Yengo and Mount Royal National Parks (some world heritage listed) providing greater opportunities for nature and adventure tourism. Significant cultural and Aboriginal heritage can be found across the landscape, including Baiame Cave. Singleton LGA is home to the Australian Infantry Museum, Singleton Historical Museum, heritage walks and the historic villages of Broke, Fordwich, Jerry's Plains, and Milbrodale.

Singleton town is a thriving shopping precinct, generating $3.5B in economic output and offering many boutique shops and award-winning playgrounds to enjoy. The Singleton Arts and Cultural Centre at Townhead Park Precinct provides an opportunity to grow the arts and cultural industries to become the epi-centre of arts in the Hunter region.

Singleton Town Area, Economic Output. Remplan. 2021 Release 1

THE DESTINATION

It is important to note the difference between the Hunter Valley and the greater regional destination called the Hunter, which covers a wide area encompassing Newcastle, Lake Macquarie, Dungog, Port Stephens, Maitland, Muswellbrook, Upper Hunter, Cessnock, Singleton, and Mid Coast.

The Hunter Region (and within it, the Hunter Valley) represents the second largest tourism industry in NSW. Consequently, it is critical that tourism in the Hunter can increase visitation expenditure substantially through clear actions and strategic decision making.

To ensure the DMP puts the visitor first and meets the acute needs of Hunter Valley visitors and product, this plan has taken a very targeted view of the destination. The Hunter Valley is defined by this DMP as encompassing the boundaries of the two main local government areas of Cessnock and Singleton. In addition, the Hunter Valley includes the Hunter Valley Viticultural boundary (some of which falls outside the Local Government boundaries).

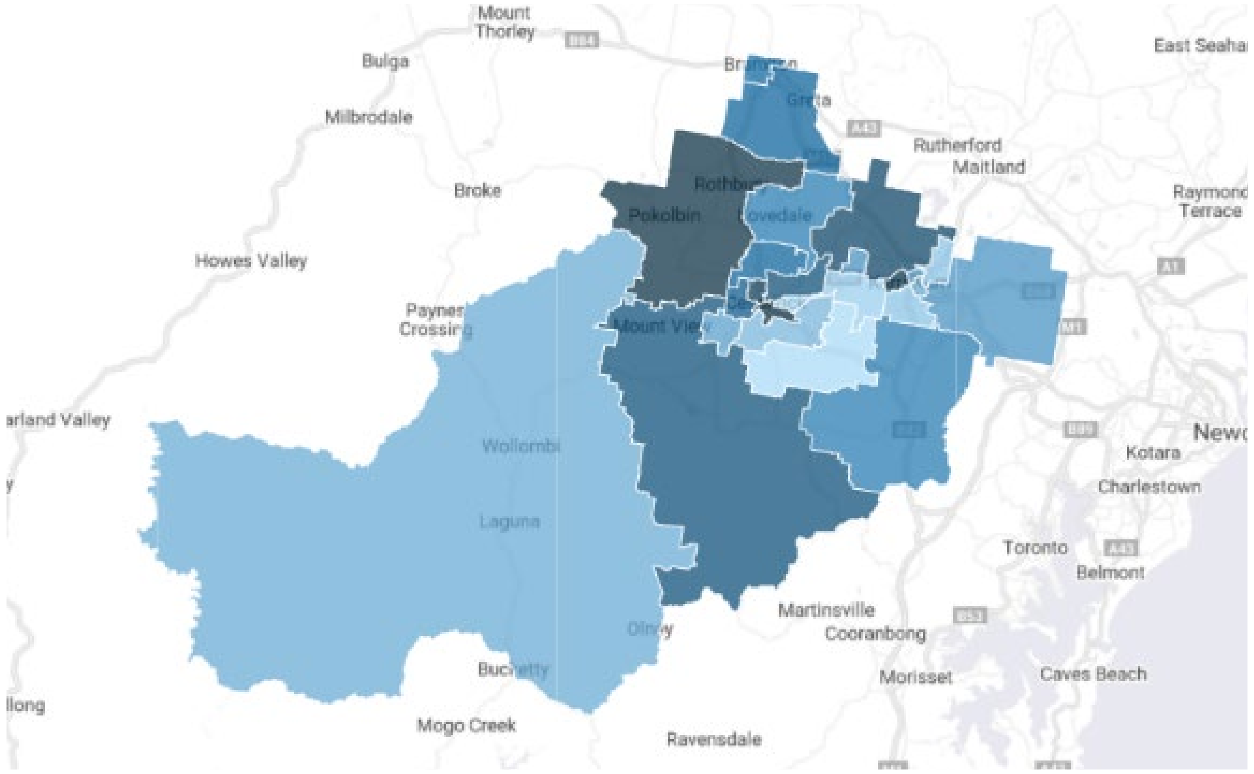

Figure 1 Cessnock LGA

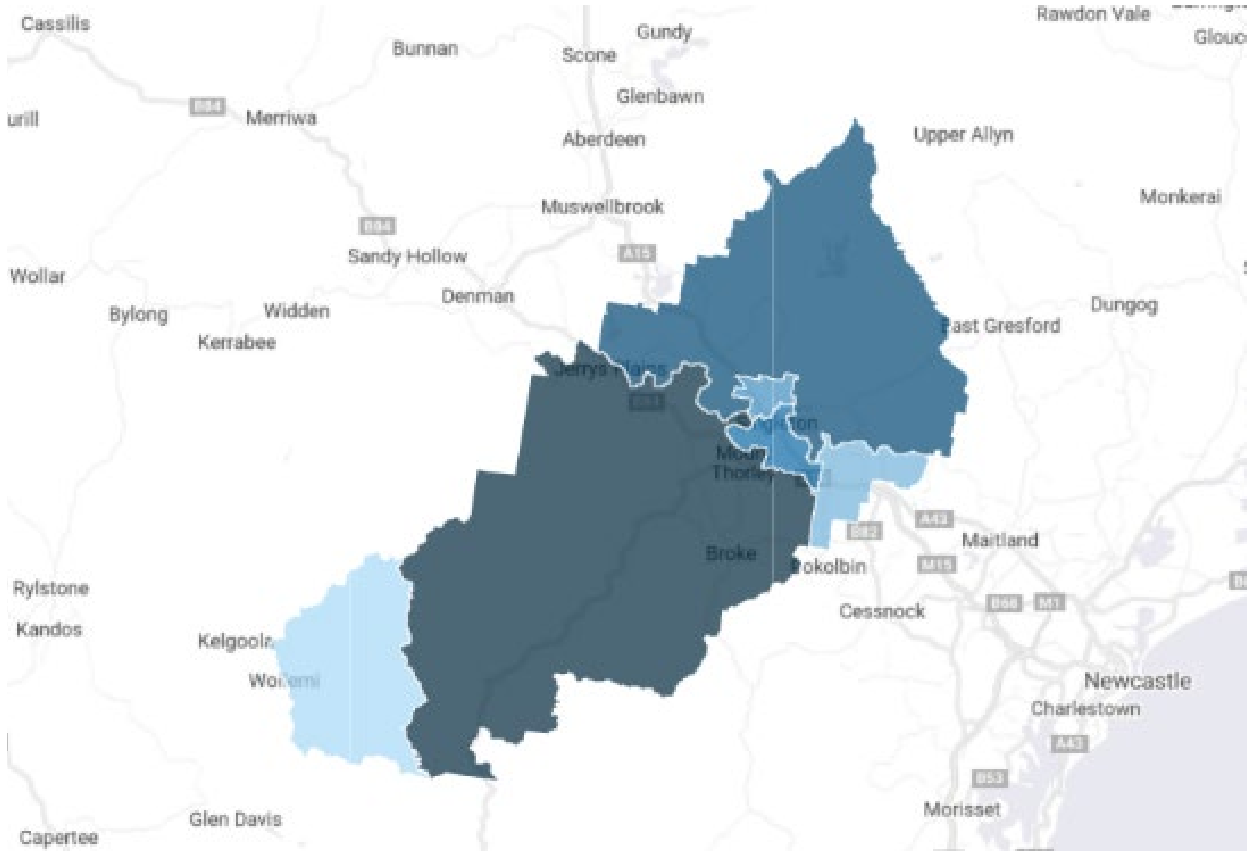

Figure 2 Singleton LGA

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PARTNERS IN THE VISITOR ECONOMY

The focus of this Hunter Valley DMP is on growing the visitor economy. In order to meet the objectives, there will be many organisations with key roles in the delivery, management and marketing of the Hunter Valley.

Tourism and the wider visitor economy is one of the region's economic drivers. Recognising the opportunities presented by the visitor economy, Cessnock City and Singleton Councils entered into a Memorandum of Understanding with the Hunter Valley Wine and Tourism Association in 2015, which has proved invaluable during the economic impacts of recent years.

Partnerships are required to integrate and leverage the activities needed to help drive the whole region's economic development and growth efficiently. Some of the organisations with roles to play in this DMP delivery are listed, below and on the following page.

Cessnock City and Singleton Councils are key players in the delivery and management of tourism products, facilities, infrastructure and services.

Hunter Valley Wine and Tourism Association are a key partner and a peak industry body in the development of tourism and the visitor economy across the Hunter Valley.

State Government – including National Parks + Wildlife Service, Forestry Corporation of NSW, Crown Lands, Service NSW, Transport and Infrastructure Providers, Regulatory Authorities, Destination NSW.

Commonwealth Government Agencies – Parks Australia, Department of Defence, Tourism Australia.

Local Tourist and Business Organisations including Lovedale Chamber of Commerce, Wollombi Valley Tourism, Broke Fordwich Wine Tourism Association, Parish of Pokolbin, Around Hermitage, Mount View Tourism, Central Hunter Business Chamber, Kurri Kurri and District Chamber of Commerce, Towns with Heart, Cessnock Chamber of Commerce, and Singleton Business Chamber.

Aboriginal Land Councils, Boards of Management and Communities.

Business, Industry, Community and Sporting Groups.

Commercial Operators – Accommodation, Attractions, Tours, Charters, Transport, Retail, Dining, Event Promoters, Venues.

Trusts, Boards and Committees.

05

INDUSTRY + EMPLOYMENT

NATIONAL, STATE + REGIONAL CONTEXT

The Australian tourism industry is a significant contributor to the Australian economy with 334,532 tourism businesses in Australia at June 2021, around 14% of Australia's total businesses. It employed 507,000 workers (3.9% of total national employment) to June 2021.

The Black Summer bushfires and the COVID-19 pandemic significantly impacted Australia's visitor economy, halting international travel and tourism exports and shifting focus to intrastate domestic travel and visitor economy. This led to a 37% decrease in Tourism GDP in 2020-2021 to $32.4B, employment dropped by 20.3% with some protection through government support.

Tourism Research Australia, National Tourism Satellite Account 2020-2021, Tourism Businesses Snapshot 2020-2021

NSW VISITOR ECONOMY + TOURISM

Tourism and the visitor economy contribute significantly to the NSW economy, in revenue and jobs across the State. In 2019-2020, NSW tourism employed 256,100 persons directly and indirectly (6.3% of total NSW employment) and contributed $30.2 Billion Gross State Product (4.8% of Total NSW Gross State Product). Over the years 2019-2020 and 2020-2021, direct tourism employment fell by 8.5% and 18.5% respectively and Gross State Product fell 18.5% and 33.6%, due to the impacts of the 2019-2020 bushfires and the COVID-19 pandemic. It should be noted that intrastate travel was stronger due to pent up demand related to the COVID-19 pandemic.

Destination NSW Economic Contribution of Tourism reports 2019/2020 and 2020/2021

HUNTER REGION

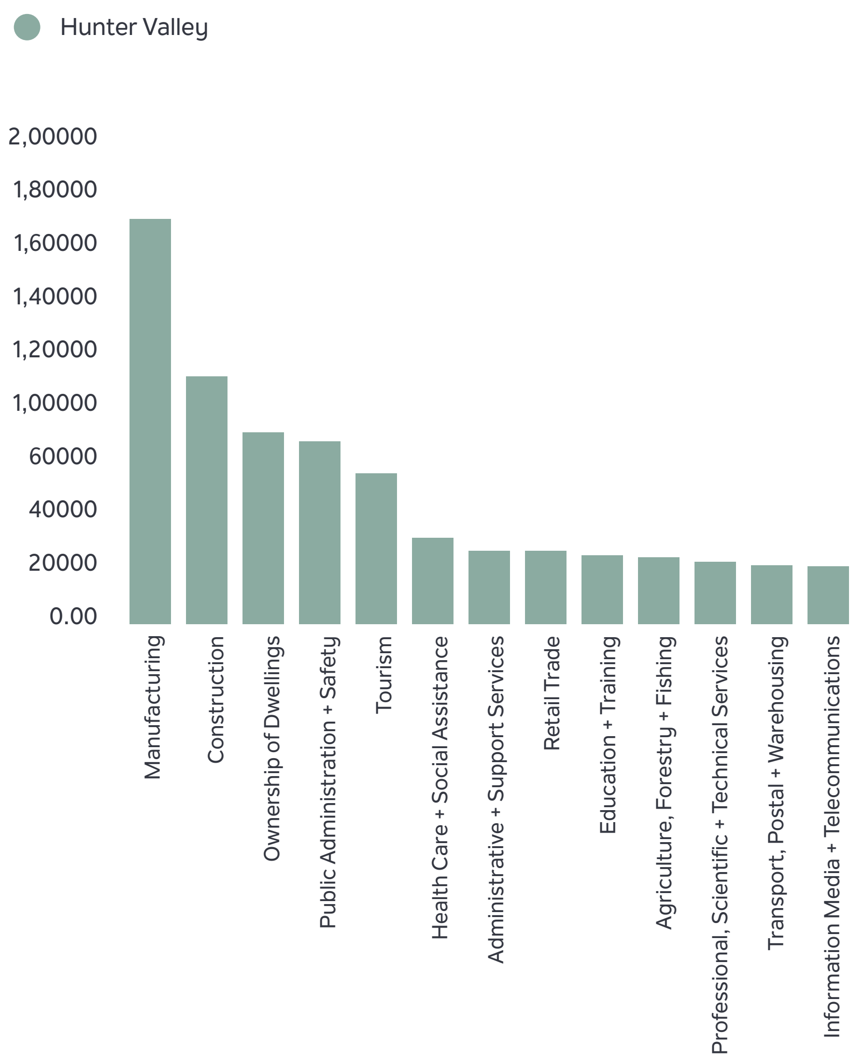
To June 2020 the Hunter Region tourism industry contributed $3.3B (2.8%) economic output to the region and employed 17,097 people directly and indirectly.

Remplan, Hunter Region, Economic Output and Employment Reports 2020 Release 2

HUNTER VALLEY ECONOMIC VALUE + EMPLOYMENT

The Hunter Valley tourism industry contributed $641M economic output, 3.1% of the total economy and employed 2,906 people directly and indirectly in 2020. This data includes all related industries who service the visitor economy, as per Remplan definitions.
Tourism is the sixth largest industry in economic output in the Hunter Valley. It is the fourth largest industry for Cessnock and the tenth largest industry for Singleton.

Hunter Valley Economic Output $M by Industry



Remplan. Economic Output and Employment reports for Singleton and Cessnock. 2020 Release 2

Note: Mining is not included in this chart and has an economic output of $11B

Hunter Valley Region Employment by Industry

Mining
7183

Tourism
2906

Health Care + Social Assistance
2742

Education + Training
2123

Construction
2086

Public Administration + Safety
2085

Manufacturing
1968

Retail Trade
2616

Tourism is the second largest employer across the Hunter Valley after Mining, with accommodation and food services being the largest employer in the Cessnock LGA and the twelfth largest employer in Singleton.

Hunter Valley tourism employment represents 17% of total tourism jobs in the Hunter Region and 1.4% jobs in NSW.

The contribution to local employment is higher than the Hunter Region and NSW by comparison. It is noted that the COVID-19 pandemic has reduced tourism jobs and that staffing shortages and talent acquisition will take time to rebuild from 2021 levels (See chart on the next page).

Remplan. Economic Output and Employment reports for Singleton and Cessnock. 2020 Release 2

HUNTER VALLEY WORKER DEMOGRAPHICS

58% of tourism workers in the Hunter Valley work part time with many working 1 - 15 hours. 42% work full time. 36% of workers are aged 15 - 24, and 30% of workers are over 45. Over 70% of the workforce is female.

Over 70%
of the workforce is female

The Hunter Valley has been significantly impacted by staff shortages created by the COVID-19 pandemic and the pent up demand for intra- and inter-state travel between lockdowns. Shortages across all roles will need to be addressed in the short and long term to support visitor economy growth.

HUNTER VALLEY BUSINESSES

There are 1884 visitor economy and tourism related businesses registered within the Hunter Valley region across Cessnock and Singleton. With accommodation, cafes, restaurants and arts and performers being the largest sectors. Residential property owners, owning rental accommodation is very strong across the region.

Remplan. Workforce. Hunter Valley (Cessnock and Singleton LGAs combined). 2020, Release 2

Business Type	Total
Residential Property Operators (including Short Term Rental)	485
Accommodation	237
Cafes and Restaurants	196
Other Creative Artists, Writers and Performers	184
Musicians and Entertainers	144
Grape Growing	123
Takeaway Food Services	106
Wine and Other Alcoholic Beverage Manufacturing	82
Pubs, Taverns and Bars	78
Travel Agency and Tour Arrangement Services	65
Performing Arts Operation	49
Taxi Service Operation	45
Cake and Pastry Manufacturing (Factory based)	14
Olive Growing	13
Urban Bus Transport (Including Tramway)	13
Amusement and Other Recreational Activities n.e.c.	11
Licensed Clubs (Hospitality) Operation	11
Performing Arts Venue Operation	7
Museum Operation	6
Amusement Parks and Centres Operation	4
Confectionery Manufacturing	3
Zoological and Botanical Gardens Operation	3
Spirit Manufacturing	2
Lottery Operation	1
Nature Reserves and Conservation Parks Operation	1
Unlicensed Clubs (Hospitality) Operation	1
Total Number of Hunter Valley Tourism Businesses	**1884**

Australian Business Register March 2022, Cessnock and Singleton LGAs combined.

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VISITATION

1.5M
Visitors annually

623,000
Domestic overnight visitors

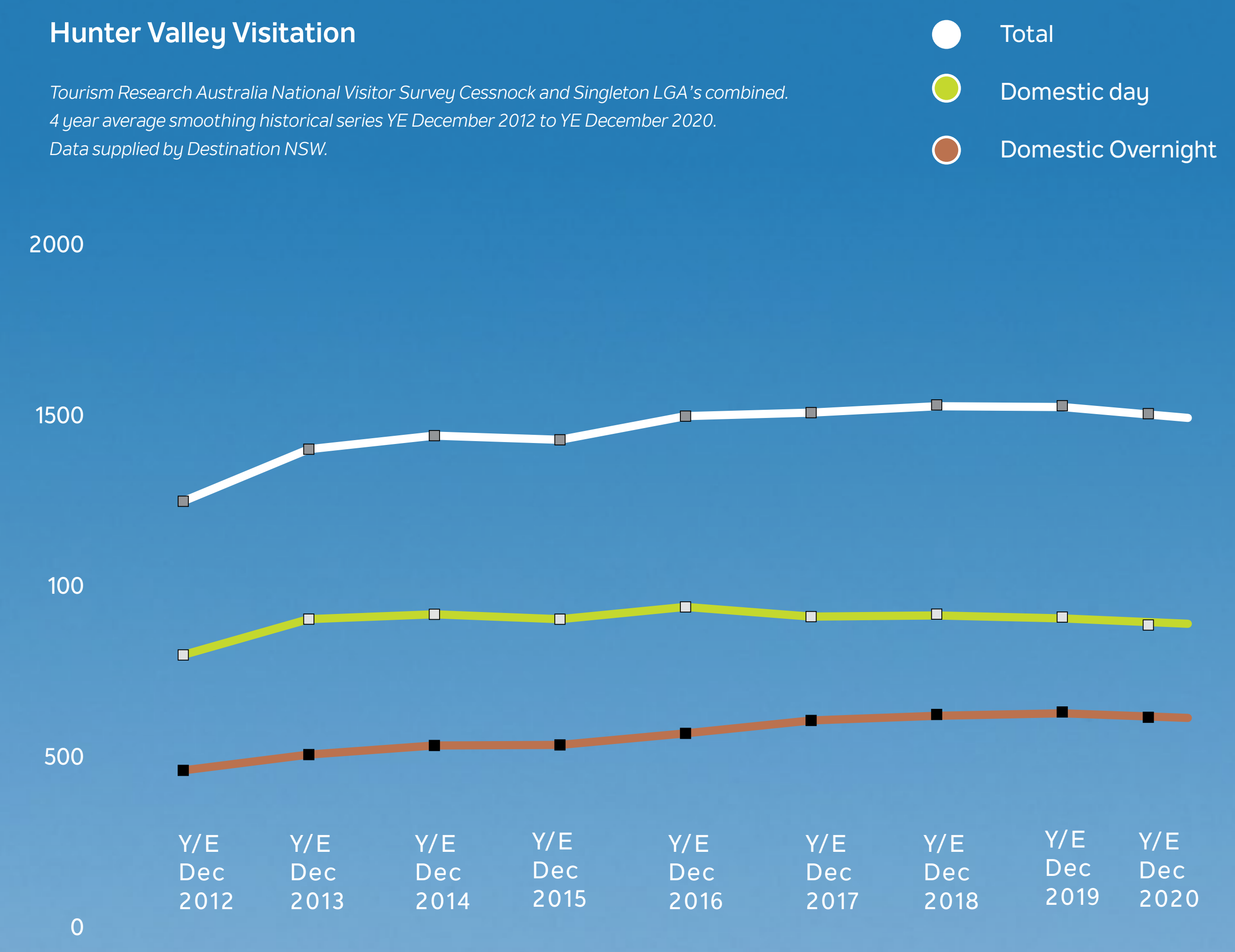
$451M
Visitor expenditure

1.7M
Nights

Tourism Research Australia and Destination NSW data for the Hunter Valley indicates significant visitation growth to 2012 and steady growth (3.8%) from 2012 to 2018 across the region.

The impacts of the 2019-2020 bushfires and the COVID-19 pandemic lead to visitation declines of 6.4% and 3.9% in 2019 and 2020. The lockdowns in 2021 created to pent up demand between these periods leading to increased intrastate travel to regional areas. The Hunter Valley's accessibility and proximity to Sydney and Newcastle contributed to the area's resiliency.

Tourism Research Australia National Visitor Survey Cessnock and Singleton LGAs combined. 5 year average YE March 2016 - YE March 2020. data supplied by Destination NSW.

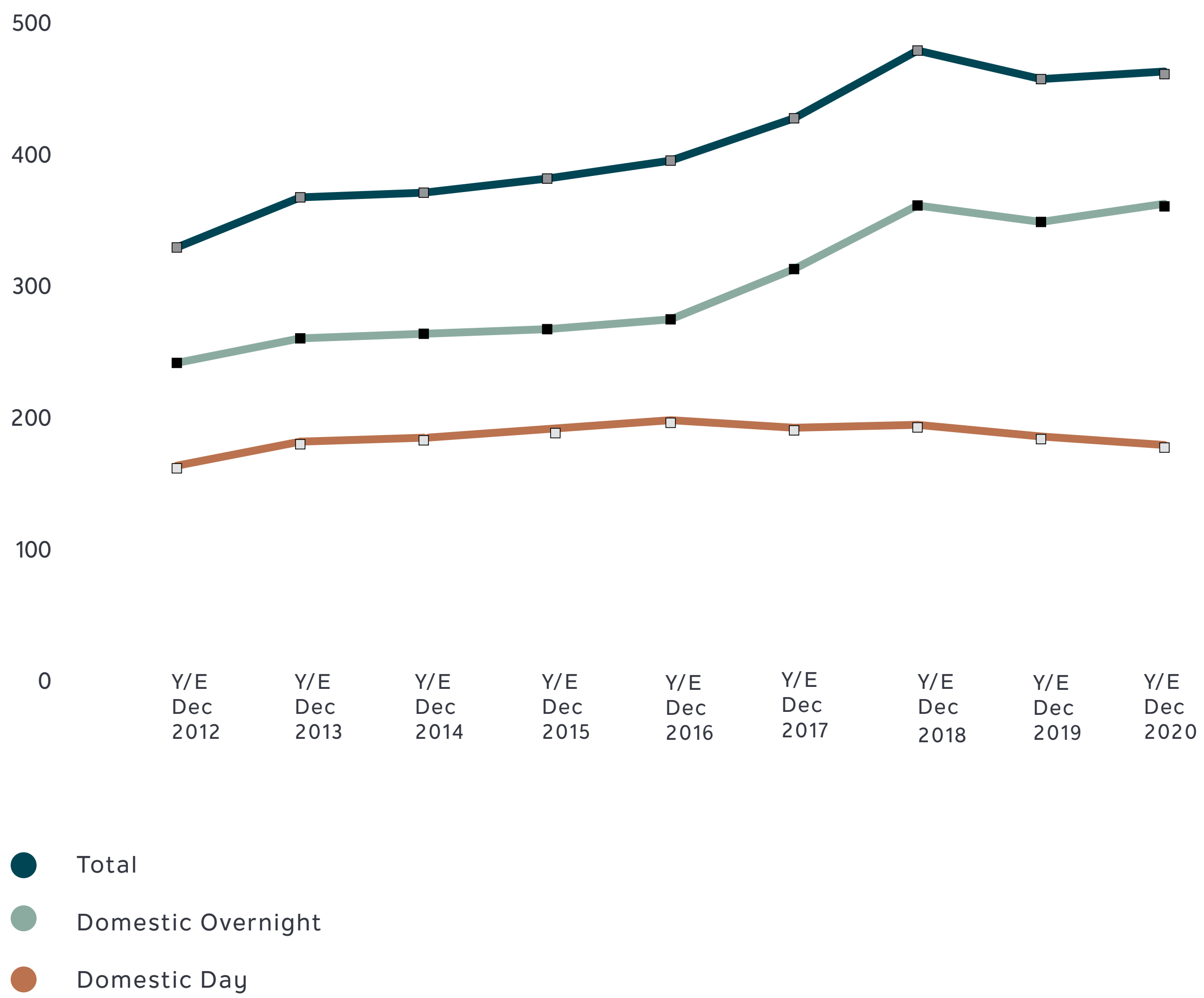


VISITOR EXPENDITURE IN NSW

Hunter Valley visitor expenditure has increased significantly over the last decade, driven by domestic overnight visitation. This can be linked to significant developments including Crowne Plaza and Hunter Valley Gardens and other investments across the Cessnock region that increased capacity, marketing and promotion and ultimately visitation and visitor expenditure.

Hunter Valley Visitation Expenditure

Tourism Research Australia National Visitor Survey Cessnock and Singleton LGAs combined.
4 year average smoothing historical series YE December 2012 to YE December 2020.
Data supplied by Destination NSW.

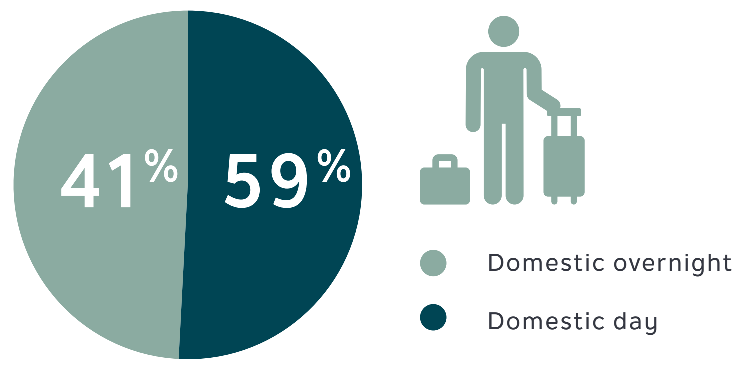


Domestic markets contribute the largest share of the total visitor expenditure in NSW

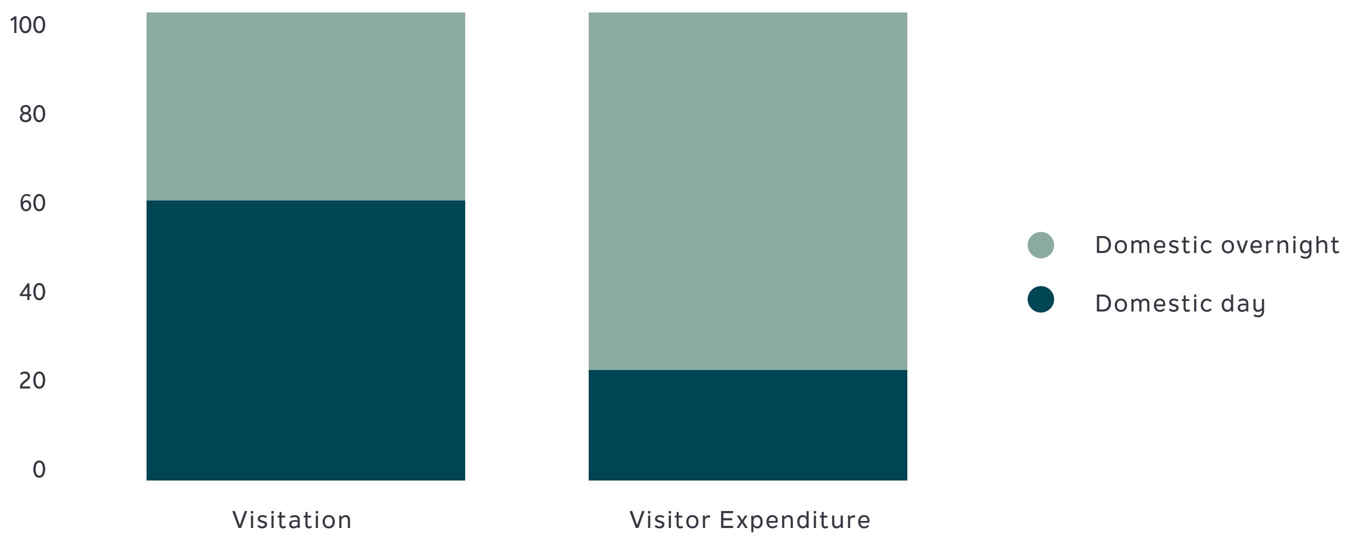
NSW Visitor Economy Strategy 2030

DOMESTIC VISITORS

59% of visitors to the Hunter Valley are domestic day visitors, while 41% are domestic overnight visitors.
75% of visitor expenditure is driven by domestic overnight visitors generating $407M annually, with domestic day visitors generating only 23% of visitor expenditure to the region.



Domestic Day + Overnight Visitation and Visitor Expenditure

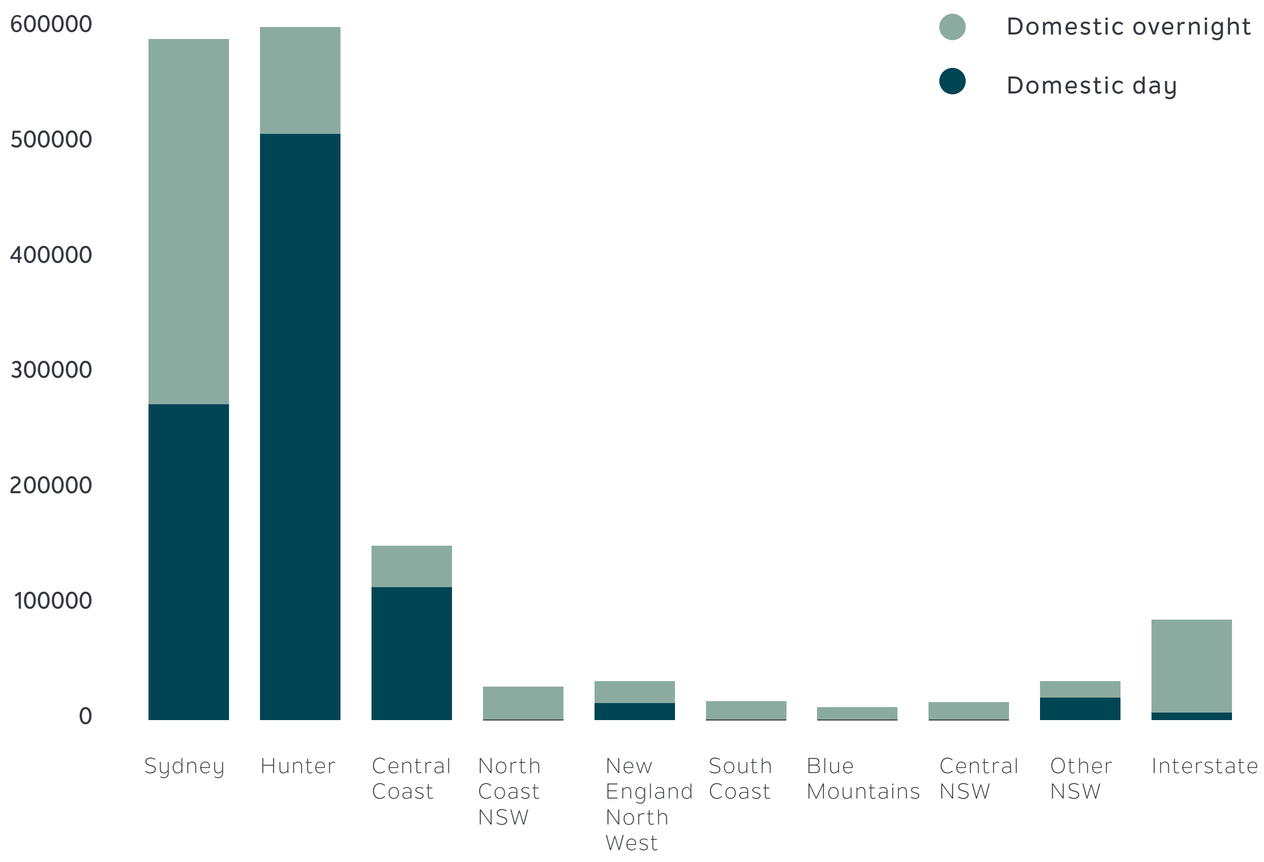


Tourism Research Australia National Visitor Survey historical series. Cessnock and Singleton LGAs combined. 4-year average, 7 YE December 2012 to YE to December 2022. Data provided by Destination NSW.

Pre the COVID-19 pandemic 9 out of 10 overnight visitors to Cessnock and 8 out of 10 overnight visitors to Singleton were from NSW, with an average of 12% of visitors from interstate. Sydney is the dominant market for domestic overnight visitors, followed by Hunter Region, Central Coast, North and South Coasts and New England.

95% of domestic day visits are from the Hunter Region, Sydney and Central Coast.

Domestic Day + Overnight Visitor Location

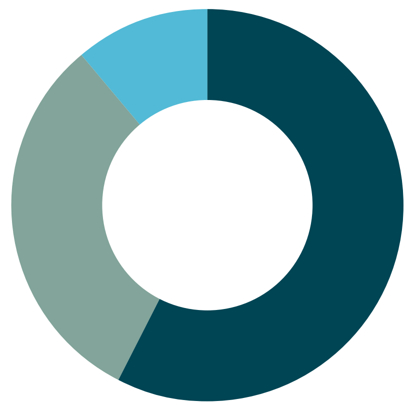


Tourism Research Australia National Visitor Survey Cessnock and Singleton LGAs combined.
5 year average YE March 2016 - YE March 2020. Data supplied by Destination NSW.

DOMESTIC PURPOSE OF VISIT

- Tourism Research Australia data indicates that holiday is the main reason to visit the Hunter Valley for both domestic overnight (57%) and domestic day visitors (63%).
- Domestic overnight visitors on holiday are the highest yielding visitors.
- Just over a third of visitors to the Hunter Valley are visiting friends and relatives (VFR).
- Hunter Valley business visitation is lower for day and overnight visitors. However it generates good visitor expenditure, presenting an opportunity for future growth.

Hunter Valley Purpose of Visit Domestic Overnight



57% Holiday
31% Visiting Friends + Relatives
11% Business

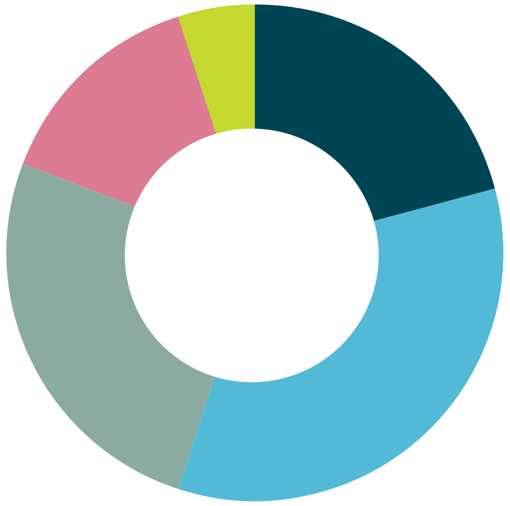
The main activities undertaken while in the Hunter Valley are eating out at restaurants and cafes, visiting wineries, visiting family and friends and sight-seeing.

Tourism Research Australia National Visitor Survey Cessnock and Singleton LGAs combined.
5 year average YE March 2016 - YE March 2020. Data supplied by Destination NSW.

DOMESTIC VISITOR PROFILES

Adult couples are the largest travel party group, followed by friends or relatives travelling together and then those travelling alone.

Travel Party to the Hunter Valley



21%	Travelling alone
34%	Adult Couple
26%	Friends or relatives travelling together
14%	Family group - parents and children
5%	Other

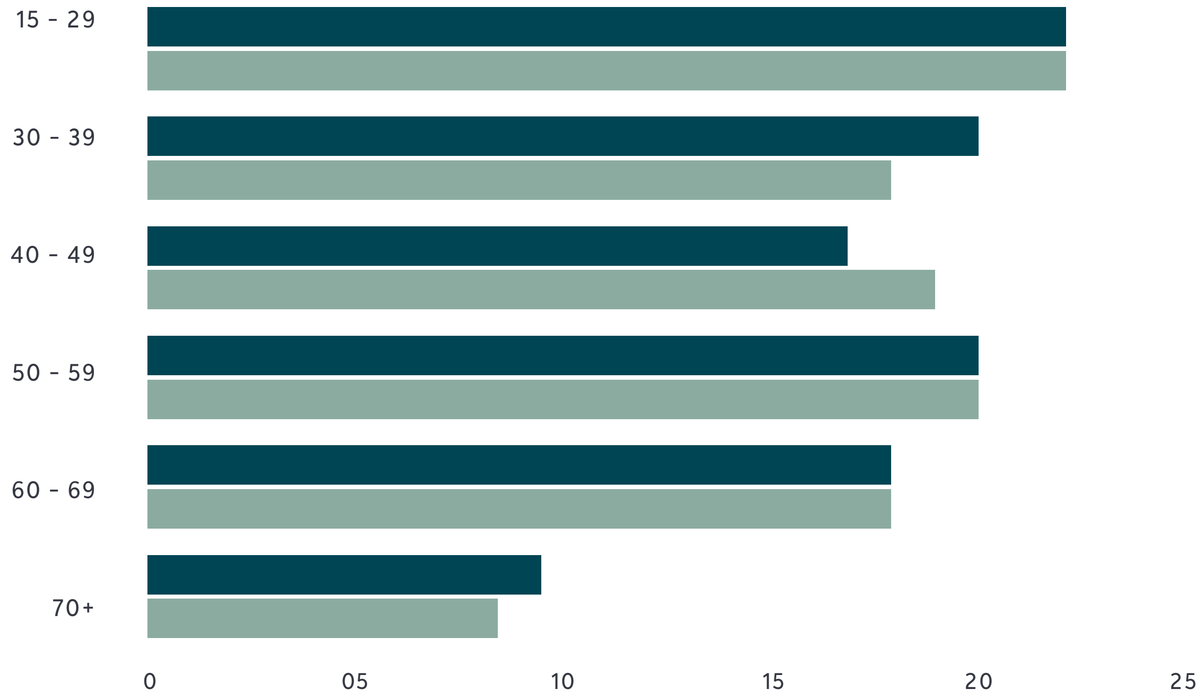
The data indicates that the largest age group visiting the Hunter Valley are aged 15 - 29. However when lifestage is considered older people 50+ (working and non working), and parents with children are the most likely to visit at 36% and 34% respectively.

Parents with children are more likely to travel as a couple or with friends indicating a growth opportunity for whole of family visits.

Generational differences also need to considered with Generation X and Baby Boomers making up 44% of visitation and Generation X and Millennial parents 34%.

Tourism Research Australia National Visitor Survey Cessnock and Singleton LGAs combined. 5 year average YE March 2016 - YE March 2020. Data supplied by Destination NSW.

Age + Generation of Hunter Valley Visitors



- Domestic Overnight Visitors
- Domestic Day Visitors

Roy Morgan Helix Persona data indicates the Cessnock region has more Leading Lifestyle visitors and the Singleton region has more Hearth and Home visitors, but that both LGAs saw an increase in Leading Lifestyle visitors during the COVID-19 pandemic.

Leading lifestyle: focused on success, career and family, people in the leading lifestyles community are proud of their prosperity and achievements. They are big spenders and enjoy cultured living to the max.

Hearth and home: closest to the average Australian, life revolves around the home for those contented Australians who embrace conventional family life. Perennial home improvers, they see their homes as an expression of their status and achievements.

Destination NSW Roy Morgan Tourism Movement Dashboard, October 2019 to October 2021. Data provided by Destination NSW.

INTERNATIONAL VISITATION

Prior to the COVID-19 pandemic Hunter Valley was a popular destination for international visitors given its proximity to Sydney, accessibility and internationally renown Australian wine. Tourism Research Australia International Visitor Survey indicates that 11% of total Hunter Valley nights are from international visitors. It also indicates that the main reasons for stay are for holiday and visiting friends and relatives from the lead markets of UK, US, New Zealand, Canada and Singapore.

Tourism Research Australia International Visitor Survey data (Cessnock and Singleton LGAs combined). 5 year average YE March 2016 to YE March 2020 and Tourism Research Australia International Visitor Survey Wine Insights Survey YE March 2019

Hunter Valley tourism industry feedback indicates that some operators enjoyed much higher international overnight and day visitation pre COVID-19 particularly with Asian and Chinese markets. This is also supported by Tourism Research Australia International Visitor Survey wine traveller insights that indicates that Korea and China were the largest markets.

The proximity to Sydney combined with the development of Newcastle Airport will create significant opportunities for increased international visitation to the Hunter Valley and future visitor economy growth.

SEASONALITY

Data indicates that autumn, spring and school holidays are typically the most popular times to visit wine regions and the Hunter Valley. This is supported by the Destination NSW Roy Morgan Tourism Movement Dashboard that indicates peaks in Easter, July, October and Christmas School holidays.

NSW / ACT wine travellers. Brand Engagement Monitor (Hall + Partners) Dec 2018 to June 2019. Destination NSW Roy Morgan Tourism Movement Dashboard. October 2019 to October 2021. Tourism Research Australia, International Visitor Survey, YE March 2019. Base International visitors who visited a NSW winery.

It should be noted that COVID-19 lockdowns and pent-up demand has also created unusual visitation patterns during 2020 and 2021. This is supported by Hunter Valley tourism industry feedback.

KEY VISITATION INSIGHTS

- Pre COVID-19, 90% of visitation was intrastate, with almost all holiday and visiting friends and relatives being intrastate. Opportunities to increase interstate visitation and extend length of stay and yield are key to long term destination growth.
- Hunter Valley visitor expenditure is driven by domestic overnight night stays (75%), yet 59% of visitors to the Hunter Valley are day visitors who only generate 23% of expenditure.
- Domestic overnight stays should be a priority for future growth given impact on visitor expenditure and yield.
- Increased expenditure from day visitors through increased experience development for this audience will aid yield from this large visitation sector, as well as provide increased day experiences for overnight visitors.
- The Hunter Valley visitor economy has been significantly impacted by the 2019/2020 bushfires and the COVID-19 pandemic. Pent up demand between lockdowns aided recovery during 2021 and 2022. This also demonstrates the benefits to be gained from the regions' proximity to major cities, and opportunity for future growth.
- Sydney is the largest market for both day and overnight visitors, which is significant for domestic and international travel. Accessibility and proximity should be a key component of future destination planning.
- The older traveller 55+ continues to be an attractive market for the Hunter Valley and this should be reflected in future product development and destination marketing.
- Adult couples and groups of parents with children are a key market for the Hunter Valley, providing an opportunity to expand the family market with more diverse experiences, accommodation and attractions to attract new and repeat visitation and extend length of stay.
- Female travellers either travelling alone or with groups of friends are a growth market. These travellers are looking to immerse themselves in the local culture and really experience the destination.
- Given the large visiting friends and relatives market (VFR), a campaign educating locals that boosts pride in their tourism area will be helpful to encourage more connection with the destination experiences.
- Experiences are centrally focused on food, wine and friends and relatives.
- Business travel is an opportunity for growth.

TOURISM SURVEY INSIGHTS

An online tourism survey across industry and community was included in the consultation process and promoted extensively across industry and community with feedback from tourism businesses, employees and local residents. Key insights from this survey are:

- Many respondents associate the Hunter Valley with the core experiences of restaurants, wine and wineries, particularly as 50% of respondents worked in these businesses. However it also indicated a limited knowledge or recall of the diverse range of experiences beyond wine and food. References to the natural landscape, national parks, Lake St Clair and cultural heritage and history were few and not top of mind.
- 64.9% of respondents would highly recommend the Hunter Valley to their friends and relatives. This is a good response, but benchmarks indicate that this should be over 80%.

These insights indicate an opportunity to develop and implement a locals/ visting friends and relatives' campaign to encourage residents to explore their own backyard, grow pride in where they live and invite their family and friends to visit and explore.

- Aligned with global trends, the respondents recognised that the mining industry and the perception of the Hunter Valley as a mining region could be detrimental to the tourism sector.

With emerging renewable energy sectors and sustainable industries, there is an opportunity to collaborate to promote future industries across the region and position the Hunter as a sustainable and progressive region. This will support the appeal of the destination to a growing sector of the market who are seeking out green places that promote wellbeing.

- The proximity to Sydney and Newcastle and access to one of Australia's well known destinations and oldest wine region is seen as a significant opportunity. However, the lack of inter and intra destination transport and connectivity were seen as major challenges that are required to be addressed.
- Nearly 70% thought there was opportunity to improve the night-time economy. Week day opening nights, a lack of diversity of food offerings, affordable dining options and other night-time experiences were all seen as barriers. Ideas included night-time markets around the region, outdoor cinema, small events and mid-range restaurants.

Opportunities for Councils and industry collaboration to facilitate the development and implementation of activities, balancing of restaurant opening times and wine and food evening experiences should be investigated to improve the night-time economy.

GROWTH MARKET OPPORTUNITIES

Research indicates there are a number of market segments where significant growth is expected to continue both within Australia and around the world, including:

- The evolution of the fifties plus market, the new demographic for travel – more people are choosing to travel earlier than retirement to enjoy the more active or immersive experiences that destinations have to offer. Globally, the 55 + market has the highest disposable income and are seeking new destinations to add to their bucket-list. Domestically, this market is travelling within Australia as well as overseas. They are as equally excited about an Australian holiday as they are about an overseas trip. This market is largely misunderstood; they want to engage and be part of the 'local scene'. They are also much more active and want to be perceived as being 'young at heart.'
- Domestically, they are also looking for short-break escapes and often choose to travel outside of peak periods to avoid the crowds.
- Millennials continue to travel more domestically than previous generations at their age. This represents an opportunity for the Hunter Valley to encourage groups of friends and Millennial families travelling together for short breaks and longer stays. This opportunity also extends to the Gen X market who are looking for family holidays and groups of friend's getaways.
- While some industries will continue to use video conferencing, the return of business travel where online cannot replace working remotely will re-open the business opportunity. The business meetings, incentives and events business sectors will also contribute to the business travel market. The emergence of the "digital nomads" market during COVID-19 allows people to mix holiday and remote working, enabling opportunities for extended stay and higher yield.
- The other growth area will be for businesses who want to reconnect with their staff through offsite small team meetings and conferences or retreats. They will look to stay longer and work remotely while they are on their retreat. These trends reinforce the importance of adopting an approach that assists in blending business with leisure and ensure that the local centres and villages are vibrant and there are experiences that fit into the work/life balance.
- Visiting friends and relatives (VFR) continues to be an important reason for travel, both domestically and internationally. Increasingly, the VFR market are choosing to stay in commercial accommodation, participate in local tours, activities and experiences and will often travel outside of peak periods to immerse themselves in the destination. It is important to market to the host to reach the VFR market.
- The continuous rise in the numbers of contemporary female travellers, who are more likely to have a higher disposable income and to travel either on their own or in small groups of friends. They are also key influencers in family travel. This market is seeking new experiences that immerse them into the destination and the local culture. Health and well-being as well as arts and culture are important influences on this market.

FUTURE OF DIGITAL

Travel Pulse

Digital access, the internet and wi-fi is an essential part of travel, with many using ecommerce to choose, book and manage their trips – pre visit and in region. Digital connectivity and mobile signal across the Hunter Valley is inconsistent and requires significant improvement in some areas to service visitor digital expectations and future visitor servicing.

Digital visitor servicing is key to the future growth of the region. The Hunter Valley needs to reassess visitor servicing at each stage of the customer journey from digital marketing engagement to online product booking and payment capabilities, to contactless technology, travel notifications and in region travel and experience information. Focus should be on easy and enjoyable experiences for the customer and tourism operator. For example ensuring all Hunter Valley maps and itineraries are available digitally online or via an App.

Councils, the Destination Network and Industry could take the lead in co-ordinating more advanced digital training in order to provide common digital services that will benefit all tourism businesses and the expectation of the visitor.

Smartphones are being used by visitors to look for information, share their experiences on social profiles and to leave comments and reviews.

Consumers also book flights on their smartphones and experiences when in destination. Hunter Valley operators need to be thinking "mobile first" and ensure their business is set up to take these bookings. Digital wallets (software based smart phone systems) that securely store users' payment and travel information are increasingly used by travellers and operators will need to ensure their technology can cater to visitors using a digital wallet.

Smart hotel rooms will become more common, where customers can open the door, adjust the temperature in their room, and even pay at the end of their stay, all with a simple tap on their smartphone. This may include setting an alarm clock, operating room amenities such as the shower, following a virtual class, and more. Sites such as Hopper offer the visitor convenience – for booking, for cancellations and more, while companies such as Airbnb are using innovative strategies to capture market share.

Data received through the use of digital technologies by tourism operators can be used by operators to gain insights and refine their product offering in order to lift the traveller experience.

08

CURRENT VISITOR OFFER

Hero Experiences

The strength of the Hunter Valley visitor experience lies in:

- A very large number of wineries, most with Cellar Doors, offering a variety of experiences from the many larger wineries that can service large groups, to the intimate boutique experience of a single estate, local vineyard.
- Several wineries combining food and wine, offering restaurants as part of the winery experience, often as a degustation or pairing experience.
- A very strong accommodation base, from small B+Bs to large sophisticated resorts (a number with quality golf courses). Most of the larger accommodation properties (and some smaller winery cellar doors) also with, mainly small size to medium conference facilities' and country house estates to enjoy with family and friends where you can hire a chef and even get the wine tasting to come to you.

- A significant number of conference and meeting facilities, mainly linked to accommodation with significant leisure facilities (such as The Vintage and Crowne Plaza).
- A wide range of restaurants and food options from award winning fine dining to pubs and cafes and some local providore style experiences, in addition the increase of micro-breweries, distilleries and unique or organic food products and markets. When the Valley is at full capacity however it can be difficult to book a table as demand is greater than supply.
- The opportunity to build on the paddock to plate approach, showcasing fresh local produce, with some restaurants already featuring these experiences.
- A strong base of tour operators, mainly focused around the wine and food experience, nature and soft adventure experiences e.g. ballooning, and sky diving, etc.
- A significant (but variable) range of leisure events, festivals and concerts with approximately 630,000 people visiting the Hunter Valley per year for these activities.
- Hunter Valley Villages and Towns, e.g. Wollombi, Broke, Pokolbin, Branxton, Kurri Kurri, Milbrodale, Bulga, Jerry's Plains, etc.
- Major non-wine related attractions such as Hunter Valley Gardens (although it is not a wet weather option), Hunter Valley Wildlife Park, Australian Army Infantry Museum amongst others, are larger and handle significant visitor numbers.
- The recently opened Singleton Arts and Cultural Centre at Townhead Park Precinct. Camping, nature-based and eco experiences such as Lake St Clair, and opportunities to grow soft adventure such as boating, walking, hiking, fishing, cycling and mountain biking in both surrounding world heritage-listed Wollemi, Yengo and Mount Royal National Parks national parks and recreation areas.
- International standard, championship golf courses.
- Country towns offering boutique shopping, award winning parks and open spaces, coffee shops and restaurants, a break for the whole family during the stay.
- Developing sports grounds bringing in regional events, e.g. floodlit cricket grounds for regional 2020, AFL regional women's rugby league.
- Cultural and Aboriginal heritage, sites and landmarks.
- Convict and settler history and heritage including heritage walks and trails.
- Cycling trials with opportunity for further development and connection across the Hunter Region.
- Roadtrips with the classic Route 33 and Putty Road routes as gateways to the Hunter Valley.

Products + experiences

A review of the Hunter Valley and Singleton tourism visitor guides indicates the number of products and experiences by current categories that are promoted from tourism operators and visitor economy businesses in the Hunter Valley. As seen in the industry section the number of visitor economy related businesses is much higher indicating opportunities for growth.

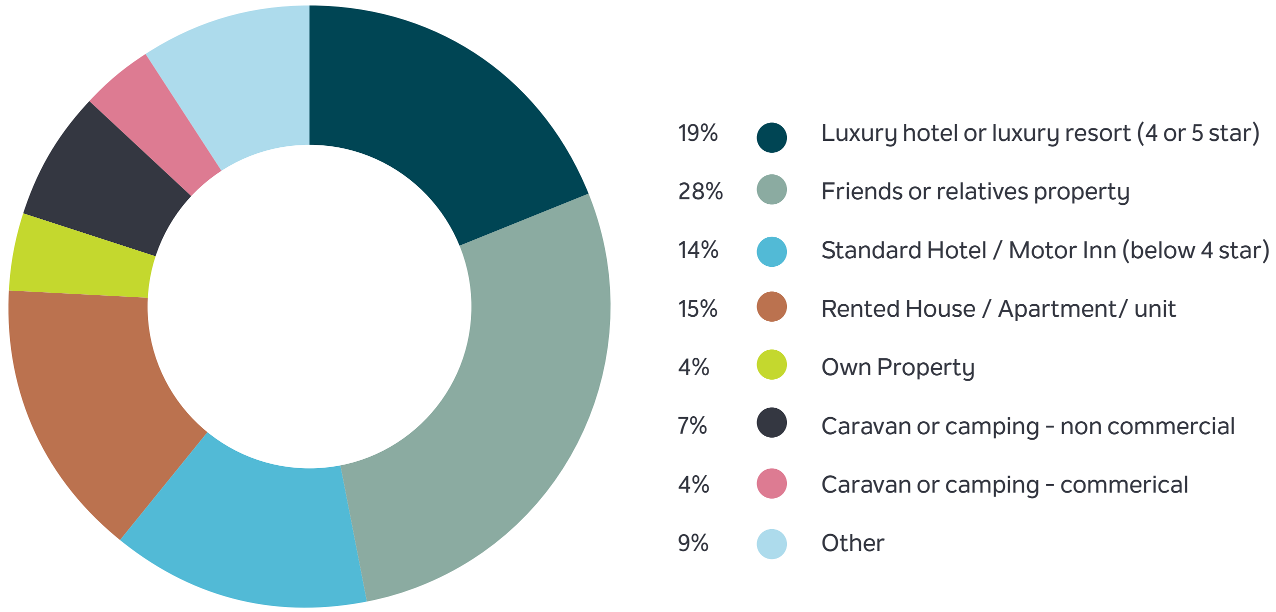
Type of Product or Service	Hunter Valley
Accommodation	149
Recreation Areas	111
Cellar Doors	106
Restaurants/Cafes/Eateries	98
Weddings	96
Experiences/Attractions/Activities	65
Tours/Transport/Transfers	49
Gourmet	18
Services	18
Breweries/Distilleries/Cider House	9
National Parks	7
Arts and Cultural Experiences	5
Roadtrips	2
Total	624

Many of these products have multiple aspects to their business e.g. cellar door, accommodation and restaurant. The above figures represent each of these products in their respective category.

ACCOMMODATION TYPES

- 28% of visitors to the Hunter Valley stay at a friends or relatives property.
- Hotels and motels are popular. The introduction of luxury accommodation in the Hunter Valley during the early 2010s has driven visitation and growth.

Accomodation Type



- The luxury accommodation sector is driven by Cessnock region accommodation while friends and family and motels are more popular within the Singleton region .
- Camping is more popular in the Singleton region of the Hunter Valley.
- The Hunter Valley length of stay is 2.55 (combined across the Cessnock and Singleton region's).

Tourism Research Australia National Visitor Survey Cessnock and Singleton LGAs combined. 5 year average YE March 2016 - YE March 2020. data supplied by Destination NSW. All data on this page.

SHORT TERM RENTAL ACCOMMODATION

The Short Term Rental Accommodation (STRA) market is an extremely fragmented one with lots of microbusinesses. Connected in some parts by Real Estate agencies, or property management groups who have sales divisions for letting and holiday rentals. The businesses are mostly small Property Managers looking after 5-10-15 properties. They list the accommodation on Stayz or Airbnb.

- Cessnock has 994 active property rentals with an average daily rate of $454, and average occupancy rate of 42%. These are located around Pokolbin, Branxton, Lovedale, Cessnock, Mount View, Wollombi, and Laguna.
- Singleton has 296 active property rentals with an average daily rate of $448 and average occupancy of 42%. These are largely located in Broke and Milbrodale, along Hermitage Road in Pokolbin and Branxton with some in Glendonbrook.

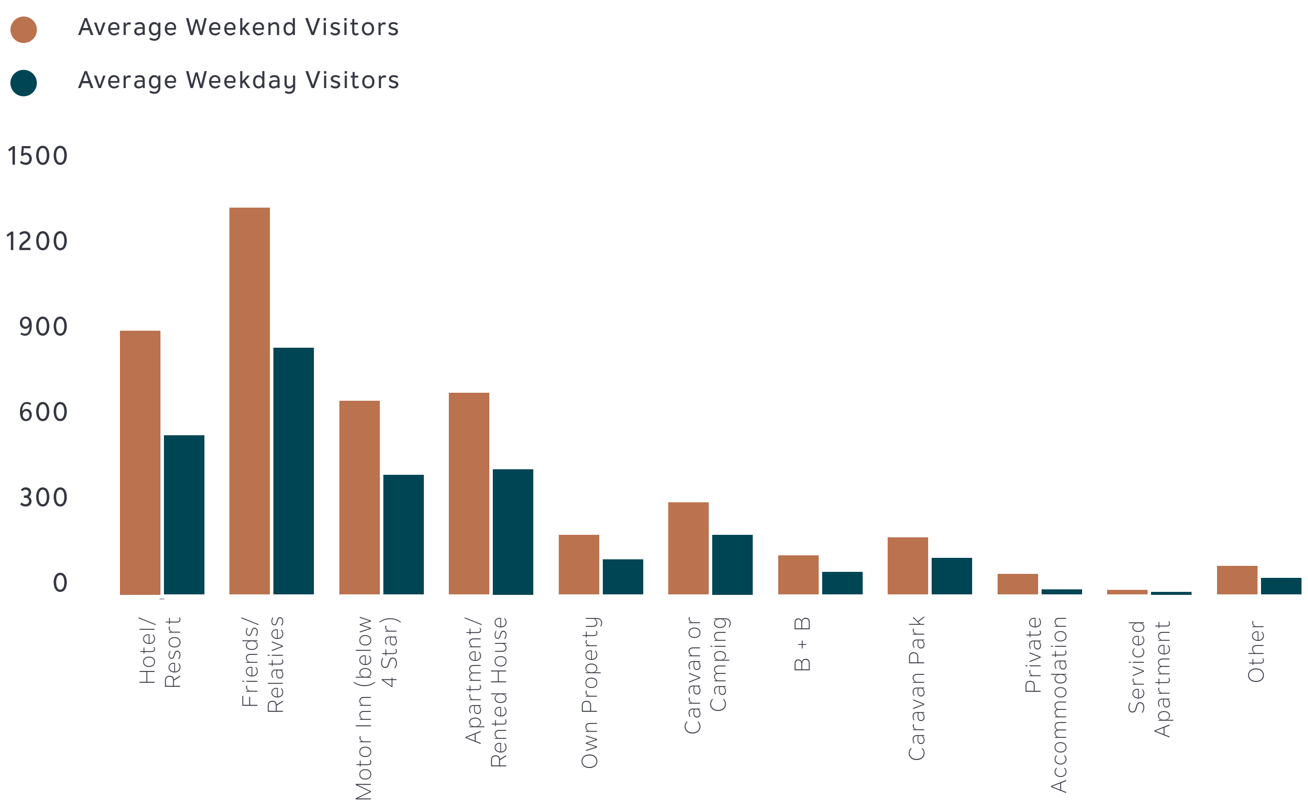
AirDNA, based on AirBNB, Expedia and Booking.com

ACCOMMODATION ANALYSIS

Accommodation modelling has been undertaken to achieve insights about capacity and bednights across the Hunter Valley. This was completed with data from the DestinationNSW Roy Morgan Tourism Movement Tracker and the accommodation data for Cessnock and Singleton LGAs combined from the Tourism Research Australia National Visitor Survey. 5 Year average YE March 2016 - YE March 2020.

- Weekday capacity is only 40% in the Cessnock region.
- The Singleton region has a 30% weekday capacity in the wine regions. However Singleton town is at capacity with business travel during the week, but requires action to increase weekend capacity.
- Demand for beds is highest for single travellers, followed by couples. The overall bed to people ratio is 50%.
- This highlights capacity for mid-week visitation growth and opportunities to extend the length of stay, particularly in Wine Country and other areas of the Cessnock region. It also highlights opportunities for weekend visitation to Singleton town centre.
- On average Hunter Valley weekend accommodation is 60% higher than during the week.

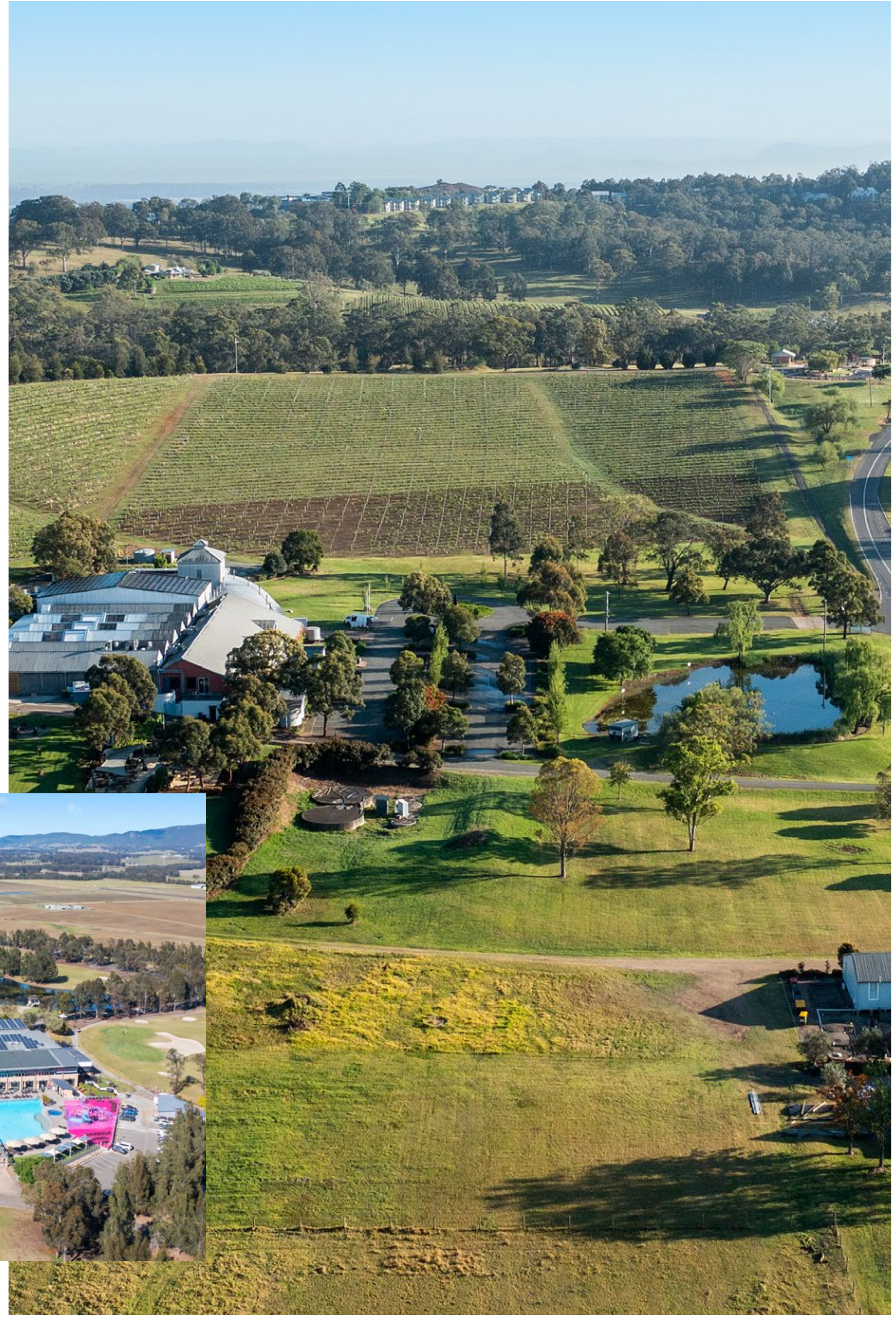
Average Weekend and Weekday Visitors by Accommodation Type

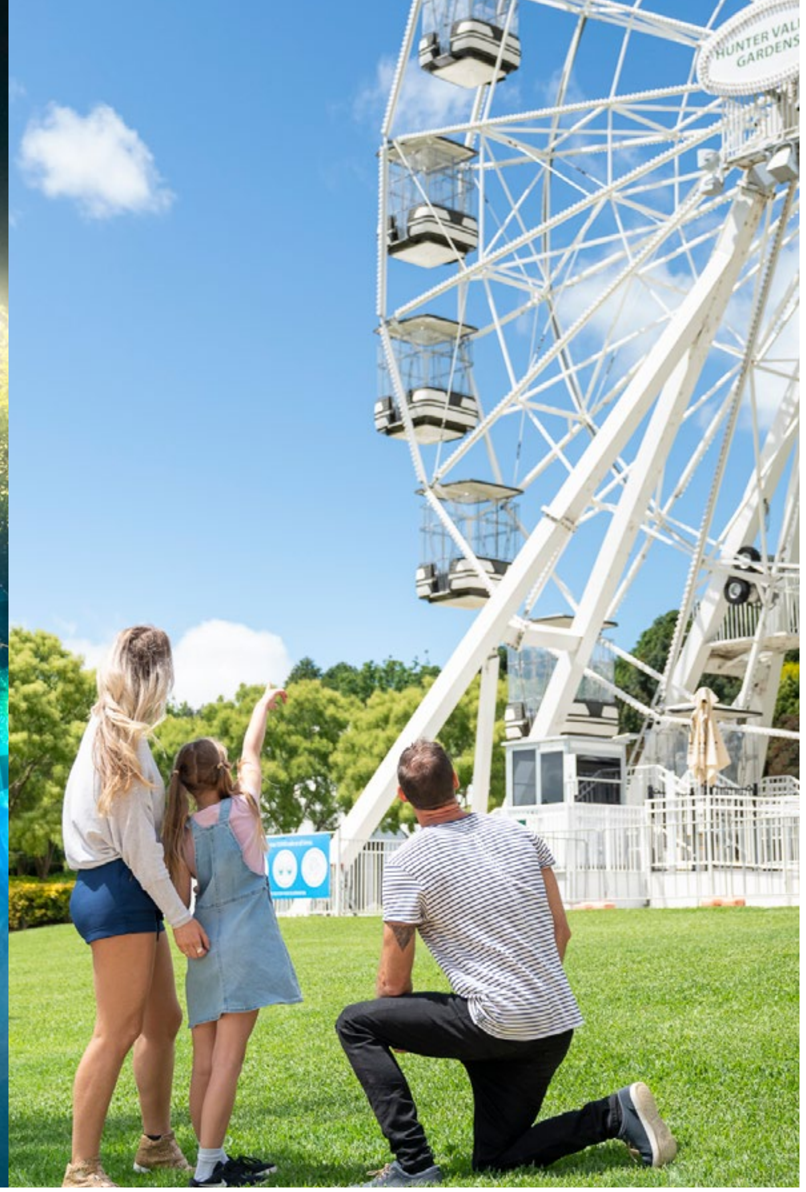


Accommodation modelling based on Tourism Research Australia accommodation usage and visitor type. Roy Morgan Visitor Numbers October 2019 – September 2020, Cessnock and Singleton regions combined.

Beds Used in Region	Total
Single	334,960
Couple	263,820
Friends or Relatives	101,060
Family Group	52,850
Other	25,350
Total Annual Beds	778,040
Ratio of beds to people	50%

Accommodation modelling based on Tourism Research Australia visitor type. Roy Morgan Visitor Numbers October 2019 – September 2020, Cessnock and Singleton regions combined.





EVENTS

Events are a real driving force for the tourism economy of the Hunter Valley. They are also another reason for friends and family to get together: the concerts are positioned in stunning vineyard locations, so it's a really fun and enjoyable experience, coupled with Hunter wines and great music; some of the family style events such as Hunter Valley Gardens bring in visitors of all ages but offer the family market a reason to visit and are often strategically placed to boost (what was traditionally) quieter periods (Winter/Summer) but is now for example school holidays, a peak.

The Cessnock area of the Hunter Valley welcomes around 480,000 visitors per year to special events with 8 being major music events with international artists.

The Singleton area welcomes around 78,000 visitors per year, largely driven by music events held at the Dashville location, but also food events out at Broke including Smoke in Broke and a Little Bit of Italy. Singleton town is also building a reputation for arts events with the annual Singleton Firelight Festival in May and Christmas on John Street in December.

BUSINESS EVENTS+ BUSINESS TRAVEL

The meetings, incentives, conferences and events (MICE) segment has been strong in the Hunter Valley and with HVWTA now once again having a dedicated business development resource to facilitate leads is an imperative addition to ensure the Hunter Valley grows its share of midweek business. Attendance at industry trade shows, connecting with domestic and international buyers, hosting key event bookers in region and increasing collaboration within the Hunter Valley is critical to growing this segment.

The proximity to Sydney and Newcastle, combined with the Newcastle Airport expansion, Cessnock Airport upgrades, New England Highway upgrades and rail links, as well as the many global businesses based across the Hunter region presents a significant opportunity for growth of business events and travel to the region.

TRANSPORT + CONNECTIVITY

Almost all Hunter Valley visitors arrive by car or by tour bus. Transport and connectivity in the Hunter Valley is limited both to the destination and within the destination. Lack of taxi and Uber across the Hunter Valley make it difficult for guests to travel between experiences, accommodation and venues, which can diminish the memory of the experience. Lack of connectivity exists between airports and train stations to experiences, accommodation and venues.

Serviced by Newcastle airport, which will have international connections within the life of the Destination Management Plan. Also serviced by Cessnock airport with upgrades underway. Hunter Valley is serviced by Singleton and Maitland train stations, however connectivity from stations to experiences, accommodation and venues is limited.

WINE TRAVELLER INSIGHTS

Destination NSW Wine Traveller Insights 2019 reveal that although food and wine enthusiasts will travel further, visits to wine regions are usually a short break rather than a holiday and as a result the distance from home becomes a key factor when it comes to choice of destination. In addition to the opportunity to try different food and wine, visitors are also looking to spend time in nature, to indulge and to find out what is unique about the destination. Local arts, craft shops and markets are of interest, as is the option to take short drives to places of interest nearby.

Spring and Autumn are generally the preferred seasons of travel for food and wine enthusiasts.

The Hunter Valley is NSW's most visited wine region, attracting a slightly younger crowd than the other regions in the state. Visitor satisfaction and advocacy is high and the region is perceived as being relaxed, welcoming, charming and accessible. The region differentiates itself from the Southern Highlands, Orange and Mudgee in terms of being seen as unique, adventurous and indulgent.

The main motivators for travel are:

- The opportunity to try different foods and wine (63%)
- Time to interact with nature as well as experience food and wine (54%)
- Indulging in a food and wine weekend (51%)
- The desire to find what is unique about the destination (49%)

The most important attributes for choosing a destination include:

- Distance from home (most influential)
- Customer service
- Accommodation
- Ease of planning

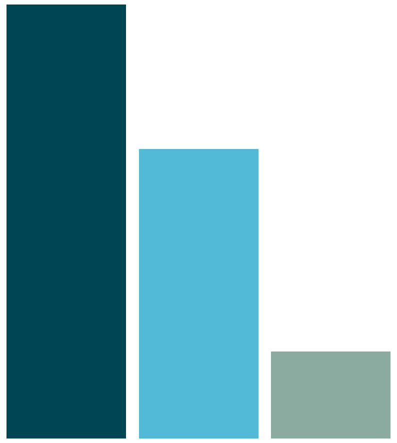
Food is an essential factor – Food and Wine Visitors are seeking more 'unique' offerings. Wine tasting, meals, local produce sampling and wine purchase should all be offered as a minimum.

To stand out from the rest, wineries could consider offering wine tours, special events, food and wine master classes and wine club dinners.

Food and Wine Tourism in NSW (2014) Tourism Research Australia
Winery visitation in NSW

Winery visitation in NSW

Of the 2.5 million visitors to NSW wineries, domestic overnight visitors are the biggest visitor segment. Visitors to NSW wineries are 2.4% of all visitors to NSW.



Visitors to NSW wineries are:

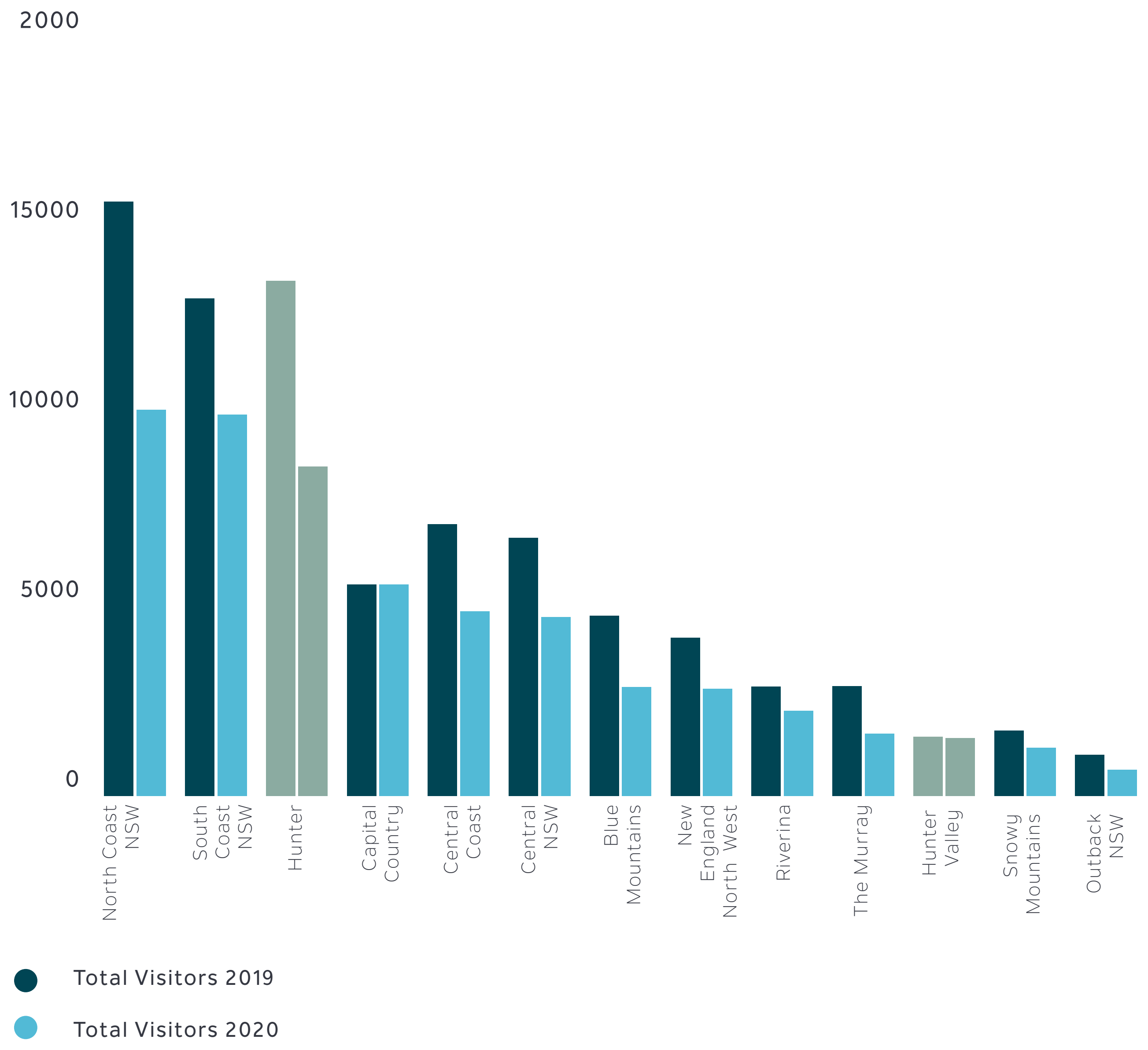
- 6% of international visitors
- 4% of domestic overnight visitors
- 1.2% of domestic daytrip visitors

National Visitor Survey, Overnight and Domestic daytrip and International Visitor Survey, YE March 2019
Base: visitors who visited a NSW winery

REGIONAL TOURISM VISITOR COMPARISON

Hunter Region tourism visitation declined by 36% between 2019 and 2020 due to the impacts of the 2019/2020 bushfires and the COVID-19 pandemic. However Hunter Valley visitation declined only 2.1%, due to its proximity to Sydney and Newcastle and the ability to meet pent-up demand for intrastate travel.

NSW Comparative Visitation 2019 + 2020



Tourism Research Australia, National and International Visitor Surveys. YE December 2019 and YE December 2020.

DEVELOPMENTS IN PROGRESS

Accommodation and experience developments in the Hunter Valley have contributed to significant growth. New developments and investment will continue to support future growth and diversity of experience across the Hunter Valley region.

Current developments in the Hunter Valley include:

Mulpha International

Construction is underway for 60 studio retreats at Bimbagen Palmers Lane in the Hunter Valley. This will be known as The Lane Retreat and will provide an accomodation option to complement the Palmers Lane weddings and events venue and tourism offering at Bimbagen's home vineyard on McDonald's Road.

Ben Ean Luxury Lodge

To be developed at the Historic Lindeman's site in Pokolbin. Key features of the proposal include:

- 50 x 1-bedroom apartments.
- A Central Lodge building containing the lobby +reception; Lounge with fireplace, Restaurant, function facilities, bar, wine tasting and dining room.
- Wellness + Recreation facilities including a Day Spa, Gym and Pool.

The vision of the Ben Ean Luxury Lodge is to provide luxury level tourist accommodation.

Road Upgrades

Sandy Creek Road, Mount Vincent- with the completion of the Fosters Bridge construction and new road approaches, the associated road safety improvement works on Sandy Creek Road are now complete. The project works involved road rehabilitation, drainage upgrades and safety improvements to the winding section of the road each side of Fosters Bridge.

Roche Group

To The combined Capital Investment Value of the below listed projects is at least $75M, and represents a significant investment in the destination that is HVG.

Harrigan's Irish Pub and Accommodation is set to expand with a further 96 tourist and visitor accommodation units (34 hotel suites and 62 apartments (1, 2 and 3 bed), with guest facilities including a wellness centre (day space, fitness centre, multisport and tennis courts) and pool/ entertainment facilities (splash pool, lap pool, plunge pool, fire pit, lounge and terrace areas, and multi-purpose entertainment area)

Hunter Valley Gardens also has plans to link the tourist facility with Harrigan's to improve visitor connections across the destination site and enhance the visitor experience with complimentary and flexible spaces, places and experiences by introducing:

- a Gatehouse building to provide a western perimeter to the Gardens (integrating a grand foyer and courtyard that connects to the Gardens, provides an arrival and departure point for the existing and approved accommodation and on site guests and includes a relocated bottle-shop, rooms for wine tasting events and experiences supported by a provedore shop and café, and a restaurant with indoor and outdoor dining terraces and dining rooms);
- expansion to the gardens to the Gatehouse Building and along Broke Road, including a vineyard sculpture walk, a wedding lawn and additional themed gardens;
- a museum and gallery building set within the expanded gardens providing permanent and temporary displays and flexible space for exhibitions, opening and events;
- a conference and function centre with raised terraces overlooking the vineyards and gardens, with flexible spaces to cater to varying sizes and types of events with meeting rooms, break out spaces, pre-function and function spaces for small, medium and large groups, up to 600 patrons.

Singleton Bypass

To commence in 2023, the Singleton Bypass will extend the Hunter Expressway, improving connectivity making it easier to access the Singleton region of the Hunter Valley and providing more opportunities for business and experience investment and development.

Richmond Vale Rail Trail

The proposed Richmond Vale Rail Trail is a 32km shared pathway along the former Richmond Vale railway between Kurri Kurri and Hexham/Shortland (14.4km are located within the Cessnock LGA). It will be a significant regional trail crossing three LGA's being Newcastle, Lake Macquarie and Cessnock. Key Objectives of the RVRT:

- Support future growth within the Lower Hunter region of NSW
- Maximise road safety benefits by providing a safe alternative route for active transport between the communities of the region (avoiding the New England Highway and M1 Pacific Motorway)
- Provide the local and regional community with better recreational access to the local natural environment (including access to the Pambalong Nature Reserve and Werakata + Stockrington State Conservations Areas)
- Encourage the growth of bicycle-tourism and industries within the region
- Generate opportunities for residents and tourists to enjoy healthier, more active lifestyles
- The establishment of 14.4km of pathway between 3-4m wide on an existing disused rail alignment
- Construction of 3 new parking facilities at various access points along the proposal route
- Restoration and repair (as required) of one tunnel (tunnel 3)
- Construction of a 15m two-span concrete bridge at Surveyors Creek
- Construction of a new 70m single span bridge at Wallis Creek

Shiraz to Shore Trail and Cycling Tourism Project

The development of a cross Hunter region Cycling Trail linking the vineyards to the shore. This project includes a master plan and cycle tourism strategy to link cycle tourism across the Hunter Region, connecting the Richmond Vale Rail Trail project further into Wine Country and to the Coast.

Other Walking, Cycle Trails and Outdoor Experience Developments

- The shared walking and cycling pathways at Broke and Milbrodale open up experiences and provide a safer visit for travellers.
- Horse trails in development in Wollombi, Laguna and Broke provide opportunity for increased horse riding.
- Additional walking trails at Broke open up nature experiences within the beautiful Broke valley and scenic backdrop of the Brokenback Range.
- Amenities and experience developments for the Lake St Clair recreational park to improve its position as a leading primitive campsite in the Hunter Region.
- Cessnock City Council has been successful in receiving $3 million in funding for a shared pathway which will connect Bridges Hill Park to Wine Country or more specifically Lomas Lane, Nulkaba.
- The upgrade of the Carmichael Park BMX Track in Bellbird will include track upgrades catering for beginner, intermediate and advanced riders.
- The upgrade and development of the Singleton Pioneer Park and Maison Dieu mountain bike trails.

Arts and Cultural Developments

- The newly opened Singleton Arts and Cultural Centre at Singleton Townhead Park Precinct which also includes the newly refurbished Singleton Visitor Information Centre, opens up the opportunity for development of Arts and Cultural experiences across the Hunter Valley.
- The funded Wonnarua Museum will provide opportunity for increased cultural experiences within the region.
- Development of the Baiame Cave Conservation Management Plan will support the ongoing management of this significant Aboriginal heritage site.

Cedar Mill Hunter Valley

- Located in the heart of Hunter Valley's wine country on approximately 40 ha, Winarch is in the process of preparing an application for a high end, mixed-use tourism & hospitality venue and function and event centre. Comprising of an amphitheatrestyle outdoor conference and events space able to accommodate 20,000 attendees, in addition to a 150-room hotel style accommodation, wine museum focusing on the rich history of the local region and specialist artesian food and beverages with multiple cellar doors.
- Cedar Mill Hunter Valley is a State significant development valued at $195 million.

Hunter Valley Integrated tourism development located at 1184 Wine Country Drive, Rothbury

This development is aimed at promoting tourism and the region's brand and profile internationally and locally. In addition to helping to drive tourism in the region, the expanded and enhanced design has also been curated to ensure the success and viability of the integrated tourism development. The development will also include residential land lots and apartments.

The key components of the Design include:

- A 5-star international standard hotel with 140 keys
- Expanded conference facilities which can accommodate up to 250 delegates
- Villas 160 keys
- A new food & beverage precinct
- A new international standard wine museum
- A new international standard art gallery
- An additional 186 residential land lots
- An additional 140 residential apartments overlooking the golf course.

A construction estimate of $144.2 million (excluding GST) for the hotel, villas, golf course, day spa, food and beverage district components. The Design would also provide 186 residential lots and 140 apartments. Overall, total construction costs are estimated at $520 million. An additional 5.8% for design and application fees was applied increasing the total capital investment value (CIV) to $550m.

Krinklewood, 712 Wollombi Road

Propsed development of cellar door, dwelling house, wash house, function centre and day spa, cafe, tourist and visitor accommodation villas and viticulture.

SWOT ANALYSIS

The analysis of strengths, opportunities, weaknesses, gaps and challenges (or SWOT analysis) has been based on consultation insights, in-destination visits as well as visitor research and data made available to the project.

The analysis is presented to highlight the opportunities or challenges to address. It also includes a summary of threats that are influenced by external factors outside the direct control of the Cessnock City Council, Singleton Council and Hunter Valley Wine and Tourism Association. A range of mitigation strategies are also provided that would assist the Councils to minimise or more effectively manage these threats.

Extensive consultation was conducted to inform the Hunter Valley Destination Management Plan with:

- 24 Consultations
- 6 Workshops held
- 18 One on One/Small Group Sessions
- 336 Tourism Survey responses

This robust consultation across stakeholders, government departments, industry associations, residents and operators gives an excellent insight to the opportunities and challenges facing the Hunter Valley.

This analysis also takes into account the data and insights presented in this Situational Analysis and provides a summary of conclusions.

Table 1: Strengths - Opportunities + Challenges

Strength	**Wine -** is a core strength of the Hunter Valley as a signature experience of the region as well as for NSW.
Opportunities	A key principle of the Hunter Valley DMP and the NSW Visitor Economy Strategy 2030 is to lead with your strengths. There is an opportunity to further develop a greater variety of and promote wine-based experiences to attract a higher yielding international market as well as create 'new news' for the established markets. New wine experiences will also encourage repeat visitation and increase length of stay. The wine experiences may also be developed and bundled with other offerings to create a new experience. 2028 provides the opportunity to leverage 200-years of winemaking and to celebrate the Hunter Valley as Australia's oldest and first wine region. It will be important to celebrate the past yet, profile the future of the Hunter Valley wine story to show the evolution of the wine experience and the industry.
Challenges	As the oldest wine region in Australia, the Hunter Valley is well known domestically and internationally. It is perceived as a high quality, well understood destination. There is an opportunity to refresh the brand creative execution and demonstrate novel, innovative and diverse experiences that will attract new audiences, as well as encourage repeat visitation. There are also other issues about accessibility and transport options within the region that can impact a visitor's ability to access the wine region and its experiences on offer. This issue has been addressed in the section under weaknesses.

Table 1: Strengths - Opportunities + Challenges

Strength	**Hunter Food -** The Hunter Valley has a reputation of offering high-end and well-known restaurants with outstanding reputation.
Opportunities	To further elevate and promote the high-quality reputation of the food offering. This will assist in differentiating the Hunter Valley from other regions who cannot deliver the same level of restaurant and food experience. Working with the hospitality sector and food producers to enhance the food offering across the entire hospitality sector from cafes and pubs to restaurants. To investigate the creation of a world class Hunter Valley farmer's market to take place in different locations around the region on a regular basis. **To work more closely with the Hunter Culinary Association to:** • Leverage the programs delivered by the association • Identify gaps and opportunities to improve the food offering beyond the renowned restaurants • Elevate customer service across the region within the hospitality sector • Create food experiences that underpin the positioning of the Hunter Valley as Australia's leading culinary destination to match its wine reputation.
Challenges	The availability for visitors to book renowned restaurants or hatted experiences can be challenging over weekends or busy holiday periods and major events. One of the key issues for the region is availability of restaurants and cafes that are not open during the week, particularly, Monday, Tuesday and Wednesday nights. This is a barrier for visitors looking for a long weekend or to extend their length of stay. It also does not support the region as a renowned culinary destination. Good food options at every level ie, from cafés to pubs is equally important to establish the region's food credentials. Many of these food experiences are also not available on Monday, Tuesday and Wednesday. Often the high-end or renowned food experiences are only available as part of a winery or by a named accommodation provider. Encouraging the development of more standalone named and reputable food offerings would enhance the diversity of food experiences to continue to demonstrate a world class food region.

Table 1: Strengths - Opportunities + Challenges

Strength	**Rural Setting and Environmental Landscape -** Communities and businesses of the Hunter Valley strongly value the rural settings, vineyards, and general aesthetics and future environmental sustainability of the region.
Opportunities	To reflect these values and bring them to life through compelling stories, interpretation and the experience offer of the Hunter Valley. Future development within the region needs to undertake and be delivered in sense of place to maintain the aesthetics of the region. This includes appropriate tourism development. Tapping into the growth travel trends of eco-tourism experiences, sustainable tourism practices and providence of food and wine. There is an opportunity to encourage higher yielding visitors who stay longer through Council internal collaboration between economic development and planning teams on strategic and master planning that attracts the appropriate investment and new developments to meet the needs of these visitors. New gateway developments to improve the aesthetics of the Hunter Valley are vital in creating a positive first impression for the region.
Challenges	Unbalanced tourism means that there could be overtourism at specific locations at times of the year. This can impact the aesthetics, perception and reputation of the region. For example, traffic flows and accessibility can be challenging in some parts of the region when major events are occurring. Housing pressure needs to be balanced with with green space planning to maintain the aesthetics of the region and meet visitor appeal and community needs. Visitor demand for green destinations will continue to grow over the next 10 years, with visitors choosing travel destinations based on sustainability and aesthetics. The challenge is to ensure that Hunter Valley Councils policies and State Government regulations are aligned with the needs of the growing green economy. The planned entrance upgrade for Cessnock's Apex Park by Cessnock City Council makes a statement and is visionary in its design. Along with the proposed Wine Country Gateway Sculpture at Hermitage Road and the Singleton Hunter Valley gateway signage, these projects will build a landscape identity across the region.

Table 1: Strengths - Opportunities + Challenges

Strength	**Recreational Facilities -** The region boasts many recreational facilities. Existing facilities such Lake St Clair, playgrounds and other sport and recreational facilities are assets to the region and are valued by the locals as well as having the potential to increase visitation.
Opportunities	Good, high quality content and information is required to showcase the regional recreational facilities such as the Lake St Clair recreational offering, parks and playgrounds, cycling, walking tracks, horse riding trails and camping sites, especially those managed by Councils. Developing content in these areas that is inspiring, motivating and informs visitors where these experiences are will disperse visitors across the region, creating more opportunities to explore the Hunter Valley landscape and build the family and other markets. Connectivity of infrastructure across the wider Hunter Valley including National Parks and outdoor areas is key. Taking a landscape and user experience approach to further developing infrastructure ensures linkages of the cycleways, nature trails, villages and walking tracks so there is a seamless user experience. Collaborating and driving the development of the Richmond Vale Rail and Shiraz to Shore Trails has the potential to be a game changing project for the Hunter Valley. Enhancing the region through offering a nature-based experience that the market across all demographics is seeking.
Challenges	There is a specific challenge to broaden the content across the diverse range of experiences to promote the whole region to new markets. This will also contribute to the opportunity to extend the length of stay of current visitors. The Hunter Valley website can benefit from a customer/user experience approach to communicate to other markets and different personas, noting that work is being undertaken on the website during 2022 and 2023. This also requires the challenge of developing inspiring content across the diverse experiences for different market sectors. Defining the roles between the Councils and HVWTA will be very important to ensure content creation by market interest is achieved. The collaboration of the two Councils to ensure that there is a landscape approach to planning, especially if there are different rules and regulations that make it difficult to develop plans to link infrastructure such as cycling and walking trails. Gaining funds and planning permission to develop the Richmond Vale Rail and Shiraz to Shore trails to their fullest potential, is a major opportunity for the region. Also, the growing competition from other regions who are much further ahead with providing rail trail experiences within their wine regions should be noted.

Table 1: Strengths - Opportunities + Challenges

Strength	**Aboriginal Cultural Landscapes -** 'The dissected sandstone plateau country in the Mount Yengo area is of the highest spiritual significance to the Aboriginal people of NSW. With an abundance of cave art, rock engravings and stone arrangements traditionally used for the learning and ceremony for tens of thousands of years. The significance of Mount Yengo and Baiame Cave is as sacred to the people of the East (the Sunshine people) as to those at Uluru in the Centre.
Opportunities	The Hunter region is home to numerous national parks and bushland. Many of these protected areas are of significance to the local Aboriginal communities. They also protected sites that include cave art, engraving and other points of interest. There is an opportunity to work with the local Aboriginal communities, relevant organisations and collaborate with the Local Aboriginal Land Councils and Aboriginal organisations to further develop cultural experiences. This may also include the appropriate development of visitor experiences around programs that already exist such as environment and caring for country programs. Councils to work more closely with the local community and association to facilitate appropriate and sensitive development of Aboriginal cultural experiences, while protecting and conversing these sites. **Some specific opportunities are:** • Mindaribba Local Aboriginal Land Council already deliver programs such as reestablishment of bird habitats as part of their environment and caring for country programs. Making these programs accessible to visitors and locals would be an amazing way for visitors to experience local Aboriginal culture in a meaningful and contemporary way • Work with Aboriginal communities and landowners on the access and cultural tourism aspects of the Baiame Cave Conservation Management Plan. • Support WUPA art trail and events. • Working with NATOC to develop cultural experiences across the Hunter Valley region
Challenges	Establishing the appropriate networks to work with the local Aboriginal organisations and identify those who have an interest in developing cultural experiences and for the visitor. Ongoing collaboration to facilitate and support the development of cultural experiences of the different Indigenous organisations such as the Baiame Cave, WUPA and the Local Aboriginal Land Councils.

Table 1: Strengths - Opportunities + Challenges

Strength	**Perception of the history, heritage and the arts offering** The Hunter Valley is steeped in the European history and heritage beyond the wine heritage.
Opportunities	The development of arts and cultural precincts such as the Townhead Park Precinct and Singleton Arts and Cultural Centre in Singleton profile the Hunter Valley region as a destination for arts and culture, attracting more diverse and new markets. Creating experiences, workshops and masterclasses along with tours that increase the profile of arts, culture and heritage across the region, will add to overall aesthetics and appeal of the Hunter Valley as a destination. Established offerings such as the Australian Army Infantry Museum are attractions within themselves to a specific target market and adds to the Hunter Valley experience.
Challenges	The ability to find a balance between curation and visitor experience is key to ensure all visitor expectations are met. Staff and volunteer training are key to ensure memorable visitor experiences. Having the skills in place to develop and facilitate tours, masterclasses, and workshops to meet the needs of the target market. Further, there is a lack of inspiring content for marketing of the arts, culture, history, and heritage experiences that needs to be addressed to achieve growth of visitation to these attractions.

Table 1: Strengths - Opportunities + Challenges

Strength	**Events -** The Hunter Valley is known for its large music events from famous Australian artists to world renown global superstars.
Opportunities	There is an opportunity to better engage with those visitors coming to the Hunter Valley specifically for a major event. To provide information to the market and sharing information about the region once they return home. Developing smaller event/s or defining and promoting events that profile the region from the food and wine events to culture and arts. Making these events high quality, bespoke and small. This will appeal to a higher-end market who is seeking a more tailored event experience. Leveraging the demand for smaller tailored business events and conferences. This sector has grown and with the emerging new consumer segment digital nomads this means business events allow people to extend their length of stay after the business event or conference has finished. Continue to work with the venues to attract bigger conference and business events that can fill mid-week.
Challenges	Because of the big events such as a Day on the Green or major music events such as Elton John, the region could be perceived as being a major music event destination or a venue only destination. While the events provide an opportunity to profile the region to the event goers there needs to be a targeted approach to share the information about the Hunter Valley once the event goers have returned home as well as before they arrive to extend length of stay beyond just the event. Major events ensure that accommodation and hospitality venues are booked out. However this limits the opportunity for other higher yield market sectors during the major event period. This can also impact region dispersal and cellar door and other sector sales sales due to the focus on the major event and the act.

Table 1: Strengths - Opportunities + Challenges

Strength	**The Natural Environment and Nature -** Creating experiences and accommodation that leverages the natural beauty across the Hunter Valley within and beyond the wine region.
Opportunities	Develop and promote nature-based tourism experiences and accommodation, including but not limited to small-group, personalised and/or immersive tours as well as boutique accommodation within nature-based settings. For example, glamping or tiny houses and boutique guest houses in wine regions or agricultural zones is very appealing to the market. This represents an opportunity for strengthening the accommodation and experience offering. Developing infrastructure links and promotional links between wine, food, cultural and nature-based experiences. Guided tours including multiday adventures by foot, mountain bike and linked to nature-based accommodation as well as to local wineries options such as glamping would provide a signature experience.
Challenges	Enabling access to natural areas, including national parks by commercial operators is critical to strengthening the Nature-based tourism offer of the area. This should be addressed through demonstrating the Council's commitment to the value of environmental sustainability and aesthetics through its planning policies and decisions as well as focusing efforts on higher-yield visitors. Ensuring a better understanding of and addressing environmental thresholds, capacity constraints and impacts of tourism. The growth of sustainable and renewable energy industries should be promoted to demonstrate a progressive, clean and green region that encourages future visitation from sustainable, green focused visitors.

Table 1: Strengths - Opportunities + Challenges	
Strength	**Interest Based Marketing -** Birdwatching, mountain biking, walking, cycling trails outdoor recreational experiences and golf.
Opportunities	Developing walking trails and purpose-built cycling trails to link the towns, villages, wine, and food experiences. Taking a landscape approach across the two Councils to ensure there is connectivity between infrastructure such as walking and cycling trails. Cycling trails linking experiences and are in themselves an experience. Developing content and bundling up product to create experiences for different interest groups. For example, bundle accommodation with birdwatching information and a cultural tour.
Challenges	Extensive content on these activities in the region is required to inspire, engage and demonstrate the diversity and variety of activities across the region. Once again taking a landscape approach between the two Councils to develop this content will require funding commitment and a clear vision.

Table 1: Strengths - Opportunities + Challenges	
Strength	**Accessibility to Key Markets** (Sydney and Newcastle)
Opportunities	The Hunter Valley has an opportunity to reinvigorate source markets interest in the Hunter Valley for a short break. With the ongoing development of the Greater Sydney Road network as well as surrounding regional areas, the Hunter Valley has become even easier to access. This provides an opportunity to build on the day market as well as the overnight market. This is also relevant for the international market.
Challenges	Providing opportunities to increase the average spend of day visitors as well as positioning and build brand equity to drive preferences for the Hunter Valley as a short break and holiday destination given the competitive nature of other regions

Table 1: Strengths - Opportunities + Challenges	
Strength	**Newcastle Airport Expansion**
Opportunities	The Newcastle Airport upgrade creates the opportunity for international and domestic visitors beyond the key sources markets to choose the Hunter Valley as the destination and not just an add on to the Sydney trip.
Challenges	Transport options from Newcastle Airport to the Hunter Valley beyond hire cars and hotel owned shuttlebuses will be an ongoing issue into the future especially for the international (Free Independent Traveller) FIT market. Advocacy related to inter and intra region transport options and connectivity is required to overcome key challenges.

Table 1: Strengths - Opportunities + Challenges	
Strength	**Visitor Servicing** - The Hunter Valley and Singleton Visitor Information Centres and the Hunter Valley Wine and Tourism Association marketing and website are key to the visitor experience.
Opportunities	Undertake a Visitor Servicing Review to identify future opportunities to improve the visitor experience. There is an opportunity to extend the roles and reach of the two Visitor Centres to create a united Omni Channel service to better service the visitor when in region. Good quality visitor servicing is a key to increasing visitor spend. It is critical to be able to reach the visitor with the right information through the right channels, especially when the visitor is in the destination.
Challenges	Cessnock City and Singleton Councils in partnership with Hunter Valley Wine and Tourism Association would need to agree on roles and responsibilities for the delivery of visitor servicing outside of the physical Visitor Centres and agree the system used to provide an Omni Channel approach.

Table 1: Strengths - Opportunities + Challenges

Strength	**The Hunter Valley already hosts a number of business events and has capacity for growth of this market segment.**
Opportunities	Growth in new accommodation and experience offerings across the region create new opportunities to target return business. Newcastle Airport has added new routes to more destinations and increased flights overall allowing easier access and lessening time into region.
Challenges	Additional accommodation to fill in quieter mid-week period. Major events drive increased accommodation rates across the Hunter Valley which make it less affordable for business events during that time. COVID-19 pandemic increased demand into the region which in turn drove accommodation rates higher. It is becoming more expensive to conference regionally than in the cities.

Table 2: Weaknesses + Gaps

Weakness	**Connectivity -** Visitors need to have the choice to connect or disconnect. A poorly serviced network is a key challenge for the Hunter Valley, as highlighted in all feedback.
Opportunities	All visitors expect good digital connectivity, which is further increased with the identification of a new consumer segment (brought about by COVID-19) the 'digital nomad'. Communication connectivity within the Hunter Valley will become a greater issue for the market seeking destinations that can provide good connectivity. There is an opportunity for the Hunter Valley region to create a competitive advantage over other destinations by improving the reliability and reach of the connectivity network through continued advocacy and collaboration.
Challenges	The lack of infrastructure support around services such as NBN and mobile connection was highlighted as a major barrier to future competitive advantage across the Hunter Valley region. Advocacy across all levels of government and collaboration with the Alliance and DSSN is required to improve and future proof the communication connectivity for the region.

Table 2: Weaknesses + Gaps

Weakness	**Consumer perception beyond wine and major events**
Opportunities	Developing more products and experiences to meet the growing demand of sustainable tourism, nature tourism, outdoor activities (cycling, walking and horse-riding) and cultural and arts tourism will enable visitor economy growth. Many of these experiences will appeal to those already visiting the region for an immersive wine experience contributing to extending the length of stay. These experiences will also attract new audiences to the region who are also likely to enjoy the wealth of wine and food experiences. Develop and promote nature and cultural-based tourism experiences, including but not limited to small-group, personalised and/or immersive tours. Encourage greater collaboration for packaging and bundling of products to create world-class experiences.
Challenges	There is a need to understand and develop the right models and networks to support the diversity of tourism products and visitor experiences across the Hunter Valley region. Capability development programs that encourage local businesses to create new experiences that meet the needs of the market. This includes ensuring tourism operators are aware of DNSW's Get Connected and NSW First programs for market-readiness and listed on the Australian Tourism Data Warehouse.

Table 2: Weaknesses + Gaps

Weakness	**Transport and a landscape approach to access**
Opportunities	Working with all levels of government to future proof the Hunter Valley transport needs. With the growing demand for the Hunter Valley as a place to visit but also as a place to live, there will be increased demand for parking, pressure on roads and managing peak visitor periods such as events. Creating infrastructure that better services these demands will be paramount. The opportunity is not just about building bigger roads it is also about cycle trails that can be used to commute and well as a leisure market. Better public transport access not only services the visitor but also impacts the attraction and retention of staff. There is also an opportunity to explore public/private sector partnership to address the transport issue. This will be important to leveraging the opportunities that the upgrade to Newcastle airport offers services beyond car hire. Looking at on-demand bus service, rideshare and shuttle bus services to better address the needs of the market. This should also include transport between towns, villages and vineyards to enable stronger workforce participation.
Challenges	Creating a long-term vision for a landscape wide approach to the development of a sustainable transport options into and around the region, from on-demand buses, rideshare to future new technologies such as Elon Musk's Hyper Loop. Council and government policy around rideshare services and the cost of the on-demand bus services. Long-term suitability of offering these services year-round and outside peak periods.

Table 2: Weaknesses + Gaps

Weakness	**Landscape aesthetic and sustainability -** Impact the first impression on arrival to the Hunter Valley. It is also critical that there is a proactive approach to improving the green credentials of the region to meet market motivations.
Opportunities	The upgrade to the entrance to Cessnock, as well as the Singleton gateway signage and Hermitage Road Gateway sign to create a sense of arrival and to deliver a good first impression is important given that the aesthetics of the region is a major draw card to the region. The ongoing protection of the Hunter Valley Wine Country and the appeal of the national parks are key to support the commitment to offering a sustainable destination. The market is more aware of and concerned about the environmental sustainability of places that they visit. Within Australia major natural disasters such as bushfires and floods has bought the issue of Climate Change to the front of mind for many markets that are visiting the Hunter Valley.
Challenges	Pressure from other industries and the State and Commonwealth Government to expand industries that might not support the environmental sustainability approach. Cessnock City and Singleton Councils planning approach and tourism and vineyard planning projects that are underway can help to mitgate this challenge.

Table 2: Weaknesses + Gaps

Weakness	**Night-time Economy -** Lack of (or perception of) a vibrant night-time economy and limitations of the food offering in some parts of the Hunter Valley.
Opportunities	The delivery of night food markets on Thursday and Friday evenings. The opportunity to develop evening wine experiences in cellar doors. Small music and bar venues as well as pop up experiences in local recreational areas. Undertaking a night-time economy audit to identify what is available across the region and create content and information to share with visitors. Develop and promote food trails, breweries, live music and entertainment. Offer small pop-up style outdoors entertainment in the evening activating open spaces.
Challenges	Private sector involvement and investment is critical to activate a night-time economy and enhance the food offering, noting that not all parts of the Hunter Valley will necessarily be suitable for or able to sustain a night-time economy. This may need to involve strengthening consultation with hospitality providers and opportunities for collaboration to promote the area year-round to assist with business viability.

Table 2: Weaknesses + Gaps

Weakness	**Attracting and retaining talent, including capability development**
Opportunities	Working with the tourism and hospitality industry and government to develop a program to attract staff to the Hunter Valley region. This could include identifying the barriers for staff to relocate or to work within the sector. Consider sharing staff, building career pathways and raising the desirability of the sector as a long-term career choice. Identify the opportunities to utilise technology to perform tasks and rethink or design the staff's role in delivering an experience or customer service.
Challenges	The industry capacity to work together to develop a program to attract new staff and to improve the customer experience beyond what is on offer. Cessnock City and Singleton Councils, working with the Hunter Region Employment Facilitator can facilitate the discussion and development of program partnerships with the private sector and other educational institutions such as regional training organisations, hospitality schools and TAFE. Hunter Valley Wine and Tourism Association's industry development and industry induction program can also support an opportunity to build and retain talent.

Table 2: Weaknesses + Gaps

Weakness	**Housing and transport -** The availability and affordability of housing for staff as well as the residents of the region.
Opportunities	Working with the private sector to develop a plan to address the housing and transport issues for staff who work in the visitor economy. This could include Council working with developers and other organisations to create affordable housing options while at the same time maintaining design and aesthetic values for the region. Identifying best practices from around the globe with affordable housing projects that add a sense of vibrancy and creativity to a destination. Look at affordable housing in context of mix use. For example, housing that includes artist studio space or shared working locations. This thinking also extends to thinking about transport opportunities for the region.
Challenges	Setting a long-term vision that can be implemented over multiple terms of Council. Developing planning policies that encourage and support creative ideas and solutions to address some of these issues and can be consistent across both LGAs. State Government support from a financial and planning perspective to encourage developers to create appropriate affordable housing and transport options.

Table 3: Threats + Mitigation Strategies

Externalities + influence on the visitor economy	Mitigation
State and Commonwealth Governments have a role to play in assisting capability, event and/or experience development as well as marketing the destination. As a result, the level of funding allocated through the budgeting process for tourism is likely to correlate with the availability of programs or other opportunities for local government and industry. In NSW, a strong focus over recent years has been to increase the appeal of and encourage greater dispersal to regional destinations. Destination NSW continues to offer a comprehensive capability development program, such as NSW First and deliver marketing initiatives from which the Councils and local industry can benefit.	Continuing to collaborate with Destination NSW, Destination Sydney Surrounds North, other NSW Government agencies and the local industry to ensure ongoing access to and engagement in capability development programs and marketing initiatives. This includes building awareness of opportunities within the local industry and assisting in creating, curating, and sharing compelling content to support marketing initiatives and promotional campaigns.
National and global economic performance, which underpins growth in tourism viability. Tourism is generally on the frontline of the impact of economic downturn, either within Australia or globally. This is a result of tourism being a discretionary expenditure. Various elements of economic performance impact tourism growth including fluctuations in the exchange rate. However, the impact can vary. For example, a higher Australian dollar can reduce demand in international markets and domestic markets, as Australian holidays become or are perceived as relatively more expensive than overseas destinations. A lower Australian dollar can improve international competitiveness while also making domestic holidays more appealing to Australians. Also, the impacts of Pandemics or even conflicts between countries can impact the domestic and international travellers, such as the cost of oil that and then affects the increase costs in transport.	Achieving a balance between market segments, including international and domestic source markets is important to ensure that if one segment or geographic market is negatively impacted that the overall impact on the visitor economy is minimised.

Table 3: Threats + Mitigation Strategies

Externalities + influence on the visitor economy	Mitigation
Significant weather events and the impact of climate change. The impacts of significant weather events can be seen to impact the Hunter Valley with issues such as bushfires and floods. Into the future, credible climate modelling suggests that there will be more of these types of events. Impacts of these environmental risks include to the integrity of infrastructure that supports community and visitor experiences, such as the wineries or recreational infrastructure in nature-based areas as well as to the sustainability of businesses.	Councils already across the State have taken significant action with regards to this externality through the implementation of effective risk management strategies to a lesser or greater degree. Collaborating and working with the Joint Organisation and State Government will be ongoing as these types of events will become a regular occurrence.
Impact of unbalanced tourism. Many destinations around the world have or are feeling the impact of high visitation, creating situations known as overtourism. However, there is another side effect of overtourism and that is 'unbalanced tourism.' This can apply to a specific location or sites within a destination, such as Echo Point (The Three Sisters) in the Blue Mountains or World-Heritage listed Cinque Terra in Italy. The impacts can range from environmental degradation to overcrowding and reduced service levels or access to facilities for local residents. The reality is that as the world's population grows and developing countries continue to advance, more people are travelling than at any other time in history.	The most important step is to develop and implement a strategic approach to the visitor economy that focuses on yield and not just visitor numbers. This principle underpins the approach adopted in the Hunter Valley Destination Management Plan (this plan). Unbalanced tourism can be effectively managed. However, it relies on understanding the capacity constraints of, and effective planning for sites, facilities and infrastructure. In addition, it relies on effective visitor monitoring and forecasting from source data collected at a national, state, or local level. Globally, many destinations are developing new approaches to assist them manage the impacts of overtourism or unbalanced tourism, including involving visitors in 'pledges' that ask them to take better care of the places to which they travel.

COMPETITOR ANALYSIS

A competitor analysis has been undertaken to further inform our plan, this coupled with a detailed Situational Analysis of the visitor and economic research from the Hunter Valley and global and domestic tourism trends will all contribute to a future focused action plan that aligns with the expectations of our target markets. It is imperative to consider the expectations of our visitors or potential future visitors. This means we need to understand their motivations, preferences and barriers to travel.

Competitior Analysis Insights

A competitor analysis has been undertaken involving a number of destinations that have similar attributes to the Hunter Valley and are the most likely to attract similar target markets.

Competitior destinations have been chosen as they fit into the following criteria:

- All destinations are recognised wine or tourism regions with food + wine offerings
- Distance from primary source markets such as Sydney, apart from the Napa Valley which is located in the United States of America
- All the destinations are in market leveraging similar experiences and attributes especially food + drink, as a main or very important focus for each region

The eight competitor regions identified are:

- Mudgee, NSW
- Orange, NSW
- Shoalhaven, NSW
- Southern Highlands, NSW
- Blue Mountains, NSW
- Napa Valley, California, USA
- Margaret River, WA
- Barossa Valley, SA

The analysis identified a range of issues, outlined below, which have been considered as part of the development of the DMP.

- All regions have a fairly similar offering, making it difficult to differentiate the Hunter Valley on its own attributes and experience offer alone.
- All NSW regions see Sydney as the key source geographical market.
- Shoalhaven is a summer holiday destination and already attracts a large number of visitors to the region. This represents a difference in that this region doesn't primarily rely on food and drink being its major draw card. However, Shoalhaven Council recognize that their food and drink offer including events will be a key driver of visitation over the low season. In addition, they also have in place many bookable food and drink experiences and offer food and drink events.
- The Orange 360 brand and collaboration is providing a focused approach to reinvigorating destination marketing activities and increasing visitation to this region.
- All regions have a contemporary website, most with e-commerce capabilities, with destinations such as the Blue Mountains even listing experiences that are taking extra COVID 19 precautions and the Napa Valley showing sustainability accreditation.
- Napa Valley has a big sustainability focus and over 40% of all sustainable wineries in the USA are in California.
- All regions could benefit by more highly-engaging and inspiring content for content marketing.
- Shoalhaven Coast and Mudgee region have a very cohesive and collaborative relationship with their industry, which is a strength of their respective destinations. The other destinations are at various levels in the process towards strengthening collaboration but are significantly behind Mudgee region and Shoalhaven Coast.
- Both the Barossa Valley and Margaret River have benefited by significant State government tourism and infrastructure funding that allow them to commit to staff and market their destinations at a very high level.
- Shoalhaven region has an excellent inclusive tourism website page that promotes all accessible experiences and lodgings.
- All regions have listed content on ATDW, the best regions integrate it into their websites and digital channels. The Hunter Valley is leading the other destinations in terms of bookable products.
- All regions have Visitor Information Centres and destinations such as Shoalhaven are reviewing and rethinking how they deliver visitor servicing. They are doing this through repositioning the VICs more experientially and to increase the use of technology to deliver visitor information, interpretation and engagement to complement face-to-face services.
- Napa Valley has more music events than wine events, so are leveraging entertainment to accompany their food and wine offerings.

What does it all mean for the Hunter Valley?

The Hunter Valley has very strong brand and customer proposition and is well known as Australia's Oldest Wine Region. However over the next five to ten years, the regions that will find success are likely to be those regions that meet the needs of the market across the customer journey: from dream to plan, book, go and share.

As a result, the two key issues to be addressed are:

Emotional connections

The development of inspiring and engaging content that is used for content marketing is going to be a key factor for success and more effectively distinguish the region's unique selling proposition. This is more than developing videos, images and stories that profile a local character, product or experience. It is also about creating stories and a narrative to showcase the values or essence of the brand. It involves engaging and inspiring content that delivers on The Good Life campaign, drives SEO, share-ability and underpins the Hunter Valley brand. To take this one step further to be able to offer visitors the unique experience of talking or engaging with an expert about a destination is also important for creating an emotional connection. Milestone events, weddings and celebrations can also inspire that emotional connection with a destination.

Ease of booking in real-time across any device will also increasingly influence the visitor's choice of destination. There is a growing demand for online booking functionality, both during the planning phase as well as in-destination, including with the 55+ market. Importantly it is now an essential for the Millenial and Gen Z markets. When considering driving conversion we must ensure that content is tailored to the needs of the customer journey. We must know how to reach each of our target markets and inspire their interest in a highly-competitive marketplace. A well designed content strategy and optimization of customer channels is essential to driving conversion. A final consideration is to ensure that the product and experience offering meets the every changing needs of our target markets. For example developing more personalised and bespoke experiences as well as delivering on the experience themes for which the region has a competitive advantage is essential.

Mudgee Region

Destination awareness/marketing

Mudgee Region has successfully delivered a number of consumer-facing campaigns that has raised the awareness of Mudgee Region as a short break destination and increased visitor numbers and spend. Mudgee Region has also accessed dollar for dollar matched funding from DNSW, MWRC and Wine Australia to deliver several marketing campaigns.

Cohesion of the industry

Mudgee Region has a very cohesive approach to the visitor economy.

This underpins the success that the Mudgee Region has experienced in recent years.

Accommodation range

Mudgee Region offers smaller boutique accommodation. Airbnb lists more properties than any other platform and this reflects the style of accommodation on offer.

Food + drink experiences

18% of the overall tourism offering is food and wine experiences.

There are:

- 40 cellar doors
- 1 brewery + 1 distillery
- 1 cooking school
- 9 tour operators offer food and wine experiences

Online experience bookings are available through plugins such as 123.tix from visitmudgeeregion.com.au or in some cases via shopping carts at individual operator level. There are no individual operators offering bookable experiences through third party websites such as Expedia, other than a tour operator or Fly Pelican.

Online bookable experiences

There are experiences offered by tour operators and airlines offered through third party platforms such as Viator.

However, there are no individual operators offering bookable tours through other third party channels such as TripAdvisor, Viator or Airbnb experiences.

Very few individual operators offer real-time bookings.

Tourism category as a %

- 10% Attractions
- 5% Tours
- 18% Events
- 22% Food + wine
- 45% Accommodation

Orange

Destination awareness/marketing

In 2018 Orange launched their new brand Orange 360 along with new collateral, website and campaign.

Orange 360 positions Orange as a year-round destination and showcases Orange as being more than just a food and wine destination.

Cohesion of the industry

The launch of Orange 360 has improved collaboration between Councils, villages and the industry.

Accommodation range

The accommodation inventory in the Orange region has been evolving over recent years. Eight wineries offer accommodation located on a vineyard.

Airbnb offers the greatest number of accommodation inventory followed by ATDW. Interestingly, compared to the other regions Airbnb by far offers more inventory than any of the other platforms.

Food + drink experiences

There are:

- 37 wineries
- 3 breweries
- 14 tour operators (4 tour operators offer food + wine tours)

Online bookable experiences

There are:

- 5 experiences offered on TripAdvisor
- Very few operators other than a few wineries offer real time bookings for experiences on their own websites.

Tourism category as a %

- 18% Attractions
- 3% Tours
- 19% Events
- 14% Food + wine
- 46% Accommodation

Southern Highlands

Destination awareness/ marketing	Cohesion of the industry	Accommodation range
The Southern Highlands is a well known short break destination for Sydney and is also where a number of Sydneysiders own a country getaway. The region is also a destination where people work part-time in Sydney, and also work remotely.	Across industry sector collaboration is limited and reflected in the packages and offers.	There is a range of accommodation inventory in the Southern Highlands including named properties. The accommodation offering also supports the conferencing market more than any other region. Airbnb has the largest source of accommodation inventory. This is probably due to the fact that many places are owned by people in Sydney, and the growth in short-term rental types of properties. There are 3 wineries that offer accommodation.

Food + drink experiences	Online bookable experiences	Tourism category as a %
There are: • 14 cellar doors • 2 breweries/distilleries • 2 cooking schools • 18 tour operators (6 tour operators offer food + wine tours) Like the Hunter Valley, many of the tour operators are global or national brands. 20% of the wineries offer booking online in real-time for experiences.	**There are:** • 24+ bookable products offered by TripAdvisor • 4 offered by Viator • 13 experiences on Expedia • 4 experiences on Airbnb. • Individual tour operators with real-time bookings is very limited.	• 18% Attractions • 9% Tours • 14% Events • 17% Food + wine • 42% Accommodation

Shoalhaven Coast

Destination awareness/ marketing	Cohesion of the industry	Accommodation range
The Shoalhaven is known as a beach holiday destination and subsequently 72% of its tourism inventory is accommodation. The wine tourism offering is a very small part of the overall experience within this region. However the region is also anchored by global food celebrities offering such as Rick Stein's Bannisters restaurants. Even though the Shoalhaven reputation is not wine focused, the region is repositioning the food and wine offering as a major attraction to the region to drive interest and conversion over the winter period.	This region is very cohesive, and the stakeholders and Council have an excellent working relationship. The Council is also very proactive in delivering workshops to build the capacity of the industry, that is either: • New products and experiences • Improving online bookability of an experience for individual operators on their own website • Content creation	The largest sector is accommodation, with Airbnb offering the largest inventory. There are 5 wineries which offer accommodation along with a variety of accommodation from traditional hotels/motels to be serviced apartments and high-end boutique resorts.

Food + drink experiences	Online bookable experiences	Tourism category as a %
There are: • 12 cellar doors • 2 breweries/distilleries • 2 cooking schools (as well as Bannisters restaurant and pavilion, along with other seafood experiences). • 52 tour operators (6 specialising in food and drink experiences	**There are:** • 10 experiences on Expedia • 23 experiences on Airbnb • 19 experiences on Viator • A limited number of operators (outside of accommodation) provided real-time online bookings. • However the Council is undertaking a program to work with the industry to increase the number.	• 13% Attractions • 5% Tours • 6% Events • 4% Food + wine • 72% Accommodation

Blue Mountains

Destination awareness/ marketing	Cohesion of the industry	Accommodation range
The Blue Mountains National Park has the highest visitation of any National Park in Australia, with more than 5 million visitors per annum, due to its accessibility and impressive natural features. (Source: National Parks Wildlife Service statistics). The majority of recreational visitors are day-trip visitors and the most popular reasons for coming to the Blue Mountains are for holidays and visiting friends and family. (Source: Tourism Research Australia, LGA Profile, 2017).	Tourism is the second largest employer in the Blue Mountains LGA and is well established within the region. As Sydney's population continues to grow and interstate and international visitor numbers increase due to improving infrastructure servicing Western Sydney, tourism in the Blue Mountains is expected to continue to thrive despite international competition. Operators that concentrate on factors under their direct control, such as new product investment, service and training, product positioning and pricing, are expected to experience relatively solid performance.	From iconic hotels such as The Carrington, and The Hydro Majestic to boutique heritage properties with magnificent views of the Jamison Valley. or traditional B+B's. Families are a priority in the Mountains, with plenty of rooms available with motels, self contained cottages and even farm stays.

Food + drink experiences	Online bookable experiences	Tourism category as a %
There are: • 4 Cellar doors and breweries • 6 Pubs Clubs and Bars • 6 High Tea venues • 8 Food + Wine bookable experiences through Viator including Paddock to Plate and Sunset Wilderness + Wildlife	**There are:** • 34 bookable experiences on Viator • 1165 rentals through Airbnb • 30 experiences bookable on Expedia	• 17% Attractions • 6% Tours • 38% Events • 15% Food + wine • 24% Accommodation

Hunter Valley

Destination awareness/ marketing	Cohesion of the industry	Accommodation range
The perception is that the Hunter Valley is the home of many Australian wine brands. The reality is that the majority of the wineries in the Hunter Valley are smaller and family owned. Over a 12 month period April 2018-2019 26,000 sources mentioned Hunter Valley through social media. In 2018 Wine Country in partnership with DNSW launched the Hunter Valley Here's to the Good Life campaign ($2 million campaign). The website www.winecountry.com.au is the key call to action.	Traditionally a fragmented industry with ongoing efforts to improve collaboration across the different sectors. This is impacting the resources to deliver bigger campaigns and the ability to take a collective approach to marketing. The Hunter Valley Wine + Tourism Alliance has been established to encourage collaboration and advocacy between Councils and HVWTA. The group has been successful in attracting grant funding for the Hunter Valley.	The Hunter Valley offers small boutique accommodation through to global brands. Global brands assist in raising the profile of the destination through their own marketing channels. 22 wineries offer accommodation in a vineyard. HotelsCombined has the largest inventory of accommodation while Airbnb has 996 properties for rent.

Food + drink experiences	Online bookable experiences	Tourism category as a %
There are: • 23% of the overall tourism offering is food and wine related. There are: • 130 cellar doors • 15 experiences (13 are export ready) • 7 breweries + distilleries • 7 cooking schools • 64 tour operators (23 offer food + wine experiences) • These tour operators are also Sydney based and are globally recognized tour companies.	**There are:** • An extensive number of bookable experiences and tours on Airbnb • 15 bookable experiences on TripAdvisor • 118 bookable products offered on winecountry.com.au • 56 bookable products on Viator	• 12% Attractions • 9% Tours • 10% Events • 23% Food + wine • 46% Accommodation

Napa Valley

Destination awareness/marketing	Cohesion of the industry	Accommodation range
World-renowned for it's ability to produce world class quality wine. While the terroir or natural landscape is an advantage, social capital and entrepreneurship behind technological leadership are central to Napa's competitive advantage. With more than 400 wineries open for tastings and 90 urban tasting rooms, Napa Valley is known for world-class wine, as well as beautiful countryside and near perfect weather year-round. It is also known for Michelin-star restaurants, and luxurious accommodation and spas. Interestingly the Napa Valley also use The Good Life branding. The destination currently receives 3.85 million visitors annually. The website www.visitnapavalley.com/ is the key call to action. There are more than 90 Green Certified Wineries, and the Napa Valley is home to 40% of all certified sustainable wineries in California. Many of the Napa Valley's most iconic wineries pride themselves not only on making exceptional wines, but on being sustainability leaders. From soil to bottle, Napa Green Certified vitners make a long series of thoughtful decisions that steward the land and conserve resources.	There are several key support institutions for the California wine industry. The first is the California Wine Institute, which has combined lobbying, marketing, and market research functions for wineries. Its counterpart for grape growers is the California Winegrape Growers Association. The third is UC Davis, with its renowned Viticulture and Enology Department, which trains winemakers and conducts agricultural research. There are, of course, regional tourist promotion agencies in each wine region of the state.	There are 622 accommodation properties available to stay around the Napa Valley separated into three main types, Resorts, Luxury Boutique Inns and Hotels. 42 properties have business meeting factilites.

Food + drink experiences	Online bookable experiences	Tourism category as a %
There are: • 400 wineries • 316 experiences • 15 breweries + distilleries • 18 education/cooking schools • 170 tour operators (119 offer food + wine experiences)	**There are:** • 909 bookable experiences on TripAdvisor • 115 bookable products offered on visitnapavalley.com • 351 bookable products on Viator	• 18% Attractions • 10% Tours • 6% Events • 33% Food + wine • 33% Accommodation

Margaret River

Destination awareness/marketing	Cohesion of the industry	Accommodation range
Proclaimed to be one of the world's youngest wine regions, achieving success, prestige and international acclaim at an early age. The Margaret River is surrounded by ocean on three sides, making it a pristine and geographically isolated environment. Large cultural connection to the Wadandi (Saltwater) people. Tourism in the Margaret River is all about living and travelling through the region in a sustainable way to ensure the natural environment is preserved and protected. Sustainability and innovation is a core focus for many of the region's wineries specializing in organic, biodynamic and natural winemaking with Cullen Wines at the forefront as the first winery in Australia to be certified 100% carbon neutral. The website www.margaretriver.com is the key call to action.	The Margaret River Busselton Tourism Association is a self-funded, not-for-profit incorporated association with over 50 years experience in supporting the Margaret River Region to thrive through Tourism.	Margaret River Region offers 99 bookable accommodation properties with a large range of accommodation from Resorts and Hotels to B+ B's, holiday homes and caravan and camping or glamping options. 22 wineries offer accommodation in a vineyard. Airbnb has 399 properties for rent.

Food + drink experiences	Online bookable experiences	Tourism category as a %
There are: • 24% of the overall tourism offering is food and wine related • 90 cellar doors • 320 experiences • 16 breweries + distilleries • 8 cooking schools • 121 tour operators and guided experiences	**There are:** • An extensive number of bookable experiences and tours on Airbnb • 71 bookable experiences on TripAdvisor • No direct bookings on margaretriver.com links to operator websites • 45 bookable products on Viator	• 36% Attractions • 14% Tours • 16% Events • 24% Food + wine • 10% Accommodation

Barossa Valley

Destination awareness/marketing

Barossa is widely regarded by international wine writers, judges, retailers and consumers as Australia's most famous wine region. Why? It has the longest unbroken lineage of winemaking and grape growing families in the country, some entering their seventh generation.

The website www.barossa.com is the key call to action.

Cohesion of the industry

Regional Tourism in the Barossa has been well supported with funding into destination marketing, tourism product and infrastructure projects.

Accommodation range

A broad range of accommodation exists from B + B's on a vineyard, caravan parks, motels, cabins to luxury retreats there is an option for every taste and budget.

8 wineries offer accommodation in a vineyard.

Bookings can be made online at www.barossa.com

HotelsCombined has the largest inventory of accommodation with 218 bookable options while Airbnb has 255 properties for rent.

Food + drink experiences

There are:

31% of the overall tourism offering is food and wine related. There are:

- 96 cellar doors
- 2 Farmers markets
- 19 breweries + distilleries
- 1 cooking schools
- 14 tour operators

Online bookable experiences

There are:

- An extensive number of bookable experiences and tours on Airbnb
- 208 bookable experiences on TripAdvisor
- 126 bookable products offered on www.barossa.com
- 19 bookable products on Viator

Tourism category as a %

- 45% Attractions
- 2% Tours
- 12% Events
- 31% Food + wine
- 10% Accommodation

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APPENDIX - CASE STUDIES

CASTELLO DI AMOROSA NAPA VALLEY

Castello di Amorosa is the realisation of an all-consuming passion. Fourth generation winemaker Dario Sattui built an authentically styled 13th century Tuscan castle winery to honor his Italian heritage and deep love for medieval architecture. But it all started with wine.

History

Dario is the great grandson of pioneering vintner Vittorio Sattui, an Italian immigrant who founded St. Helena Wine Cellars in 1885. The Sattui family lived at the winery, even after Prohibition closed the business in 1920. Dario was always fascinated by the stories and photos of the old winery. As a child, he would play in the winery's underground cellars and dream of reviving the family business.

The construction took 15 years and opened to the public on April 7, 2007. Today, Castello di Amorosa is considered an architectural masterpiece with all the elements of an authentic medieval castle: a moat, drawbridge, five towers, high defensive ramparts, courtyards and loggias, a chapel, stables, an armory, and even a torture chamber. 107 rooms in total, no rooms alike.

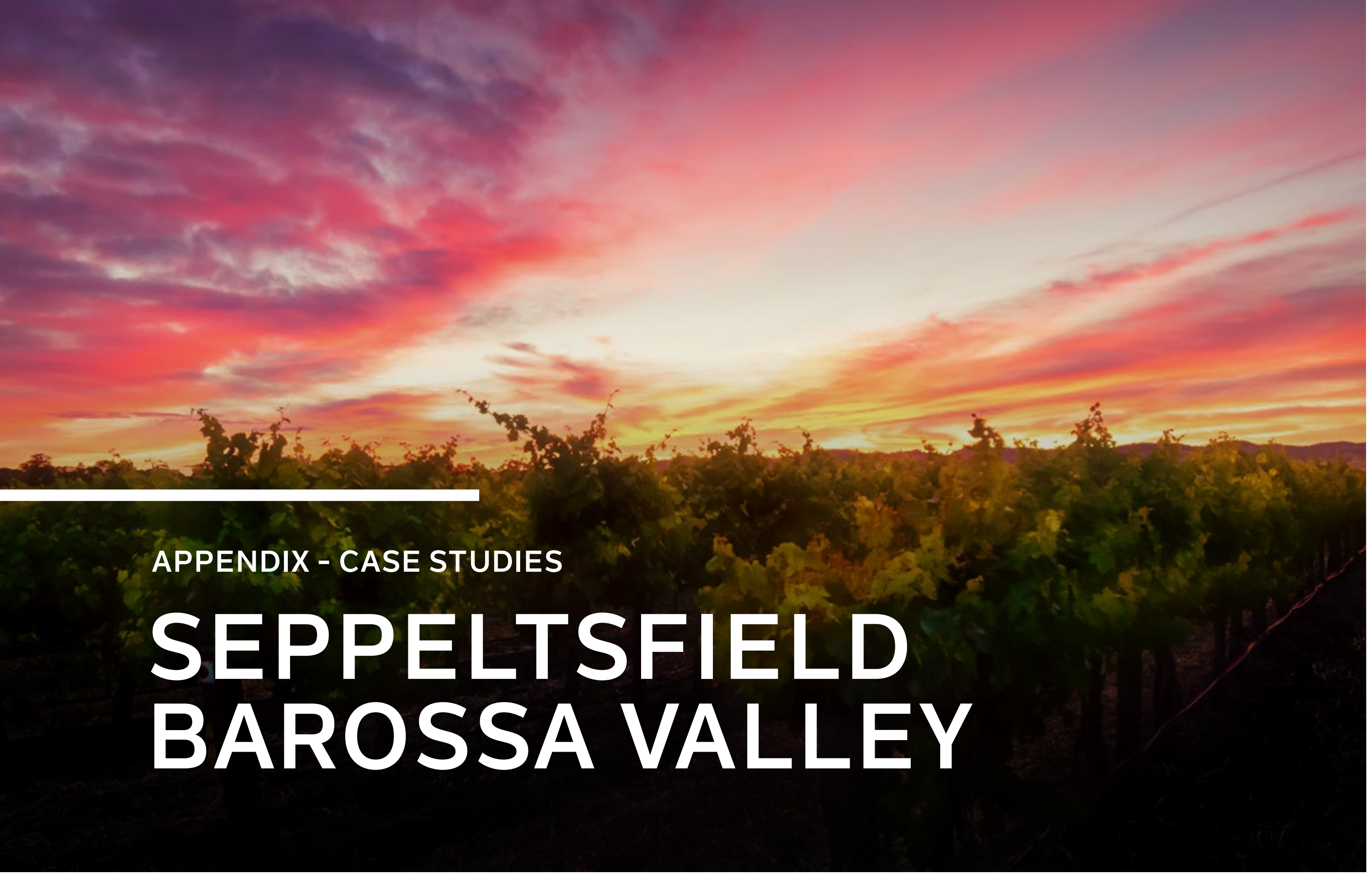
Containing some of the most beautiful vaulted wine cellars in the world, Castello di Amorosa has fulfilled Dario's dream of producing superior quality wines with the same love and attention to detail that went into building his castle.

The Visitor Experience

- An amazing experience to visit an Italian medieval castle in the middle of the Napa Valley bringing Dario Sattui's vision of medieval architecture and winemaking to life
- Clear pricing and key information. All easily booked online from wine clubs to annual purchase clubs. They offer private wine events and also events organised around annual celebrations, or for team building for business events. Castello di Amorosa also offers extensive food and wine pairing recipes on their website and has a large focus on giving back to the community through charity work
- Rich history of winemaking in America beginning in San Francisco and in the Napa Valley
- Offer of a very exclusive small group touring to Tuscany and Umbria with the family of Castello di Amorosa and their Italian couterparts
- Tripadvisor ratings indicate a visit to Castello di Amorosa is a unique and amazing experience, a beautiful location with delicious wine
- Knowledgeable staff were also highly recommended in many visitor reviews.

Marketing + Branding

- Sophistocated website showing stunning video imagery of Castello do Amorosa
- Well-developed photo and video gallerys available online as well as the option of a Virtual Tour, Castello di Amorosa also offer event photography where you can purchase special images captured of events held there
- Well promoted on the Napa Valley visitor website if you look in the categories or undertake a search, Castello di Amorosa is said to be one of the most romantic and photographed places to visit in the Napa Valley
- Branding exudes class and sophistication at all times immersing the visitor in the wine experience using imagery with people involved in the activities.
- Information on the Castello di Amorosa website is well presented for visitors, online sales, wine club, press and Blogs. It also features a very handy 'Plan your stay' page with visitor information such as accommodation options for the area
- Great for Couples and Romance, Groups, Heritage, Iconic, Functions and Events



APPENDIX - CASE STUDIES

SEPPELTSFIELD BAROSSA VALLEY

A new golden era now sees FINO Restaurant, Octeine Coffee, JamFactory Craft + Design Studios, Vasse Virgin skin care, Segway Sensation SA, Dragan Fine Art Photography Gallery, as well as Seppeltsfield Cellar Door of course, contribute to an exciting renaissance of Australia's iconic wine estate

History

Seppeltsfield was established in the Barossa Valley by Joseph and Johanna Seppelt just 15 years after the European settlement of South Australia. Steeped in rich Barossan heritage, the estate is considered a true national treasure which helped shape the history of the Australian wine industry. Seppeltsfield is most famed for the Centennial Collection – an irreplaceable and unbroken lineage of Tawny, every vintage from 1878 to current year. More recently, the recommissioning of the 1888 Gravity Cellar has revitalised the estate's prowess with still wines. Super premium Barossa red varietals are once again passed through the Gravity Cellar, which enables gentle colour and tannin extraction – now a coveted modern day winemaking practice. Seppeltsfield is a marriage of Barossan history, community and fine winemaking endeavour.

The Visitor Experience

- Taste your birth year of Tawny experience, participate in the Cooperage experience where you can fashion your own oak barrel, or visit for a corporate function or wedding
- Clear pricing and key information. All easily booked online
- Rich history of winemaking in Australia
- Built their product offering to expand on the wine, spirit, liquer and vinegar tastings and sales to also include an art gallery, Segway tours, a cooperage and function spaces
- Tripadvisor ratings indicate this is an awesome wine tasting experience set on a sprawling estate with so many artisans you can view and learn more about activities such as glass blowing, cooperage, pottery, knife making.
- Knowledgeable and passionate staff were also highly rated in many visitor reviews.

Marketing + Branding

- Extensive high quality imagery showcasing many facets of the Seppeltsfield Experience
- Well developed experiences and packages marketed online
- Well promoted on the Barossa Tourism visitor website if you look in the categories or undertake a search however it did take a bit of digging
- Branding has a classic yet modern feel with exciting language used to captivate the prospective visitor. A wonderful place to experience the legacy of the Seppeltsfield brand in the Barossa
- Information on the Seppeltsfield website is well structured and easy to digest for visitors, online sales, memberships, distributors and stockists
- Great for Couples and Romantic, Families, Groups, Heritage, Iconic, Weddings and Functions

APPENDIX - CASE STUDIES

MAMMOTH CAVE MARGARET RIVER

Mammoth is an impressive, gothic-like cave that could easily be described as the perfect home for a caveman. Tours are self-guided with an audio headset and begin via an elevated boardwalk through towering karri forest. As you journey through the spectacular formations lookout for the carefully lit animal bones and fossils and listen to the stories about extinct animals. Wildflowers are abundant around the precinct from September to November. Located 18km south of Margaret River.

History

Mammoth Cave was one of the larger caves in the South-West with huge caverns and majestic formations. It was one of the first caves to be opened to tourists on a regular basis. It is likely that it was once occupied by early Australians. A perennial stream flows through Mammoth Cave in winter and early spring which has slowly eroded the limestone creating huge caverns and rock piles. There are many cave formations including stalactites and stalagmites, flow-stones which resemble a karri forest and beautiful shawls. Excavations have produced a fossil collection of over 10,000 specimens including small and typical species still found in the South-West today but also large extinct species such as the Giant Python, Giant Echidna, Marsupial Lion and Tasmanian Tiger amongst others.

The Visitor Experience

- The self-guided audio tour with head set was very informative, equally enjoyed by young and old
- Clear pricing and key information. All easily booked online
- The aren't too many steps, the steps are manageable and hand rails made it easier
- There are two options for exiting the cave, one a 200 meter walk and one a 700 meter walk which gives people the option depending on their mobility
- Tripadvisor ratings indicate this cave is brilliant, and one of the most expansive and informative experiences

Marketing + Branding

- Strong beautifully lit imagery, some showing people actively participating including pictures of tourists walking along the platforms wearing the audio headsets
- Eco Certified for advanced ecotourism promotes sustainable travel
- Well promoted on the Home Page of the Margaret River Busselton Tourism Association visitor website, also featuring promintley under "Things To Do" "Attractions and Outdoor Activities". Accommodation is available under a "Plan Your Trip" heading
- Branding has a clean and modern feel with exciting language used to captivate the prospective visitor. Words such as "massive labyrinths", "tunnel of doom", and "be amazed" all encourage this as a must-do. Also described as "at your own pace" opens up the activity to accessibility for all
- Information on the caves is adequate to tell the story of the place
- Great for Budget Friendly, Couples and Romantic, Families, Groups, Heritage, Iconic, Nature and Wildlife, School Groups and Sustainable Travel

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CESSNOCK CITY COUNCIL

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