



DESTINATION MANAGEMENT PLAN

HAY SHIRE COUNCIL
SEPTEMBER 2021



Australian Government
**Department of Agriculture,
Water and the Environment**

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ACKNOWLEDGEMENTS

An aerial photograph of a vast wetland area at sunset. The sun is low on the horizon, casting a warm orange glow across the sky and reflecting on the water. The wetlands are a mix of dark, marshy areas and lighter, sandy or silty patches, with some water channels visible.

ACKNOWLEDGEMENT OF COUNTRY

We acknowledge the Wiradjuri Nation and the Nari Nari people, the traditional custodians of the land on which Hay Shire is located. We respectfully recognise their enduring and dynamic culture and inherent connection to Country.

We pay our respects to the Elders past and present.

We also acknowledge Aboriginal and Torres Strait Islander peoples as the traditional custodians of Australia.

Wetlands of Gayini in 2020. Image: Jamie Woods, Nari Nari Tribal Council website

APPRECIATION TO COUNCIL, STAFF & STAKEHOLDERS

Destination Marketing Store (DMS) wishes to express its appreciation to all Councillors, staff and stakeholders who participated in the consultation process and so willingly shared insights to inform the development of the Destination Management Plan (DMP). Your active involvement and insights are greatly appreciated.



The Hay Destination Management Plan was prepared by Destination Marketing Store

www.destinationmarketingstore.com.au

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Today, tourism is a significant contributor to Hay Shire's local economy. In 2019, it was valued at around \$12 million annually and responsible for over 10% of total employment in the region, second only to the contribution of the agricultural sector (at 25%).

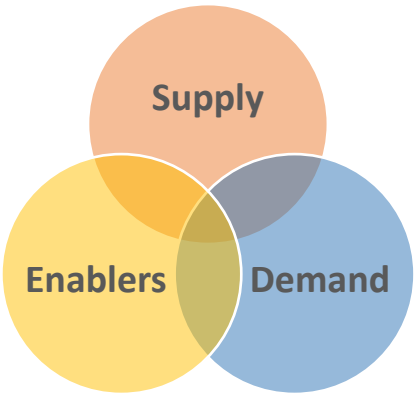
Over recent years, Hay Shire has witnessed significant changes to its economy. This has been exacerbated by a number of challenges, including a crippling drought, the COVID-19 pandemic and ongoing structural adjustments to the agricultural industry. As a result, tourism has emerged as an increasingly important sector to the sustainability of Hay Shire's economy.

At its heart, the DMP aims to set the direction and identify actionable priorities to sustainably grow the visitor economy and more broadly the overall economy of Hay Shire over the next five to ten years.

However, we're not starting with a blank page. The DMP has been informed by the hard work done to date to elevate tourism and enhance the vibrancy of Hay's visitor economy. It is guided by the overarching goals relating to tourism and events from Hay's Community Strategic Plan 2017 – 2027 and underpinned by a robust situation analysis, including:

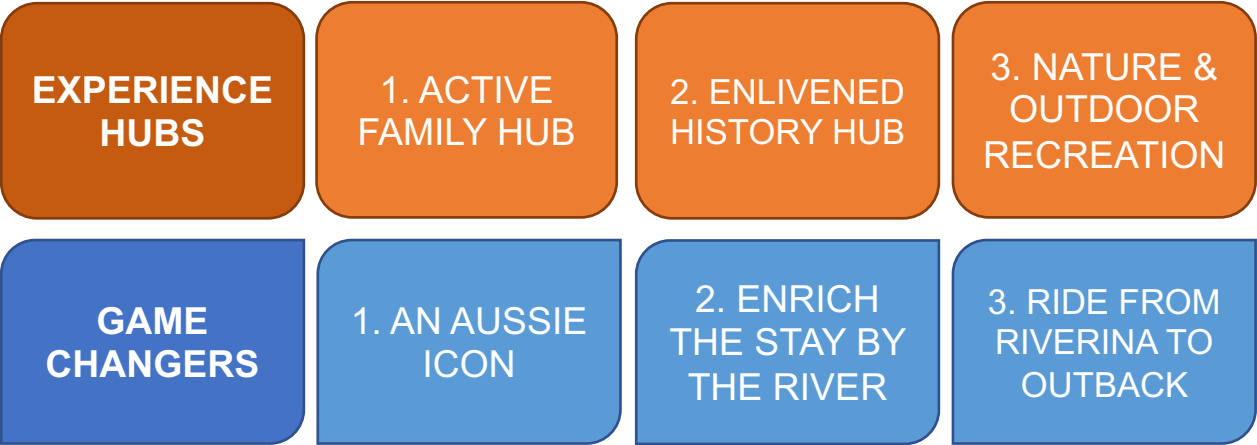
- Insights from consultation with industry and community representatives
- Review of important strategies and plans, including the Community Strategic Plan 2017 – 2027, draft Murrumbidgee River Master Plan, Bike Plan, Water Park Precinct and Main Street Master Plan, among others
- Analysis of major trends in tourism and travel, including an understanding of the motivations, expectations and barriers to travel of visitor markets
- Understanding of the broader context for Hay's visitor economy, such as the role and strategies of Destination Network Riverina Murray NSW and Destination NSW, including the NSW Visitor Economy Strategy 2030 (VES)
- Impact of externalities such as COVID-19 and the prolonged drought

Finally, the DMP addresses both the supply and demand sides of the visitor economy as well as enablers to make it happen. A succinct and practical Action Plan is provided to guide implementation of the DMP.



A simple outline of the framework for the DMP is presented below.

POSITIONING
Where an enlivened sense of the ancient and our past meets a thriving future, Hay is a place for those who seek to welcome a new horizon, dawning with optimism, enriched by history.



PRIORITY PROJECTS
Addressing supply through experience development & events, growing demand through marketing & visitor services and enablers for success

PRIORITISED ACTION PLAN
Includes next steps for the Game Changer projects

HAY'S VISITOR ECONOMY

FAST
FACTS

Hay is part of
NSW's Riverina
Region &
Destination
Network
Riverina
Murray

Tourism is
worth more
than **\$12 M**
annually to
the local
economy

Over **10% of**
Hay's total
employment
is in the
tourism
sector

THE STATS: WHAT WE KNOW

- Value of tourism to the Riverina and Murray (2019): As a proportion of tourism to the broader region, Hay Local Government Area (LGA) receives:
 - 5% of overnight visitors
 - 3% of overnight expenditure
- In 2019, while Hay LGA had more visitors, they stayed for fewer nights than Balranald or Edward River
- In 2020, Riverina Region experienced strong growth in business travel (32%), which is the most likely reason for the relatively higher performance of Hay LGA on both length of stay and expenditure
- Riverina Region has been significantly impacted by COVID-19, as evidenced below. More specifically, for the year ending September 2019 vs 2020, Hay LGA saw a 25% decline in nights and an 18% decline in expenditure relating to domestic overnight visitors.
- There was a 5% increase in visitation count and a 10% increase in spend per visitor between Q1 2020 and Q4 2020 (*DNSW Westpac Tourism Expenditure Monitor, December 2020*), which likely reflects the early rebound in domestic tourism and growth in business travel to the Riverina.

Riverina Visitor Profile

Year ended March 2021

Source: National and International Visitor Surveys, Tourism Research Australia.



Icons sourced from www.easilly.com

Domestic overnight travel

Visitors: 0.8m (-36.7% YoY)

Nights: 2.6m (-16.0% YoY)

Expenditure: \$348.0m (-28.2% YoY)



Average spend
\$136 per night
\$437 per visitor



Average
length of
stay:
3.2 nights



#9 for visitors
#8 for nights
#10 for expenditure
In Regional NSW

KEY OUTTAKES FROM VISITOR RESEARCH



THE STATS: UNPACKING THE DATA

- Hay LGA receives a relatively small proportion of overnight domestic visitation to the wider Riverina Murray region. There is a clear opportunity to encourage increased length of stay for leisure markets through enriching the experience offer and enhancing the awareness, perception and appeal of Hay.
- While COVID-19 has had a negative impact on visitation to the region, Hay has an opportunity to attract a greater share of the domestic market in relation to the increased demand for drive tourism (touring by car) as well as nature-based activities and outdoor recreation. A key insight is that these markets are seeking more experiential itineraries compared to those visitors who stop in Hay as part of 'point to point' travel (eg Sydney or Canberra to Adelaide or *vice versa*).
- A key to driving the visitor economy is to increase length of stay and spend, not just grow visitor numbers. This is in line with the NSW Visitor Economy Strategy 2030 targets and is critical to deliver economic sustainability for the Hay LGA. As a result, a stronger focus should be brought to higher-yield (not necessarily high-yield) markets who are seeking a more diverse and immersive experience offering and accommodation.
- Visiting Friends & Relatives (VFR) market is a higher value market for the region compared to the holiday markets in terms of visitor numbers, nights and expenditure. There is an opportunity to increase engagement with this market and encourage them to be advocates of the region to extend the reach of marketing activities.
- There are numerous visitor research reports that include the Hay LGA. However, there is limited access to any trend data or clear and consistent interpretation of the data year on year. As a result, it is recommended that a more consistent approach be taken to analysis of the visitation research to provide more meaningful reports for the management of the region's visitor economy.

TARGET MARKETS



INTRODUCTION

Understanding your visitor markets underpins a visitor-centric approach to growing a sustainable visitor economy. Target markets can be grouped in various ways, for example on the basis of purpose of travel, such as VFR and touring (drive tourism), demographics, such as the family and 55 plus markets as well as psychographics, which are the basis of the Roy Morgan Helix Personas. Psychographics focus more on the motivations and behaviours of market segments across demographic and geographic boundaries.

CURRENT MARKETS

While it is important to consider demographic market segments, more recently Destination NSW (DNSW) has commissioned Roy Morgan to identify psychographic profiles for domestic markets. This is highly relevant to Hay LGA, especially at a time when international borders are closed due to COVID-19 and there has been a corresponding and related increase interest in domestic tourism.

DNSW Roy Morgan Tourism Movement Dashboard and the DNSW Westpac Tourism Expenditure Data identifies and examines these visitor segments, including for Hay LGA. More specifically, the Roy Morgan Helix Personas (Communities) that are currently visiting Hay are: *Hearth and Home*; and *Fair Go*. To a much lesser degree, *Leading Lifestyle* and *Doing Fine* are also visiting Hay.

A profile summary for each of these four Roy Morgan Helix Personas (Communities) is provided on the following page.

FUTURE-FOCUS: TARGET MARKETS

Into the future, Hay region should bring a stronger focus to higher-yield market segments, in particular the *Leading Lifestyle* Helix Persona/Community.

Likewise, the VFR (for Hay and surrounding regions) and drive tourism markets should also be target audiences for the Hay region along with special interest markets such as those interested in nature and outdoor recreation.

ROY MORGAN HELIX PERSONAS



Leading Lifestyle Helix Community

Focused on success, career and family, people in the Leading Lifestyles Community are proud of their prosperity and achievements. They are big spenders and enjoy cultured living to the max. (average income \$133,000)

Hearth and Home Helix Community

Closest to the 'average Australian', life revolves around the home for these contented Australians who embrace conventional family life. Perennial home improvers, they see their homes as an expression of their status and achievements. The personas within this community who are visiting Hay LGA:

- House Proud (average income \$82,000)
- Working Hard (average income \$97,000)
- Home Improvers (average income \$109,000)

Doing Fine Helix Community

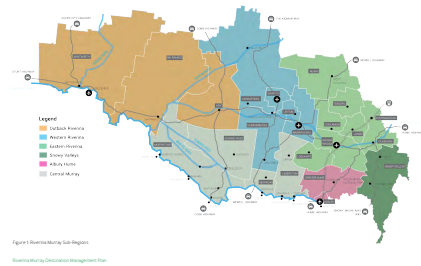
Modest but contented, people in the Doing Fine Community are happily making their way through life and value simple pleasures. Price sensitive and light spenders, they take a pragmatic approach to what they buy.

Fair Go Helix Community

Struggling to make ends meet, looking for a better deal in life, making the best of things or simply pessimistic, cynical and likely to feel they get a raw deal out of life; the Fair Go community are lower income Australians. The two Fair Go personas who visit Hay LGA :

- Quiet Homelife (average income \$64,000)
- Simple Living (average income \$70,000)

For further information on Roy Morgan Helix Personas see: <http://www.roymorgan.com/products/helix-personas>



Destination Riverina Murray NSW

Destination Riverina Murray NSW (DRM) is one of six Destination Networks established in 2017 to increase visitation and contribute towards achieving the NSW Government's overnight visitor expenditure goal. The Destination Networks are funded by the NSW Government through Destination NSW (DNSW).

The Riverina Murray region encompasses 149,000 square kilometres, 22 local government areas, 16 National Parks and is home to over 275,000 people. Hay Shire Council is within the DRM region, specifically within the Outback Riverina sub-region.

The DRM's Destination Management Plan 2018 (RM-DMP), identifies a range of themes, priority projects as well as initiatives required to support governance and positioning of the broader region. Specifically, for Hay Shire, the RM-DMP includes:

- One Tier 1-level major project and three Tier 2-level projects, which relate to themes such as Rivers & Waterways, Sports & Recreation, Festivals & Events, Accommodation and Infrastructure & Servicing
- Recognition that history, heritage and culture as well as rivers and waterways are an existing strength of Hay
- Consideration of opportunities to repurpose heritage assets as well as improve visitor information, digital resources and visitor experiences
- Events, touring routes, such as the Long Paddock and drive tourism continue to be important to the local visitor economy.

DRM's *Strategic Plan 2020-21* reaffirms and evolves the RM-DMP while strengthening the focus on industry engagement, development of more appealing experiences, investment attraction and promotion of events.

For further information see: <https://riverinamurray.com.au/>

NSW VISITOR ECONOMY STRATEGY 2030



NSW Visitor Economy Strategy 2030 (VES) sets a target to triple 2009 overnight visitor expenditure in NSW by 2030, surpassing previous targets despite recent challenges. There are specific targets set for regional NSW as well as for domestic tourism:

- Regional Overnight Visitor Expenditure: \$25 Billion by 2030 (from \$20.5 billion in 2019)
- Total Domestic Visitor Expenditure: \$47 Billion by 2030 (from \$31.9 billion in 2019)

Five strategic pillars underpin the NSW Government's vision to be the premier visitor economy in the Asia-Pacific by 2030.

It identifies five guiding principles (one of which is provided below) as well as three core phases: Recovery (to 2024); Momentum (to 2026); and Accelerate (to 2030).

For further information see: <https://www.destinationnsw.com.au/about-us/strategies-and-plans/visitor-economy-strategy-2030>

GUIDING PRINCIPLE 1: PUT THE VISITOR FIRST

We have put visitors front and centre of this strategy to enable better targeted marketing, experience design and industry support through a greater understanding of potential visitors. Every visit should be an unforgettable one that inspires and encourages visitors to keep exploring and returning to NSW. Consumer trends and visitor needs will inform experience design, event development, infrastructure investment and marketing. This visitor-centric approach will involve:

- › A deep understanding of the needs and aspirations of potential visitors
- › Tracking and analysis of evolving consumer preferences and trends
- › A dynamic market prioritisation and segmentation approach
- › Working with industry to deliver exceptional visitor experiences
- › Personalised marketing and communications to guide visitors to experiences in NSW that match their specific interests and needs and encourage them to return.

NSW VES 2030, page 28

MAJOR TRENDS IN TOURISM & TRAVEL



Nature,
sustainability,
and outdoor
recreation on
the up & up

Experiences
win over
destinations,
the more
immersive
the better

Rebirth of the
Road Trip
and rise of
small group
travel

In order to ensure the DMP is both **future-focused and visitor-centric**, an analysis of the most relevant trends in global and domestic tourism and travel has been undertaken. The core insights are summarised below. They provide context for and underpin the strategies and actions identified within the DMP. It is important to remember that these trends are influencing travel decisions and choice of holiday destination within key source markets for the Hay region.

NATURE, SUSTAINABILITY & OUTDOOR RECREATION

Across Australia and around the world, there is an increasing concern for the health of our environment and the planet. This has been heightened in Australia by significant natural events, such as the prolonged drought, catastrophic fires and damaging floods. It is resulting in greater interest in environmental sustainability as well as making a positive contribution towards a healthier planet.

Nature tourism has been on an upward trend for many years now. COVID-19 has amplified this interest, particularly for experiences in nature, including but not limited to:

- Accommodation that more directly connects people with nature and open/green space
- Activities and opportunities to spend time together in nature, including for families as well as small groups and special interest markets, such as mountain biking, kayaking and bird-watching

MAJOR TRENDS IN TOURISM & TRAVEL



EXPERIENCES WIN OVER DESTINATIONS

Gone are the days when travellers simply looked and listened. In today's world of travel, people are seeking to immerse themselves in the experience. Associated with this trend are:

- An increasing preference for small group and bespoke tours where they have the opportunity to engage with locals and/or experts
- Cultural experiences that are more hands on and engage all (or more of) the senses, including bringing history and heritage to life
- Signature events, workshops and masterclasses that mean people can spend time finding out, in a fun and exciting way, about a specific interest or are able to share that experience with their friends or family. This includes experiences for children and families
- Quality food and drink as well as local produce and products (artists & artisans) are all desirable and influencing the decision to stay or stay longer in a destination. This is coupled with an increasing expectation of quality service, which is no longer viewed as a 'nice to have'

REBIRTH OF THE ROAD TRIP & SMALL GROUP TRAVEL

Road trips and drive tourism have seen a resurgence over the last few years. Like nature tourism, this interest has been amplified by COVID-19. However, the critical point of difference is that people are now more interested in the experience offering along the way, not so much just the places they'll visit. This has major implications for how we reimagine and bring to life the dream of the 'Aussie road trip' for a contemporary audience. The demand for drive tourism has also seen:

- Increase in intergenerational family travel
- Significant growth in demand for caravan and camping
- Higher numbers of groups of friends travelling together, including for short breaks and more experience-focused holidays

CHALLENGES OR OPPORTUNITIES?



IMPACT OF COVID-19

There is little doubt that the COVID-19 pandemic continues to have a major impact on the visitor economy. Some influences will be temporary while others will continue to influence visitor and consumer behavior well beyond the period of the pandemic. Key trends in tourism have been highlighted above, with three important factors outlined below.

- It is clear that **international tourism will take a significantly longer time to return to previous numbers**. This means the domestic market is essential to the recovery phase (to 2024) and provides a unique opportunity to capture a greater share of this market once international borders reopen.
- **Connecting with family and friends** will likely be an important motivator for the domestic market, albeit as part of a longer holiday, reinforcing the importance of the Visiting Friends & Relatives (VFR) market.
- All markets and demographics are now **online and engaging in digital platforms more than ever before**. The pandemic has increased familiarity with online and digital environments. Likewise, e-commerce is now an essential; no longer a 'nice to have.' This means that into the future, the online channel will be even more important as a channel to reach, inspire, engage and connect with your audience.

CHALLENGES OR OPPORTUNITIES?



INCREASING COMPETITION FOR A SHARE OF THE DOMESTIC MARKET

With Australia's international borders closed to tourism (both inbound and outbound) for the foreseeable future, domestic tourism has received a significant boost. However, continuing uncertainty over State border closures and lockdowns pervade and are the major influence on people's preparedness to either travel or make bookings for future travel.

In this setting, competition is fierce, with destinations all vying for a share of the domestic market. While regional destinations are preferred by domestic travellers over our cities, uncertainties continue to negatively influence travel sentiment.

To achieve success, it will be critical to stand out from the crowd by demonstrating why Hay's experience offering is worthy of consideration. Simply listing the destination's attributes or products is unlikely to achieve cut-through in a highly cluttered marketplace. Increasingly, it will be critical to connect with potential visitors in a more meaningful way; one that relates directly to their motivations, expectations and values while addressing potential barriers to travel.

These factors should influence a range of strategies, from visitor servicing through to experience development.

CHALLENGES OR OPPORTUNITIES?



SEASONALITY

Many destinations are challenged by seasonality. However, some have viewed this as an opportunity rather than a challenge and thought about the way in which their experience offer is more reflective of the seasons. While this is not always possible, the essential thing is that simply listing all the things to do and see in a destination must (at the very least) be contextualised by the seasons.

There are others ways in which destinations can also assist their visitors better understand seasonality. This includes packing lists (what to bring, what to wear, how to prepare) as well as warnings about the things to avoid during a particular season. Check out the Iceland Academy for some inspiration on what to do and how to do it (with some fun!) – just think of ways to replace the snow and ice with sun and heat! See:

<https://visiticeland.com/iceland-academy>

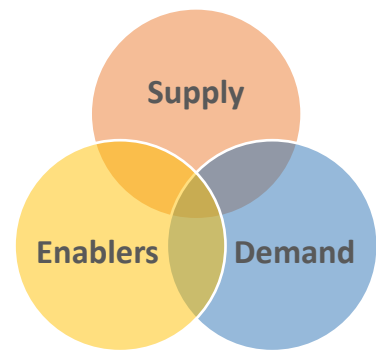
IMPACT OF A DYNAMIC AGRICULTURAL SECTOR

There have been a number of significant changes to Hay's agricultural sector, including the impact of the prolonged drought as well as a transition to more corporately-owned (rather than family-owned) land holdings. This has resulted in lower employment within the sector while also bringing change to traditional farming practices and the type of production. Related to this are changes to the social and economic fabric of the Hay region. While all this may seem challenging, it presents an opportunity to reframe the way in which the sector and the region are positioned for the future, underpinned by adaptability and resilience.

AGING POPULATION & DEMAND ON VOLUNTEERS

An increasing challenge for the Hay region is that many events and attractions are managed or maintained by volunteers. Further, an aging population means there are increasingly fewer people who are able to actively volunteer. This is matched by a changing expectation of visitor markets relating to the type of experiences offered (including by whom). An exciting opportunity is to consider commercial events and adaptive reuse of heritage assets to enhance the appeal of Hay to new markets.

THE WAY FORWARD



FRAMEWORK

Hay's *Community Strategic Plan 2017 – 2027 (CSP)* identified tourism, events and the region's history as important to economic prosperity and sustainability (Section 3), with a number of strategies (specifically relating to 3.2 and 3.3) designed to further enhance economic outcomes for the region. The CSP underpins the framework of the DMP.

Utilising a positioning process is essential to developing a DMP that is future-focused and customer-centric. In essence, this is a marketing filter on the DMP that ensures the destination doesn't only rely on its attributes.

An important aspect of positioning is to create a framework that leverages the region's strengths, values and attributes with a clear emotional territory that appeals to the target audience.

The DMP utilises the positioning statement as a framework to address:

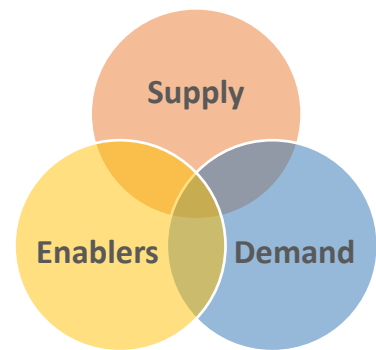
- Supply, which relates to the experience offering of the region and includes consideration of infrastructure and adaptive reuse or repurposing of heritage assets
- Demand, which is about marketing the destination as well as providing contemporary visitor services that meet the needs and expectations of today's visitors
- Enablers, which are the things that make implementation possible. Often, it's the little things that matter most.

POSITIONING HAY TO GROW A SUSTAINABLE VISITOR ECONOMY

The position statement for the Hay region is:

*Where an enlivened sense of the ancient and our past meets a thriving future, Hay is a place for those who seek to welcome a new horizon, **dawning with optimism, enriched by history.***

THE WAY FORWARD



SUPPLY: SIGNATURE & SUPPORTING EXPERIENCES

For the Hay region, the DMP adopts a landscape-wide approach. Integral to this are three experience hubs as well as three potential game changer projects, which would ultimately be signature experiences of the region. Within this context, priority projects have been identified across four core themes, which are:

- Celebrating a timeless connection to Country
- Immersed in an endless landscape
- Enlivened history
- Destination hero signature event

In adopting a landscape-wide setting, the DMP aims to address supply through providing a more immersive experience offering, connected across the landscape, which would appeal to existing as well as new market segments.

DEMAND: MARKETING & VISITOR SERVICES

While a core focus of the DMP is on supply, there are some high priority projects identified that relate specifically to marketing and visitor services.

It is clear that in order to enhance awareness and the perception of the region as a destination to visit and spend more time, Hay will need to lift the level of its current experience offering. However, bringing this to life through more engaging stories, images and videos of the region, its characters and experiences is required.

MAKING IT HAPPEN: ENABLERS FOR SUCCESS

Finally, the DMP identifies a small number of enablers that would facilitate the implementation of priority projects and ensure that the experience hubs are brought to life in a meaningful and appealing way.

CONNECTIVITY ACROSS THE LANDSCAPE



A clear opportunity for Hay is to create **experience hubs that connect across the landscape**. This is about adopting a landscape-scale approach.

The hubs below leverage and align with the draft Murrumbidgee River Master Plan and aim to create an experience offering that resonates with core target markets while providing opportunities for the local community. However, these hubs are not exclusive – some great experiences sit outside of these core hubs yet are connected to them.

Importantly, the target audience identified below doesn't exclude other target markets from enjoying these experience hubs too.

1. **Active family hub:** South Hay and links between Shear Outback, Bushy Bend Reserve (Lions Park) and Sandy Point, including a new tree top adventure experience, access points for kayaking and the shared cycling and walking trail
2. **Enlivened history hub:** Linking the museums of Hay, its township and Shear Outback, including opportunities for adaptive reuse of heritage assets and to create more immersive and inspiring experiences that leverage the historical and heritage values of Hay or the specific site
3. **Nature & outdoor recreation hub:** Experiences on foot or by water from Cemetery Bend to Murrumbidgee Valley Regional Park and beyond, including facilities and access that appeal to special interest markets from bird-watchers to cyclists, kayakers and fishers. Seek opportunities for interpretation of the Wiradjuri's connection to Country.

Importantly, connectivity between these experience hubs and the Game Changer projects will be important.

EXPERIENCE HUB # 1

ACTIVE FAMILY HUB

ACTIVE FAMILY HUB

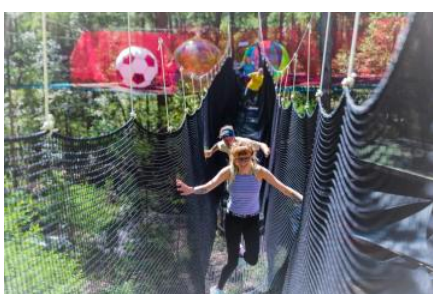
South Hay and links between Shear Outback, Bushy Bend Reserve (Lions Park) and Sandy Point, including a new tree adventure experience, access points for kayaking and the shared cycling and walking trail

Hay has long been a place to refuel (the car and the kids) on the journey between Adelaide and Sydney or Canberra. For some, this has involved a quick overnight stay. There is a significant opportunity to encourage this market to extend their stay as well as attract more of the drive tourism market.

A great way to achieve this is by enhancing opportunities for active families to explore the region where the riverina meets the outback. This might be spending time on the Murrumbidgee, cycling along its banks or finding out more about the region's rich agricultural history, including the legend of sheep farming.

The draft *Murrumbidgee River Master Plan* identifies a number of the core components of this experienced hub, including river access points, a potential tree adventure facility (for example, 'Net World') as well as footbridge access across the river between Sandy Point/Bushy Bend Reserve and South Hay.

These elements would be significantly enhanced through an experience offering at Shear Outback that will resonate with or engage the whole family (see Game Changer project relating to Shear Outback).



EXPERIENCE HUB # 2

ENLIVENED HISTORY HUB

ENLIVENED HISTORY HUB

Linking the museums of Hay, its township and Shear Outback, including opportunities for adaptive reuse of heritage assets and to create more immersive and inspiring experiences that leverage the historical and heritage values of Hay or the specific site

Reimagining heritage for contemporary audiences is the best way to ensure its values are brought to life and celebrated, including through more immersive and engaging experiences.

In Australia and around the world, interest in history and heritage is increasing. However, expectations about the way in which it is interpreted have changed significantly. People are seeking a more interactive, engaging and hands-on experience rather than simply an inventory of what's on display. Its critical to engage the senses in more ways than one.

Its important to think laterally about the experience. In many cases, adaptive reuse of heritage assets has delivered a forward-thinking or contemporary use within a stunning, revitalised heritage setting that also brings greater meaning to its original purpose. This approach assists in attracting investment or provides new opportunities for businesses. Best practice examples of adaptive reuse have been included in Appendix A.

There is a clear opportunity to link the heritage precincts of Hay, with some offering a taste of history while others provide new commercial opportunities albeit infused with a deep connection to the past.



EXPERIENCE HUB # 3

NATURE & OUTDOOR RECREATION HUB

NATURE & OUTDOOR RECREATION HUB

Experiences on foot or by water from Cemetery Bend to Murrumbidgee Valley Regional Park and beyond, including facilities and access that appeal to special interest markets from bird-watchers to cyclists, kayakers and fishers. Seek opportunities for interpretation of the Wiradjuri peoples' connection to Country.

Nature and outdoor recreation have been trending upwards for several years. However, with COVID-19, interest in nature, nature tourism and outdoor recreation has grown significantly. This is coupled with an increased interest in health and well-being and a growing interest in understanding the cultural connection to Country of the local Aboriginal community.

Once niche markets, such as cycling, bird-watching, night skies, hiking and kayaking, are becoming much more common activities across a range of markets and demographics, with the emergence of the active 55+ now eclipsing the previous 'grey-nomad' market in terms of size and discretionary spend.

The nature-based experience offer of the Hay region at first seems obvious. However, accessibility and facilities are a critical issue as identified within the draft *Murrumbidgee River Master Plan*.

A key to success in lifting the perception and appeal of Hay as a place for nature-based pursuits and activities, is to finalise and implement the Master Plan. This would be significantly enhanced through interpretation led by the local Aboriginal community, connectivity with the Hay Bike Plan (2016) and opportunities for greater collaboration with NPWS, who manage the Murrumbidgee Valley Regional Park, which includes important recreational values (see: <https://www.nationalparks.nsw.gov.au/conservation-and-heritage/regional-parks>).



GAME CHANGER # 1



AN
AUSSIE
ICON

TRANSITION SHEAR OUTBACK TO A TRULY ICONIC EXPERIENCE FOR ALL AUSTRALIANS

Currently, Shear Outback celebrates and showcases Australia's shearing history, including an annual induction of the 'next gen' to the Shearer's Hall of Fame. There has been some minor updating to the museum's display since it first opened in 2001 and the temporary exhibition space has been entirely replaced by retail.

The most popular activity currently offered is the shearing demonstration, which is scheduled daily subject to staff availability (etc). There are very limited activities for children, which is further disadvantaged by the location of the maze relative to the museum and café. As a result, the primary audience is an older demographic.

The opportunity is to elevate Shear Outback to a truly iconic experience. This would make it more popular with younger markets, including families.

In order to do this a number of core elements need to be delivered:

- More active ways to engage and involve children, from younger children through to teenagers. For example, greater interaction with farm animals
- Reinstatement of temporary exhibits as well as other ways of celebrating and showcasing Hay's agricultural history and future, including but not limited to shearing as well as profiling the use of products from shearing/agriculture (eg wool and fashion) or even as a showcase for sustainable agriculture of the future
- Revitalising both the food and retail offering, including a redesign of the café space and its limited connectivity with the outdoor areas (albeit a feature of the original design) as well as the use of Shear Outback for third party events eg weddings and hosting special occasions

GAME CHANGER # 1

continued ...



AN
AUSSIE
ICON

TRANSITION SHEAR OUTBACK TO A TRULY ICONIC EXPERIENCE FOR ALL AUSTRALIANS continued

- Develop a signature event that showcases Australia's shearing and agricultural industry. It should be commercially run and curated as a best practice model for regional events across Australia
- Enliven the space and bring attention to Shear Outback, potentially through a creative installation or lighting projections (as has previously been done with some success).

Next steps:

1. Prepare a **concept plan and feasibility assessment** to deliver a positive return on investment. This should identify realistic target audiences (contemporary target market segments – ie not grey nomads as they were defined in 2001) as well as consider the impact of seasonal and other influences on visitation to the region.
2. Based on the concept plan and feasibility assessment, prepare a robust and credible **business plan**, including but not limited to:
 - Clear vision and measurable objectives
 - Strategies and actions relating to all functions and elements, including retail and hospitality services, events and functions as well as marketing activities
 - Appropriate levels of resources (human and financial), roles and responsibilities
 - Reporting framework to evaluate success on an ongoing basis to facilitate responsive management of Shear Outback and as a trigger for annual funding from Hay Shire Council
3. In line with the concept plan, map **visitor movements and flows** as the first part of a **redesign of the visitor experience** and linkages to the outside and surrounding areas

GAME CHANGER # 2

ENRICH
THE STAY
BY THE
RIVER

ENRICH THE STAY BY THE RIVER: HIGHER-YIELD HIDE-AWAY PRECINCT

Diversifying the accommodation offer within the Hay region presents an opportunity to attract higher-yield markets. This includes couples as well as small groups of close friends (or besties), who are looking to immerse themselves in Riverina Outback NSW.

An important trend is the growing interest in high-quality self-catering and bespoke accommodation options, particularly for couples and small groups, including intergenerational family groups. It also supports special interest groups, such as bird-watching, night skies, photography, art or outdoor recreation pursuits. An added bonus is that the wedding market is also seeking new and different options to host their special occasion.

It is critical that the design of the precinct, including buildings – both the accommodation and revitalisation of the club house – as well as landscaping are of a high standard and reflect opportunities for connecting with the local environment and nature (eco-friendly), privacy and to facilitate moments or occasions best shared, from a simple BBQ to chilling out to live music.

The precinct should incorporate access to the Murrumbidgee River as originally proposed in the draft Murrumbidgee River Master Plan.

The Hay Golf Club offers a wonderful setting to create this precinct along the Murrumbidgee River and easily connected by bike or foot to other precincts and experience hubs. It would potentially offer the perfect stay after a ride from Whitton (see Game Changer # 3).



GAME CHANGER # 2

continued ...



ENRICH
THE STAY
BY THE
RIVER

ENRICH THE STAY BY THE RIVER: HIGHER-YIELD HIDE-AWAY PRECINCT

Next steps:

1. Collaborate with **Hay Bowling and Golf Club** to determine interest in the creation of this precinct at this location. If not, then consider alternative sites with similar attributes, including river access.
2. Prepare a **concept plan, feasibility assessment and business plan** to deliver a positive return on investment. It should consider the broader experience offer, including events as well as connectivity with the nature and outdoor recreation experience hub and the proposed Whitton to Hay Rail Trail.
3. As part of the concept plan and feasibility assessment, develop a **partnership and investment strategy** and commence discussions, including with:
 - Destination NSW and Destination Network Riverina Murray
 - Private sector organisations who could invest in and manage/operate the commercial elements of the precinct
4. In line with the concept plan, consider the **guest experience** that would enhance the appeal of the precinct, including hospitality services and events as well as opportunities such as:
 - Experiencing the night sky
 - Social events such as Sunday sessions on the deck as well as private weddings/functions
 - Themed events and masterclasses, for example with an astronomer, bird expert or wildlife photographer etc

GAME CHANGER # 3

RIDE
FROM
RIVERINA
TO THE
OUTBACK

ON YOUR BIKE (OR A HORSE): FROM RIVERINA TO OUTBACK

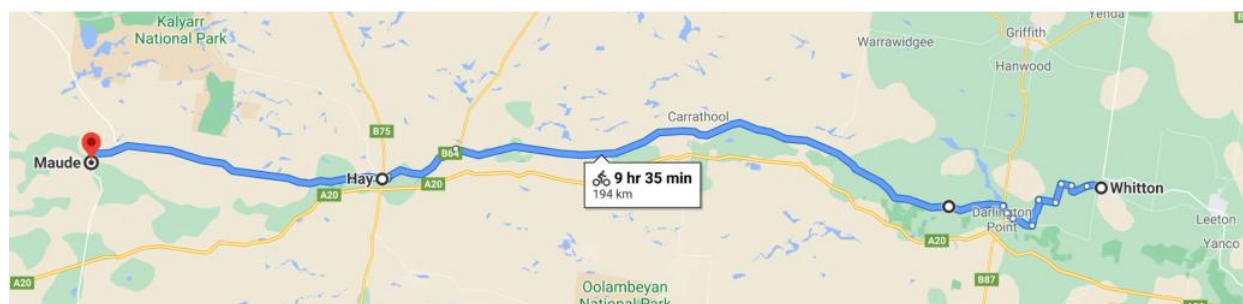
Hay connects the NSW Riverina to the Outback. A journey from Whitton meanders along the legendary Murrumbidgee River through the Murrumbidgee River Regional Park and via authentic rural towns, including Carrathool. There is an opportunity to make this journey by bike alongside the Murrumbidgee River Road or in the future, also on horse back along the existing but non-operational railway line that connects Whitton to Hay.

This would be a magical way to experience the landscape of the Hay Plains and the Murrumbidgee River, taking in the history of the rural sector and timeless connection to Country of the Wiradjuri people. Given the length of the trail (see below), there is also potential for overnight accommodation along the way that connects with existing accommodation such as Whitton Malt House, which has increased awareness and appeal of the region. Likewise, investigate the opportunity to extend and connect the route via Maude Road to Maude and to the sunset and night skies viewing platform on the Cobb Highway.

Although unusual, some rail trails have permitted horse riding, which would be a point of difference and reinforce the rural setting. The horse-riding experience is best suited to a properly designed rail trail setting, rather than along the road.

The facts:

- Distance: 142.5 kms via the Murrumbidgee River Road
 - Whitton to Carrathool: 88 kms; Carrathool to Hay: 60 kms; Hay to Maude: 50 kms
- Hay Rail Line: Closed between Whitton and Hay. See: <https://www.nswrail.net/lines/show.php?name=NSW:hay>



GAME CHANGER # 3

continued ...



RIDE
FROM
RIVERINA
TO THE
OUTBACK

ON YOUR BIKE (OR A HORSE): FROM RIVERINA TO OUTBACK

Next steps:

1. Commence discussions with Transport NSW on the **permissibility, viability and potential for the development of the rail trail** along the existing but non-operational rail line between Whitton and Hay.
2. Prepare a **concept plan, feasibility assessment and business plan** to deliver a positive return on investment. It should consider the impact of seasonal and other influences on visitation to the region and use of the Rail Trail.
 - It will be important to consider the design of the rail trail – consider case studies such as Tumbarumba Rail Trail and insights from Rail Trails Australia's *Rail Trail Establishment Guidelines* (see: <https://www.railtrails.org.au/management-resources/rail-trail-establishment-guidelines>)
3. As part of the concept plan and feasibility assessment, develop a **partnership and investment strategy** and commence discussions, including with:
 - Other local government areas (LGA) that would be involved, including Carrathool Shire and Darlington Point Shire Councils
 - NSW National Parks & Wildlife Service, Destination NSW and Destination Network Riverina Murray, Transport NSW and Transport Heritage NSW
 - Private sector organisations that may provide services or facilities to support the rail trail/cycle route development, promotion and experience offering. For example, it may be possible to identify a new accommodation provider who could offer accommodation along the way, such as in Carrathool (roughly half way)
4. Consider alternative options including the use of the Murrumbidgee River Road with road access through parts of Murrumbidgee River Regional Park. This would provide an early-to-market option as well as an alternative route subject to weather and other seasonal conditions for cycle tourism (including the impact of cotton harvesting on road access). This should also consider an extension of the cycle route to Maude along Maude Road.
5. In line with the concept plan, create an **experience development strategy** that identifies existing experiences as well as gaps and opportunities to enhance the appeal of the overall rail trail experience, including hospitality services as well as investigating opportunities for more immersive agritourism experiences.

PRIORITY PROJECTS

1. TIMELESS CONNECTION TO COUNTRY

1. CELEBRATING A TIMELESS CONNECTION TO COUNTRY

The right of the Traditional Custodians of the region to share their culture in the way they choose is paramount. Whether this is through a Welcome to Country ceremony, immersive cultural tourism experiences or interpretation, including of artefacts. As a result, any initiative to celebrate or share the culture of the local Aboriginal community must be led by the community and those who represent the Traditional Custodians.

Actions:

1.1 Subject to the agreement and support of the Traditional Custodians, **relocate Australia's oldest bark canoe and 'largest flown' boomerang** from the Hay Gaol Museum to a showcase at Hay VIC and invite the traditional owners to lead interpretation of them

1.2 Involve the traditional owners in **concept planning for Experience Hub # 3**, including to identify opportunities for interpretation of their connection to Country

- This may also assist in identifying **longer-term opportunities** for the local Aboriginal community to lead cultural tourism experiences or tours within the region, which may require support from Council and other key bodies, including the NSW Aboriginal Tourism Operators Council (NATOC) to develop business plans or access grant funding to facilitate the start-up of any such initiatives
- Commence building interest in the opportunities of delivering **Aboriginal cultural tours and experiences** through offering a training program for local Aboriginal youth/young adults, which may involve an exchange program and mentoring

PRIORITY PROJECTS

1. TIMELESS CONNECTION TO COUNTRY

1. CELEBRATING A TIMELESS CONNECTION TO COUNTRY continued

Actions:

1.3 Provide ongoing support to the Nari Nari Tribal Council and other strategic partners with regard to important conservation efforts relating to **Gayini Conservation Area**. This may include potentially developing bespoke, exclusive (limited numbers and only conducted when appropriate or suitable ie not a regular tour) and immersive **Caring for Country tours linked to the wetlands scientific program**. These tours should be positioned as a unique opportunity for voluntourism, including immersive Aboriginal connection to Country elements as well as participating in the invaluable scientific work being undertaken to protect the wetlands and wildlife.

- A **concept plan and feasibility analysis** is required, which considers options such as pop-up accommodation and catering options as well as packages that involve small group travel and connections from key source markets. It would also present important PR opportunities for the Nari Nari Tribal Council, especially in relation to the important conservation of the wetlands.



Images #1 & #2 from Nari Nari Tribal Council website: <https://www.narinari.org/>
Image # 3 from Big4 Holiday Parks

PRIORITY PROJECTS

2. IMMERSED IN AN ENDLESS LANDSCAPE

2. IMMERSED IN AN ENDLESS LANDSCAPE

Bringing to life the extraordinary landscape of the Hay region should involve more ways for people to access and enjoy nature, whether that is on the Murrumbidgee River, along its banks or into the plains. These experiences offer a wide range of opportunities for diverse target markets, from active families to those who are escaping our cities on the road trip of a lifetime or those who are pursuing their special interest.

Actions:

2.1 Implement high priority precinct upgrade projects, specifically for:

- Sunset and night skies viewing platform, located north of Hay on the Cobb Highway. This is a popular and well-known spot to view Hay's spectacular sunsets and the curvature of the Earth across the Hay Plains
- Revitalisation of Sandy Point to enhance its recreational value and opportunities for hosting outdoor events, including rediverting the road access that currently separates the picnic area from the river beach area as well as water access

2.2 Identify opportunities and funding, including a potential public-private partnership with an outdoor adventure organisation for a **tree adventure facility** (such as *Net World*) within Bushy Bend Reserve/Lions Park. A site for such a facility has been identified within the draft *Murrumbidgee River Master Plan*. This facility would significantly value-add to the experience offering for active families and the drive tourism markets. An important consideration will be to identify a facility that has a point of difference to the tree top adventure circuits that have become popular.

PRIORITY PROJECTS

2. IMMERSED IN AN ENDLESS LANDSCAPE

2. IMMERSED IN AN ENDLESS LANDSCAPE continued

Actions:

2.3 Develop a series of **Experience Hub Concept Plans** that draw on and integrate key initiatives from the extensive planning undertaken to date, including the draft *Murrumbidgee River Master Plan* (2021) and *Hay Bike Plan* (2016). This approach should focus on the Experience Hubs outlined above and integrate access for outdoor recreation and nature tourism, including multiday, multi-activity trails that link kayaking with cycling and hiking

- Integrate linkages between existing attractions or to places of interest, such as the sunset and night skies viewing as well as along the Murrumbidgee via Hay Weir and on to Maude

2.4 Develop a concept plan for the **Hay Golf Club precinct** as outlined in Game Changer # 2, *Enriching the Stay - higher-yield hide-away precinct*.

2.5 Implement **facilities that support infrastructure and access for outdoor recreation activities**, including but not limited to:

- Solar panels/power options for lights at BBQ and picnic facilities
- Night lighting of the trail with sensor lights for example commencing on the trail between Hay centre and South Hay and the Hay Golf Club
- Make sure end of trip or trip stop-over facilities are provided, including tire repair and air pumps as well as e-bike charging stations (including at the VIC)
- Simple directional signage to link experience hubs across the landscape – from Sandy Point to Hay township and out to Maude
- Implementation of bird hides as well as river access points for kayaks

PRIORITY PROJECTS

3. ENLIVENED HISTORY

3. ENLIVENED HISTORY

There is little doubt that the region offers incredible insights into Australia's rural history, from early settlements through to leading agricultural industries. However, it's clear that today's travellers are seeking a more immersive and interactive experience rather than simply being 'shown or told'. In short, they want to see history brought to life in a way that engages the senses and inspires them to find out more. This requires a new approach to presenting and interpreting history than is currently on offer in Hay. While this may be challenging, if the history and heritage of Hay is to be experienced and understood into the future, it is critical it is enlivened as a high priority.

Actions:

3.1 In line with Experience Hub # 2 outlined above, develop an **Adaptive Reuse Strategy for Hay's heritage buildings and precincts** as a high priority. This strategy should aim to create a more inspiring and valuable experience while ensuring the heritage values of the sites are maintained. The strategy should also consider alternative and contemporary uses for some or all of these sites or precincts that enables the integration of engaging interpretation while ensuring a commercial return to maintain and operate it without placing increased burden on Council's limited resources

3.2 In the more immediate term, **introduce a Museums of Hay ticket** that permits unlimited entry to any of Hay's museums for seven (7) days, including Shear Outback. This is essential as collaboration will deliver direct benefits to the collective institutions and provide a simple and easy way to encourage more visitors to see more than one heritage attraction. The multi-museum ticket shouldn't prevent visitors only paying to visit one of the museums/attractions at that attractions standard entry rates.

- A simple revenue-sharing system should be agreed based on the relative size and/or capacity of each institution as well as providing a percentage to Hay's tourism team for the implementation and promotion of the single ticket.

PRIORITY PROJECTS

3. ENLIVENED HISTORY

3. ENLIVENED HISTORY continued

Actions:

3.3 In line with Game Change # 1, *Transition Shear Outback to a truly iconic experience for all Australians*, collaborate with the Shear Outback Board and staff to **reimagine the experience offering to attract new markets and create advocacy** for Hay as a signature experience.

- Ensure Shear Outback is more strongly integrated with the wider experience offer of the Hay region, both through exhibitions in a reinstated temporary exhibition gallery as well as through physical connectivity such as the cycle and walking trail network
- Consider the opportunity to promote Shear Outback's experience as part of attracting third party events and special interest groups to Hay. This should include ensuring opportunities for 'behind the scenes' tours or private bookings of demonstrations can be easily packaged for large or corporate groups
- Shear Outback to prepare a business plan with annual funding from Council tied to measurable objectives and key performance indicators (KPI)

PRIORITY PROJECTS

4. SIGNATURE EVENT

4. DESTINATION HERO EVENT

Many destinations have benefited from hosting an annual signature event that provides a unique experience for event participants. Creating a destination hero event means developing an event program like no other (ie not currently being done elsewhere – think Parkes Elvis Festival or Deniliquin's Deni Ute Muster).

Currently, many events in the Hay region are run by volunteers. Their tireless efforts are both acknowledged and recognised. There is also an opportunity to consider new ways to raise funds to support event operations and reduce reliance on volunteer support.

Actions:

4.1 Consider a **hero destination event** based around the night sky and the opportunity to view the spectacular sunset and sunrise across the Hay Plains. This event could be positioned as the ***Twilight Festival – Dusk to Dawn*** and introduce a wide range of elements, from sensational sundowners to Aboriginal cultural interpretation of the night sky. Various 'dusk to dawn' experiences that celebrate Hay's night sky could be hosted across multiple venues – indoors or out. Timing of the annual event could follow the Lunar Calendar

4.2 Investigate and develop a commercially-viable (and run) annual **signature event based at Shear Outback** that heroes the agricultural history of the region in an immersive and interactive way

4.3 Continue to implement and promote the **existing events program** such as *Tunes on the Sand, Hay Show, Hay Races and Rainbow on the Plains* among others but consider new ways to raise funds to support event operations and reduce reliance on volunteer support, noting that volunteer involvement and participation may be required at some level and when done well delivers positive community outcomes

PRIORITY PROJECTS

5. MARKETING & VISITOR SERVICES

5. MARKETING & VISITOR SERVICES

It is clear from the visitor research and market trends that Hay region needs to lift its awareness, perception and appeal to attract higher-yield markets as well as extend the stay and spend of visitors. As previously highlighted, this will involve significant efforts to uplift the experience offering, including repositioning signature assets and attractions to appeal to broader audiences.

It is also important to start with those channels over which the region has greatest control. This means bringing a focus to owned channels, including the Hay tourism website, newsletters, printed collateral and social platforms, among others. This should include the development of more remarkable content, including short videos and images. By starting at home, Hay region will be able to better leverage third party channels through cross-referencing and sharing content, for example with Destination NSW and The Riverina as well as recent campaigns such as Thrive Riverina's *Now's the Time to Love NSW Visit Riverina road touring routes campaign (2021)*.

It is also recognised that the Hay Visitor Information Centre has a strong visitor-centric approach. This should be reinforced by ensuring it remains and continues to evolve as the lead in-destination visitor services hub.

Actions:

5.1 Prepare a three-year Marketing Plan, including a rolling 12-month action plan. The Marketing Plan should:

- Adopt the positioning and target markets recommended in this DMP to provide a framework for and to guide all actions, including marketing communications
- Consider opportunities for collaboration with surrounding regions and experiences, from Balranald and Mungo National Park through to Carrathool, Whitton and Griffith in the Riverina as well as ongoing collaboration with initiatives such as the Long Paddock and to leverage previous campaigns such as the Thrive Riverina's *Now's the Time to Love NSW Visit Riverina road touring routes campaign (2021)*
- Align with the evolving experience offering of Hay region, including celebrating the opening of new visitor-related infrastructure or the revitalisation of existing attractions. These should also be a focus for public relations (PR).

PRIORITY PROJECTS

5. MARKETING & VISITOR SERVICES

5. MARKETING & VISITOR SERVICES continued

5.2 Develop a **new tourism website for Hay region**, including integration of a simple e-commerce functionality, for example for the sale of Museum entry and event tickets, noting the following points:

- Consider the potential to create a **single destination website in collaboration with Edward River, Darlington Point and Balranald** that adopts an experiential, customer-centric approach and provides ‘economies of scale’ regarding investment, ongoing management and upgrading
- Critical considerations include the customer journey from awareness to advocacy, the quality of the user experience (UX) as well as the opportunity to integrate mapping and new content utilising various formats, including video (which drives higher conversion than images)

5.3 Remarkable content is an essential in any good marketing strategy. It needs to resonate with your target audiences on an emotional level while also ensuring its backed up along the visitor journey by providing practical information when and where required. As a result, Hay region should **prepare a Content Strategy, including identification of gaps and opportunities to create new content, imagery and video**, including videos with locals. It should also involve the **development of experientially-led itineraries as well as stories that connect experiences and attractions to core themes**. Consider best practice case studies, from the Corridor Project through to the Iceland Academy, among others – see Appendix A

5.4 Reinforce the **position of the Hay Visitor Information Centre (VIC) as the lead in-destination visitor services hub**. This should evolve towards a ‘concept store’ for the region, profiling the best of regional products and produce. It should be home to signature artefacts, such as Australia’s oldest bark canoe, making it the go-to place to start an immersive journey into and across the region. This should be complemented by services such bike hire, recharging stations and kayak hire. A further opportunity is to enhance the appeal of the VIC hub to the local community as a place to meet and find out more about their own backyard, especially useful for when their out-of-town guests arrive.

PRIORITY PROJECTS

6. ENABLERS FOR SUCCESS

6. ENABLERS FOR SUCCESS

Underpinning the success of the DMP is remaining informed, visitor-centric and future-focused. However, collaboration and ensuring that tourism and the visitor economy are viewed as significant and important contributors to a vibrant economy and liveability are also critical. The actions below bring focus to these core principles.

Actions:

6.1 Grant funding provides significant opportunities for Hay Shire Council. However, in order to attract new funding through these grant programs, it is recommended that concept plans and feasibility assessments are undertaken for the Game Changer projects as a priority.

6.2 Continue to strengthen collaboration across LGA boundaries as well as with important stakeholders such as DNRM, DNSW, RMJO and other regional tourism organisations. This includes to identify opportunities for investment attraction; experience development; building industry capability; and destination marketing. This should include drive tourism and touring routes as well as experiences that extend across the landscape and connect local government areas in an experiential way.

6.3 Strengthen industry capability and network, including through industry engagement and training programs, which may also be offered in partnership with TAFE NSW and other organisations. For example, customer service and hospitality standards as well as experience development and establishing and managing tourism businesses, including for Aboriginal cultural tourism experiences

6.4 Determine a more consistent and insightful way to measure and interpret visitor data on an annual basis, including on numbers of visitors, spend and market segments (utilising the Roy Morgan Helix Personas). This is critical to understanding the key trends to evaluate the performance of Hay region's visitor economy. An annual sentiment analysis (online media and social platforms) would also assist in understanding visitor motivations, perceptions and behaviours.

- This should involve liaising with Destination NSW, DNRM and/or Riverina & Murray Joint Organisation to identify the most relevant and credible visitor data sources and potentially collaborate on the preparation of an annual insights report.