BATHURST

A Plan for Tourism

PART II

Analysis of Tourism

Prepared by Peter Austen, Tourism Manager
Interim Report – June 2000
# Contents

## PART I  OVERVIEW AND POLICY RECOMMENDATIONS  
*(Separate Document)*

<table>
<thead>
<tr>
<th>Section</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Introduction</td>
<td>3</td>
</tr>
<tr>
<td>2</td>
<td>Analysis Summarised</td>
<td>7</td>
</tr>
<tr>
<td>3</td>
<td>Conclusions</td>
<td>16</td>
</tr>
<tr>
<td>4</td>
<td>Recommended Policy Framework</td>
<td>19</td>
</tr>
</tbody>
</table>

## PART II  ANALYSIS OF TOURISM

*This document contains:*

<table>
<thead>
<tr>
<th>Section</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>Bathurst and District Tourism Profile - Overview</td>
<td>3</td>
</tr>
<tr>
<td>6</td>
<td>Visitor Profile</td>
<td>10</td>
</tr>
<tr>
<td>7</td>
<td>Audit of Tourism Infrastructure</td>
<td>16</td>
</tr>
<tr>
<td>8</td>
<td>Organisation of Tourism</td>
<td>37</td>
</tr>
<tr>
<td>9</td>
<td>Consultation with Stakeholders</td>
<td>45</td>
</tr>
<tr>
<td>10</td>
<td>Key Markets</td>
<td>52</td>
</tr>
<tr>
<td>11</td>
<td>Approaches to Tourism by Regional Centres</td>
<td>62</td>
</tr>
</tbody>
</table>

## PART III  REFERENCE MATERIAL  
*(Separate Document)*

<table>
<thead>
<tr>
<th>Section</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>12</td>
<td>Attachments</td>
<td>3</td>
</tr>
<tr>
<td>13</td>
<td>Bibliography</td>
<td>74</td>
</tr>
</tbody>
</table>
PART II

ANALYSIS OF TOURISM

6. Bathurst and District Tourism Profile – Overview

5.1 Bathurst

The City of Bathurst is located on the central tablelands of New South Wales, around 207km west of Sydney by road. Bathurst is well known in Australia because some of the nation’s best known motor sport events are held at the Mount Panorama circuit. Current high profile events include the FAI 1000 and the Bob Jane Festival of Motor Sport. In the year 2000, major motor cycling returned with the Easter Motorcycle Festival. This exposure also extends to the international arena through the extensive television coverage that the events achieve.

As Australia’s oldest inland settlement, and the first settlement west of the Blue Mountains, Bathurst became an important regional centre and a ‘gateway’ for much of the exploration and development that took place in inland New South Wales. This process was accelerated by the discovery of Australia’s first payable gold nearby in 1851. As a result, the City has a strong heritage character which is reinforced by a rich culture which has both historic and contemporary components.

Bathurst, despite being a significant regional centre, retains an essentially rural atmosphere and both visitors and residents find this one of the area’s most engaging attributes. A summary of key facts relating to the district are provided in Table 1.

5.2 Bathurst District

From a tourism perspective, the City of Bathurst should not be considered in isolation from the surrounding district. The visitor does not consider the boundaries of Council areas when visiting an area. So from the point of view of this paper, the area of interest includes the Council areas of Bathurst, Evans, Blayney and Oberon. From a tourism administrative viewpoint, the Oberon Council area is not considered to be in the Bathurst area but, from the point of view of visitor interest, many of the attractions and facilities within the Oberon Council are relevant to tourism in Bathurst.
As in the early days of settlement, Bathurst is still a ‘gateway’ for visitors exploring further afield. It is an ideal hub to explore the wine/food areas of Cowra, Orange and Mudgee, and many people from Sydney stop at Bathurst on their way to or back from the Western Plains Zoo at Dubbo. Travellers heading east also use Bathurst as a stop before heading to the Blue Mountains, Jenolan Caves and Sydney.

The district has a diverse range of scenery ranging from the western edges of the Blue Mountains, including the Kanangra Boyd National Park in the east, to more undulating country in the western part of the district where land which is used principally for agricultural purposes. A number of old gold mining centres such as Sofala and Hill End are substantial tourism drawcards, as well as other villages of significant heritage and scenic interest such as Carcoar, Rockley and Millthorpe are also located within the Bathurst District. Significant natural features of the area include the popular Jenolan Caves and the less well known Abercrombie Caves. A number of watercourses traverse the area and there are several water impoundments which make the area popular for camping and fishing.
### Table 1

<table>
<thead>
<tr>
<th><strong>Proclamation</strong></th>
<th>Bathurst was proclaimed a town on May 7, 1815, and a city on March 20, 1885.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Distance from Sydney</strong></td>
<td>207km by road 239km by rail 144km by air 3 hours by rail 3½ hours XPT train 40 minutes air</td>
</tr>
<tr>
<td><strong>Population</strong></td>
<td>Bathurst 30,053 (30/6/99 – ABS) Bathurst District 16,157 (comprising Blayney, Oberon and Evans Shires) Total 46,210</td>
</tr>
<tr>
<td><strong>Temperatures</strong></td>
<td>Summer average 25°C Winter average 5°C</td>
</tr>
<tr>
<td><strong>Rainfall</strong></td>
<td>Average of 620mm per year</td>
</tr>
<tr>
<td><strong>Elevation</strong></td>
<td>670.27 metres above sea level</td>
</tr>
<tr>
<td><strong>Area in square kilometres</strong></td>
<td>Bathurst 241 sq/km Blayney Shire 1,616 sq/km Oberon Shire 2,924 sq/km Evans Shire 4,276 sq/km Bathurst &amp; District 9,057 sq/km</td>
</tr>
<tr>
<td><strong>Agriculture</strong></td>
<td>Sheep (wool, prime lambs), cattle, wheat, vegetables, honey, orchards (apples, peaches) and forestry.</td>
</tr>
<tr>
<td><strong>Key industries</strong></td>
<td>Education, food processing, building, mapping, rural services, timber, transport and pet foods.</td>
</tr>
</tbody>
</table>
5.3 Map
5.4 History and Charm

Bathurst’s cultural and industrial heritage has produced a city of charm and elegance which is widely regarded as one of Australia’s leading regional centres.

Proclaimed a town site in 1815, Bathurst is Australia’s oldest inland settlement and with considerable history associated with its urban landscape. Victorian cast-iron lamp-posts adorn the streets along with appealing displays of early 1880s architecture ranging from stately Victorian homes to small workers’ cottages.

Bathurst Courthouse is situated in the centre of town and, along with beautiful Machattie Park, is a centrepiece in the historic city. The heritage listed Miss Traill’s House and the home of one of Australia’s favourite Prime Ministers, Ben Chifley, are open to the public regularly. The baronial mansion Abercrombie House, an example of fine Gothic architecture, is also open for inspection. Museums in Bathurst and the surrounding district also provide opportunities to gain insight into the history of the area.

For over 180 years, artists have been flocking to the Bathurst region for inspiration. Brett Whiteley, Russell Drysdale and more recently, Tim Storrier, Reg Campbell, Graham Lupp, John Olson and Greg Hyde have resided in or visited the area regularly. The small villages of Hill End, Sofala and Millthorpe attract many people interested in arts, crafts and antiques. A landscape of rolling green hills and blue skies contrasts with a harsh landscape in some areas and provide endless inspiration for locals and visitors alike. A number of galleries and craft shops provide release for some of this inspiration.

Bathurst enjoys fine traditions in art, music and theatre. The Bathurst Regional Art Gallery, located in Keppel Street, has both changing exhibitions and a permanent collection. The Central West branch of the Conservatorium of Music is also based in Bathurst. Along with three active theatre companies, Bathurst sustains a vibrant regional arts community showcased each year at the Bathurst Eisteddfod during October and November. The opening of Bathurst Memorial Entertainment Centre confirmed Bathurst as a leading arts centre and draws many diverse talents from across Australia.

Bathurst’s strength in industry is testament to its early days as a pioneer township. From the establishment of the famous Cobb and Co. Coach Company headquarters in
1862 and the opening of the western rail line in 1876, Bathurst’s industrial development has continued. Today it is a cosmopolitan city with a diverse range of industry, from vegetable growing and livestock production to engineering and education. Three major industrial plants - Simplot, Devro and Uncle Ben’s - reflect this strength. In addition, the State Government decentralised its mapping organisation to Bathurst in the early 1970’s resulting in the establishment of the Land Information Centre. All play important roles through the direct employment and support of the local community.

A renowned educational centre, Bathurst is home to Charles Sturt University’s Mitchell campus and a large TAFE college along with four private and two public high schools. Education attracts around 55,000 students to the city annually, pouring approximately $110 million into the local economy and ensuring academic standards equal to any in Australia.

**5.5 Climate & Topography**

The Central Tablelands around Bathurst comprises mostly undulating to hilly country, with the basic soil types being slate-shale, granite or basalt. These vary considerably in depth, texture, colour and fertility. Much of the area has been developed for a diverse range of agriculture, both farming and grazing. There are significant pockets of natural bushland and extensive areas that have been developed as pine plantations.

The climate varies from the 600-650mm rainfall zone with a relatively hot dry summer and autumn spells around Bathurst, to over 750-800mm rainfall and cooler summer temperatures around Oberon.

**5.6 Value of Tourism**

Official figures released by Tourism New South Wales (1998) show the official value of tourism to the Bathurst District to be $58 million for 1996/97 in terms of direct visitor expenditure. These figures may substantially underestimate the value of tourism to Bathurst as the manner in which they are compiled would appear to not take full account of the visitor expenditure generated over a relatively brief period by major events at Mount Panorama. There is, however, no other widely available means of monitoring levels of visitor expenditure.

It would appear that residents of the Bathurst area have a better understanding of the value of tourism now than was the case ten or more years ago and have at least a superficial concept of its economic contribution of tourism. The fact remains that the
tourism industry within the Bathurst district is comprised of a wide range of various components. There is not a single, physically identifiable piece of infrastructure which serves as an icon for the tourism industry. Hence regularly reinforcing the value of tourism to the local community is important so that ‘out of sight’ is not ‘out of mind’ should be considered important.

Employment generation figures may be a better way to view the value of tourism. Using the formula used by the Bureau of Tourism Research (Bureau of Tourism Research Paper 3) tourism expenditure of $58 million would generate 1,035 direct and indirect positions. It should be noted, however, that this formula is based on the employment generation effect in capital cities and that because of the leakages in a regional economy the effect may not be as great.

**KEY ISSUES**

- Mount Panorama is the major icon for Bathurst
- Outsiders know relatively little about Bathurst's other tourism assets
- Diverse tourism product
- Tourism is a major industry for Bathurst and district
7. Visitor Profile

‘Domestic Tourism Trends in New South Wales’ (1998) provides information which gives a profile of visitors to the Central West. Equivalent information, specifically on the Bathurst District is unfortunately not available. Figures obtained from the ‘Bathurst Tourism Survey’ (Jarratt 1995) and the ongoing survey collected at Bathurst Visitor Information Centre (Hughes 1998) do allow some refinement of this information but it should be emphasised that the data is not strictly comparable. The information, as presented in ‘Domestic Tourism Trends in New South Wales’ (1998) is reproduced in Attachment 1.

The major findings of both documents that help build a profile of visitors is outlined below:

6.1 Origin of Visitors
The majority of visitors to both the Central West and Bathurst are intrastate visitors, with Sydney being the source for more than half of these. The local study (Jarratt 1995) did not place Sydney as highly (34%) but adding Wollongong, Newcastle and the Blue Mountains accounted for almost half of the visitors. Another result was that the country visitors, other communities in the region and in the Hunter Valley were strongly represented.

6.2 Main Purpose of Trip
The Central Western Region attracts a high proportion of people who are visiting friends and relatives (VFR) (34.6%) and similar numbers of people on holiday visits (34.3%) (Tourism New South Wales 1998). The Bathurst Tourism Survey, which sampled visitors across a range of sites, (Jarratt 1995) indicates that Bathurst attracts slightly more people for holiday visits and that the VFR component may not be as high as for the region as a whole. A repeat visit is more likely to be a VFR visit. Special events, visits to schools and the University, business visits and sporting events accounted for most of the balance.

6.3 Type of Accommodation
On a visitor night basis the homes of friends and relatives are the most popular form of accommodation in the region (43.5%), while accommodation in hotels/motels with bathrooms accounted for a further 15.3% of visitor nights (Tourism New South Wales ‘Domestic Tourism Trends in NSW’1998).
For Bathurst the percentage of people staying in a hotel/motel type accommodation is much higher (41%) and VFR is only 29%, but the Bathurst Tourism Survey (Jarratt 1995) also points out that the length of stay for VFR is much longer and this could account for the significant contrasts in results.

6.4 Main Transport
Visitors to the region almost inevitably use private transport as the main form of transport (88.3%) (Tourism New South Wales ‘Domestic Tourism Trends in NSW’1998).

6.5 Average Length of Stay
The average length of stay for the region in 1996/97 is only 2.5 nights, which declined from the level of 2.7 nights in the previous financial year. This is well below the state average of 3.6 nights - 1996/97 (Tourism New South Wales ‘Domestic Tourism Trends in NSW’1998 - pg 7).

Information on average length of stay from the Bathurst Tourism Survey (Jarratt pg 5 1996) also confirms that the average length of stay in Bathurst is between 2 and 3 nights.

6.6 Age and Sex of Visitors
The 1996/97 figures show that the majority of visitors to the region were males (52.9%), which is fairly typical of the national pattern for domestic tourism. The majority of visitors were aged between 25 and 39 (29.7%) but this was closely followed by 28.7% in the 40-54 age group.

6.7 Life Cycle
Using the life cycle groups defined on page 3 and details in Table 10 of ‘Domestic Tourism Trends’ (Tourism New South Wales 1998) most visitors to the area were families (32.6%), older couples (18.5%) and younger solos (13.6%).

6.8 Seasonally
Regional figures show that January and June are the most popular months to visit the region. However these months are closely followed by October and March. The least popular months in the Central West are July and August, respectively (Tourism New South Wales ‘Domestic Tourism Trends in NSW’ 1998).

As far as Bathurst is concerned Attachment 2 shows that December and January are pronounced trough months for commercial accommodation. It would be reasonable
to assume that these months would have a high incidence of VFR, which may mitigate certain negative aspects of this trough as far as the wider business community is concerned.

The following graph based on figures from Attachment 2, also highlights that the peak periods for Bathurst are during the spring and autumn months, respectively. There is no evidence as to specific reasons for this but it is suspected that these are generally when the weather is at its best and also when many events are held.

![Graph showing peaks and troughs in occupancy](image)

Peaks and Troughs in Occupancy

### 6.9 Perceptual Research

No ‘Bathurst’ specific perceptual research appears to have been undertaken.

Tourism New South Wales, in conjunction with the Regional Promotion Committee, have commissioned two studies which sought information on how people perceived the Explorer Country / Central West Region.

While now five years old, a paper produced by Tourism New South Wales (1994) is telling as far as consumer perceptions on the region are concerned. “Consumer perceptions of the Central West were confused at best, negative at worst …… of the seven regions examined in the research the Central West fared poorest in attracting travellers” (pg 101 1994). The study found that participants associated Bathurst with the Central West and that its reputation centred around car racing. While this was not of interest to everybody, it had put Bathurst ‘on the map’. Centres such as Dubbo,
Bathurst and Orange were better known than many in the region but that they were not perceived as legitimate holiday destinations, simply ordinary rural centres with nothing to offer that was distinctive or exciting.

Further on in the report it was stated that “Bathurst was associated with the car races, that was of appeal to very few respondents addressed in the research. Indeed, most saw it negatively, recalling the publicity of the ‘yobbo’ element that attended the races”. (pg 104 1994).

In research undertaken by Frank Small Associates for Tourism New South Wales (Frank Small and Associates 1997), the key drivers for holidays to Explorer Country were identified as:

- escape from Sydney for the purpose of ‘exploring’ (a discovery or experience) and spending time with family or friends;
- a sense of discovery for ‘me’ and for ‘us’;
- discovery linked to Australia’s past. There is a notion that some of the keys to understanding who we are as a nation lies in Explorer Country;
- obligation of parents to show families the bush;
- outdoor activities;
- escape – ‘over the mountains and out west’; and
- countryside – rural, undisturbed and under-populated.

In a further study, also undertaken by Frank Small and Associates, to evaluate Explorer Country’s 1998 Campaign (Frank Small and Associates 1998), a number of findings were of particular relevance to Bathurst and District. The top ranked themes for the region were identified as:

- Rural Life – with Explorer Country offering a stark contrast to city life;
- History and Heritage – towns and cities in Explorer Country provide clues as to Australia’s history and heritage;
• Gold and Mining – there is a general belief that prospectors explored and developed much of inland Australia.

The same paper (Frank Small and Associates 1998 pg 20) also reported that participants in the focus groups had identified Bathurst as a regional gateway. As part of marketing research to investigate the potential of new markets for the AMP Bathurst 1000, focus groups were convened to gain material on a number of aspects of the event. Greg Eaton of Event Management Specialists (1998) reported that one of the key findings of the study is that people perceive Bathurst as being a significant distance from Sydney – ‘around five hours drive in the minds of some’. This information should have significant implications on the marketing messages used to promote Bathurst.

6.10 Data Needs

A significant problem for researchers and managers attempting to investigate tourism issues at the local levels is a lack of hard data. Material prepared by Commonwealth and State Government bodies is only prepared down to a regional level. Information at the local level is often non existent or relies on local surveys and is therefore not comparable to similar information from other sources. A further problem is that because of the limited resources available for tourism, there is a tendency to utilise all funds for pursuing the initiatives that are proposed. This means that many activities are undertaken without data being collected to provide feedback, the focus becomes conducting the activity rather than the results that are achieved.

Organisations preparing statistical information for tourism should be encouraged to prepare useable data down to Local Government area level, the gathering of local area survey information should be encouraged and made an integral part of a local tourism framework and promotional initiatives should incorporate evaluation measures.
KEY ISSUES

- Majority of visitors are families, followed by seniors
- High degrees of seasonality
- Visitors travel in their own car
- Strong association with Mount Panorama
- ‘Yobbo’ perception of Bathurst
- Important attractions for Central West are:
  - heritage
  - country
  - outdoor experiences
  - sense of discovery
- Perceived distance from Sydney
- Need to improve tourism data collection for regional and local government areas
8. Audit of Tourism Infrastructure

7.1 Attractions
Attachment 3 lists the attractions in the Bathurst District. The listings are comprehensive and inclusion is based on enquiry and facilities provided. They have been grouped into categories under the headings – natural, heritage and cultural, and recreational facilities. The attachment demonstrates the numerical importance of cultural and heritage attractions, but Mount Panorama would be widely recognised as the principal icon for Bathurst.

Other than Mount Panorama, few attractions have a strong identity outside the immediate area. Jenolan Caves is an exception but is more closely associated with the Blue Mountains.

Tourism Leisure Concepts (1999) found that the attractions sector with Explorer Country suffered from a number of problems. Those that would appear relevant to Bathurst include:

- poor quality marketing materials;
- reality of the attraction experience is overstated in marketing material;
- attractions do not participate in cooperative marketing and few, if any, develop packages with other attractions, accommodation or transport operators;
- operators do not appear to understand packaging and cooperative marketing; and
- attractions view other operators as competition rather than working together with them to improve overall visitation.

Further issues that have been identified include relatively low promotional budgets; display techniques and programs offer poor interaction; attractions appear to be operating in low yield-low profit environments; lack of adequately trained staff particularly in regard to customer service, marketing and general operations.

7.2 Activities
Many of the activities that can be enjoyed in the Bathurst area are based on natural
features. There is no evidence to suggest that any activity has any dominance as a percentage of visitor numbers. The Bathurst area has some prominence as the focus of Australia’s first goldrush, consequently many come to the area to try fossicking but this is only one of the potential activities. The list of activities which would be considered important from a tourism perspective includes:

- Adventure Caving/Abseiling/Climbing
- Bushwalking
- Camping
- Cycling
- Fishing
- Fossicking
- Four Wheel Driving (4WD)
- Horseriding
- Motor Sport
- Shopping
- Water Sport

Attachment 4 provides details of some of the key activities and briefly describes the opportunities available for that activity in the Bathurst area. An interesting observation in regard to activities is that they tend to be male oriented and that the development of more activities with a female orientation could be an opportunity for the Bathurst district.

With the exception of horseriding and adventure caving, none of the activities generate a direct economic return as a result of the activity. The return is secondary and results from visitor demand for goods and services, especially accommodation, and, in the case of say fishing, potentially for equipment.

In 1998 efforts were made to implement a strategy for increasing fishing activity in the area. The problems that were encountered in implementing the strategy included the small number of operators prepared to support the initiative and the difficulty in identifying people attracted to the area because of the availability of fishing. Feedback from accommodation providers especially is that fishing is generally low yield for the industry.

Bathurst is in close proximity to a range of fisheries including Wyangala Waters,
Burrendong Dam, Windamere Dam, Lake Oberon, Lake Lyel, Lake Wallace, Carcoar Dam, Thompson’s Creek Dam, and the Bathurst water supply - Chifley Dam - as well as rivers and creeks which offer good opportunities for fishing. Local operators report that there is a considerable propensity for fishermen to move throughout the region and therefore it may be more appropriate to pursue fishing and water-based activities on a regional basis.

Chifley Dam, near Bathurst, is currently in the process of being extended and it is also proposed to upgrade recreational facilities at the site. Bathurst has the potential to derive considerable benefit from fishing and water-based activities as a result of this initiative.

7.3 Events

Attachment 5 lists major events held in the Bathurst area each year. Bathurst is fortunate to have such a strong events calendar and the work that is done by Council to preserve the current events at Mount Panorama, to encourage the revitalisation of some events and development of new events in today’s highly volatile events climate, should be recognised.

Because of the scale and impact of its major events, the City of Bathurst realises the significant benefits that major events can bring to a community. Not only is there the economic effect and the benefit of job creation, major events and unusual events can generate important exposure for the host community.

In 1986, Bathurst City Council commissioned Tom Murphy of the School of Business and Public Administration from Mitchell College of Advanced Education to undertake a study to assess the economic impact of the then James Hardie 1000 (Murphy 1986). This study found that:

- Over $8 million is spent directly in Bathurst each year by all groups associated with racing events on the Mount Panorama circuit;

- In the Central West, Mount Panorama racing events are estimated to contribute:
  - over $15 million in gross output (turnover);
  - the equivalent of over 300 full time jobs;
  - over $6 million in household income (disposable);

  when account is taken of flow on effects (ie additional output as a consequence of
stimulus to other industries and household income);

- Australia wide, spectators, competitors and sponsors spend over $17 million annually in preparing for and participating in racing events at Mount Panorama. With flow on effects, the resulting gross output generated is in the vicinity of $30 million;

- Australian wide, the equivalent of over 600 full time jobs and over $15 million in household income can be attributed to racing events at Mount Panorama; and

- The economic impact of Mount Panorama is not confined to the City of Bathurst. There is at least as much output, household income and employment generated outside of Bathurst by Mount Panorama racing events as there is in Bathurst itself.

In recent times, Council has been advised that the figures would have doubled since the original study. However, in seeking support for further events and improvements to facilities at Mount Panorama, Council has commissioned new research to measure the impact of Mount Panorama.

The list also demonstrates the tendency for events to be held in Spring and Autumn. This is also reflected in the occupancy rates shown at Attachment 2. Spring and Autumn are the most pleasant times of the year in Bathurst and it is not surprising that organisers tend to select these periods to hold events. This does lead to events competing with each other at these peak times and limited accommodation availability may restrict visitor numbers for many events, including the vast number of smaller events not listed. Seasonality contributes to the lack of new accommodation infrastructure.

Event organisation in Bathurst exhibits the characteristics noted by Tonge, Dunstan and Kauez (1999):

- lack of coordination (and communication) between event organising committees, which frequently results in several events being held on the same weekend or in the same month; and

- events being held in peak season demonstrating a lack of awareness of the importance to build on low and shoulder periods.
To a certain extent, some of the issues, such as clashes of events, have been addressed with the regular production of a ‘What's On’ calendar, however, organisers of smaller events do persist in ploughing on regardless and also fail to recognise the time lines and cost factor involved in achieving external publicity for events.

Major events can overshadow the benefits of many smaller events. Sporting events and special interest gatherings, especially those with high levels of participation and those involving children and families, can be major drivers of visitor numbers.

The graph in Section 6.8 demonstrates that mid Winter and January are particularly quiet as far as occupancy rates are concerned. It would be advantageous to develop or encourage new events to be held at these times to help level these trough periods. Organisers often enlist the support of Council to help with event. Priority could be given to suitable proposals to hold events during these trough periods.

### 7.4 Conference Facilities

Prior to the opening of the Bathurst Memorial Entertainment Centre, Bathurst had a good range of conference and meeting facilities. With the opening of the new facility the City could claim to be one of the regional centres that is equipped with the best range of facilities to handle this market. (List of Facilities is at Attachment 6).

The Sydney Convention and Visitors Bureau has recently been commissioned by Tourism New South Wales to develop the regional conference and convention market. At the 1998 New South Wales Tourism Conference it was stated that Bathurst was one of the State’s 25 regional conference and convention hot spots (Hutchison 1998). Much to the credit of the City, Bathurst was selected by the Minister for Tourism to launch the State’s Regional Conference and Convention Strategy.

During discussions on the potential of Bathurst as a conference and convention destination at the Bathurst Tourism Summit (1997), it was felt that priorities for the development of this market included:

- the need for a quality publication to sell Bathurst as a conference and convention venue;

- the need for cooperation between venues;

- the need for a person, or organisation, to coordinate promotional efforts in regard to conferences and conventions; and
• the need for a central location for enquiries of this nature.

It is suggested that ideal numbers of delegates for multi-day conferences would be currently around 400. This limitation is largely a result of accommodation availability.

The suggestions made at the Tourism Summit (1997) regarding conferences and conventions appear logical. By comparison with other regional centres, there is a distinct lack of 4 star accommodation necessary to attract major conferences. This will, only in part, be alleviated by the development of a 5 star property on Mount Panorama. However, it would be prudent to develop a comprehensive strategy for this market which takes full account of the initiatives that are being developed by the Sydney Convention and Visitors Bureau.

7.5 Sports and Recreation Facilities

Like many regional centres, Bathurst has a wide range of sporting facilities to cater for almost every sport. The range of what might be regarded as typical is enhanced by facilities at various educational institutions including Charles Sturt University and the boarding schools. The City was also selected as the venue for rehearsals of the 2,000 strong Olympic Marching Band.

Many of Bathurst’s facilities, either individually or in combination with others, are suitable for visiting groups and special events. This point is well illustrated by the fact that Bathurst hosted the 1998 Eastern Conference University Games involving 3,000 participants across 11 sports.

The facilities which appear to have the greatest potential include:

• **Carrington Park** – football field with television standard lighting and modern covered grandstand;

• **Cooke Park Hockey Complex** – two sand based fields with eight additional grass fields. Modern clubhouse and facilities. The Hockey Association expects to construct an international standard pitch in the near future. The Association also has considerable experience in hosting major events;

• **Basketball** – Bathurst City Council operates an air conditioned, four court indoor facility. The stadium is professionally managed. Additional indoor facilities
includes Charles Sturt University (new facility), Police Citizens Youth Club, All Saints’ College, and The Scots School;

- **Tennis** – the John Matthews Complex has 17 all-weather courts (2 hardcourts and 15 synthetic) and the City has numerous additional smaller facilities;

- **Archery** – facilities are available at indoor and outdoor venues and are recognised as a branch of Field Archery Australia. National qualified coaches are available for coaching;

- **Squash** – the Bathurst Squash Centre has 4 indoor squash courts;

- **Ten Pin Bowling** – Bathurst Ten Pin Bowling Centre is a modern facility featuring computer scoring with 16 alleys;

- **Netball** – located at the John Matthews Complex, there are 4 all weather netball courts, with lighting, 6 bitumen courts and 5 grass courts.

- **Golf** – Bathurst’s 18 hole championship course is highly rated and has hosted the NSW Open Championship. The course is the only one in Bathurst and casual visitors can experience a wait for tee off times, but most afternoons are available. Charles Sturt University has a small nine hole facility with driving range facilities available at Walmer Park Driving Range and Rossmore Park;

- **Motor Cycling** – Mount Panorama and Mount Panorama International Motocross circuit;

- **Car Rallies** – excellent forest roads and secondary roads plus Mount Panorama;

- **Road Cycling** – good terrain and roads that are not heavily trafficked; and

- **Horse Riding and Harness Racing** – both have facilities of a high standard with Harness Racing, in particular, conducting a carnival that attracts visitors for a long period and visitors from overseas.

Bathurst was listed as a potential training venue for five Olympic sports but received no specific enquiries. Some of these facilities will be used as Bathurst hosts rehearsals for the Olympic Bands which will be the largest element of the Olympics held outside Sydney.
It should be noted that the ability to attract sporting events may rely not only on the suitability of facilities but also on the willingness and ability of local sporting associations to provide an organisational infrastructure, often on a voluntary basis. The groups involved in hockey, basketball and cycling have expressed a particular interest in seeking new events for the Bathurst District.

### 7.6 Accommodation

Within the Bathurst City area, Australian Bureau of Statistics’ Accommodation Survey (1999) figures show that there are 12 accommodation establishments in the Hotel, Motel and Guest House categories and these provide 394 rooms. Because of the way in which the Accommodation Survey is compiled it is not possible to separate the balance of the district. Table 2 provides an overview of accommodation in the Bathurst district.

<table>
<thead>
<tr>
<th>BATHURST</th>
<th>No. of Rooms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Motel</td>
<td></td>
</tr>
<tr>
<td>4½ Star</td>
<td>62</td>
</tr>
<tr>
<td>4 Star</td>
<td>37</td>
</tr>
<tr>
<td>3½ Star</td>
<td>92</td>
</tr>
<tr>
<td>3 Star</td>
<td>62</td>
</tr>
<tr>
<td>2½ Star</td>
<td>103</td>
</tr>
<tr>
<td>Hotel</td>
<td>87</td>
</tr>
<tr>
<td>Caravan Park</td>
<td>25 ensuite vans</td>
</tr>
<tr>
<td>Bed &amp; Breakfast</td>
<td>65</td>
</tr>
<tr>
<td>Self Contained</td>
<td>30</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>BATHURST DISTRICT</th>
<th>No. of Rooms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Motel</td>
<td>81</td>
</tr>
<tr>
<td>Hotel</td>
<td>26</td>
</tr>
<tr>
<td>Caravan Parks</td>
<td>9 park cabins</td>
</tr>
<tr>
<td>Bed &amp; Breakfast</td>
<td>19</td>
</tr>
<tr>
<td>Self Contained</td>
<td>20</td>
</tr>
</tbody>
</table>
A further shortcoming of the Australian Bureau of Statistics figures is that they do not fully include properties less than 14 rooms, Bed and Breakfast style accommodation, self-contained accommodation, nor, at the local level, information about accommodation in caravan parks. Bathurst also has accommodation that is specifically oriented at the school excursion market which also supplements the more traditional forms of accommodation. A more complete inventory of accommodation including information on room numbers and facilities is provided at Attachment 7.

The number of properties in the Hotel, Motel and Guest House categories, as used by the Australian Bureau of Statistics, increased from 13 properties in 1996 to 14 properties in 1998. This was not the result of the construction of a new infrastructure but rather the inclusion of a property previously outside the scope of the survey. As previously noted, a further change in methodology has reduced the properties surveyed to 12. In broad terms, there have been no significant changes to capacity in this category since 1988.

There has been a significant increase in the number of operators providing Bed and Breakfast, Country Escape and Self-Contained styles of accommodation. The 1993 Bathurst and District Visitors Guide listed a combined total of 22 of these categories and the 1999-2000 publication lists 60. Whilst this represents a significant increase in the number of small operators it has not greatly increased the overall room capacity.

Most properties have undertaken a level of refurbishment to maintain standards, but Bathurst has received feedback that there is insufficient high quality hotel/motel accommodation within the City. Based on current published occupancy rates and with further properties coming on-line, it is difficult to justify the need for greater capacity other than at pronounced peak periods relating to special events. It is an argument as to whether supply follows demand or visa versa. Without additional accommodation Bathurst will have difficulty attracting some conferences and special events.

Bathurst also has developed facilities to bring extra accommodation ‘on-line’ for special events and at certain times of the year. Charles Sturt University can accommodate up to 1,100 people in ‘on campus’ accommodation. Mostly student accommodation, ie single rooms with shared facilities, it also includes a 32 unit motel style – Centre for Professional Development.

- Bathurst is a major centre for education. Facilities include four private schools with boarding facilities that can accommodate up to 700 in dormitory type
accommodation;
- The demand for accommodation during Bathurst’s major motor racing events has lead to the development of a home host/home hire program. Up to 400 homes have been involved in this program;
- Home and Farm Stay programs have been developed to cater for international visitors; and
- The demand for educational tours to Bathurst has resulted in the establishment of three facilities which provide accommodation oriented specifically at this market but which can supplement more traditional forms of accommodation at peak periods. Rossmore Park provides 230 beds, Bathurst Goldfields have 180 beds, and Newhaven Park has 50 beds.

Feedback from potential visitors received at the Visitor Information Centre indicates that there is a perception that operators in Bathurst engage in price ‘gouging’ at peak periods and that operators ‘hold out’ for the best possible booking. This presents an image problem for Bathurst which may impact on a year round basis.

With a few exceptions, there has been little attempt to pursue planned marketing strategies or for operators to develop packages. Operators also appear reluctant to utilise the potential of the travel industry distribution network because of a reluctance to pay commissions and contribute towards the distribution and marketing costs associated with arrangements of this type. Many operators focus exclusively on the day to day operation of their business and wait for business to ‘walk through the door’ rather than taking a proactive approach to the development of business.

7.7 Transport
Timetables for Coach, Road and Air Services are provided at Attachment 8.

7.7.1 External Transport

Road
The majority of visitors to the area travel in their own car. From a tourism context, the road network is therefore of considerable significance.

The City of Bathurst is located at the junction of three major highways. The Great Western Highway which crosses the Blue Mountains from Sydney; the Mid Western Highway which links Bathurst to the south-west and also links with the Newell and
Olympic Highways; and the Mitchell Highway which services the west and north-west, and also links with the Newell Highway at Dubbo. A north-south road link is also emerging as significant. Main Road 54 links Bathurst to Goulburn in the south and Mudgee in the north. As this road becomes fully sealed, usage is expected to jump significantly.

From the perspective of country drivers, the roads on these key routes would be considered reasonable, however, city based drivers may not view them favourably. The drive from Sydney to Bathurst via the Blue Mountains is a good quality road but driving times are lengthened by extensive areas of speed restriction and there seems to be a perceptual problem for many Sydney and coastal people to cross the Blue Mountains.

**Coach**
Bathurst is serviced by a number of express coach operators which provide services from destinations west of Bathurst to Sydney on a day return basis. Linkages are also provided via a number of express services travelling between the capital and major centres. Countrylink also provides coach services which link to rail services at Bathurst and Lithgow.

There is no common coach terminal facility at Bathurst. Countrylink services use the Railway Station and other operators utilise restaurants in the CBD and even service stations on the fringe of the CBD as pick up/drop off points.

**Rail**
There is only one daily rail service to Bathurst. This XPT service arrives in Bathurst from Sydney mid morning and the return service travelling from Dubbo departs Bathurst from late in the afternoon.

Further services provided under the rail banner are coach services which link areas to the west and south west with electric train services at Lithgow. State Rail electric commuter services from Sydney terminate at Lithgow.

**Air**
Bathurst has 3 daily air services to and from Sydney. The service is principally used by people travelling for business purposes. While the service is little used by the ‘typical’ tourist, the facilities are very significant during major motor sport events at Bathurst and could be an important factor for the conference and meetings markets.
7.7.2 Internal Transport

Road
Road linkages within the City of Bathurst are generally good and subject to ongoing upgrading.

The surrounding district also has an extensive road network which make it possible to get to most points of visitor interest by car. In the Evans Council area, however, there are extensive sections of unsealed road which may be a disincentive for the visitor. The Sofala–Hill End Road is a prime example although it is argued by some that to seal this road would change the unique remote character of Hill End.

The various unsealed roads, forestry roads and the like may also be a tourism asset. Because of the district’s proximity to Sydney, and other areas where there are high levels of 4WD ownership, there are opportunities to market 4WD experiences to owners who may not otherwise have an opportunity to use the 4WD capability of vehicles. Various roads in the district are also an asset from the point of attracting car rallies.

Bus Services
Bathurst has a public transport bus network which services most parts of the City. Operators are currently planning ways to upgrade this facility so as to provide a better service for residents. Some adventurous visitors without transport also use the facility as a means of sightseeing.

School bus services are provided to many areas in the district on a daily basis during school terms. There is some capacity on these services to provide transport for visitors, however, this service would not be easy to use.

There are community bus services that operate from centres as far away as Mudgee. These services mostly operate on a day return basis with a weekly or fortnightly frequency.

The availability of buses for charter can be an important facility in attracting conferences and events.

Taxi Service
Bathurst has a fleet of 28 taxies providing a 24 hour service. Visitors would mostly
use the facility for point to point transfers but the Taxi Cooperative have also worked with the Visitor Information Centre to develop a ‘Taxi Tour of Bathurst’. The Cooperative has also developed a series of tour packages to attractions and points of interest in the region.

Local Tours
A day tour service has commenced operation. This operates in conjunction with Countrylink who provide an extensive distribution network. The service only operates on limited days and at this stage the product is ‘Historic Bathurst’. The cost is also somewhat higher than similar day tour product. In the past similar ventures have failed. If the program is to succeed it will require development to the stage of multi-day packages, more extensive marketing support and potentially some form of operating subsidy for an agreed period.

Another tour which is currently available is the Wambool Aboriginal Cultural Tour which focuses on Aboriginal culture. The tour includes aboriginal cultural talks, traditional aboriginal dancing, bushtucker lunch and a tour of Abercrombie Caves. This tour would appear to have considerable potential, however, the organisers do not have a great deal of experience in the industry or in marketing. The current structure of this tour relies on a larger minimum number than demand can support at present. Again this is an area where training, financial and marketing support could be critical to the successful development of this product.

7.8 New Developments
During the last six months of 1999 several announcements regarding new tourism developments have been made. These developments are of a magnitude that will impact substantially on the industry and the markets for the District.

A five star 125 room hotel facility will be constructed at Mount Panorama. This will be the first five star development west of the Blue Mountains. The second stage of the facility will be a ‘high tech’ motor sport theme park that will give visitors the opportunity to try a range of motor sport activities in a combination of actual and simulated environments. The cost of the joint development is estimated at $66 million. The developers have undertaken extensive research and anticipate that the development will attract a whole new market to Bathurst on a year round basis.

A development application for a forty unit motel has also been lodged. This facility will be constructed close to the CBD in a highway location. At the time of writing, the
The combination of these two developments will increase Bathurst’s pool of hotel/motel rooms available by a substantial 42%.

Another important initiative for Bathurst is to be the establishment of a major Museum for the City. The new facility will be based around the Sommerville Collection. This is a world class collection of fossils and minerals valued at over $15 million. The project is a joint initiative of Bathurst City Council, the New South Wales Government, Charles Sturt University and the Australian Museum. The Sommerville Collection will be developed along with a number of other collections to create a facility that will have regional icon status and will potentially be of State, even national, significance. The other collections may well include Australia’s premier collection of Bushranger Memorabilia – the Penzig Collection – which has recently been given to the City, a collection of Cobb and Co. memorabilia including one of the five remaining Cobb and Co. Coaches, a Chifley interpretive centre and regional archives.

Bathurst has also commenced two other important infrastructure projects that will impact on tourism. The City has undertaken an extensive CBD beautification program that will give more prominence to the historic streetscape of much of the CBD, and enhance the overall ambience of the City. The reinstatement of verandah posts in the CBD is also contributing to this.

Bathurst’s water supply, Chifley Dam, is being upgraded to double its capacity. An important aspect of the development will be the provision of improved facilities at the Dam for camping/caravaning, water sports and fishing.

### 7.9 Visitor Services

#### 7.9.1 Visitor Information Centre

Bathurst City Council has played a leading role in the development and promotion of tourism since the early 1960’s with the appointment of a specialist tourism and public relations position, which was supported by a small visitor information facility located within the Council Chambers. In 1978, Council also took over the operation of a Chamber of Commerce sub-committee on tourism and gradually expanded its role including the operation of a separate Visitor Information Centre.
Bathurst City Council, through its Visitor Information Centre, is perceived as having the leading role in the coordination of efforts to promote and develop tourism in the Bathurst District. In reality, the resources that are provided allow for the operation and staffing from a visitor servicing point of view. Few resources can be allocated for product development and promotion.

In operating the Visitor Information Centre, Council provides a physical infrastructure including a building and non-specialised equipment, furniture and vehicle. Council provides a budget for the majority of administrative costs and contributes sufficient funds to cover 4.5 of the 6 full time staff as well as weekend casual staff. The Centre operates in accordance with the administrative requirements imposed by the Local Government Act and Council provides financial administration, computer support and general administrative support for the Visitor Information Centre. For budgetary details, refer to Table 4 in Section 8.2.2.

The area serviced by Bathurst Visitor Information Centre includes the local government areas of Bathurst City, Evans Council and Blayney Council. There is also a strong affinity with much of the Oberon area and visitor enquiries are also ‘fielded’ for parts of Cabonne Council area, Rylstone Council area and the City of Greater Lithgow. The core area is Bathurst, Blayney and Evans, and Bathurst City Council is keen to foster a strong partnership and commitment from the latter Councils to assist in the development of tourism.

The Visitor Information Centre is located in William Street – the main street just outside the CBD. The centre has been accredited as operating at the level 1 standard required for VIN (Visitor Information Network) membership by the New South Wales Council of Tourist Associations.

An unfortunate aspect of the current location is that it is ‘off highway’ and accessing the facility from the key traffic direction involves a right hand turn. Directional signage is in excess of Roads and Traffic Authority guidelines, however, it is in a ‘busy’ section of the City both in terms of traffic volume and signage.

The facility has good parking for cars but does not provide adequate parking for coaches or vehicles with caravans or trailers.

It also lacks adequate public toilets to cater for the volume of people who pass through. The parking and toilet situation also discourages coach groups from using.
the Visitor Information Centre.

The building is attractive and functional creating a good atmosphere for visitors and good working conditions for staff. Little space is available for the provision of interpretive displays or electronic forms of supplying information. Staff are knowledgeable and well trained. Although some industry sectors have suggested that hours of operation could be extended and that the large pool of casual staff should be better informed. The requirements of VIN accreditation will place greater emphasis on staff training.

A wide selection of brochures are on display from the local area as well as brochures from other parts of the State. The key local publications include:

- Bathurst and District Visitors Guide – a good quality DL sized publication containing detailed information about Bathurst and the surrounding district (50,000 copies – 80% self funded);

- Bathurst City Map – a full colour map of the City of Bathurst (50,000 copies – near self funded);

- Bathurst Promotional Booklet – quality A4 publication designed to promote the Bathurst area to potential visitors and potential residents (30,000 copies – heavily subsidised);

- A range of ‘in house’ information sheets;

- Tour Planner’s Manual for coach operators and anyone planning groups visits – also produced ‘in house’; and

- A web page is currently being developed.

A consistent problem within the production of the Map and Visitors Guide has been that because the projects are managed ‘in house’ under a variety of pressures, staff resources have not been available to get the next edition up and running before the supplies of previous editions have been exhausted. The Promotional Brochure is a new initiative that has been well received, unfortunately on current financial projections it does not appear possible to fund a further edition. The remaining publications could be improved but are considered adequate in the light of available resources.
The Visitor Information Centre stocks a range of souvenirs. The market has dictated a fairly ‘ordinary’ range, however, over the past twelve months a concentrated effort has been made to upgrade the quality of stock and to focus on goods which are locally produced or promote Bathurst. A business plan is to be produced for the Souvenir Shop to provide greater focus to this aspect of the Visitor Information Centre operations.

There is discussion by stakeholders and within the local community regarding the possibility of developing a new Visitor Information Centre with a highway location or the possibility of re-developing the current site to provide improved parking, better public toilets and improving visibility. The table below shows Visitor Information Centre usage on a financial year basis for the last five years. It is clear that Council will need to address this issue in the near future.

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Usage</td>
<td>83,360</td>
<td>111,703</td>
<td>115,367</td>
<td>106,893</td>
<td>79,929</td>
</tr>
</tbody>
</table>

7.9.2. **Signage and Information Bays**

The City of Bathurst is fortunate that three highways meet the City but they do not pass through the CBD. Anecdotally, people report that they drive through the City without stopping to find out what Bathurst has to offer because:

- there is not good signage to the CBD, parking, etc; and
- from the highway, Bathurst looks to be just like many country towns.

Only one commercial attraction has an international standard tourism sign. The towns of Sofala and Hill End have equivalent signage, as do Jenolan Caves and Kanangra Boyd National Park. Mount Panorama has very faded signs which direct traffic via obtuse routes, avoiding the more interesting parts of the City.

From a visitor perspective, Bathurst needs to substantially upgrade its directional signage and introduce visual clues at the entrances to the City and along the highways which will attract visitors to the City and its unique ambience.
Bathurst only has one roadside information bay. This is located on the Mitchell Highway on the western outskirts of the City. It is well located and has the key features that would be regarded essential to this type of facility. Advance warning signs, good parking, a large map, public toilets, some playground equipment and a BBQ area. The facility is maintained under a relationship with Bathurst Correctional Centre. Because maintenance tends to be spasmodic, this facility is not always presented at its best. There is a need to improve the maintenance of this facility and to plan for similar facilities on at least the other Highway entrances to the City. Ongoing maintenance and updating needs to be programmed.

It would also appear desirable to promote the branding of ‘Explorer Country’ at the entrances to Bathurst and other cities in the region.

### 7.10 Support Services

Facilities required by visitors to make stays comfortable and enjoyable are often facilities that are shared with residents. Facilities include banks / ATMs, medical services, public toilets, the Post Office, etc (Tonge et al 1999). As a major regional centre, Bathurst has most of the facilities that are called for in modern society, however, there is a substantial ‘drop off’ in the availability of facilities outside the City.

One need which has often been mentioned to staff at Bathurst Visitor Information Centre is a facility to exchange international currency and to cash travellers cheques written in international currency.

### 7.11 Education and Training

With greater demands for professionalism, customer service and business skills demands generally, there is an increased need for a much higher degree of training for everyone involved in the tourism industry.

The Western Institute of TAFE (Technical and Further Education) is the only locally based education provider of tourism related programs. The course provided is Community Services, Health, Tourism and Hospitality.

A wider selection of programs are available by considering block release programs, distance education programs, and the offerings of specialist providers and industry associations.
Bathurst Visitor Information Centre is the accredited local provider of the AussieHost Customer Relations Program, however, changes to the requirements of this program appear to imply that this arrangement will not continue.

By way of general observation, it would appear that the tourism industry and the retail sector generally in the Bathurst area would benefit from improved standards of customer service and local knowledge in front line staff. Training in marketing and industry practices (yield management and packaging) would also be of benefit to the industry.

7.12 Hospitality and Entertainment

A lack of theme parks, video game parlours, etc are the cause of constant cries from the young people in the area that “there’s nothing to do”. For an older age group there is a strong ‘pub’ culture with a number of popular venues, but these tend to be more ‘alive’ towards the end of the week and on weekends. Another important facet in the entertainment scene is Bathurst as a university City – entertainment venues tend to be more ‘lively’ during periods when the University is in session.

The recent opening of a five theatre cinema complex and the opening of Bathurst Memorial Entertainment Centre, with its regular offerings of quality live performances, has certainly filled a significant void in the area of entertainment. It should be stated, however, that Bathurst could not be promoted as a centre of exciting nightlife. An overview of entertainment venues is at Attachment 9.

Restaurants, fast food outlets and coffee shops are plentiful. They are listed in Attachment 10. Despite the wide range of facilities, none have established a reputation that would generate regular special purpose visits. Several restaurants are located in heritage buildings which may present an opportunity for some form of cooperative marketing. Bathurst is located in a productive agricultural area yet no facilities are promoting the use of local produce nor do any appear to be working towards the development of a regional cuisine.

The neighbouring centres of Cowra, Orange and Mudgee have promoted food and wine tourism, COME (Cowra, Orange, Mudgee Experience), on a cooperative basis. This initiative appears to have gained good exposure for these areas and has accelerated the development of food and wine products.
## KEY ISSUES

### Attractions
- Small marketing budgets
- Lack of marketing experience and skill
- Little cooperation
- Locals are only a small percentage of visitors to attractions

### Activities
- Wide variety
- Little marketing support
- Little coordination
- Minimal infrastructure

### Events
- Lack coordination
- Significant peaks and troughs
- Represent a significant opportunity

### Conference Facilities
- Quality facilities with good depth
- Lack PCO (Professional Conference Organiser)
- Some deficiencies in audio visual technology
- Accommodation shortage for some conferences
- Represent a significant opportunity

### Sports and Recreation
- Most facilities are good
- Major users are local
- Controlling body need to be able/willing to handle major events

### Accommodation
- Significant peaks and troughs
- Published occupancies are not high
- Occupancies need to be boosted, and peaks and troughs reduced to justify development of new accommodation
- Potential to develop, if new market created
- Operators often ‘inward’ looking
# KEY ISSUES (cont’d)

## Transport
- Good transport links vital for tourism
- Road is of particular importance
- Perception of need to develop local tour service as important aspects of tourism development

## New Developments
- Substantial plans for new development
- ‘Critical’ mass of tourism product
- Significant pressure for Council to ensure success and viability of industry

## Visitor Information Centre
- Questions about current location
- Need improved signage, toilets and parking
- Suffers by trying to be all things to all people
- Need information bays on all highway entrances

## Support Services
- Facilities to cash foreign currency travellers cheques.

## Education and Training
- Need for:
  - business skills training
  - customer service training
  - local awareness training

## Hospitality and Entertainment
- Need attraction/activities for younger children
- Potential and need to develop excellence reputation in wine and food, especially if wish to link with Orange, Cowra and Mudgee.
8. Organisation of Tourism

The leadership, management, coordination and clear direction of the tourism industry are critical success factors for the tourism industry (Tonge et al 1999).

8.1 External Tourism Bodies

Bathurst and the surrounding area is part of the Central West tourism region. This region, created by Tourism New South Wales, is promoted as Explorer Country. Bathurst contributes towards the Regional Promotion Committee and has been represented on the Board of Explorer Country. The region covers 21 Local Government areas in Central New South Wales extending from Bathurst in the east to Coonabarabran in the north west, to Condobolin in the west, with West Wyalong and Cowra forming the southern boundary. Bathurst has expressed concern to Tourism New South Wales at the size of the region and the lack of a strong ‘community of interest’ for marketing purposes.

Despite these concerns, Bathurst has continued to support the Regional Promotion Committee by maintaining its financial support and involvement in projects organised by the Committee. The level of commitment, however, is below what might well be contributed to a regional organisation which was structured to overcome the concerns regarding the organisation. There is nothing to prevent the formation of sub-regional groups under the current regime, however, there is no mechanism which encourages or facilitates this.

Tourism New South Wales is the state marketing body. Funds are contributed to the regional bodies to assist administration and marketing. Individual areas and operators can directly access Tourism New South Wales’ promotional programs, although these are more suited to larger players.

8.2 Local Tourism Organisation

8.2.1 Tourism Committee

Since 1978 the key organisation responsible for the development of tourism has been Bathurst City Council. Council has undertaken this role through a Tourism Committee. Until 1994 this Committee had the authority to make decisions within its own budget limits. In 1994 the role of the Committee changed to that of an advisory committee. Members of the Committee were appointed by Council. While the exact makeup varied from time to time, the structure typically included:
• 4 councillors from Bathurst City Council;
• 1 councillor from Evans Council;
• 1 councillor Blayney Council;
• 3 nominees from Bathurst and District Chamber of Commerce;
• 6 industry nominees; and
• 1 nominee from the Bathurst Sport and Recreation Council.

In September 1999, Bathurst City Council decided not to reappoint any of its non-statutory committees in an effort to streamline operations, and to develop more open and direct communication with stakeholders. This decision ended the role of the Tourism Committee.

While there had been no particular problem with the Committee, comments over a number of years had identified issues such as:

• the lack of a clearly defined role for the Committee;
• lack of communication between Committee members and the industry;
• delegates seen to pursue sectional interests;
• delegates with no experience or connection with the tourism industry;
• size of the Committee making it unwieldy; and
• committee becoming issue rather than strategy driven.

The development of a strategy which allows Council and the tourism industry to develop a partnership to foster the growth and development of tourism is a stated outcome of this paper.

8.2.2 Funding for Tourism
The net costs to Bathurst City Council of operating its tourism facility is $266,000 which is just under the administrative cost for this area ($284,000). In addition to these direct costs, Council also supports the administration of tourism via the provision of financial services and computer support. Council, during the course of any particular year, may also support requests to assist the funding of events and is also involved in the operation of a number of significant tourism facilities.

The table below provides a summary of the tourism budget.
### Table 4

**Table 4**

<table>
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<th>Total Expenditure – Tourism</th>
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<tr>
<td>Administration</td>
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<td>Capital Items</td>
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<td>Promotional</td>
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<td>Tours</td>
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<table>
<thead>
<tr>
<th>Total Income – Tourism</th>
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<td>Other Councils</td>
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<tr>
<td>Tours</td>
<td>$650,120</td>
</tr>
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</table>

**Net Cost to Council**

| Net Cost to Council        | $266,266   |


The operation of a farmhost/homehost program and the homehire/homehost program for major events are the most significant expenditure and income items. Profits from this operation are transferred to a promotional reserve. Perhaps the most telling figure is that $180,000 is spent on items covering promotion and product development. Almost half of this amount is allocated towards the production of core publications including the Bathurst and District Visitors Guide, maps and promotional materials. This leaves only an inconsequential amount of money to spread across advertising and promotion, regional initiatives, product development and the Autumn Heritage Festival. This is further diluted by spreading these initiatives across a range of markets.

### 8.2.3 Industry Involvement

Industry appears content to sit back and allow Council to take a leading role as far as tourism is concerned. The Council, through the Visitor Information Centre, seeks the involvement and contribution of industry through opportunities to participate in promotional initiatives, advertising in publications and as a prerequisite to the previous two items – making a direct contribution as a tourism supporter. The tourism supporter program is outlined at Attachment 11.

One hundred and thirty six businesses contribute to tourism via the tourism supporter
program. Most of the businesses involved in tourism as their principal focus are supporters, however, there is a significant drop off beyond this point. Due to resource constraints, little effort is made to actively recruit supporters with new involvement principally coming from operators who actively seek support of the Visitor Information Centre.

The operators of many businesses involved in tourism comment that they do not spend enough time talking to other people in the industry, do not know much about the industry and do not develop strategic alliances with others. Some opportunities for networking exist. These include an informal Accommodation Association involving, but not restricted to, moteliers who meet about 6 times a year, and a bed and breakfast association which has a formal membership and meets on a quarterly basis.

In broad terms the industry has not taken a positive lead as far as tourism is concerned, has been reluctant to make a substantial contribution towards the costs associated with tourism, and has not taken steps to implement initiatives which would improve networking across the industry.

8.3 Tourism Policy and Council’s Role

At present Bathurst City Council has no specific policy in regard to tourism. Council is generally supportive of tourism but has approached issues in an ad hoc manner which has involved ‘oiling’ the squeaky wheel and the pursuit of particular projects because someone thought it would be a good idea or a wonderful opportunity rather than pursuing markets in a planned manner with the identification of clearly established outcomes.

The expectations of the community, industry and Council, as far as tourism is concerned, can be quite divergent. Three key issues appear to be paramount:

1. that the role and function of the Visitor Information Centre be clarified;

2. an appropriate level and method of resourcing tourism needs to be identified; and

3. that trying to cover all the bases without adequate resources is a guaranteed formula for failure.

The exact nature of Council’s role in regard to tourism has also never been clarified.
In Bathurst’s case Council, through the Visitor Information Centre, is undertaking the role of local tourism body. Authors who have had a significant influence on local and regional tourism over the years (Tonge et al 1999 pg 33) (Advance Tourism 1998 pg 12-2) link the role of Councils in regard to tourism with the fact that a major role for Councils is to foster the economic development of the community.

While arguing the desirability of private sector involvement, Advance Tourism (1998 pg 12-2) recognises that operators in many areas let themselves down through attitudes which:

- assume Council or someone else will fund their industry; and
- result in a lack of professionalism in business leading to a failure to allocate funds for the marketing of the business and for destination marketing.

Tonge, Dunstan and Kauez (1999 pg 33) argue that Councils “have the responsibility to at least initiate, facilitate and support the development and promotion of tourism in their areas of responsibility”. The key areas of Local Government responsibility identified by Advance Tourism are:

- “support the industry as a whole to be competitive against other destinations; and
- create an environment where businesses can succeed, increase in capital value and by so doing increase in property values”.

A different approach is advocated by Tourism New South Wales. The Central West Tourism Strategy (1996) sees the Regional Tourism Organisation as having the prime responsibility for promoting the areas with the role of Councils, the Tourism Manager and Local Associations being to provide funding, assist in product and infrastructure development and operate the Visitor Information Centre. The New South Wales Tourism Masterplan (undated) also suggests that better use could be made of Local Government marketing funds if these were utilised via regional cooperative promotional programs.

In a letter to Bathurst City Council, General Manager of Tourism New South Wales (Thirlwell 1998) stated, “….Visitor Centres have the pivotal role in collecting and providing information to visitors and in implementing strategies to maximise visitor satisfaction with the destination experience. They also have a critical role in providing product information, marketing intelligence and resource support to regional, State
and thematic marketing campaigns to most effectively create demand for holidays in the area or region. Visitor Centres also have a key role in identifying, and if resources permit, promoting to the markets that are not specific to their tourism city or area”.

Despite the position of Tourism New South Wales there appears to be a strong opinion that Council needs to be involved and, in fact, assume a position of leadership as far as destinalional promotion is concerned.

Section 11 provides details of how a number of other major regional centres approach tourism in relation to a number of specific issues. Each of the Councils involved contributes financially and with the exception of Armidale is directly involved in the operation of the Visitor Information Centre and promotion of the City for tourism purposes.

In Armidale the Council handed the operation of the Visitor Information Centre to the Armidale Development Corporation late in 1998, Council contributes by way of a fixed contribution. There are already signs that this approach may not be providing the necessary resources and that the approach from an amalgamated Council may be different. Orange Council handed the responsibility for tourism promotion and the operation of the Visitors Centre to an industry group in the mid 1990’s but this only lasted 1½ - 2 years and Council has again taken over the responsibility. Wagga Wagga Council does not allocate substantial resources to tourism promotion or the operation of the Visitor Information Centre given the size of the city. Resources are, however, allocated to areas that impact significantly on tourism such as the provision of sporting and cultural facilities.

In Bathurst, as with any other regional centre, there is the potential to limit Council’s involvement in tourism by say handing the function to another organisation or offering aspects of tourism such as the operation of the Visitor Information Centre as part of a competitive tender.

From discussions held during the development of this paper, it appears that Council needs to adopt a position of leadership in regards to tourism and promotion in a more general sense as there is no industry body with the potential to take on this role at present. Council also has a substantial investment in tourism through its own operations but is keen to see the development of a partnership with industry in regard to promotion. The key aspects of the role as perceived in Bathurst included visitor servicing, industry development, promotion and entrepreneurial activities which stimulate tourism and generate income to offset costs.
A compelling reason for Councils to support tourism through the provision of Visitor Information Services is the finding by Symonds, Travers and Morgan (1997) that total expenditure on a Visitor Information Centre budget generates additional visitor expenditure in the order of four and one third times the size of the budget. This increase relates only to expenditure of visitors who have personal contact – visitors also receive information and advise that originally came from a Visitor Information Centre via a secondary source or electronic source are not included the model.

8.4 Community Support
The general community in Bathurst appears to endorse positive efforts to develop tourism. It is interesting to note, however, that the local community is not active in visiting local attractions. Attraction operators report that local visitation would fall far below the level of 54% local visitation identified in the ‘Attractions Development Strategy for Regional New South Wales’ (Tourism Leisure Concepts p28 1999). Local residents are also important in that 45% of visitors stay with friends and relatives (Tourism New South Wales 1998) who will have a major impact on what visitors see and do while they are in the area.

Informed, enthusiastic residents are more likely to encourage visitors to try the experiences that the Bathurst area has to offer. Local residents can also be enthusiastic ambassadors for Bathurst, and given the importance of word-of-mouth advertising, could represent an important promotional opportunity. The study by Symonds, Travers and Morgan (1997) also found that only 1/3 of the respondents to their study on Visitor Information Centres were aware of the operation of the Visitor Information Centre in their own place of residence. This presents further evidence of the need to promote local tourism to the residents of the area.
KEY ISSUES

External
• Questions about effectiveness and relevance of regional organisations
• State wide cooperative programs are for ‘big’ players

Local
• No tourism association
• In sufficient resources for desired levels of promotional activity
• No tourism policy or consistent direction
• Lack industry involvement and commitment
• Lack industry networking/packaging/product development
• Passive community support for tourism but community could become:
  - ambassadors for area
  - ‘visitors’ for attractions and events

Council Involvement
• Council needs to establish clear direction for tourism
• Council needs to show leadership
• Need for increased funding:
  - results other areas
  - significance of industry
  - potential for economic growth
  - 4 1/3 return on investment in Visitor Information Centres
9. Consultation with Stakeholders

The consultative process involved three key elements with a fourth consultative stage planned on consideration of this interim report. The industry and community in general were invited to participate in a series of workshops scheduled between 18 to 24 October 1999. The Mayors and General Managers of Evans and Blayney Shire Councils were interviewed and interviews were conducted with people involved in community organisations that have shown an interest in tourism within the key villages located in the Blayney and Evans Council areas.

9.1 Workshops

Industry consultation took the form of eight workshops which were attended by 49 people. Workshop participants were invited to attend meeting with similar types of operators or general workshops. The general public was invited to two of the workshops. Overall attendance was not overwhelming and perhaps indicative of one of the issues identified – that the public and industry lacks a deep understanding and commitment to tourism.

The groupings included:

- Bed and Breakfast operators;
- Self contained, country escapes, caravan parks and hotels;
- Attractions;
- Motels;
- Visitor Information Centre staff;
- General public (x 2);
- General business group.

The people who attended the workshops were enthusiastic and contributed freely. Workshops were structured in such a way as to identify issues in the environment which were important in the tourism arena (Opportunities and Threats), issues which were of external and internal nature (Strengths and Weaknesses), as well as providing specific input in regard to key markets and organisation of tourism.

The points made during the workshops are combined at Attachment 11. While the issues raised were varied and obviously reflected the perspective of the stakeholders, a number of matters came up on a recurring basis.
9.1.1 **External Environment**

**Opportunities:**
- Touring holidays especially for seniors/emergence of impulse short break and touring short breaks;
- World Wide Web;
- Wine and food tourism – Bathurst as a gateway/hub;
- Proximity to Sydney;

**Threats:**
- Inertia of Sydney market;
- Blue Mountains blockage;
- Bathurst too close to Sydney for touring holidays;
- Bathurst in limbo between activity generated in the Blue Mountains, and the Cowra, Orange, Mudgee alliance.

9.1.2 **Internal Issues**

**Strengths:**
- Mount Panorama;
- Historic Buildings / CBD beautification;
- Country experiences.

**Weaknesses:**
- Facilities:
  - Location of Visitor Information Centre
  - Signage
  - Website
  - Need for electronic or gas BBQs
  - Standard of toilets
  - Poor picnic facilities / lookouts at Mount Panorama
  - Parking for coaches/caravans/trailers
  - Entrances, highway and signage does not create favourable impression or convey ambience of the City
- Community:
  - Lack of industry networking/marketing;
Lack of community knowledge and support

- Events:
  - Lack of coordination;
  - Trough periods

9.1.3 Markets
The workshop groups were asked to identify what they considered to be the key markets. The full list is also included in Attachment 10. The markets considered significant across a wide range of the workshop included:

- Tourism by Car
- Families
- Seniors
- Sport
- Car clubs
- Four wheel drive
- Coach groups:
  - Educational
  - Seniors
- Conferences

9.1.4 Ideas
During the course of the workshop a host of different ideas were generated. Again these are listed in full in Attachment 10. Popular ideas included:

- Development of itineraries with mudmaps for different market segments;
- Billboard advertising, especially boards giving distance to Bathurst;
- Events promotion at entries – banner poles or electronic signs;
- Mount Panorama as a concert venue.

9.2 Funding for Tourism
Workshop participants did not introduce any new suggestions for tourism funding but feedback suggested that there would be opposition to a form of tourism levy and that Council should allocate a greater proportion of revenue to the promotion and development of tourism.

9.3 Organisation of Tourism
Participants in the workshops did not bemoan the abolition of Council committees, including the tourism committee. Participants expressed the desire for a more direct means of communication with the Council on tourism issues, but they did indicate some reluctance to participate in the format that Council forums have previously operated. The idea of a special tourism forum involving a presentation on issues and future directions in tourism, an industry education component and the opportunity for workshopping and networking within industry segments, or across groups with particular interests – say in particular markets, generated a favourable response.

When asked whether the industry could form an association, the consensus of opinion was that without Council involvement, this would be very unlikely.

9.4 Meetings with Councils

As outlined in Section 2, the Bathurst District, for tourism purposes, includes the Council areas of Evans and Blayney in addition to the City of Bathurst. A formal relationship in regard to tourism has existed with these Councils. In formal terms, the Oberon Council area is not part of the Bathurst District but Bathurst Visitor Information Centre and operators in Bathurst field many questions in relation to the Oberon area. From a tourism administration viewpoint, the Oberon Council area is part of the Blue Mountains.

Interviews were held with the Mayors and General Managers of Evans and Blayney Councils to gain input about tourism, especially in regard to perceived needs and issues.

Both Councils indicated that because of their low ratepayer base and lack of infrastructure, the priority for resources needs to be channelled into infrastructure provision. This situation is particularly strong in the case of Evans Council.

Both Councils see Bathurst as an important hub for tourism in the area and are keen to work with Bathurst in this regard. Blayney Council also works with Orange in regard to tourism but perceives Bathurst as an important ‘feeder’ for tourism in the Blayney area.

Neither Council has the infrastructure to cater for mass tourism and both feel that excessive visitor numbers would destroy much of the appeal that currently exists.

The Councils feel that the heritage of the district is its biggest asset and that this aspect
of the area is yet to realise its potential. Both Councils cited village and private historic cemeteries as sites that could be of great interest to visitors, as would the historic pubs of the district. Evans Council also see great potential in regard to natural environment of their area as far as niche markets are concerned – four wheel driving, camping and fishing. The Councils suggested that catering for niche markets also helped to reduce the pressure for more infrastructure.

Improvements to signage within the district was perceived as a major infrastructure need both in terms of directional signage and the potential to develop interpretive signage to help inform visitors about points of historical interest.

Other aspects of the area could be developed as far as tourism is concerned. These include village itineraries and tours of car club runs, pub tours, aboriginal sites, four wheel drive tours, etc. These could be developed along with a ‘mud map’ concept.

Within the Evans area, the Macquarie Turon Parklands (bush camping with basic facilities) may come under the control of Council and there is a possibility of an improved camping facility at Sofala.

Blayney Council is currently building a multipurpose centre which will upgrade community facilities and provide a venue for events. Blayney is also keen to develop eco-tourism product. The Council is expecting to approve a wind farm power development shortly and see potential for linking this with environmental restoration projects at Cadia Gold Mine and the Age of Fishes Museum at Canowindra.

Both Councils have stressed the need for staff at Bathurst Visitor Information Centre and operators in Bathurst to be better informed about the villages and tourism opportunities in the district. Councils would like to see tourism issues as agenda items for meetings between their Council and Bathurst Council. They did not express concern at the abolition of the Tourism Committee providing some form of consultative mechanism for both Local Government and industry is put in place.

In terms of contributions towards tourism in the district, the Councils are prepared to make contributions to the extent of available resources and would prefer to contribute to a specific program which involved some set initiatives. Suggestions to consider included:

- Display space in Bathurst Visitor Information Centre;
- Villages’ promotional brochure supported with advertising and public relations campaign;

- Display area at trade and consumer promotions; and

- Coordination of tourism interests in villages across total district.

### 9.5 Village Consultation

The villages of the Bathurst District represent an important part of the tourism inventory of the area. To gather input from people within the villages discussions have been organised with key representatives.

The discussions held to date reveal a feeling of isolation but a willingness to develop cross community consultation as far as tourism is concerned.

Key issues identified included:

- Need for improved knowledge of villages by Information Centre staff and industry;

- Lack of promotion for villages;

- An enthusiasm for the development of village based events;

- Bathurst excessively focused on itself and Mount Panorama – Bathurst needs to build bridges with local communities especially if amalgamation is likely to proceed;

- Bathurst could benefit from integrated approach to economic and community development together with tourism; and

- Attitude of business in Bathurst not welcoming.
KEY ISSUES

Industry
- Key Markets broad:
  - Families
  - Seniors
- Wide range of other relevant markets
- Short break/touring type holidays
- Bathurst is gateway/hub
- Proximity to Sydney
- Improved Website needed
- Year round focus for Mount Panorama
- History/heritage and City ambience
- Location of Visitor Information Centre
- Directional Signage for facilities and attractions
- Website
- Standard of public facilities
- Lack networking and cooperation
- Poor knowledge levels of industry and community
- Events lack coordination and support
- Troughs

Councils
- Would like more concrete proposal from Bathurst regarding tourism initiatives
- Potential for heads of agreement/resource sharing
- Tourism initiative need to suit existing infrastructure
- Council to Council liaison on tourism issues

Villages
- Villages important part of district’s tourism assets
- Need for cooperative effort
- Promotion of villages at Visitor Information Centre
- Better knowledge industry and Visitor Information Centre staff about villages
- Interested in events
10. Key Markets

In preparing this report, consistent with the diversity of tourism product in the area, a wide range of target groups, holiday types (purposes) and niche segments have been identified as being relevant. This section gives a brief overview of the key groups that have been identified and also reviews the more highly targeted markets in which the Bathurst area would appear to have the greatest potential or competitive advantage. The first part also considers the expressed need for promotion which creates a destinational awareness.

10.1 Destinational Awareness

As has been identified in this paper, there is a need and desire to develop an overall awareness of Bathurst and the surrounding district. The local community perceive this as a significant issue and it is to a certain extent reinforced by studies undertaken by Tourism New South Wales (1994) where the respondents were found to identify Bathurst’s association with motor racing but had no depth of knowledge about the City or district.

Tourism marketing experts emphasise the need for product oriented marketing in tourism. They also down-play the importance of destinational promotion. The approach suggested by this paper recognises the need for both approaches. Destinational promotion is analogous to brand marketing and image creation type programs. It follows that it is far easier to undertake successful product marketing campaigns on where there are strong, positive images of the destination.

Destinational tourism marketing would also appear to have two further side effects that may not be considered by the marketing purist.

The need to promote regional areas extends beyond visitors. A positive image also helps to create an impression that is conducive to the attraction of new residents and development of new industries. Industrial cities in Great Britain have focused on tourism promotion as a means of attracting secondary spin offs (Bramwell et al 1994). Destinational promotion for regional centres also has the potential to serve as a vehicle for internal marketing. Destinational marketing programs could have the potential to improve the ‘self image’ of a community, instill a sense of pride and stimulate the enthusiasm of the community to become ambassadors for the City, or simply create a more positive ambience and welcoming attitude.
An enthusiasm for destinational marketing does, however, need to be tempered by inevitable resource constraints. Factors to consider when considering options for marketing of a destinational awareness factors would include:

- the need to continue to appeal to the broad market segments which currently visit the area such as older couples and families;

- the key geographic areas identified as key source markets; and

- the type of holidays and experiences which appeal to these groups.

From the foregoing discussion, other broad factors to consider include the characteristics of potential new residents and new industry, as well as the type of marketing that would achieve a positive internal marketing effect. Section 8 considers the way in which other key regional centres approach tourism and it is interesting to note that Orange and Tamworth have taken a more integrated approach to marketing which take these wider issues into account.

10.2 Market Segments

10.2.1 Families
Along with seniors, families are the most significant market group for the area, as identified by operators. Information from ‘Domestic Tourism Trends’ (Tourism New South Wales 1998) indicates that 32.6% of visitors to the region can be categorised as families.

Whilst families are widely considered as a key market group by many destinations, it has not been possible to find any significant market research on this group. Possibly because the market group is so broad that any studies in fact use more criteria to further delineate the market. The fact remains, however, that families, in the broad sense, are identified by operators and statistical data as the most important lifecycle group for the Bathurst District.

In developing product for this group, and in considering some of these issues, it would be appropriate to consider some of the information in the Tourism New South Wales Research (1994) and the Frank Small and Associates (1997) research which looked at the key drivers for holidays in the Central West. Another consideration which could
be important in regard to this market is the suggestion that females tend to make the
decisions regarding travel plans.
The fact remains, however, that more detailed research needs to be undertaken -
probably coordinated at a State level - so that regions, local areas and operators can
develop products and develop strategies that are more appropriate for this market.

10.2.2 Seniors
The other market segment that is considered important by a wide range of operators is
the seniors or over 55 group. Again this observation is reinforced by ‘Domestic

Like the families market, the seniors groups is a very broad. Some operators perceive
the market as the older ‘group’ travel market and some with this view dismiss it as
overly cost conscious. However, unlike the families market, special research has been
commissioned which provides a close up look at the seniors market in Australia. The
express purpose of this paper is to help domestic tourism operators target this
important group. The report, ‘Not Over the Hill, Just Enjoying the View’ (Golik
1999) was produced as a initiative for the International Year of Older Persons. The
key findings of the report were:

- Seniors have higher levels of discretionary income and spend a greater percentage
  of this income on travel than any other market segment;

- On average, 50,000 Australians retire each year taking $5.5 billion in lump sum
  payments;

- Promoting the health benefits of a travel experience make products more
  appealing to this market;

- Seniors are more likely to travel in off-peak seasons;

- Seniors can, and do, take longer holidays;

- Innovative products are required that appeal to aging ‘Baby Boomers’ to
  overcome the ‘been there done that’ syndrome;

- Value for money is more highly regarded than discounts; and

- Travel motivations include:
making new friends;
- social contact and mental stimulation;
- maintaining health and well being;
- a sense of adventure; and
- trying new things.

Given the depth of cultural heritage product in the Bathurst district, the need to boost trough periods and the image of the Central West as a friendly and safe place to visit, this group represents a market which Bathurst should focus on. The report does suggest that product needs to be developed to cater for but not patronise this group.

The New South Wales Department and Disability have recently staged a Rediscovery Tour which included the Blue Mountains, Jenolan Caves, and Bathurst on a return trip from Sydney. While this is to be promoted as a one off three day event, it is perhaps indicative of the type of product that could be developed.

10.3 Holiday Types

During the course of this study workshop participants identified the short break market and touring by car market as being significant to the Bathurst District. At a domestic market update presentation in August 1999, Tourism New South Wales identified the short break market and car touring market as the two areas of domestic tourism that are experiencing growth (Donnelly 1999). This growth is attributed to a number of factors influencing and increasing the propensity for some people to travel. These include:

- Stress causing people to have a greater need for holidays;
- People wanting ‘more’ from a holiday;
- ‘Banking’ holidays;
- Time poor – cash rich;
- Increased time at work;
- Demand to be better parents;
- Need for unique holidays; and
- A willingness to drive.

10.3.1 Touring by Car

Donnelly (1999) suggests that the touring by car market wants:
To explore their own State;
• More independence;
• More freedom;
• Unplanned discovery as part of the experience.

Being at the junction of three highways, with a broad range of experiences locally and an ideal hub from which to explore both the local district and wider region, Bathurst appears to have the basis to compete strongly in this market.

Key initiatives to increase Bathurst’s appeal to this market include the development of ‘loose’ itineraries that have strong points of interest and experiences. These itineraries would also need to be flexible to allow the opportunity for exploration and self discovery. The development of strategic alliances with other destinations in the region, the Blue Mountains and the villages in the district would also be important cornerstones for expanding potential. The ‘mud map’ concept which provides varied options for different sub groups of the touring by car market may have considerable merit.

10.3.2 Short Breaks

The short break market out of Sydney is one area where the Central Western Region actually has a substantial market share. A study of the Sydney Short Breaks Market (Tourism New South Wales 1994 pg 8) found that the Central West enjoyed a 10% market share. The report also found that the average expenditure per person per night was $101.75 compared to the average expenditure at that time of $71.30. This would suggest that this market could be up to 40% more lucrative than the average visitor.

A further finding was that the market enjoys natural experiences, dining and shopping. Activities that also rated highly included sightseeing, bushwalking, historic towns, and museums and galleries. Considering the eastern end of the Central Western Region, the activities and experiences available match closely with the interests of this market. The Tourism New South Wales study also found that there is a tendency for the short break market to peak during the winter period. Given that this is a trough period for Bathurst, the development of this market could help to overcome this.

Staff at the Bathurst Visitor Information Centre and some operators have observed what they feel is the emergence of a touring short break. There appears to be a market developing which is undertaking tours of the eastern end of the Central Western Region which include itineraries such as Jenolan Caves, Bathurst, Hill End and Mudgee. Another popular choice appears to combine visits to Bathurst with the
visitors to the wine/food areas of Cowra, Orange and Mudgee. This observation, and the fact that 90% of the short break market travel in their own car, confirms a strong link between these two types of holiday.

Another important observation by operators and Visitor Information Centre staff is that short breaks in the area are often taken with families or small groups and that the accommodation choice does not necessarily revolve around the more indulgent forms of accommodation. These observations would be at odds with the more stereotypical view of short breaks as romantic indulgent escapes for couples.

**10.4 Target Markets**

During the process of developing this plan, several key markets emerged as one in which the Bathurst district has particular competitive advantage or as offering a special opportunity for the area. The paper has not attempted to discuss all of the market segments and further analysis would be recommended prior to the adoption of specific strategies in relation to these markets.

**10.4.1 Conferences and Conventions**

As identified in the infrastructure audit, Bathurst has a range of facilities which mean that the City can cater for meetings and conventions involving small groups, to meetings where delegate numbers exceed 500. Whilst the Bathurst Memorial Entertainment Centre is undoubtedly a flagship for this industry segment, a number of other regional centres have, or will shortly have, similar facilities. A major source of competitive advantage for Bathurst in regard to this market is the variety and range of facilities in addition to the Memorial Entertainment Centre. Further factors in Bathurst’s favour, as far as this market is concerned, is that Bathurst is reasonably close to Sydney, but centrally located, and that the City has good transport links to Sydney. As has previously been identified, the availability of higher quality accommodation may be a limiting factor.

The conference and convention market also represents a good target as the market is lucrative. A study commissioned by the Bureau of Tourism Research (Johnson et al 1999) found that the average expenditure for domestic overnight trip delegates is $178 while the average expenditure for domestic overnight visitors is $83. This study also found that there was a total of 232,000 meetings of 15 or more people held in Australia in 1996/97 and that these meetings attracted a total of 11.4 million delegates. On a national scale the market is large. This market also represents an opportunity to boost trough periods.
Regional New South Wales is to be helped in its effort to capture a greater slice of the conference and convention market by the implementation of a Regional Conference and Convention Strategy. This has involved the creation of a unit within the Sydney Convention and Visitors Bureau, the New South Wales Convention Bureau, to facilitate this strategy.

10.4.2 Sports
Bathurst boasts a wide range of good sporting facilities and a few which are of national and international standard. Sporting events regularly attract significant numbers of visitors for carnivals and special competitions. The ability to attract these events relies not only on the suitability of facilities, but also on the willingness of local sporting associations to provide the organisational infrastructure, often on a voluntary basis.

The marketplace for sporting events is becoming increasingly competitive with a number of centres actively vying for events.

Within Bathurst the following sports facilities have express an interest in cooperating to actively seek events for the District – hockey, basketball stadium and cycling.

10.4.3 Car Clubs
Because of Mount Panorama, Bathurst has a special fascination for people with an interest in motor vehicles. This interest is not just simply confined to people with an interest in racing. Experience has shown that the numbers of vintage and veteran clubs are just as easy to motivate to visit Bathurst as is the Holden Performance Car Club. As a result of the City’s long involvement with motor sport and a successful Light Car Club and the Panorama Motor Cycle Club, there is a significant expertise in conducting motor vehicle events. This expertise could be utilised by visiting groups that do not have the necessary resources to organise certain aspects of the event.

With Mount Panorama as a hook for these groups, Bathurst has a unique opportunity to develop product, even to the point of costed packages for this market. Features may well include:

- Concourse de elegance
- Scenic drive/tour
- Presentation dinners and functions
- Accommodation
• Navigation trials
• Sport events:
  – hill climbs
  – standing 1/5th
  – rallies

It would appear that there are some 130 national car clubs in Australia. These could be readily reached via a campaign involving direct mail and personal follow up.

10.4.4 Four Wheel Drive

Hill End was recently identified by a leading four wheel drive magazine as one of the top ten four wheel drive destinations in Australia (Amon 1999). Each weekend many Sydney based four wheel drive vehicle owners come to the Bathurst District to experience four wheel drive adventures. This market segment was also identified during a number of workshop sessions as one with potential for the district.

No research has been specifically conducted in relation to this market but the New South Wales Outback Tourist Organisation has recently developed and promoted a four wheel drive product called ‘The Darling Run’. A drive was developed which included 800kms along the Darling River between Brewarrina and Wentworth. A considerable amount of background work was undertaken to develop a suggested itinerary and driving notes to assist people making the trip. A colour brochure was prepared and inserted into subscription based four wheel drive magazines as well as public relations effort to secure media exposure. As a result, 3,000 information requests were received and many groups complete the trip in small and large convoys. This was well in excess of the initial expectation of organisers (Wilkinson 1999).

The Bathurst area has already proved to be of interest to this market and it is suggested that with the development of appropriate materials this market could be expanded considerably. Recent discussions with Orange and Mudgee about the potential of developing a four wheel drive track involving the Bridle Track from Bathurst to Hill End, Dicksons Long Point from Hill End to Orange, and the Hargraves Road from Hill End to Mudgee, have met with a favourable response. An initiative along these lines could be pursued via the Regional Promotions Committee.

10.4.5 Educational Tours

Bathurst’s heritage and its proximity to the Turon Goldfields has led to Bathurst being a significant destination for school excursions. A number of facilities have emerged which cater specifically for this market and others make special arrangements to
provide for it. This section of the industry has become known as the edutourism sector.

The market is substantial and significant for Bathurst, Hill End and, to a lesser extent, Abercrombie Caves. One attraction operator catering for this market has over 20,000 visits each year.

The task of product development for packaging and promotion for this market has largely been undertaken by the individual operators or by the coach companies or teachers at the market source. Bathurst Visitor Information Centre continues to produce a desktop published type publication, ‘The Bathurst and District Tour Planner’, to assist in this regard.

The educational tour market has largely focused on gold and the associated history, as this is an established curriculum topic. It would appear that relatively little has been done to refine the product or develop new product based on changes to school curriculums. Bathurst could develop product based on an increasing interest in environmental issues such as combining a visit to a proposed wind farm at Blayney, the best practice land restoration projects at the nearby mine, and the Canowindra Fossil museum.

Initiatives for this market could also include the development of student project sheets for teachers to use during the field trip. The fact that this market is catered for by only a few operators leads to the suggestion that it could be high priority for the cooperative program proposed as part of this plan.

10.4.6 Film
The Australian film industry continues to expand and the location of the Twentieth Century Fox studio in Sydney will increase the potential for areas within New South Wales to become film locations. Selection of an area as a film location provides short term economic benefits and can provide huge exposure for an area as well. The New South Wales Film and Television Office maintains an inventory of possible film sites which is developed by inviting areas to provide details of suitable locations.

The Bathurst District, with the advantage of being close to Sydney, could offer film makers a variety of backdrops including:

- Historic buildings;
Heritage street scapes;
Natural bushland scenery;
Farm locations;
River locations; and
Contemporary Australia.

10.4.7 Fishing and Fossicking
Feedback from the workshops identified fishing and fossicking as potential target markets for the area. Whilst there is little doubt about the validity of this, the industry has previously been reluctant to invest in proposals to promote to these markets. Simple guides have been produced to assist interested people to pursue these activities but the support to undertake extensive marketing is not apparent at this stage. These markets have potential and could be pursued with appropriate cooperative support.

KEY ISSUES

- Need for promotion to lift destinational awareness;
- Potential to integrate aspects of tourism promotion with promotion intended to stimulate economic awareness
- Families markets need further segmentation
- Seniors market has good research available
- Short break/touring holidays
- Longer touring holidays
- Short breaks not necessarily ‘indulgent’
- Key niche markets:
  - conferences
  - events – car/sport
  - 4WD
  - educational
- Potential for film location
11. Approaches to Tourism by Regional Centres

This section is in two parts:

- An investigation has been conducted into tourism activity and the approach to tourism by six other major inland regional centres. The cities selected were Wagga Wagga, Dubbo, Orange, Tamworth, Armidale and Goulburn. The purpose was to gain an overall impression of the tourism industry by utilising commonly available Australian Bureau of Statistics figures and to gain a better understanding of these, Defert’s Index and Tourism Intensity Indexes (Oppermann et al 1997) were calculated.

It should be noted that the Australian Bureau of Statistics figures that are used only include licenced hotels, motels, guest houses with facilities and serviced apartments with 15 or more rooms. Therefore, the study may not take full account of all aspects of the industry.

Other relevant information was obtained by interviewing the person most closely involved in the management of tourism in the various local government areas. In some cases this was the head of the relevant Council Department but was most often the Tourism Manager. Again the material presented should be regarded as indicative only as Councils approach the issues differently and use different accounting approaches. For ease of comparison the information is presented in Table format.

- The way in which Councils fund their commitment to tourism also varies significantly. The second part of this section briefly reviews some of the techniques that Councils use to secure support from industry to bolster promotional funding.

11.1 Comparison Tables

The information obtained from the other regional centres is presented in table form:

- Table 5 - Bathurst and the three larger centres; and
- Table 6 - Bathurst and the three smaller centres.
## Table 5
Approaches to Tourism by Largest Three Inland Regional Centres - Compared to Bathurst

<table>
<thead>
<tr>
<th></th>
<th>Bathurst</th>
<th>Wagga</th>
<th>Dubbo</th>
<th>Orange</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABS Est Resident Population (1)</td>
<td>29,683</td>
<td>56,566</td>
<td>37,030</td>
<td>35,584</td>
</tr>
<tr>
<td>No. Guest Rooms(2)</td>
<td>396</td>
<td>697</td>
<td>822</td>
<td>414</td>
</tr>
<tr>
<td>No. Guest Nights(2)</td>
<td>131,121</td>
<td>241,863</td>
<td>402,471</td>
<td>143,291</td>
</tr>
<tr>
<td>Tourism Intensity Index (3)</td>
<td>441.74</td>
<td>427.58</td>
<td>1086.88</td>
<td>402.68</td>
</tr>
<tr>
<td>Defert's Index(4)</td>
<td>1.33</td>
<td>1.23</td>
<td>2.22</td>
<td>1.16</td>
</tr>
<tr>
<td>Average Annual Occupancy 1998/99 (2)</td>
<td>55.3%</td>
<td>58.2%</td>
<td>65.3%</td>
<td>62.9%</td>
</tr>
<tr>
<td>Prime responsibility for provision of Visitor Services &amp; Tourism Promotion</td>
<td>Bathurst City Council - through Visitor Information Centre</td>
<td>Wagga Wagga City Council Promotions Manager plus Visitor Information Centre</td>
<td>Dubbo City Council- Tourism Services Section has two subsections- Promotion and Visitor Information Centre</td>
<td>Orange City Council through Visitor Information Centre</td>
</tr>
<tr>
<td>Organisation of Tourism</td>
<td>Council will seek industry involvement through forums</td>
<td>Tourism Committee- Councillor, Council Director, 6 selected individuals</td>
<td>Tourism Committee is advisory committee- 1 Dubbo City Councillor, the Executive of Dubbo City Tourist Ass, Reps- Western Plains Zoo, Commercial Accommodation, Chamber of Commerce, Tourist Attractions, Chamber of Commerce &amp; Dubbo City Development Corporation</td>
<td>Council may reappoint Tourism Committee but day to day Corporate Mgt Team and a staff working group- Promotions Project Team- Have a whole of Council approach</td>
</tr>
<tr>
<td>Approx Gross Tourism Expenditure- VIC &amp; Promotion</td>
<td>$468,000 VIC $287,000 Promotion $180,000</td>
<td>$432,000</td>
<td>$620,000</td>
<td>$597,000</td>
</tr>
</tbody>
</table>
## Approaches to Tourism by Largest Three Inland Regional Centres - Compared to Bathurst (Cont’d)

<table>
<thead>
<tr>
<th></th>
<th>Bathurst</th>
<th>Wagga</th>
<th>Dubbo</th>
<th>Orange</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Net Cost to Council</strong></td>
<td>$266,000</td>
<td>$350,000</td>
<td>$470,000</td>
<td>$551,000</td>
</tr>
<tr>
<td><strong>% Gross Costs met by Council</strong></td>
<td>56%</td>
<td>81%</td>
<td>75%</td>
<td>92%</td>
</tr>
<tr>
<td><strong>Key Revenue Sources</strong></td>
<td>Council, Operational profits, Industry</td>
<td>Council, commissions, industry</td>
<td>Council</td>
<td>Council, advertising</td>
</tr>
<tr>
<td><strong>Publications</strong></td>
<td>Key publications are included in promotional expenditure</td>
<td>Mixed arrangement</td>
<td>Key publications are produced outside Council expenditure</td>
<td>Key publications are included in expenditure</td>
</tr>
<tr>
<td><strong>Promotional &amp; VIC Staffing Levels</strong></td>
<td>4.5 F/T Casual Pool, 1.5 Tours and Accommodation</td>
<td>3 F/T Casual pool, P/T Secretarial</td>
<td>2 F/T Promotion, 2 F/T VIC, 1 F/T Trainee, 2 Casuals as required, Council supply additional staff for promotions</td>
<td>3 F/T Pool 6 Casual, Other Council staff involved on a project by project basis</td>
</tr>
<tr>
<td><strong>Key Products and Markets</strong></td>
<td>Seniors, Families</td>
<td>Sports &amp; Events, Conference, Cultural Tourism, Technical Agricultural for International</td>
<td>Leisure 54%, Business 18%, Transit 22%, Other 6%</td>
<td>Focus on Industry development at present, Geographically-Central West &amp; northern and eastern parts of Sydney, Food &amp; Wine, history, parks &amp; gardens, gold are key themes under overall banner of four seasons</td>
</tr>
<tr>
<td><strong>Other Comments</strong></td>
<td>Bathurst gains extensive exposure as a result of publicity from motor racing events</td>
<td>CSU has tour coordinator who is promoting agri-tourism and education, army and air force bases also promote facilities</td>
<td>Western Plains Zoo has extensive promotional budget which complements promotion by Council</td>
<td>Orange District Tourism is separate industry body which may undertake some limited promotional activity</td>
</tr>
<tr>
<td>Table 6</td>
<td>Approaches to Tourism by Smallest Three Selected Inland Regional Centres - Compared to Bathurst</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>---------------------------------------------------------------</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>ABS Est Resident Population (1)</strong></td>
<td>29,683</td>
<td>35,326</td>
<td>21,219</td>
<td>21,061</td>
</tr>
<tr>
<td><strong>No. Guest Rooms(2)</strong></td>
<td>396</td>
<td>702</td>
<td>387</td>
<td>375</td>
</tr>
<tr>
<td><strong>No. Guest Nights(2)</strong></td>
<td>131,121</td>
<td>253,092</td>
<td>134,905</td>
<td>133,474</td>
</tr>
<tr>
<td><strong>Tourism Intensity Index (3)</strong></td>
<td>441.74</td>
<td>716.45</td>
<td>635.77</td>
<td>633.75</td>
</tr>
<tr>
<td><strong>Defert’s Index(4)</strong></td>
<td>1.33</td>
<td>1.99</td>
<td>1.82</td>
<td>1.78</td>
</tr>
<tr>
<td><strong>Average Annual Occupancy 1998/99 (2)</strong></td>
<td>55.3%</td>
<td>56.3%</td>
<td>53.5%</td>
<td>53.2%</td>
</tr>
<tr>
<td><strong>Prime responsibility for provision of Visitor Services &amp; Tourism Promotion</strong></td>
<td>Bathurst City Council - through Visitor Information Centre</td>
<td>Tamworth City Council- Visitors Centre &amp; Economic Development Unit</td>
<td>Armidale Development Corporation</td>
<td>Goulburn City Council-through Visitor Information Centre</td>
</tr>
<tr>
<td><strong>Organisation of Tourism</strong></td>
<td>Council will seek industry involvement through forums</td>
<td>Tourism Committee has delegated authority - 3 Tamworth Councillors (1 Chair) Accommodation Industry, Camping and Caravanning, Clubs &amp; Hotels, Retail, Council Directors</td>
<td>Executive of Armidale Development Corporation</td>
<td>Tourism Committee is a committee of Council with delegated authority under section 355 of Local Government Act- 2 Goulburn Councillors, 1 Mullwra Councillor, 7 Industry operators, 1 Chamber of Commerce</td>
</tr>
<tr>
<td><strong>Approx Gross Tourism Expenditure-VIC &amp; Promotion</strong></td>
<td>$468,000 VIC $287,000 Promotion $180,000</td>
<td>$600,000 VIC $255,000 Promotion $345,000</td>
<td>$265,000 $20,000 Promotion</td>
<td>$500,000</td>
</tr>
<tr>
<td><strong>Net Cost to Council</strong></td>
<td>$266,000</td>
<td>$475,000</td>
<td>$265,000</td>
<td>$350,000</td>
</tr>
<tr>
<td><strong>% Gross Costs met by Council</strong></td>
<td>56%</td>
<td>79%</td>
<td>100%</td>
<td>70%</td>
</tr>
<tr>
<td><strong>Key Revenue Sources</strong></td>
<td>Council, Operational profits, Industry</td>
<td>Differential Rate on Commercial Property yields $125,000</td>
<td>Council, membership, operator contributions, commissions, souvenir profits</td>
<td></td>
</tr>
</tbody>
</table>
## Approaches to Tourism by Smallest Three Selected Inland Regional Centres - Compared to Bathurst (cont’d)

<table>
<thead>
<tr>
<th>Publications</th>
<th>Key publications are included in promotional expenditure</th>
<th>Publications are included in expenditure budget</th>
<th>Key publications are produced outside</th>
<th>Key publications are included in promotional expenditure</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Promotional &amp; VIC Staffing Levels</strong></td>
<td>4.5 F/T Casual Pool 1.5 Tours and Accommodation 2 F/T Promotion 1 P/T Promotion 4-5 F/T Equivalent at VIC plus extensive use of Volunteers</td>
<td>1 F/T Manager 1 P/T 3 Casual Volunteers</td>
<td>5 F/T 7 day roster</td>
<td></td>
</tr>
<tr>
<td><strong>Key Products and Markets</strong></td>
<td>Seniors Families</td>
<td>Touring by Car Conferences &amp; Meetings Sports and Events</td>
<td>Little promotion at present due to funding. Education major source for tourism Conferences Agricultural Business Business generally</td>
<td>Events, groups &amp; conferences Sydney Canberra Plus 40 age</td>
</tr>
<tr>
<td><strong>Other Comments</strong></td>
<td>Bathurst gains extensive exposure as a result of publicity from motor racing events</td>
<td>Chamber of Commerce is promoting food and wine aspects of area Tourism promotion is part of holistic approach to promotion including residential and industrial plus $150,000 on events (Country Music Festival)</td>
<td>Two adjoining Councils have strong commitment to tourism and run VIC’s and undertake promotion. Amalgamation of Councils is on agenda and tourism levy is possible</td>
<td></td>
</tr>
</tbody>
</table>

### Table 3 & 4 Notes:

3. Tourism Intensity Index- (Visitor Nights per annum/Resident Population)X100 as per Oppermann et al (1997 p 48)- The higher the value the more an economy is dependent on tourism.
4. Defert’s Index-(No. Guest Rooms/Resident Population)X100 as per Oppermann et al (1997 p 46)- The higher the value the more an economy should be dependent on tourism.

Table 3 & 4 Abbreviations:

ABS: Australian Bureau of Statistics
VIC: Visitor Information Centre
F/T: Full Time
P/T: Part Time

11.2 Securing Industry Contributions for Tourism

Of the Councils surveyed only Tamworth had any form of special rate to generate funds specifically for tourism. In Tamworth the funds raised are also specifically tagged to be used for promotional purposes rather than administrative costs. A number of coastal centres also have tourism or promotional levies in place (Central Coast, Shoalhaven, Tweed) as a means of increasing the industry/community contribution via a compulsory rate or levy median sum. Some centres are endeavoring to introduce tourism levies to secure a compulsory contribution towards tourism promotion, however, the current State Government view is that unless the levy does not increase the rate beyond the approved rate pegging level they will not be approved. A levy which takes rate increased above the government imposed level requires a special variation in rates and recent applications have not met with approval. Levying a special rate is the most equitable means of ensuring that the beneficiaries of tourism contribute towards the costs.

Techniques to gain a voluntary direct contribution from industry include membership or support programs. Under these schemes industry pay a fee which entitles them to benefits such as the right to distribute brochures via the Visitor Information Centre, newsletters and automatic listings in various publications. Bathurst and Goulburn were the only centres studied to have this type of arrangement in place. Experience of both centres is that the program is time consuming to administer and can lead to administrative problems.

Port Stephens (Deuis 1999) also have a membership supporters fee but Councils adds an incentive for industry to contribute by matching each dollar contributed towards specific initiatives from Council’s funds. This results in a promotional budget alone that is around $800,000 each year.
In terms of overall expenditure on tourism the proportion contributed by Bathurst City Council is considerably lower than the other areas investigated. The promotional budget for Bathurst is also significantly lower than Dubbo, Orange and Tamworth, each of which exhibits higher annual occupancy rates for commercial accommodation.

**KEY ISSUES**

- No uniformity of approach to tourism
- Appears that Bathurst could do better in terms of occupancy/utilisation of accommodation pool
- Integrated approach to tourism and economic development in some centres
- Bathurst generates more income from other sources than is the case in other areas
- Bathurst Council contributes a lower proportion of the overall expenditure on tourism compared to other inland centres.
- Increased contribution from Council could be used to leverage increased contribution from industry
- Higher occupancy levels appear to be related to higher promotional budgets