

TIME TO
UNDERSTAND
WHY
TIME TO SMILE



CONTENTS

1. EXECUTIVE SUMMARY	4
1.1 Introduction	
1.2 References	
1.3 Acknowledgements	
2. OVERVIEW	8
2.1 Dubbo City Council: Mission and Vision	
2.2 Dubbo's Economic Development Strategy	
2.3 Linking economic development and city image	
3. CITY OVERVIEW	11
3.1 City at a glance	
3.2 SWOT	
3.3 City image:	
- what is city image?	
- where are we coming from?	
- where to from here?	
4. AIM OF CITY IMAGE MARKETING STRATEGY	16
4.1 Functional objectives	
4.2 Specific objectives	
5. SITUATION ANALYSIS	17
5.1 Current brand and brand perceptions	
5.2 Perception versus reality and experience	
5.3 Competitive environment	
a) Economic conditions	
b) Attracting professionals	
c) A city to experience	
5.4 Force field analysis	
6. KEY MARKETS	24
6.1 Visitation: Business, VFR and Group Tourism	
6.2 Events: Attraction and capitalisation	
6.3 New residents: Skilled professionals	
6.4 Investments: Major developments and catchment area	

TIME TO UNDERSTAND WHY

In June 2007, Dubbo City Council endorsed the City's Economic Development Strategy which identified the need for a City Image Program to facilitate economic development.

Five months later, Council established a City Image Branch that would be responsible for creating the City Image Program with the aim of delivering a more cohesive, co-ordinated promotion of Dubbo.

The City Image Program would need to encourage and support growth across many sectors of the local economy including destination marketing for leisure and business tourism, as well as investment, event and skill attraction.

As part of the endorsement of the Economic Development Strategy, Council also resolved that a city brand would be developed.

TIME TO SMILE

1. EXECUTIVE SUMMARY

1.1 INTRODUCTION

The City Image Program involves development of a marketing strategy, identification of funding streams and delivery of city marketing initiatives.

The City Image Marketing Strategy identifies outcomes for the next five years and sets the objectives and strategies that will be reviewed annually.

Following agreement of the Strategy, an actionable 12-month marketing plan will be finalised. This plan will outline actions that will be taken by the City Image Branch on an annual basis, and could be described as the practical application of the City Image Marketing Strategy.

To achieve the aspirations of the Strategy, it is vital that the City Marketing Program be implemented in partnership with industry groups and with community engagement.

With a \$114,000 budget, city marketing promotions will only be effective through cooperative opportunities; therefore it is essential that industry partners with the City Image Branch to ensure the Strategy's success.

With this in mind, the City Image Branch undertook a consultation process which included a range of discussions with Council, industry representatives, key industry bodies and members of the community.

Industry representatives included Dubbo City Council staff and Councillors, Grow Dubbo, Dubbo City Tourism Association, Dubbo Chamber of Commerce, The University of Sydney Rural Clinical School (School of Rural Health) Community Advisory Board, NSW Tourism, Greater Western Area Health Service, Gowest and major retail and industry players. It also included informal feedback solicited from numerous operators across a variety of industries (refer to Acknowledgements 1.2).

This consultation process has also been supported by the development of a City Marketing Reference Group (comprising 15 individuals representing various community and industry sectors), as well as focus group research that was conducted with current and new residents, potential residents, investors and visitors.

The City Image Marketing Strategy looks to further define the role that Dubbo City Council will play in delivering city marketing initiatives and identify opportunities for Council to work in collaboration with industry and the community to deliver a successful City Image Program.

Whilst this Strategy details some of the supporting research, more detailed background information has been excluded with the view to providing a clearer, actionable Strategy for marketing the city.

For the Strategy to be accountable, Key Performance Indicators (KPIs) have been attributed to each

major outcome, and measures have been placed against each objective. Evaluation will also be completed on a campaign by campaign basis.

Progress against actions in the Strategy will be reported to Council on a monthly basis via the Informal Report.

Progress against the strategic plan will be provided to Council on a six-monthly basis (November and April). The objectives and strategies will be reviewed on an annual basis (June).

In delivering this Strategy, the City Image Branch will continue to consult and work closely with industry to ensure the Branch continues to work in partnership to meet the needs of the City Image Program and the community.

1.2 RESOURCES

The development of the Strategy has also taken into consideration findings from reviewing several previous consultancy and research papers.

Papers reviewed:

- Dubbo City Council Economic Development Strategy (updated 2008)
- Dubbo City Council Corporate Strategic Plan 2008-2028
- Dubbo LGA Economic and Demographic Profile (2008)
- Discussion papers: The Economic Development of Dubbo (2007)
- Report: Review of Tourism Services for DCC (Proactive Consulting 2006)
- URS Final Report and Recommendations (2006)
- Submissions to Economic Development Strategy and Tourism Review Workshop (2006)
- Central NSW Tourism Draft Strategic Plan (2008)

Research sourced:

- Domesticate - Tourism Research Australia (2007)
- Dubbo Visitor Profile and Satisfaction Research - Tourism Research Australia (2008)
- Local Government Area Tourism Profile - Tourism Research Australia (2007)
- Regional Cities Market Research - ASCET Groups (2006)
- ReDiscover Dubbo Survey - Dubbo City Council (2008)

City Image Marketing Project qualitative research:

- 22 formal consultations
- 30 industry and community informal consultations
- 1 Councillor workshop
- 3 City Marketing Reference Group workshops
- 3 new resident focus groups
- 3 long-term resident focus groups
- 6 recent visitors interviews

- 10 city professionals interviews
- 10 business investors interviews

For further details, see Appendix 1 City Image Marketing Project qualitative research.

1.3 ACKNOWLEDGEMENTS

The future of the City is anchored in our community and therefore any City marketing efforts should be about combined aspirations for Dubbo. The development of the City Image Marketing Strategy has been greatly assisted by the contributions of a number of people. Dubbo City Council would like to thank people that gave their time, energy and insights to the Project:

Name	Organisation
Mayor Greg Matthews	Dubbo City Council
Dubbo City Councillors	Dubbo City Council
Mark Riley	Dubbo City Council
Megan Dixon	Dubbo City Council
David Dwyer	Dubbo City Council
Chris Dennis	Department of State and Regional Development
Catherine Deverell	Greater Western Area Health Service
John Walkom	Go West / Developer
Rod Crowfoot	REI NSW
Wayne Mawby	Dubbo Tourism Association and Grow Dubbo
Andrew Grant	Dubbo Chamber of Commerce
Mike Sutherland	Grow Dubbo / Industry
Peter Vane	Talbragar Working Street Party
Leo DeKroo	Resident
Eleanor Robson	Dubbo Youth Council
Carolyn Garner	Resident
Janet Watters	Dubbo City Tourism Association
Dawn Makeham	Dubbo City Tourism Association
Grow Dubbo Board	Grow Dubbo
Colin McLean	Tourism NSW
Patricia Wilkinson	Tourism NSW
Marje Prior	Central NSW Tourism
Pamela Dickerson	Gowest
Mathew Fuller	Taronga Western Plains Zoo
Cherie Forester	Orana Mall Marketplace
Chris Muir	Centro Dubbo
Vicki Canalese	School of Rural Health Community Advisory Committee
Gary Shipp	Charles Sturt University

Name	Organisation
Pia Prangenberg	Charles Sturt University
Tina Reynolds	Dubbo Chamber of Commerce
Steve Gooley	Bachrach / Investor
Brad Everett	Hunterland / Developer
Lyn Marais	Resident
Jeremy Fentrell	Resident
Mark and Wendy Dawes	Resident
Will Willoughby	Resident
Glenn and Jenny Wilde	Resident
Margaret Samuels	Resident
Jen Cowley	Resident
Lee Dundas	Resident
Joe Snare	Resident
Luke Cross	Resident
Ray Core	Western Broadcasters
Rod Morrison	Resident
Ken and Christine Borchardt	Red Earth Estate / Residents
Dr Amal Tadros	Resident
Ann Brandon	Dundullimal / resident
The numerous residents and business operators and representatives from other towns and Cities who spoke informally at meetings, provided feedback on the street and provided insights through the media.	

This development of this strategy has been funded by Dubbo City Council. The City Image Marketing Project is supported by funding from the Department of State and Regional Development.

Thank you.

2. OVERVIEW

2.1 DUBBO CITY COUNCIL - VISION AND MISSION:

Dubbo City Council's Vision statement:

"The vibrant City on the plains meeting service and lifestyle needs."

Dubbo City Council's Mission statement:

"To manage Dubbo's growth in an ecologically sustainable manner to meet the service and lifestyle needs of residents and visitors."

The City Image Marketing Strategy will work within Dubbo City Council's corporate planning framework. Its direction is derived from the endorsed Economic Development Strategy.



Diagram 1: the City Image Marketing Strategy in context of Dubbo City Council's Corporate Planning.

2.2 ECONOMIC DEVELOPMENT STRATEGY

Dubbo City Council's 2007 – 2010 Economic Development Strategy has a clear ambition, which is:

"Through business investment; build a strong economic base for Dubbo that reflects competitive advantages in key emerging and developing industry sectors."

The Economic Development Strategy seeks to build on that economic success by capitalising on the advantages of the Dubbo economy, identifying key issues for action and addressing any shortcomings.

The Economic Development Strategy identified key economic opportunities in:

- The continued development and promotion of the city's role as a regional centre for the western population
- The continued development and promotion of the city's regional role supporting business and industry
- The expansion of key infrastructure that supports not only business growth, but also the "liveability" of the city
- The expansion of the business tourism market
- Value-adding to existing industries
- Improved collaboration and engagement with all stakeholders involved in economic development in Dubbo
- Dubbo City Council looking inwards to ensure that it is providing best practice in the delivery of a positive and supportive investment environment.

The Economic Development Strategy also notes that the existence of social problems has resulted in Dubbo experiencing negative publicity, which has affected public perceptions about the city. The impact of this is that Dubbo may have more difficulty attracting managers and professionals.

2.3 LINKING ECONOMIC DEVELOPMENT AND CITY IMAGE

The Economic Development Strategy identifies a Key Result Area that 'Dubbo is recognised as the leading regional centre in Australia', with the actions:

1.1 To develop a City Image Marketing Strategy

1.2 Implement the City Image Marketing Plan

The City Image Marketing Strategy must support the agenda of the Economic Development Strategy by:

1) Supporting industry to ensure effective marketing efforts, including:

- providing collaborative campaign management
- improving information provision and reporting practices
- improve online promotions.

2) Supporting Grow Dubbo in efforts to secure investments including:

- providing support for event attraction
- providing event support services
- providing support for investment attraction

3) Providing a suite of materials and services that support the agenda of the strategy.

3. CITY OVERVIEW

3.1 CITY AT A GLANCE

Dubbo's central geographic location and national highway and transport links has assisted in the development of the City and positions Dubbo as a popular inland tourist destination. The city of Dubbo is the only city located in the Orana Region having developed over time as a major service centre.

Dubbo is located within Wiradjuri Country and was named a village in 1849, a town in 1872 and a city in 1966.

Total population as at 30 June 2007 was 39,787. The city's growth rate for the 12-month period ending 30 June 2007 was 0.7% and whilst down from the rates of the 1970s and 1980s which saw growth rates in excess of 3% achieved, the current figure is on par with most other inland regional centres in New South Wales (Dubbo LGA Economic and Demographic Profile 2008).

Dubbo is a focal point for the cultural and recreational life and activity of several surrounding LGAs. Towns such as Wellington, Narromine, Gilgandra, Warren, Nyngan, Cobar, Bourke, Brewarrina and Walgett often rely on Dubbo for goods and services as well as access to government departments.

Annually Dubbo welcomes: 347,000 day visitors, 432,000 domestic overnight visitors, and 10,000 international visitors.

The city has enjoyed growth but has had a rather adhoc approach to long-term economic growth strategies and has only recently made a concerted effort to 'market' the city to various markets to support the economic agenda.

Whilst Dubbo City Council has identified the need to change perceptions about our city and proactively sell our story, the development and delivery of a city marketing strategy will not do this alone.

Product development, expansion of retail offerings and increases in service capability needs to happen in order for the city to continue to grow and attract a variety of target markets. The City Image Program must support development initiatives and continue to evolve to ensure that services and materials reflect any developments in the community.

3.2 SWOT

There has been much analysis of the strengths, weakness, opportunities and threats for the city. Following is a brief SWOT analysing Dubbo as a product, in relation to the goals of the City Image Marketing Strategy. Also included is an analysis of the city in specific reference to images and perceptions of the city. The difference between product and image is important to note separately.

Whilst the 'product elements' of the city will influence the positioning of the City Image Marketing Strategy, the Program is primarily charged with promoting the city. In stating this, it is recognised that the Program needs to play a role in assisting industry with product development.

STRENGTHS

City	City Image
<ul style="list-style-type: none"> • Dubbo's unemployment rate has been below the NSW overall level since 1988 • Dubbo is the main focal point for the cultural and recreational life and activity of several local government areas • Intersection of major regional routes for road, rail and air transport/travel • Accommodates tertiary education institutions, namely Charles Sturt University, Western Institute of TAFE and rural School of Medicine • Variety and number of accommodation options • Not reliant on any one particular industry and strong industry base • Provides services to catchment area 115,000+ • High standard of community services • Availability of water • Relative affordability and high standard of living 	<ul style="list-style-type: none"> • CBD and streetscape beautification • Sporting facilities • Dubbo is well known • Dubbo is thought of as a major regional centre • Dubbo is perceived as a profitable place to do business • Residents can be best promoters • Strong and established local media presence • Strong brand association with Taronga Western Plains Zoo • Seen as a friendly city • Open spaces • Great weather • Friendly community; inclusive • No traffic • Green parks and gardens • Strong sense of community • The positive notation of 'rurality': honesty, nostalgia and the 'decent caring Aussie battler' • Down-to earth atmosphere

WEAKNESSES

City	City Image
<ul style="list-style-type: none"> • Like many regional cities, Dubbo has a labour shortage, the city struggles to retain its youth and to attract trained personnel • Distance from coastline • No private boarding school • Marketing efforts focussed on leisure tourism. • The perceived and reality of available healthcare services • Distance from major centres distancing people from family and friends • Council perceived to be restrictive • Limited competition in some sectors • Trading hours and early closing times of restaurants and cafes 	<ul style="list-style-type: none"> • Awareness of city is often a comical dig • Residents can be worst critics • Attracting key staff is limiting growth • City perceived as dry and isolated • Considered too far from Sydney • Perceived to have issues with crime and social disorder • Low level awareness of breadth of services and attractions • Too many 'brands' in marketplace • Perception of unsupportive Council could turn off potential developers • Belief there is 'nothing to do' in the city • Perceived as second rate education • The negative notation of 'rurality': isolation, racism and lack of culture • Tight knit community; exclusive

OPPORTUNITIES

City	City Image
<ul style="list-style-type: none"> • Attract investment based on our location and access to major domestic markets (Sydney, Newcastle, Melbourne, Brisbane and Adelaide) • Provide and support a positive investment environment • Higher fuel prices encouraging regional customers to travel more locally • Expansion of the business tourism market • Expansion of products and services including airport • Affordability of quality housing – families can afford the ‘Australian Dream’ • Attract new business through competitive rents • TWPZ seen as a benefit to potential ‘tourism related’ operator • Promoted limited competition to encourage new business and establish healthy competitive business community 	<ul style="list-style-type: none"> • Encourage residents to be city ambassadors in a variety of senses • Communicate City’s commitment to growth • Promote growth of ‘cultural aspects’ • Promote city’s capability to host events and conferences • Promote availability of water and clean air • Romanticism of ‘the bush’ • Edge of the Outback • Country feel with City services • People can afford to have a backyard • Professionals can fast track their careers • Educate prospective business about relative cost of establishing in Dubbo • Willingness of other business to make recommendations / provide leads • Promote the best of both worlds lifestyle and thriving business • Promote an inclusive community and how our Indigenous community and growing multicultural community enriches our City • Encourage later trading time

THREATS

City	City Image
<ul style="list-style-type: none"> • Aging population • High fuel prices • Retail competition • Industry transport competitors • Lack of skill attraction halting developments • Continual drought • Lack of labour halting developments or growth • Tightening of wallet squeezing out leisure travel • Comparable low house prices turn off developers • Lack of quality local suppliers to drive developments/ business operations 	<ul style="list-style-type: none"> • To much ‘poor us’ cries for state and federal support suggests lack of services • Crime and anti-social behaviour • Perception of unsupportive Council stifles new developments • Possible new expressway through Blue Mountains sees more eastern regional cities more accessible to Sydney

A more detailed SWOT analysis of the City can be found in Dubbo City Council’s Corporate Strategic Plan.

3.3 DUBBO CITY IMAGE

WHAT IS CITY IMAGE?

An 'image' is something that is usually based on perception and often believed to be fake or phoney. Images can be accurate, inaccurate or illusions.

Identity on the other hand is a reality. Dubbo's identity is based on truth, experiences and evidence.

However, people's perceptions are not always based on reality.

The challenge is to appreciate the identity of our city and portray that identity in a positive light – supporting creation of a positive image. We cannot simply 'create' an image – our image will come over time and through efforts that communicate our agreed identity. It is the consistent positive portrayal of our city that will deliver a shift over time in any negative perceptions of Dubbo.

WHERE ARE WE COMING FROM?

The URS Economic Development Final Report and Recommendations concluded that the impact of past negative publicity was not felt in the retail sector of the community i.e. people continue to spend money in the city. To varying degrees it has impacted on the city's leisure tourism markets, however the business tourism and visiting friends and relatives markets have not been so affected.

It has been anecdotally reported that over the past two years there has been a noticeable downturn in leisure travellers asking about crime and safety concerns in Dubbo at travel consumer shows and at the Visitors Information Centre.

The URS Economic Development Report also concluded that the negative publicity affected the city's ability to attract managers and professionals. Dubbo's ability to attract key workers is crucial to sustaining the growth and development of the city as a leading regional centre. With record low unemployment across Australia, the challenge to attract these key workers is made all the more difficult. A negative perception of the city may be the difference between a prospect selecting Dubbo over another regional (or metropolitan) opportunity.

Whilst negative publicity especially related to social problems has contributed to downturn in some markets, it more importantly has created a potential long term association of the city with crime and disorder.

Overall, the residents of Dubbo are very positive about their city and passionate about seeing the city move forward. Participation in the 'I love Dubbo' campaign is testament to the belief and passion that residents have for their city. Many residents believe there is a need to revitalise the pride the community has for the city.

WHERE TO FROM HERE?

The City Image Marketing Strategy is not an attempt to whitewash problems, rather it is believed that by increasing proactive and strategic marketing efforts perceptions will be altered.

So how do we capitalise on the awareness of our city but ensure that prospects have aligned perceptions? How do we capitalise on having such an iconic attraction like Taronga Western Plains Zoo in our backyard whilst not falling victims to prospects believing it's all that we have to offer?

City image is not something which can be solely represented in an advertisement, a logo or a website. City image is influenced by the people that live here, the physical city environment, our climate, the way we talk to our customers, the visitor experience, activities and attractions, how previous residents talk about the city, the lifestyle we offer, and lastly external city promotions and media exposure.

A marketing strategy can only direct some components of city image. It is important to note that all city touchpoints (being any point in the city that connects with a consumer/visitor) contribute to the image portrayed of Dubbo. Therefore every resident, industry, media and community group has a role to play in maintaining and promoting a positive image of our city.

Various stakeholders have the means of directly delivering a positive city image, and they also have the power to influence our city image to ensure that it is positive. Some examples could be:

STAKEHOLDERS DELIVERING AND INFLUENCING A POSITIVE CITY IMAGE

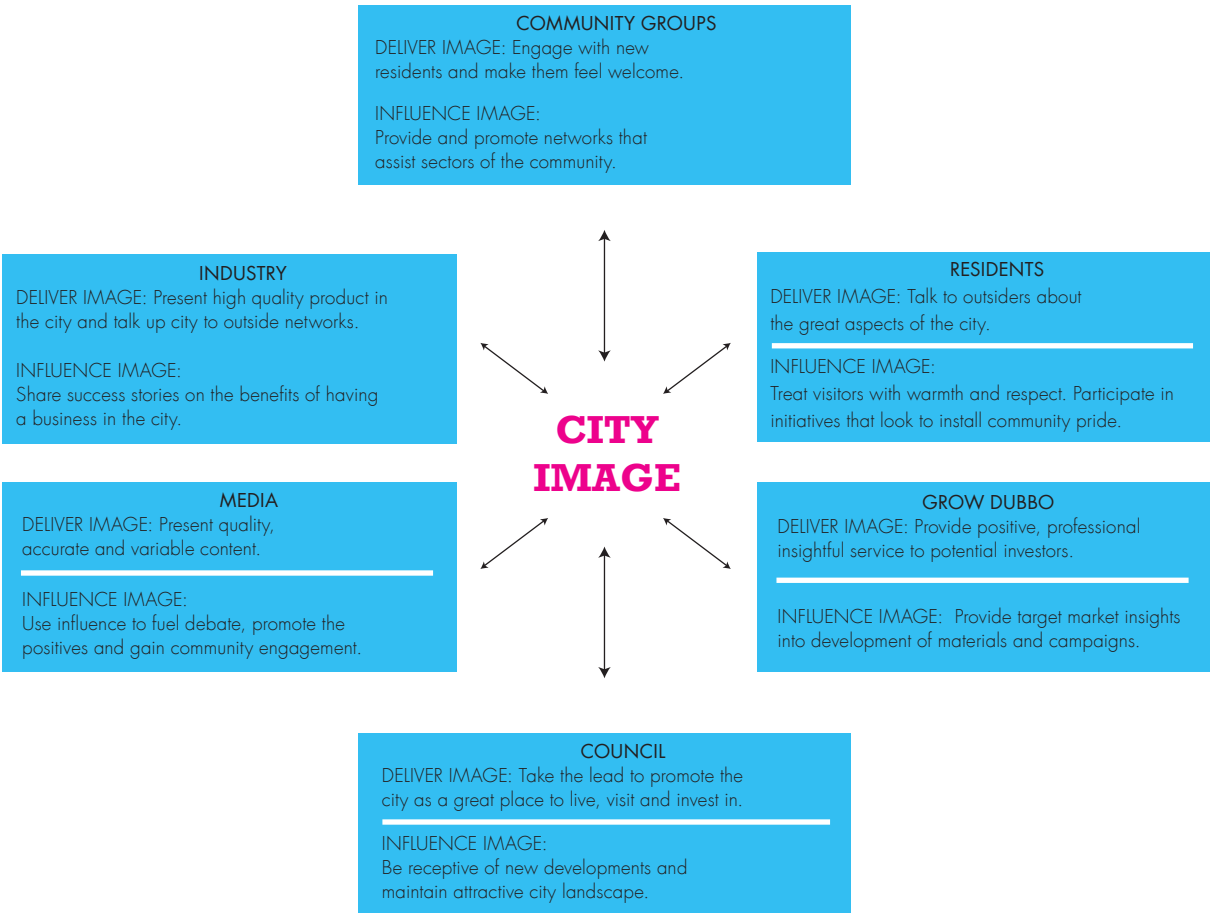


Diagram 2: Examples of how various sectors of the community can have an impact our city image.

4. AIM OF CITY MARKETING STRATEGY

WHAT WE WANT THIS STRATEGY TO ACHIEVE

To drive the economic growth of Dubbo through realising opportunities and increasing awareness of the city's offerings.

By supporting development of a positive image, assist to drive the recognition of Dubbo as the leading regional centre in Australia.

4.1 FUNCTIONAL OBJECTIVES

- To highlight key areas of growth for city and identify target market decision drivers
- To ensure a collaborative approach to funding and effective resource and skill utilisation
- To define expected outcomes and performance indicators of the strategy
- To create a city marketing direction for Council and community organisations to use as platform for industry specific campaigns/actions.

4.2 SPECIFIC OBJECTIVES

The City Marketing Strategy is required to contribute to the achievement of the following performance indicators as identified in the City's Economic Development Strategy:

- Increase Business Investment Projects facilitated with firm outcomes (50 new jobs)
- Three events hosted per annum
- 1% increase in population (based on 39,500 June 2006 ABS)
- 3% increase in income/capital per annum (\$35,088 2003/04 ABS Average wage DCC).

Performance against specific campaigns will be reported on a campaign by campaign basis.

Note: The City Marketing Strategy is not accountable for product development, however the City Image Branch should play a role in supporting product development in the city by facilitating development initiatives and providing market research.

5. SITUATION ANALYSIS

5.1 CURRENT CITY BRAND IMAGE

There are currently a range of brands in place across Dubbo City Council, tourism marketing, city and regional development.

In 2000, through a corporate image project Dubbo City Council adopted a brand and imagery that supported the city's position as a dynamic and major hub.

Council's corporate brand remains a strong identifiable symbol, but is more aligned with the organisation and is not suitable to market the city to a wider range of customers.

In 2003, the branding of "Dubbo - Home of Western Plains Zoo" was adopted. This brand is tourism focused and its tagline now antiquated due to the recent rebranding of Taronga Western Plains Zoo.

There is a need to establish a central brand that represents a 'whole of city' approach. Consistent and effective use of this brand in our marketing efforts will assist to build a positive image of Dubbo.

5.2 PERCEPTION VERSUS REALITY AND EXPERIENCE

Perception is an opinion based on senses, emotions, what someone has been told about a product/company/place by a person or through marketing material. Since individuals interpret things differently, perceptions of something can vary and are not necessarily representation of fact.

ASCET Groups Regional Cities Market Research was commissioned on behalf of participating NSW regional cities to understand the target markets which had the potential to relocate and invest in regional cities of NSW. The study found that overall Dubbo has an image of being a big inland city with crime problems. An image raised in most survey groups was one of being dry and out in the "very west". Many also mentioned friendly people. The study also identified safety as the second most important factor in a relocation decision.

Although Dubbo is often perceived to have extensive problems with crime and social issues, research by Tourism Research Australia indicates that when people actually visit Dubbo, personal safety and security is rated as a strength of the city. Other strengths were recognised as Taronga Western Plains Zoo, friendliness of locals and value for money (refer to Diagram 3).

ASPECTS OF VISIT: IMPORTANCE VS SATISFACTION

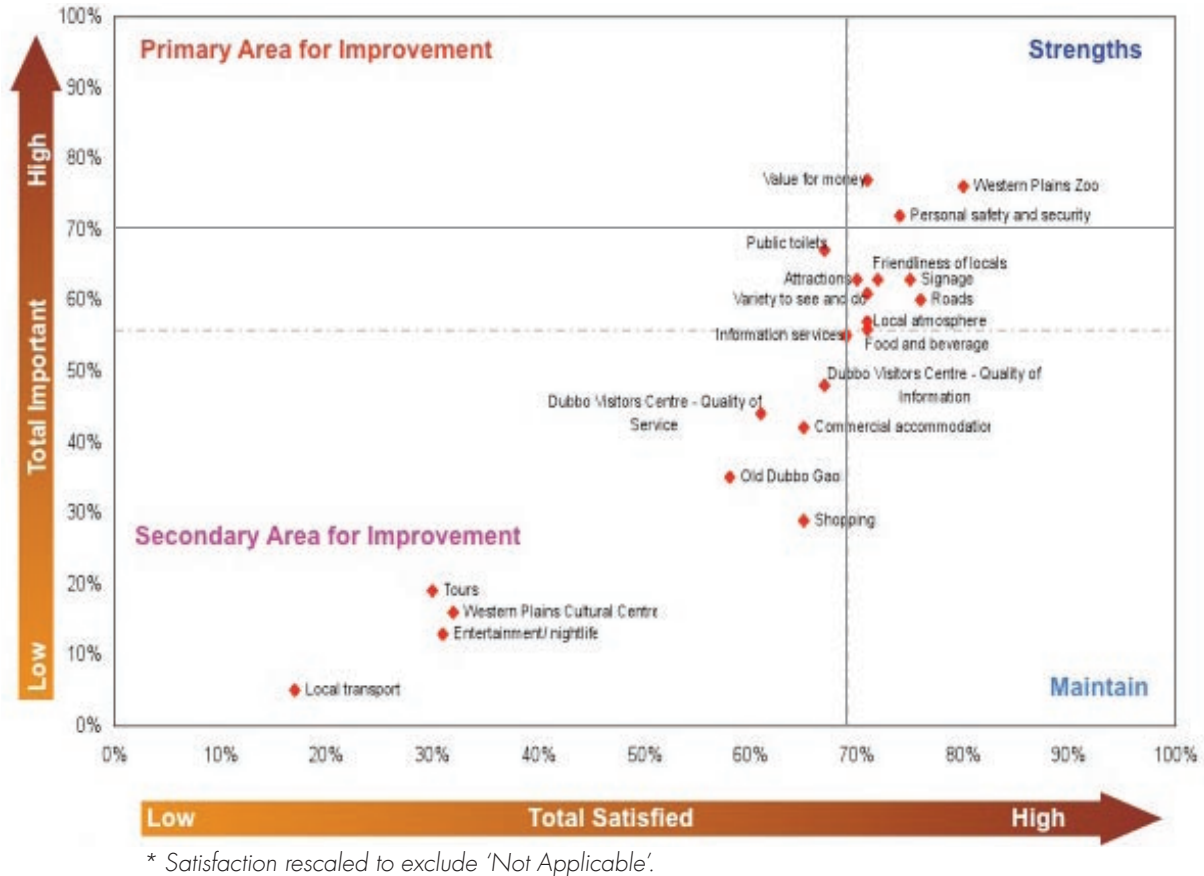
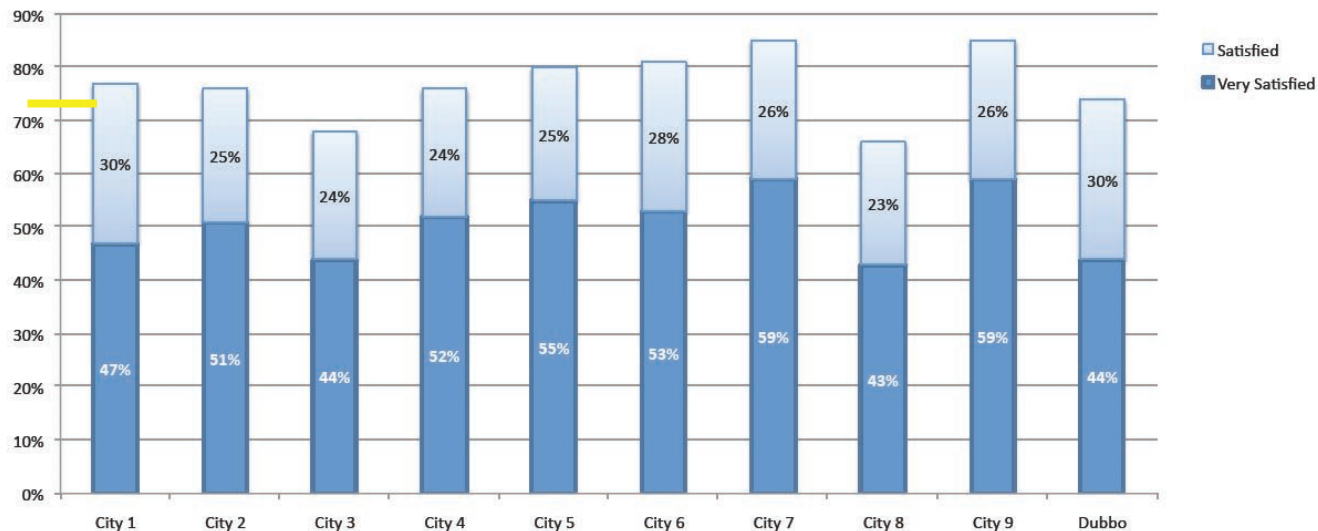


Diagram 3: Visitors to Dubbo rate aspects of their visit, analysis by importance and satisfaction - Tourism Research Australia (2008).

As demonstrated in the following diagrams, Dubbo visitors rated the importance of personal and safety on average with visitors of other cities. The importance placed on this aspect of the trip is no greater for a visitor coming to Dubbo as it is for visitors going to another city (Diagram 4).

Likewise the satisfaction with this aspect of the trip is also very close with visitors' experiences at other cities (Diagram 5).

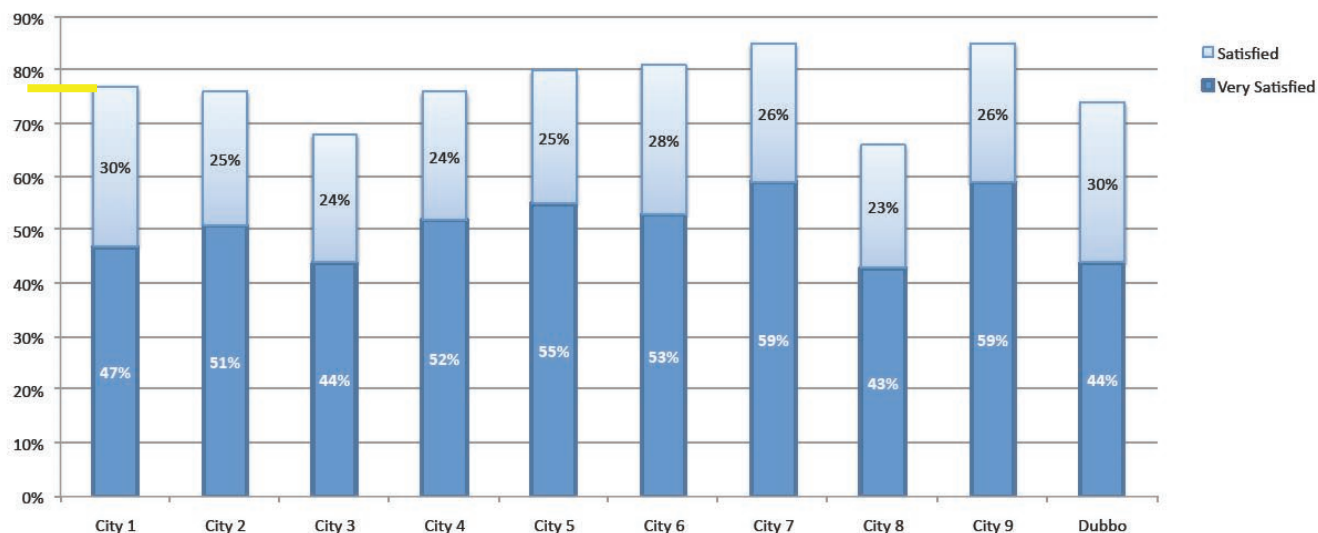
ASPECTS OF TRIP IMPORTANCE OF PERSONAL SAFETY AND SECURITY



Average importance of personal safety and security: 72%, Dubbo 72%

Diagram 4: Importance of personal safety and security, Dubbo visitors benchmarked against visitors to other cities - Tourism Research Australia unpublished data (2007).

SATISFACTION WITH PERSONAL SAFETY AND SECURITY



Average satisfaction with personal safety and security: 77%, Dubbo 74%

Diagram 5: Satisfaction with personal safety and security, Dubbo visitors benchmarked against visitors to other cities - Tourism Research Australia unpublished data (2007).

Benchmark included nine destinations from NSW, VIC, and QLD.

Taronga Western Plains Zoo is consistently the number one association that people have with Dubbo and it is by far the number one reason for leisure tourism. The top two reasons for choosing to visit Dubbo are:

- "To visit the Western Plains Zoo" (63%)
- "It was a convenient stop over point" (13%)

Visitors to the city are expecting Dubbo to have the following attributes:

- "Nature base experiences" (64%)
- "Quality time with partner / family / friends" (63%)
- "Opportunity to tour around and explore" (62%)
- "Relaxation and rejuvenation" (60%)
- "Something the kids would enjoy" (59%)
- "Chance to discover or learn something new" (54%)

Experiences that were most likely to be somewhat better or much better than expected were:

- "Something the kids would enjoy" (62%)
- "Discover or learn something new" (53%)
- "Experience our nation's / Australia's history" (53%)

Once they have experienced our city, 75% of visitors are likely to recommend Dubbo to others as a destination to visit.

(Tourism Research Australia 2008).

5.3 COMPETITIVE ENVIRONMENT

Many regional cities are facing similar challenges to Dubbo. Many are pitching for 'treechangers' and claiming to have the lifestyle to suit. Just like a product or service in any marketplace, to be competitive, Dubbo must understand the selling points that are unique to our city and connect those with the right audience.

Whilst we essentially compete with other regional centres to attract investments, visitors and new residents, these cities are also our allies in marketing the advantages of regional living. The city should continue to support collaborative efforts that promote regional living, for example the Evocities campaign. However to capitalise on these efforts we need to be able to deliver a stronger selling pitch to those considering living, visiting or investing in regional NSW, to do so in Dubbo.

a) Economic conditions

From regional LGA comparison, Dubbo has been experiencing slightly higher population growth in 2002-2007 of 0.5% compared to Bathurst Regional 0.1% , Orange 0.2%, Tamworth Regional 0.2%, Wagga Wagga 0.3% and Albury 0.3%. Along with Bathurst Regional, Dubbo also has the highest projected average annual population increase over 2007-2031 of 0.8%. Median sale prices

and rental for units and houses in Dubbo LGA are the lowest or on par lowest amongst these LGAs (Dubbo LGA Economic and Demographic Profile 2007).

b) Attracting professionals

In the ASCET Groups Regional Cities Market Research study, 28% of respondents stated they were considering moving out of Sydney. When asked what areas were most appealing respondents identified Coastal NSW (31%) and inland NSW (24%). When participants were asked to review possibility of particular inland cities, Dubbo was listed most frequently as one of the least appealing cities to relocate to. The most common reason was that it was too far away from Sydney.

RELOCATION APPEAL TO MAJOR INLAND CITIES

	<i>High appeal</i>	<i>Low appeal</i>
Bathurst	11.2%	5.0%
Wagga Wagga	7.1%	5.2%
Armidale	4.5%	1.7%
Dubbo	4.5%	19.8%
Tamworth	4.0%	3.1%
Albury	3.1%	3.8%
Queanbeyan	0.5%	0.7%

Table 1: Sydney professionals rate relocation appeal of major inland cities - ASCET Groups Regional Cities Market Research 2006.

The cost of housing is the biggest advantage of country NSW over Sydney and the variety of choice was the biggest disadvantage (ASCET Groups Regional Cities Market Research).

c) A city to experience

Dubbo, like many towns and cities across Australia, has experienced a decline in the domestic tourism market. Tourism Australia’s Domestic Report qualifies that Australians are choosing not to undertake domestic travel in favour of an overseas holiday (due to availability of cheap airfares) or buying a new plasma TV (not wanting to pay higher fuel prices).

On a state comparison, domestic overnight visitors in Dubbo do not stay as long as average, with 2.2 nights compared to 3.5. Our visitors tend to spend a little more each night above the state average \$134 compared to \$124 (LGA Profile - Tourism Research Australia 2007). Repeat visitation is quite high with 54% of visitors being return visitors; 28% of visitors say they would

be likely to visit Dubbo in the next 12 months and 51% planned to return in the next three years (Tourism Research Australia 2008).

The majority of overnight visitors are drawn from the eastern seaboard and regional New South Wales, with 71% coming intrastate and 29% interstate.

Compared to other cities and towns in the region Dubbo welcomes the most domestic overnight visitors. However, the City has less domestic day visitors than Bathurst and Orange.

	Annual Domestic Overnight visitors	Annual Domestic Day visitors
Dubbo	432,000	347,000
Bathurst	342,000	482,000
Cowra	134,000	128,000
Mudgee	280,000	183,000
Orange	258,000	434,000

Table 2: Visitors to cities and towns in region 3 or 4 year average to June 2007.

CENTRAL NSW DOMESTIC OVERNIGHT VISITORS

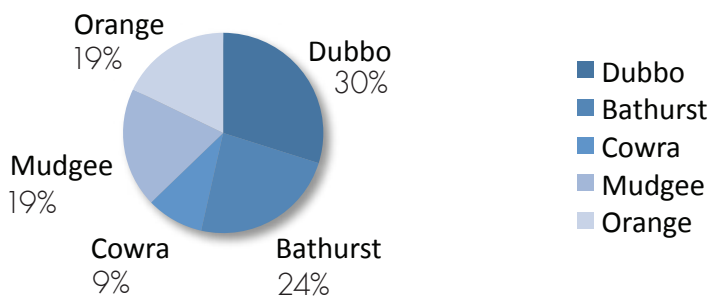


Diagram 6: Percentage share of domestic overnight visitors among regional cities and towns.

CENTRAL NSW DOMESTIC DAY VISITORS

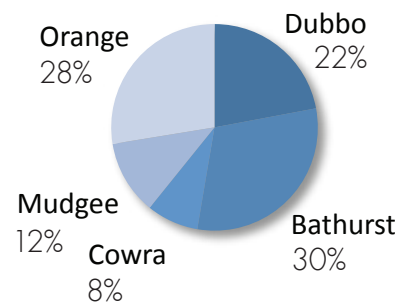


Diagram 7: Percentage share of domestic day visitors among regional cities and towns.

Source: LGA Tourism Profiles - Tourism Research Australia 2007.

The City needs to build on the number of day visitors (travel round trip of at least 50km) and increase this markets spend through encouraging multi-purpose trips.

We also need to increase the number of nights our overnight visitors stay. The challenge is to build awareness of products and experiences on offer beyond Taronga Western Plains Zoo and Old Dubbo Gaol. There is opportunity to work closely with neighbouring LGAs to increase the activities and attractions offered to various markets.

A more strategic and coordinated effort is being made by the Regional Tourism Association in 2008 to promote the Central West region in collaboration with Tourism NSW. Dubbo should continue to be an active member within the Association and support efforts to attract more visitors into the region, however to capitalise on any collaborative campaigns we must ensure they are aligned to the direction of our City's marketing efforts.

5.4 FORCE FIELD ANALYSIS

Below is a force field analysis that further defines the desired future in relation to Dubbo's city image and the possible barriers to achieving that position. It examines the current position, the future position, the forces that will motivate change and forces that will restrain the required change.

<i>Current position</i>	<i>Desired future position</i>
No centralised city brand or city marketing information	Brand that identifies the city and promotes Dubbo's strengths
Perceived as being isolated and dry	Viewed as assessable and well connected
Primary association for the city is Taronga Western Plains Zoo	Promote diversity of regional attractions on offer and encourage repeat visits
Reliance on major attractions to bring in visitors	High consumer spend and multi purpose trips for visitors
Cited as one of the least appealing NSW regional options for young professionals	Targeted event marketing capability
Growing City	Council viewed as supportive and pro-development
Viewed as inclusive community to some, exclusive to others	Strong community pride
Lack of 'actionable plan' for industry to support marketing initiatives.	Strong collaborative direction, industry buy-in and support of campaigns

<i>Motivating forces</i>	<i>Restraining forces</i>
Want to participate in effective campaigns that deliver returns to industry	Industry players and Council believing it is easier to do our own thing
Want quality and sustainable new product development	No single ownership of city/product development
Need to improve perception of Dubbo	Limited resources to market city
Need to attract key workers	Economic downturn reducing target market's ability to invest or visit
Proactive local government	Lack of support from Federal and State Government
Possible support via State and Federal Government	Lack of infrastructure/product development
Desire for the City to grow whilst retaining the character of the City	Contentment / doing nothing
Gain recognition for the successful businesses and quality services that operate in our City	Some sectors of industry happy with current levels of competition
To gain recognition for the efforts by current and previous generations that built the Dubbo of today	Some sectors of community concerned we will grow into a 'mini Sydney'

6. KEY MARKETS

In marketing our city we cannot try to attract every single market, nor can we afford to spend resources on disengaged markets or unfeasible opportunities.

Whilst this Strategy will target specific markets for growth, the development of a stronger city marketing platform and implementation of City Image Program will result in a positive ripple effect across all markets and provide much needed support to individual industry or organisational pursuits.

Key markets

- 1) Visitation: business, visiting friends and relatives (VFR) and group tourism
- 2) Events: Attraction and capitalisation
- 3) New residents: Skilled professionals
- 4) Investments: Major developments and catchment area spend.

6.1 VISITATION: BUSINESS, VFR AND GROUP TOURISM

Marketing efforts to attract the broader leisure tourism market can be delivered more effectively and efficiently though collaborative regional marketing efforts with Central NSW Tourism. With limited resources, the City Image Program should concentrate on business, VFR and group tourism.

a) Business Tourism:

The purpose of visitation is diverse with the holiday/leisure segment accounting for 39% of all overnight visitors in Dubbo.

PURPOSE FOR VISIT TO DUBBO

Holiday/leisure	39%
Visiting friends/relatives	30%
Business	18%
Other	13%

Table 2: Purpose for visiting Dubbo; Tourism Research Australia LGA Profile

Whilst statistics show business tourism accounts for 18% of visitation, it is understood that this market is hard to measure. Operators in the city believe that the business tourism market provides the most stability to their operations. Dubbo's accommodation sector relies on business visitation and research suggests that there is opportunity for this market to grow even further. To increase the growth of this market Dubbo needs to be actively marketing for business events and conferences.

b) VFR Tourism:

There is also potential to expand the visiting friends and relatives market (VFR). Research suggests that visiting friends and relatives tend to stay longer and spend more money in our city (Table 3). This market can be cost-efficiently reached via local community campaigns. The VFR markets spend in the city can also be increased through 'bring a friend' initiatives that target/reward locals who experience the city as well.

	<i>Visiting relatives and friends (VFR) market in Dubbo*</i>	<i>All overnight visitors in Dubbo</i>
Overnight stays		
1-2 nights	34%	76%
3-4 nights	41%	16%
5 nights+	25%	7%
Go shopping at a speciality store / for pleasure	77%	27%
Dined at restaurant/cafe	80%	54%

Table 3: Visitor habits; Dubbo LGA profile Tourism Research Australia three year average to June 2007 * ReDiscover Dubbo Survey 2008.

c) Group Tourism:

As the acquisition cost of individual leisure tourists is relatively quite high, it is far more feasible for any city centric marketing campaign to concentrate on group visitation.

Dubbo is well positioned and well resourced to support more group tours and develop educational focused tourism. The majority of this opportunity is via school programs and alignment of product with school curriculum. The targeted marketing of these groups can also look to establish visitation across the year – not just school holiday periods where the city is already at capacity.

6.2 EVENTS: ATTRACTION AND CAPITALISATION

With the facilities available in Dubbo there is opportunity to grow the events calendar with not only public social events but major industry events and business conferences.

The City Image Program needs to provide support to Grow Dubbo to increase targeted event attraction. Improved marketing support is required to increase attraction of high quality and high yield events. The City lacks marketing material that targets this market and also needs to develop a specific city Event Strategy. This Strategy needs to identify potential events as well as introduce ways for the City to support and capitalise on existing events and increase visitors spend i.e. through industry retail campaigns.

We also need to review the way we support events to ensure their growth and repetition by introducing services such as central online booking. Whilst there is currently an online event calendar and weekly radio and newspaper spots, the lack of communication on current and upcoming events is a common complaint amongst industry and the community.

The Event Strategy should detail the types of events we attract, support and promote. This Strategy will also investigate how we will target specific events that will fill current gaps in the city’s event calendar, either by type of event and timing of event. With the amount of Government services that are based in Dubbo there is untapped potential in hosting more government-based conferences and events in the city.

ANNUAL AND REPEAT EVENTS OF NATIONAL, STATE OR REGIONAL SIGNIFICANCE HELD ANNUALLY IN DUBBO

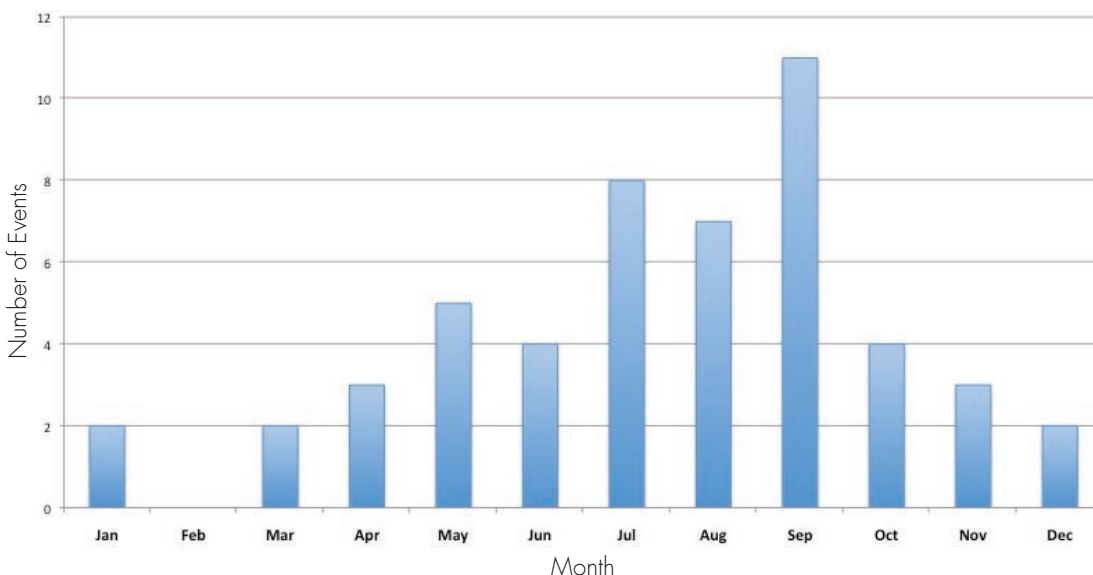


Diagram 8: Peaks and troughs in Dubbo’s event calendar; Dubbo City Council, 2008.

There is also opportunity to capitalise on major events in the region, for example the Parkes Elvis Festival, and provide the needed accommodation requirements or extending the stay of a regional event attendee to include Dubbo in their trip itinerary.

6.3 NEW RESIDENTS: SKILLED PROFESSIONALS

Efforts to educate wider audiences about living in regional NSW will be delivered through Dubbo's involvement in Evocities Project (collaborative campaign with other major regional cities). The ongoing support of this collaborative campaign allows the City Image Program to reach those people who are converted to the idea of regional living, and direct resources to convincing them to choose Dubbo.

Segments most likely to consider relocating to country NSW are people that have lived in regional NSW before or had relatives in country NSW. The main reasons cited for relocation to regional NSW is lifestyle and to move away from the big city, followed by employment, families and education (ASCET Groups Regional Cities Market Research 2006).

Skilled professionals are also more likely to bring with them another skilled professional partner. The city would benefit from introducing an industry network where the lead on attracting a skilled professional can be assisted by finding a role for their partner. With a projected average annual population increase for the city of 0.8% for 2007-31, there is a need to connect those needs to achieve or exceed these projections.

Whilst overall population growth is required, the city must continue to attract professionals that deliver much needed services to our city and region. These key workers are more likely to quote lifestyle as the main consideration to moving to Regional NSW. To connect with this target, the city must promote the 'liveability' of the city, a message that extends beyond housing affordability.

There is also a need to introduce new resident initiatives that assist in connecting new residents with the community to assist in retaining skilled professionals.

6.4 INVESTMENTS: MAJOR DEVELOPMENTS AND CATCHMENT AREA SPEND

Attracting new, sustainable developments is the lifeline of a city's growth. The City Image Program needs to provide support to Grow Dubbo to increase targeted commercial and industry development. This will be delivered by producing targeted materials i.e. prospectus pack and providing a stronger information provision framework via a 'city information hub' and improved online capability.

The URS Economic Development Report recommended that marketing efforts should focus squarely on those potential customers (or workers) at surrounding towns, to grow the city's role as major regional centre. To maximise the potential of this market, we need to capitalise on multi-purpose trips i.e. people travel in to visit the dentist but they are encouraged to go shopping. We need to promote that variety of products and services to encourage increased spend and a length of stay in our city.

There is also opportunity to promote successful business case studies.