

COOMA-MONARO ECONOMIC DEVELOPMENT MARKETING STRATEGY



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PREAMBLE

The Cooma-Monaro Economic Development Taskforce was set-up as a 12-person committee in June 2013 to make recommendations concerning the development of the Shire's economy.

The Taskforce Report was presented to Council in late 2013.

In order to gain traction and momentum for the report's recommendations, Cooma-Monaro Shire Council is developing a marketing strategy in pursuit of the vision articulated by the Economic Development Taskforce.

It is envisaged that the marketing strategy would be comprehensive and integrated addressing the key drivers in accelerating growth of Cooma-Monaro Shire's economy.



BACKGROUND

The need for a Shire marketing strategy was identified in the final report of the Cooma-Monaro Economic Taskforce. The recommendations of this community and business group, which was convened by Council and facilitated through Dr Kim Houghton, were adopted in December 2013.

The Taskforce report presented a positive vision for Cooma-Monaro Shire.

“Cooma-Monaro’s population will again be growing, especially with people of working age, due to the vibrancy and diversity inherent in our great lifestyle which is appealing to residents and visitors alike. Cooma positions itself as a major commercial, retail, educational and services centre.

Our Shire will offer a range of employment options and we will be known for our strengths in specialist manufacturing, energy technology, agriculture and active tourism. Stronger tertiary education options will be providing a foundation for young people to live and study in the Shire, and a basis for local business innovation.”



The Taskforce report notes that maintaining the status quo will not address inherent challenges in achieving this vision. In order to progress towards its goal, positive actions in six key categories are required.

1. Education, training and retention of younger workers
2. Strategic marketing
3. Industry strategies
4. Tourism and events development
5. Council activities (townscape and internal processes)
6. Growing local businesses

Cooma-Monaro Shire Council's leadership, provision of strategic direction and prioritization of resources will be critical in addressing most challenges and in stimulating positive actions.

However, the report also notes that the entire community must share in this responsibility, particularly in relation to community expectations, business and community participation, and the prioritization and allocation of Shire and community resources.



MARKETING BRIEF & SCOPE

Cooma-Monaro Shire Council's brief calls for the plan of action for marketing to address relevant aspects articulated in the Taskforce report. The tactics required may vary as a number of individual objectives are planned within a coordinated matrix of actions.

A cogent marketing strategy that is consistent yet adaptable across individual objectives, target markets and opportunities is the optimum outcome.

It is recognized that Cooma-Monaro Shire Council has limited human and budgetary resources. This points to an increased need for more innovative marketing solutions and possibly a more phased approach in implementation timing.

Marketing activity is seen, directly and indirectly, as a significant component of the Cooma-Monaro Economic Taskforce action plan.

It is relevant to these specific areas identified by the Taskforce:

1. Education, Training & Retention of Younger Workers

- Promotion of town strength in tertiary education

- Data collection of visitor and new arrival experiences

- Community 'meet and greet' service, orientation day, welcome pack

- List of what's what, who's who, where's where to be maintained and distributed



2. Strategic Marketing

Add 'Open for Business' site to Council's website

Develop district marketing collateral and marketing strategy (collateral, channels, events etc.)

- Available land, large lot sizes, good services, good access etc.
- Promote NSW relocation allowance for buyers and renters
- Make the business case (e.g. available labour force, easy distribution access)

Link 'Visit Cooma' to 'Live in Cooma'

Signs at town entrances and link to website

Main Street parking signage to be more visible

Review services provided by the Visitor Information Centre in the context of delivering the Economic Development Plan

3. Tourism & Events

Progress Destination Management Plan activities

Include links with agriculture in the Destination Management Plan

Town Beautification Plan

Deliver an Events Strategy

Continue involvement, participation and support with TSM

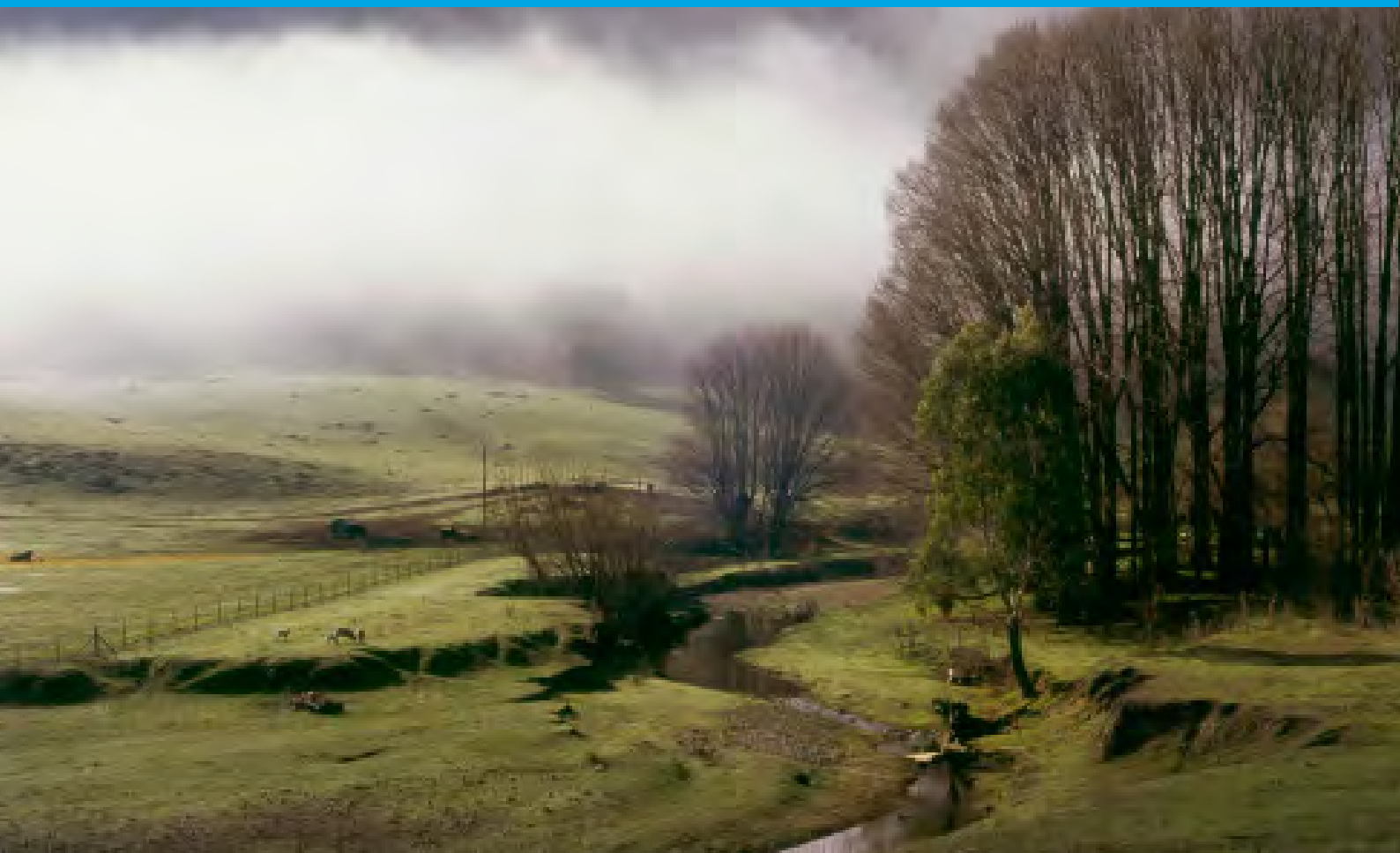
Improve Visit Cooma website and include packages

Investigate marketing opportunities through Canberra overseas tertiary students, families and impending international flight arrivals

4. Growing Local Business

Each business to 'tell its story' campaign

It is an implied imperative that the marketing strategy for the Shire must ensure that the communications platform crafted for each element to be addressed by the Taskforce recommendations is presented within a unified and complementary brand structure.



CONTEXTUAL ANALYSIS

The Place

Covering an area of approximately 5,230 square kilometres, in south-eastern New South Wales, Cooma-Monaro Shire is home to just over 10,000 residents. The population density is low with a little over 1.9 people per square kilometre.

The epicentre of the region is the town of Cooma. Its population of six and a half thousand represents about two-thirds of the Shire's residents.

Other hamlets within the LGA include Nimmitabel, Bredbo, Michelago and Numeralla. Smaller clusters of residents are found at localities such as Bunyan, Four Mile, Shannons Flat, Yaouk, Peak View, Jerangle, Rock Flat, Countegany and Kybegan.

The Monaro

The Monaro region is a unique part of Australia. North to south, it stretches from Tinderry Mountains near the southern outskirts of Canberra, to just south of the Victorian border. It is a high plateau of generally rolling plains bordered by coastal ranges dropping sharply to the east and the roof of Australia to the west in the Snowy Mountains range within Kosciuszko National Park.

The Monaro Range gently divides the catchments of the Murrumbidgee River to the north and Snowy River to the south.

Much of the area is in a 'rain shadow' and characterized by granite outcrops of a highly leached, ancient landscape, creating a steppe or prairie type environment.

Despite pockets of rich basaltic soil, the average altitude of over 900 metres and extreme winter temperatures, preclude extensive crop growing. However, the region has an historical reputation for Angus and Hereford cattle with sheep breeding having produced some of the world's finest merino wool.

Climatically, with the exception of Snowy Mountains, the Monaro region is the coldest in mainland Australia.

Historical Background

The Shire's roots are rich in indigenous history. Prior to the 1800s the Ngarigo Aboriginal tribe had occupied the greater Monaro district for some 15,000 years.

European exploration began in 1823 and the village of Cooma was surveyed in 1849.

Gold discovered at Kiandra in 1860, and other parts of the district, saw Cooma's population accelerate and the foundations as the region's administration, commercial and service centre were established.

Prior to the 20th Century, the Monaro region developed a reputation for fine merino wool. With the coming of more efficient road and rail access, the town became the gateway to the Australian Alps, now more widely known as Snowy Mountains.

However, the town's name and reputation was etched in Australian history when Cooma became the centre of Australia's largest engineering project, the Snowy Mountains Hydro Electricity Scheme.

For 25 years between 1949 and 1972, the project employed 100,000 workers with 70% from overseas. At the time, Cooma was the most multicultural town in Australia. The project's road network opened up the region to greater tourism.

In 1967, the Snowy Mountains Scheme was rated by the American Society of Civil Engineers as one of the Seven Wonders of the Modern World. Its legacy is that Cooma remains the

headquarters of Snowy Hydro Limited, the Shire's largest employer, and it retains a regional location for SMEC, a global civil engineering consultancy, spun out of the project.

In 1959, the district was the location for Academy Award-nominated feature film, "The Sundowners", starring Robert Mitchum, Deborah Kerr and Peter Ustinov.

Government Organization

The Shire's overlays of state and federal government areas include electorates of Monaro and Eden-Monaro respectively.

The New South Wales Legislative Assembly division of Monaro has approximately 48,000 electors and is currently represented by Mr John Barilaro MP. Mr Barilaro is currently Minister for Small Business and Minister for Regional Tourism.

The Federal House of Representatives Division of Eden-Monaro has approximately 100,000 electors. Constituents are currently represented by Dr Peter Hendy MP.

Queanbeyan dominates both State and Federal electorates with a city population of 38,000 people.

At a local government level, a council of nine members elected by residents administers Cooma-Monaro Shire. Councilors elect the mayor.

The Local Government Area (LGA) came into being with the amalgamation of Cooma Municipal Council and Monaro Shire in 1981. While Cooma-Monaro Shire occupies a significant proportion of the Monaro geographic region, two other LGAs cover southern sections: Snowy River to the south and west, and Bombala to the south-east.

The north-west of Cooma-Monaro Shire overlaps with Kosciuszko National Park in the Tantangara region. Here the Shire's highest elevation is reached at Mt Morgan (1,874 metres).

Regional Tourism

The Shire is within the Snowy Mountains Regional Tourism Area as designated by Destination New South Wales. Tourism Snowy Mountains Inc. is the membership-based, not-for-profit marketing entity recognized as the Regional Tourism Organization (RTO). The RTO covers LGAs of Cooma-Monaro, Snowy River, Tumut and Tumbarumba with a total population of approximately 35,000.

The region is best known for the highest point on the Australian mainland, Mt Kosciuszko (2,228 metres) within Kosciuszko National Park. It also boasts the mainland's only truly alpine areas, only glacial lakes and the southern hemisphere's leading snow resorts of Perisher, Thredbo, Charlotte Pass and Selwyn Snowfields.

The tourism region was consolidated with the completion of the Snowy Mountains Scheme, which created numerous lakes and underground tunnels with capacity estimated to be 15 to 20 times greater than Sydney Harbour.

The Snowy Mountains region's current marketing theme is: "There's more to it than you think".

Capital Region Living

Another marketing relationship is Cooma-Monaro Shire's participation in Snowy Living within the Capital Region Living program. Under the banner "a new way of life is just down the road", Capital Region Living promotes residential relocation to the region around Canberra from Crookwell in the north, Young in the west, Queanbeyan, Narooma to the east and Bombala and Jindabyne in the south. Enquiries are directed through Boorowa and Young Councils.





ECONOMIC PROFILE

Cooma-Monaro is a relatively small shire in terms of population with just over ten thousand residents. The median age of 43.3 years is older than the Australian median of 37.3 years. When compared to the other LGAs in the region (Bombala, Snowy River, Tumbarumba and Tumut), Cooma-Monaro is ranked third in terms of oldest median age.

Almost a third (29.2%) of Cooma-Monaro residents lived at a different address five years earlier. The overall Australian average is 42%.

As a general trend identified in the last Australian Bureau of Statistics (ABS) Census, the proportion of resident population over 65 years is growing slightly, while the proportion of residents 25 to 44 is declining slightly. This is similar to other shires in the region and not dissimilar to rural areas across Australia generally.

It is estimated that almost 19% of the population was born overseas. This compares to 26% across all Australia. This is the second highest in the region. Approximately 6.2% of shire residents speak a language other than English at home.

Approximately 69% of residents are able to access the Internet at home. This is the highest of the region.

Cooma-Monaro Shire Economic Summary

ABS 2011/12

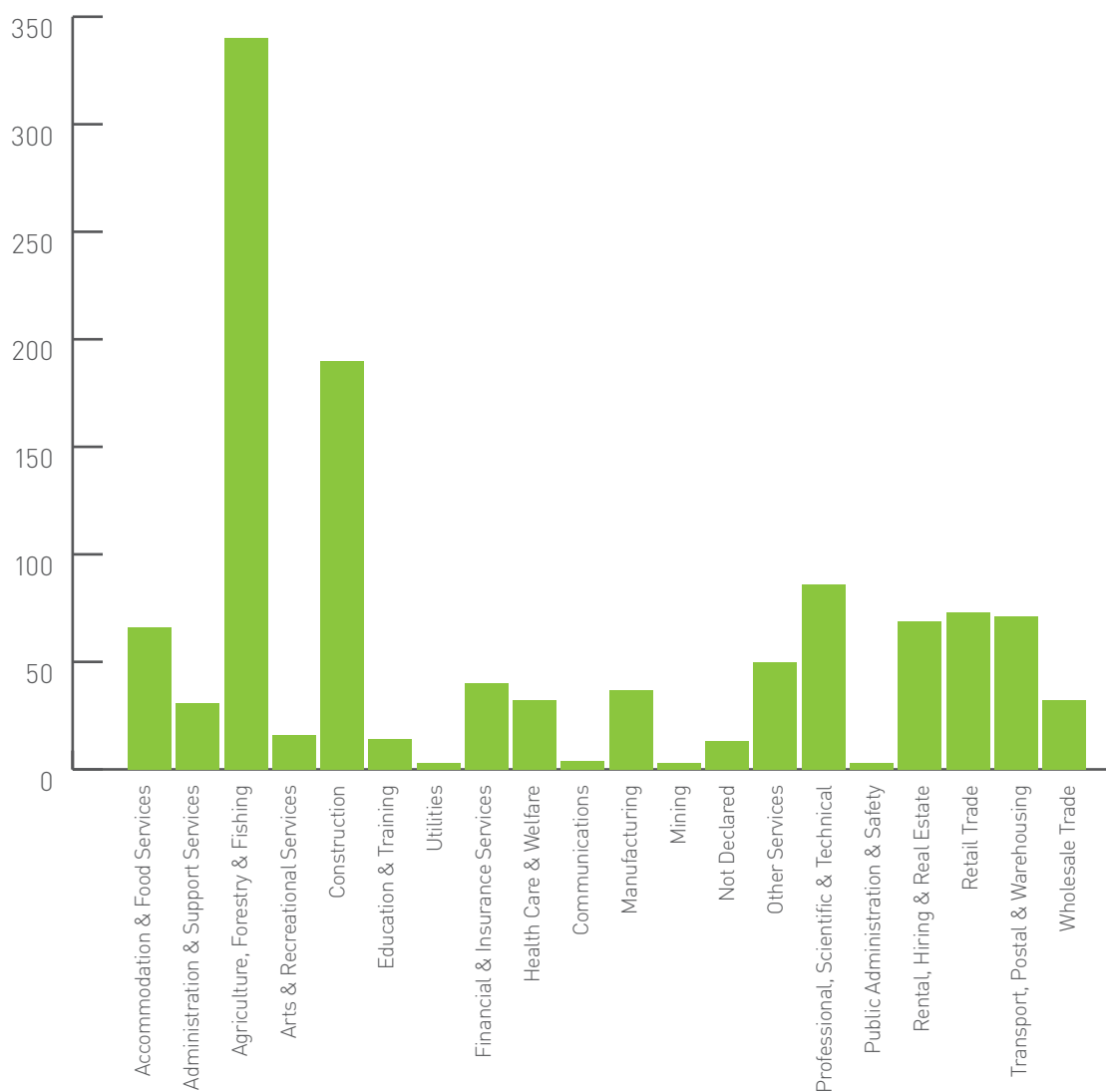
Population	10,164
Median Age	43.3 years
Businesses	1,167
Businesses with 5 or More Employees	228
Registered Vehicles	8,610
Personal Income Earners (excludes Pensions)	5,576
Value of Personal Income	\$250,800,000
Average Personal Income	\$44,975
Total Value of Building Approvals	\$10,400,000

Australian Bureau of Statistics records Cooma-Monaro Shire as having 1,167 businesses. Of these, 228 have five or more employees.

Agriculture, Forestry and Fishing is by far the largest category for numbers of businesses with 340, or 29%, registered. Construction is ranked second with 190, or 16%, of businesses.

Number of Businesses Cooma-Monaro Shire

ABS 2011/12

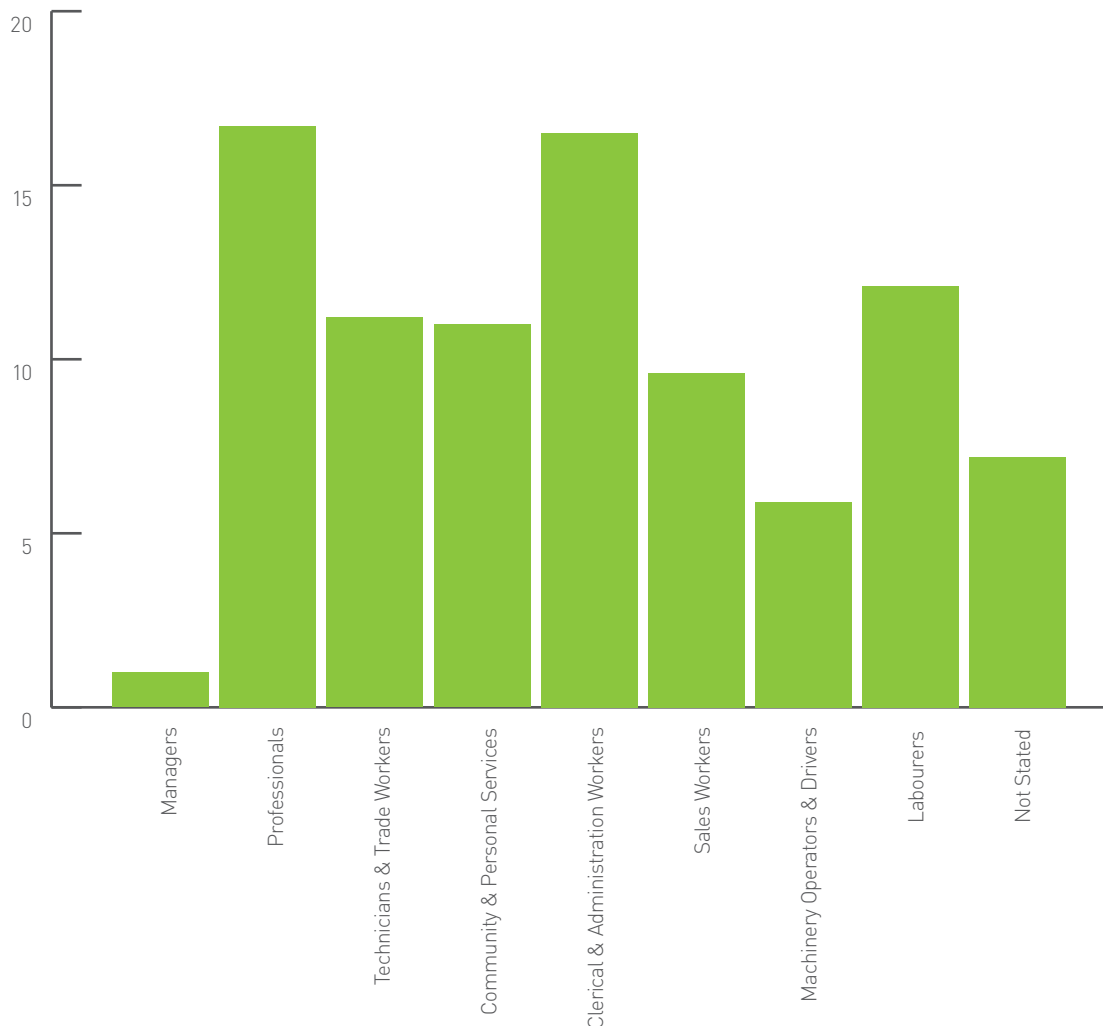


Despite a high proportion of businesses registered in Agriculture, Forestry and Fishing, and to a lesser extent Construction, it does not reflect the true picture of employment in the Shire's economy.

ABS data shows Cooma-Monaro has a strong orientation towards white-collar occupations, with 52.6% representing occupations that employ professionals, managers, sales workers, clerical and administration workers.

Wage & Salary Earners By Occupation Cooma-Monaro Shire

ABS 2011/12



Cooma-Monaro Shire is a diversified economy when compared to other similar rural and regional areas. Its position as a service centre is entrenched with over 60% of employment in service industry sectors.

This strong service orientation is led by retail, public administration and safety, health care and social assistance, accommodation and food services, education and training.

The Shire's largest employers are believed to be Snowy Hydro, Cooma-Monaro Shire Council, Birdsnest, Monbeef and Cooma Hospital.

Cooma-Monaro Shire Employment by Industry

ABS 2011/12

Industry	Percentage	Rank
Retail Trade	12.4%	1
Public Administration & Safety	12.0%	2
Health Care & Social Assistance	10.7%	3
Construction	8.0%	4
Agriculture, Forestry & Fishing	7.6%	5
Accommodation & Food Services	7.4%	6
Education & Training	7.4%	6
Professional Scientific & Technical Services	5.6%	8
Electricity, Gas, Water & Waste Services	5.0%	9
Manufacturing	4.1%	10

Public and utility services account for approximately 35% of employment. The allied industries of retail, accommodation and food services represent approximately 20%. This would appear to be a shire that caters well for residents and visitors alike.

The dispersal of employment in Cooma-Monaro Shire across numerous industry sectors is a much more balanced portfolio than what might be expected, and contrasts with many other rural and regional shires.

Regional Economic Comparisons

To gain greater perspective of Cooma-Monaro's economic position, it is useful to compare its relativity to other shires in Snowy Mountains, New South Wales and Victoria with a number of similarities.

Snowy Mountains' Shires - Employment by Industry

ABS 2011/12

Shire	Industry	Percentage
Bombala (Pop: 2,424)	Agriculture, Forestry & Fishing	30.5%
"Platypus Country"	Manufacturing	9.1%
Av Personal Income: \$42,048	Retail Trade	8.8%
	Health Care & Social Assistance	8.6%
Snowy River (Pop: 7,917)	Accommodation & Food Services	22.1%
"Spirit of The Snowy Mountains"	Arts & Recreation Services	10.6%
Av Personal Income: \$42,702	Retail Trade	7.9%
	Construction	7.6%
Tumbarumba (Pop: 3,517)	Agriculture, Forestry & Fishing	26.2%
"Experience The Magic"	Manufacturing	12.0%
Av Personal Income: \$41,838	Retail Trade	8.7%
	Health Care & Social Assistance	8.2%
Tumut (Pop: 11,290)	Manufacturing	15.8%
"Catch Your Breath"	Agriculture, Forestry & Fishing	13.4%
Av Personal Income: \$45,408	Retail Trade	10.1%
	Health Care & Social Assistance	9.9%

Other shires in the Snowy Mountains region exhibit different industry employment profiles. Tumut, Tumbarumba and Bombala's employment is heavily skewed to Manufacturing and Agriculture/Forestry industries.

Snowy River Shire, the location of the major Snowy Mountains resorts, has employment heavily skewed to Accommodation and Food Services and Recreational Services.

Selected Victorian Shires - Employment by Industry

ABS 2011/12

Shire	Industry	Percentage
Mansfield (Pop: 8,067)	Accommodation & Food Services	13.1%
"High Country, Lakes & Rivers"	Retail Trade	11.9%
Av Personal Income: \$37,562	Education & Training	11.2%
	Agriculture, Forestry & Fishing	9.4%
Alpine (Pop: 12,138)	Accommodation & Food Services	13.6%
Av Personal Income: \$37,235	Retail Trade	11.2%
	Health Care & Social Assistance	10.6%
	Agriculture, Forestry & Fishing	9.7%

Victoria's high country shires, for example, have Accommodation & Food Services and Retail Trade sectors as their main employment industries.

Selected New England Shires - Employment by Industry

ABS 2011/12

Shire	Industry	Percentage
Glen Innes Severn (Pop: 8,881) "Celtic Country" Av Personal Income: \$33,262	Agriculture, Forestry & Fishing	18.7%
	Health Care & Social Assistance	11.9%
	Retail Trade	10.8%
	Accommodation & Food Services	7.2%
Armidale Dumaresq (Pop: 25,278) "New England High Country" Av Personal Income: \$42,594	Education & Training	20.7%
	Health Care & Social Assistance	13.0%
	Retail Trade	12.4%
	Accommodation & Food Services	8.7%

Glen Innes Severn is still heavily oriented towards Agriculture, Forestry & Fishing sector. Education is unsurprisingly the focus of Armidale Dumaresq Shire.

Selected Mid-West Shires - Employment by Industry

ABS 2011/12

Shire	Industry	Percentage
Mudgee Mid-Western (Pop: 23,493) "In Every Sense Perfection" "A Prosperous Community We're Proud to Call Home" Av Personal Income: \$45,260	Mining	13.8%
	Retail Trade	11.3%
	Agriculture, Forestry & Fishing	9.5%
	Health Care & Social Assistance	9.2%
Orange (Pop: 40,108) "Australia's Colour City" Av Personal Income: \$50,126	Health Care & Social Assistance	16.2%
	Retail Trade	11.4%
	Education & Training	8.7%
	Manufacturing	8.6%

Employment in Mudgee Mid-Western Shire is skewed to the Mining sector while in Orange it is the Health Care & Social assistance sector.

Selected A.C.T. Border Shires - Employment by Industry

ABS 2011/12

Shire	Industry	Percentage
Yass Valley (Pop: 15,981) "The Country, The People" Av Personal Income: \$55,717	Public Administration & Safety	19.1%
	Construction	10.2%
	Health Care & Social Assistance	8.6%
	Education & Training	8.1%
Palerang (Pop: 15,083) Av Personal Income: \$54,806	Public Administration & Safety	23.3%
	Construction	10.2%
	Professional Scientific & Technical Services	8.9%
	Retail Trade	7.6%

Palerang and Yass Valley Shires along with Cooma-Monaro share a border with Australian Capital Territory. However, unlike Cooma-Monaro, the employment of their residents reflects Canberra employment with a distinct Public Administration & Safety orientation.

As housing develops creating homes for a Canberra workforce, Construction is a significant employment sector. Both Palerang and Yass Valley Shires boast an average personal annual income substantially more than Cooma-Monaro.

Relevant Observations

Employment in Victoria's high country shires is much more oriented towards Accommodation & Food Services than in Cooma-Monaro. Retail Trade represents a roughly similar proportion of employment. These shires enjoy significant through traffic as alpine gateways in winter, and growing summer tourist arrivals, and are juxtaposed to the region's snow resorts.

This is not so much the case with Cooma-Monaro, where in the Snowy Mountains region, Snowy River Shire has the dominant Accommodation & Food Services sector. The development of the new Jindabyne from the 1960s has progressively impacted on this sector's employment in Cooma-Monaro. This has eroded the tourism sector's relative economic importance.

New South Wales' two main high elevation New England shires are as different as chalk and cheese in terms of employment. Both are service centres with high levels of through traffic and both exhibit strong employment in health and retail. However, Armidale has achieved distinction as an education hub while Glen Innes' primary strength remains in agricultural employment.

In New South Wales' Mid-West, Orange and Mudgee have distinctly different dominant employment sectors, yet have developed an external positioning that is similar to each other. With mining the dominant employer, Mudgee has positioned the region as a destination for quality local produce, fine wine, gourmet food and events.

Orange, on the other hand, has the health and social industry dominating employment. Nonetheless, the city has also positioned its brand as a food, wine and events destination.

Palerang Shire actually shares a smaller length of border with Australian Capital Territory than Cooma-Monaro Shire. However, Cooma-Monaro's northern neighbor has its residents' employment clearly dominated by the public sector of Canberra and Queanbeyan. The shire's average personal income is over \$54,800 per annum, ten thousand more than Cooma-Monaro.

The shire does not have a distinct market position other than its relativity to Canberra. However there is a significant heritage positioning for Braidwood and Bungendore with an increasing emphasis on wine and gourmet food in the area.

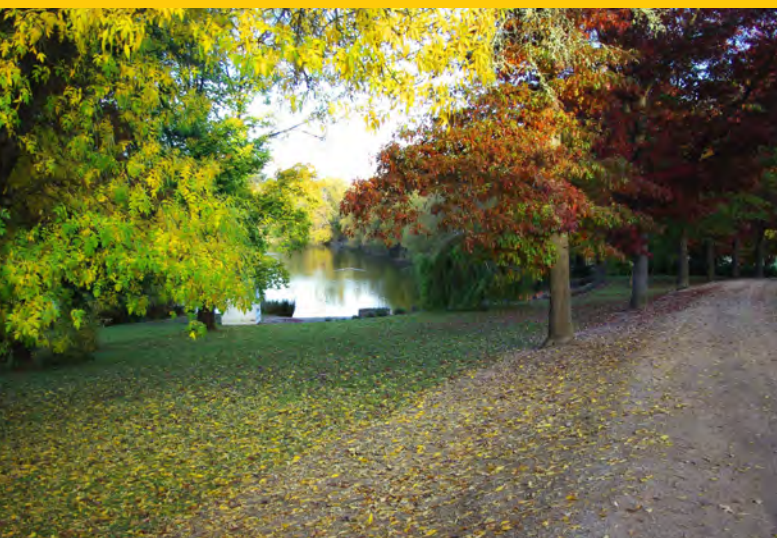
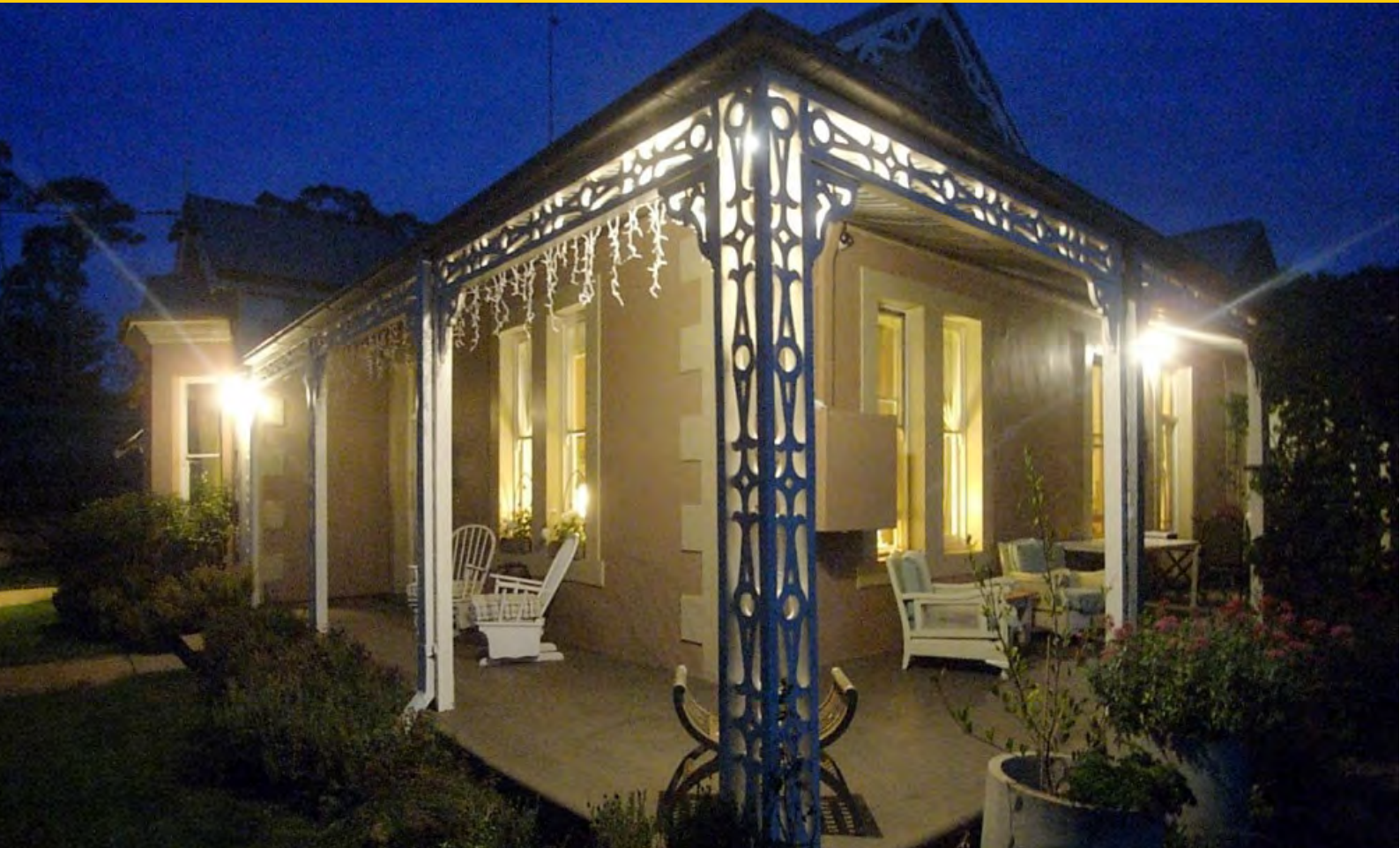
Cooma-Monaro Shire has a relatively broad economic base with a skew to white-collar employment. Compared to other shires, it is a well-developed services centre.

Cooma is the largest town in the Snowy Mountains region and it is the traditional gateway to the alpine region. The Shire Council has historically taken a leadership posture by underscoring Cooma, in a corporate sense, as the Capital of the Snowy Mountains region.

However, this has largely been a latent positioning without resourced brand or product development. As Snowy River Shire's Jindabyne continues to develop its gateway perception and commercial offering, Cooma will be challenged. This could have significant erosive economic effects.

Nonetheless, the positioning for Cooma has credibility with all that "capital" implies as a regional service centre, gateway to Snowy Mountains and significant administrative sector as reflected in Cooma's employment economy.

Compared to the analysis of other selected shires, Cooma's "Capital of the Snowy Mountains" positioning more accurately mimics the Shire's broad based economic profile. However, in a marketing context, it is perceptually challenged and Cooma either needs to use it to advantage, or risk losing it in the long term.



THE VISITOR ECONOMY

Regional Tourism

Tourism is very important driver for the overall economy of the Snowy Mountains region.

Economic Impact

A Tourism Research Australia (TRA) study showed that tourism across the aggregated Snowy Mountains region represents approximately 17.1% of the region's economic output as the industry's ripple effect positively impacts non-tourism sectors. This is the fourth highest in Australia.

ABS data suggests this strong economic representation of tourism is heavily skewed to Snowy River Shire. Nonetheless, Cooma-Monaro is the largest town and the major gateway to the region with substantial economic benefits derived from tourism. The Shire has opportunities to improve and optimize its relative position within the region's visitor economy.

Total Visitors

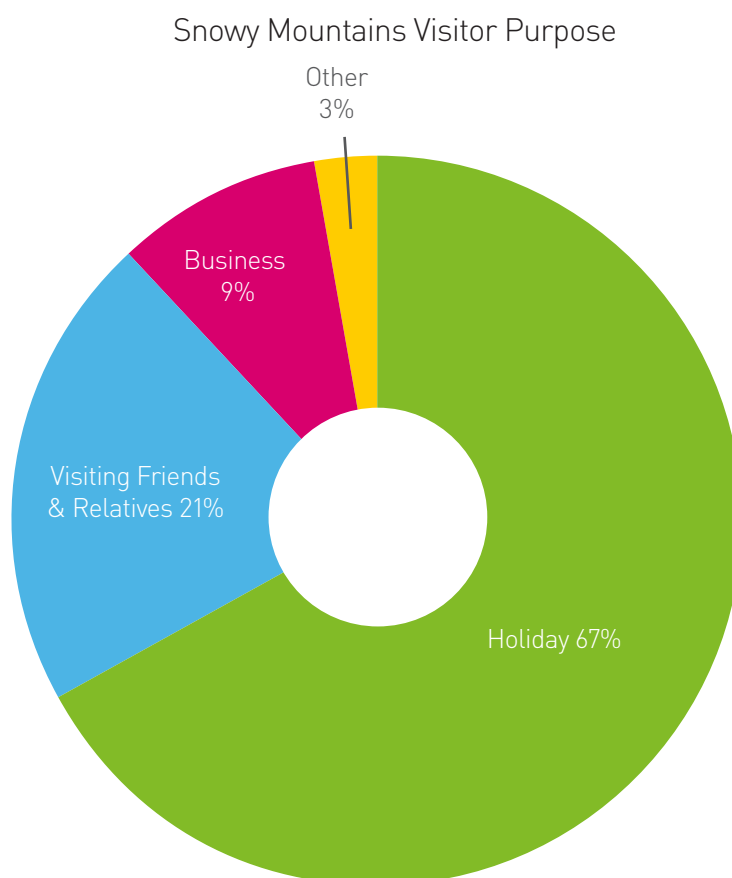
TRA research shows that visitors to the Snowy Mountains region in the year to 30 September 2014 totaled 1,213,700. This was a decline of 6.8% on the previous year. While total visitor nights declined by only 1.0% to 2,640,100, overall expenditure fell by 8.3% to \$580 million.

Domestic Overnight

The region's share of NSW's domestic overnight visitors declined slightly to 2.6%. Three quarters of visitors came from within New South Wales.

Domestic Source	Share	Rank
Regional New South Wales	40.3%	1
Sydney	35.5%	2
Australian Capital Territory	12.0%	3
Victoria	6.4%	4
Queensland	4.1%	5
Other States	1.7%	6

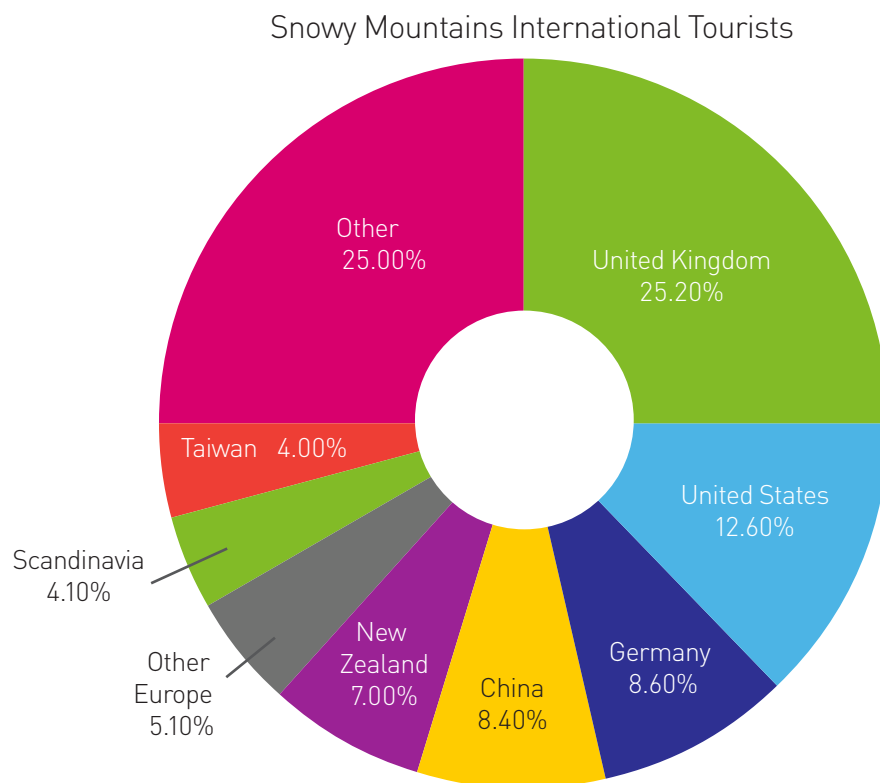
Over 90% of domestic overnight visitors arrive by private vehicle.



International

International overnight visitors represent a small component of the region's overall tourists.

The year ended September 2014 recorded only 19,300 international visitors. This was a decline of 6.4%. For perspective, all NSW increased international visitors by 6.6% in the period.



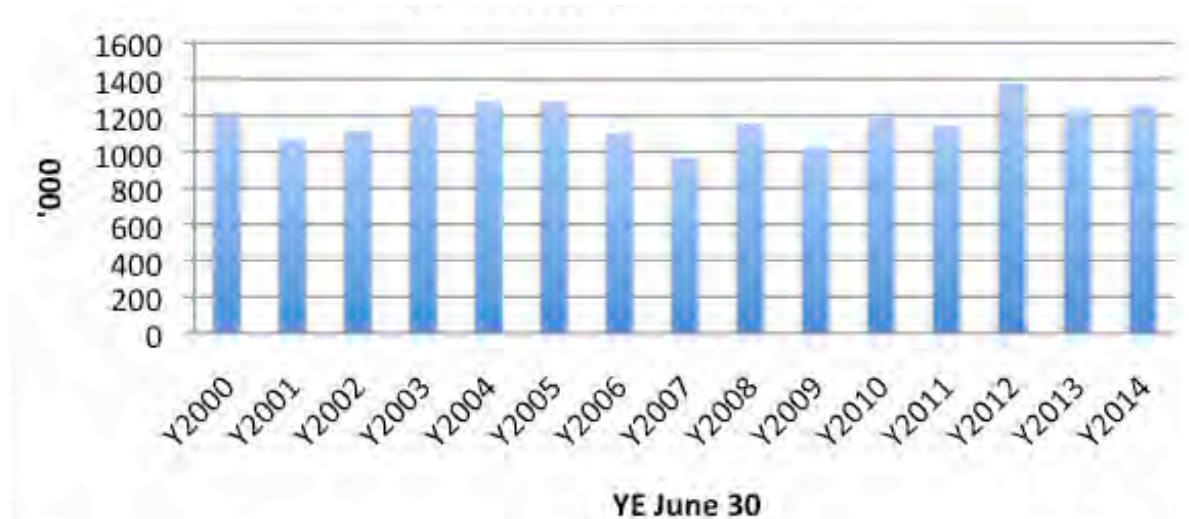
Daytrips

Domestic daytrip visitors to the Snowy Mountains region are estimated at 519,000 in the year to 30 September 2014. This was an 8.2% decline. The category expenditure was estimated at \$58 million.

Trends

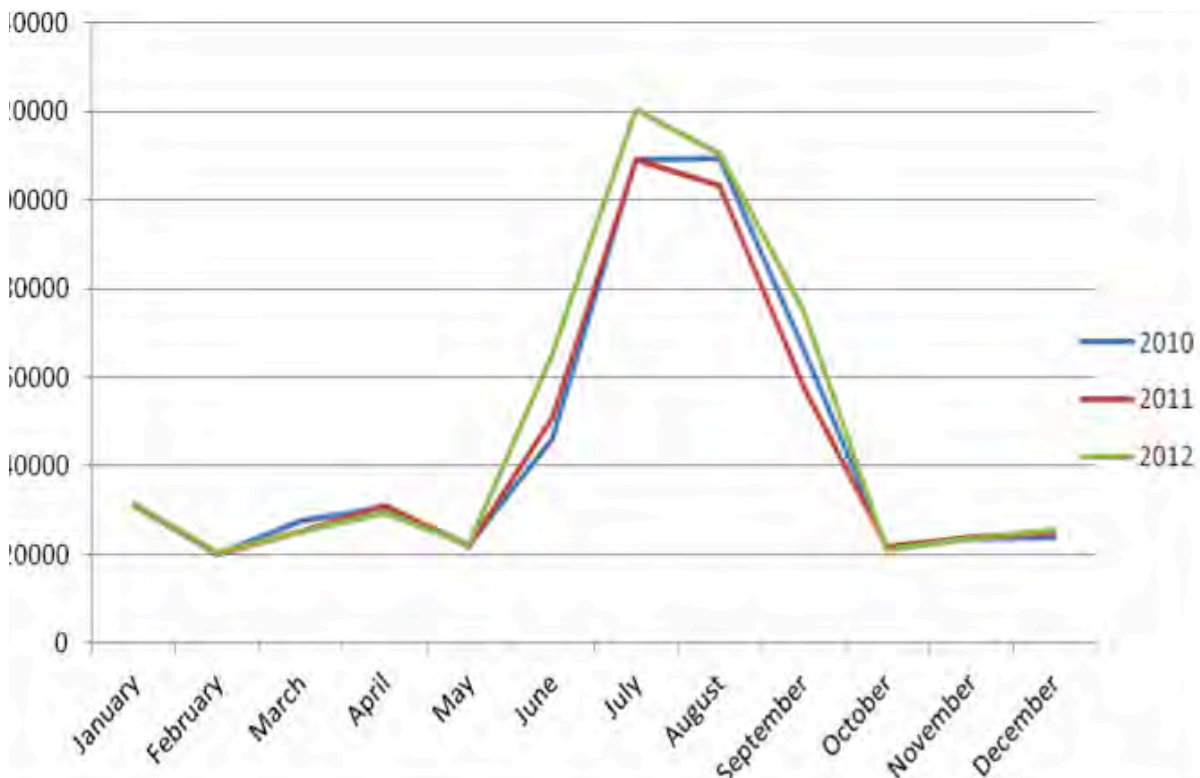
Annual visitor numbers to the Snowy Mountains region have not shown any sustained growth over the last 14 years. Some years are up, others are down with a general correlation to winter snow falls.

Snowy Mountains Total Annual Visitors



Seasonality

Seasonality is a major consideration when analyzing the region's tourist arrivals. For example, vehicle entries to Kosciuszko National Park show a heavy skew to winter months.



Cooma-Monaro Shire Tourism

Visitation

There is generally limited research data available into the Shire's tourism industry. However, the National Visitor Survey rolling four-year average to September 2014 suggests that 301,000 visitors spent \$84 million in Cooma-Monaro in the last period.

Compared to the broader Snowy Mountains tourism region, this is about 25% of regional visitors but only 14% of regional expenditure.

Accommodation

According to the ABS June 2014 Quarter Report, Cooma-Monaro has 11 tourist accommodation establishments with 15 or more rooms and a total stock of 275 rooms. This compares to 64 establishments and 2,457 rooms across the region.

In the quarter, a total capacity of 25,000 room-nights was available in Cooma-Monaro. This represents approximately 14% of a total 175,000 available across the total Snowy Mountains region.

Occupancy was 35.8%, up 3.9 percentage points on a year earlier. This contrasts with an overall Snowy Mountains occupancy of 25.6%, which was down 2.2 points.

In the same period, regional NSW produced an occupancy rate of 49.4% and NSW 62.8%.

Accommodation Takings

Takings for Cooma-Monaro in the period totaled \$900,000. This is only 13.4% of the total for the Snowy Mountains region (\$6.7 million). It was down 1.1% on a year earlier, while Snowy Mountains was down 16.9%.

Average room rate was \$104.42 compared to the region's average of \$150.25. Yield was a low \$37.40.

Based on this result, annualized takings for Cooma-Monaro would be \$3.6 million. To demonstrate unrealized potential, if the Shire’s accommodation was able to reach the regional NSW average, it would deliver \$5 million on an annualized basis at existing average rates.

With approximately 100,000 room nights available in Cooma-Monaro, at current average rates, the potential takings value of the stock is over \$10.4 million.

Activities

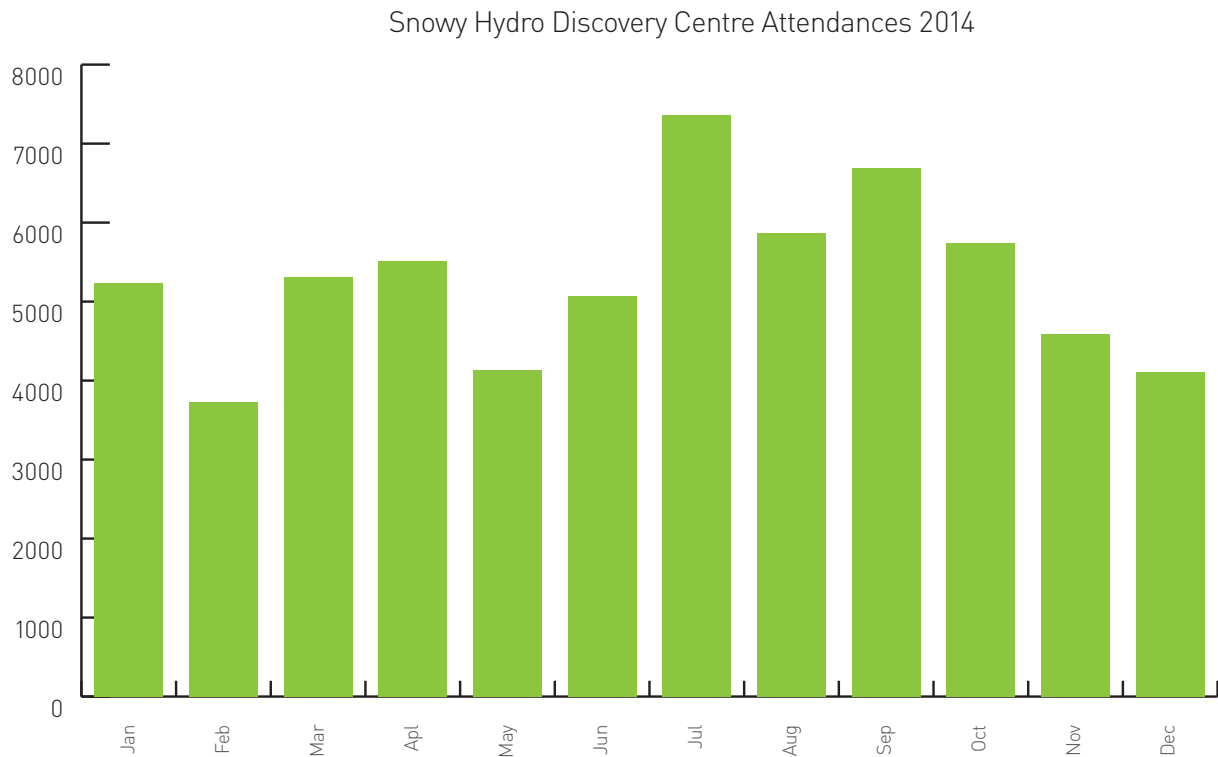
The main activity for domestic overnight tourists in Cooma-Monaro Shire is recorded as Eating Out at Restaurants followed by Visiting Friends & Relatives. Interesting Snow Sports are not included.

Activity	
Eat Out at Restaurants	36%
Visiting Friends & Relatives	30%
General Sightseeing	24%
Pubs & Clubs	22%
Fishing	21%

Seasonality

Cooma’s seasonality does not appear as pronounced as the whole Snowy Mountains region. There is nonetheless a winter skew.

As the major developed attraction product in Cooma, Snowy Hydro’s Discovery Centre is a credible metric of visitor seasonality. Its attendances see school holiday periods and winter strongly represented.



There is also an emphatic skew to winter by vehicular traffic on the Monaro Highway.

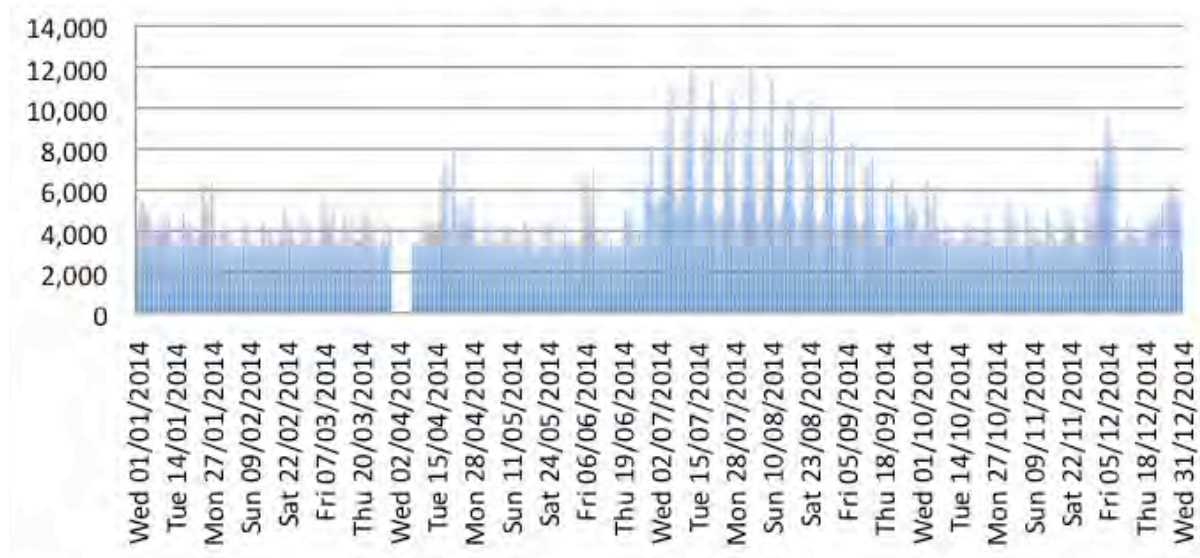
In calendar year 2014, 1,701,073 two-way traffic was registered at Bunyan according to RTA. Vehicle numbers are seen to spike in the July to September period. Public holidays and school holiday periods also show significant increases.

By contrast, Snowy Mountains Highway at Nimmitabel shows no winter skew, with a constant traffic flow all year round, except for increases on public and school holidays.

Monaro Highway Traffic Counts

Bunyan

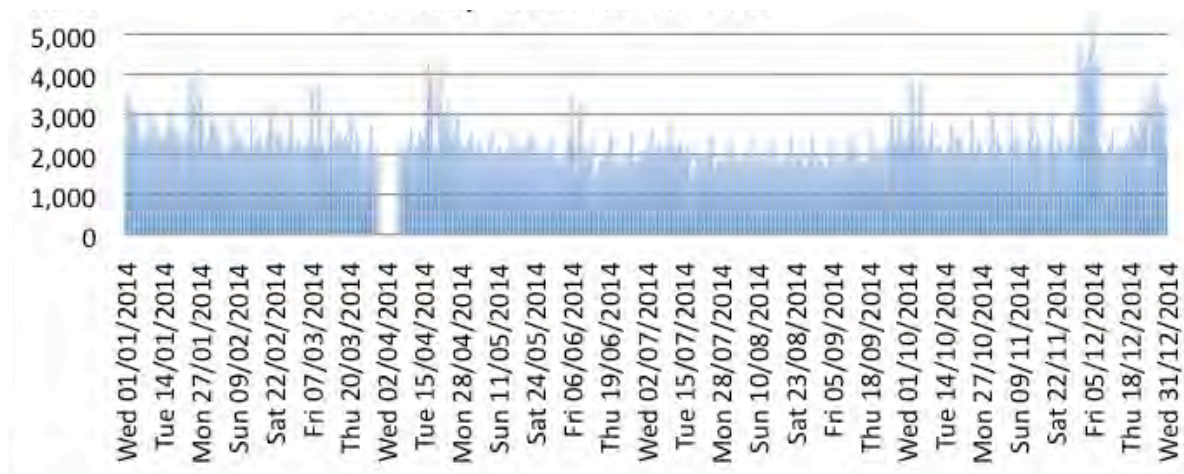
1 January - 31 December 2014



Snowy Mountains Highway Traffic Counts

Nimmitabel

1 January - 31 December 2014







STRENGTHS & OPPORTUNITIES

Understanding the key drivers and dynamics of Cooma-Monaro Shire, with Cooma as its urban focus, has identified a number of key strengths. These present numerous possibilities for economic development.

Enhancing those strengths that have capacity to positively influence the local economy, through packaging and promotion within a cogent marketing strategy consistent with Taskforce recommendations, is the objective.

The Shire's primary strengths have been identified as follows:

- Geographic Location
- Service Delivery
- Diverse Employment
- Corporate Headquarters
- Amenity
- Cost of Living
- Community Safety
- Highway Tourists
- Snowy Mountains
- Accommodation Capacity
- Leisure & Tourist Attractions
- Food & Produce
- Monaro Agriculture
- Events Program
- Information Centre

Geographic Location

The Shire's location is its biggest strength and biggest opportunity.

Cooma-Monaro shares a common border with Australian Capital Territory. This has proved very beneficial to other shires, such as Palerang.

Clearly, as Canberra continues to grow, with a conurbation ultimately spreading beyond its borders, opportunities in the north of the Shire would need to be considered for residential and commercial property development.

If the Shire wished to optimize positive economic impact from Canberra's suburban expansion, the localities of Williamsdale, The Angle, Burra and Michelago represent the most obvious areas to be assessed.

While this is a long-term issue of vision and local government planning, there are many relevant examples from around Australia of the positive economic and marketing outcomes that can be derived to benefit the whole Shire through the overflow of nearby cities.

The location of Cooma itself is also positive for residential and business development. It is just far enough away from Canberra and Queanbeyan for it to be sustained as a regional centre servicing the Monaro, eastern Snowy Mountains and Kosciuszko National Park.

However, Jindabyne is progressively challenging Cooma's role as a Snowy Mountains service centre particularly within the Accommodation & Food Services and Retail Trade sectors.

Cooma is advantaged by its crossroads location. Roughly an hour from A.C.T., an hour from the South Coast and an hour from the Southern Hemisphere's major snow sports destination is a positive attribute. This intersection of traffic flow means it is a natural hub.

Crucially, Canberra's new international airport is just over an hour away. This favorable location has benefits for commercial, tourism and lifestyle sectors.

Service Delivery

The proximity to Canberra also has advantages in expeditious service delivery such as logistics, freight, postal, broadband, courier, medical and pathology to name a few.

Cooma has a midsize regional hospital, medical centres, ambulance, fire services and emergency services. The town provides a choice of public and private schools. The new Cooma Universities Centre is a significant initiative as a tertiary education facility.

A proposal to provide free Wi-Fi in the central Sharp Street area is a positive initiative for residents, businesses and tourists. It would provide additional encouragement for highway traffic to take a break in Cooma.

There is also an opportunity for Cooma to become grey nomad friendly with appropriate RV parking and hygiene facilities.

Diverse Employment

The broad base of employment in Cooma is beneficial to those considering relocation to the Shire. It means more chance of securing a role to fit a larger range of experiences and skills than in many other regional areas.

Corporate Headquarters

It is positive enforcement for Cooma-Monaro Shire that Snowy Hydro Limited retains its corporate headquarters in Cooma and is the community's largest employer.

Additionally, other significant companies in diverse industries delivering excellence and success include Birdsnest and Monbeef. This is a commercial endorsement of the Shire.

Amenity

Nestled within a pleasant dale at the base of Mt Gladstone, Cooma presents an almost unexpected sense of arrival from all directions with a welcoming town environment. Sharp Street usually expresses a vibrant dynamic. A streetscape upgrade and beautification program is underway.

The town boasts major supermarkets, active church communities, sporting clubs and over 40 restaurants and cafés. Cooma delivers many facilities expected of a much larger town.

Cost of Living

Housing is a very important factor in the Australian economy. In particular, escalating prices in major cities has created a growing issue with housing affordability.

However, living in Cooma has major advantages in terms of housing affordability. In the 12 months to 31 December 2014, freestanding house prices in Cooma were less than half those in Canberra and just 25% of Sydney's house prices.

Centre	Median Freestanding House YE Dec 14
Sydney	\$1,005,000
Melbourne	\$646,500
Canberra	\$626,200
Brisbane	\$547,200
NSW	\$544,000
Cooma	\$249,000

The lower mortgages required to purchase comparable housing in Cooma significantly lowers the cost of living and potentially improves household budgets and lifestyle opportunities.

These values flow on to commercial property with lower costs across the board.

Community Safety

Cooma-Monaro has seen a steady reduction in crime rates in the last two years. Crime has fallen across the Shire with a decrease of nearly 40 per cent in robberies.

This one of the largest reductions across New South Wales and, according to Bureau of Crime Statistics, Cooma is performing much better than most other regional areas in New South Wales.

Highway Tourists

Originally, Cooma was the only jump-off point for visitors to Kosciuszko National Park. With the development of relocated Jindabyne in the 1960s and railway closure, it has progressively become more a transit break for vehicular traffic.

This is particularly evident in winter. This sees visitors largely stopping for refreshments with fast food, drinks and toilets popular in a frenetic rush to the snow. Retail impact is generally limited to petrol, ski hire and winter clothing.

However, Jindabyne's growing commercial emphasis is a long-term threat to Cooma's retail trade, just as it has eroded the town's accommodation sector.

RTA figures show a tsunami of traffic flowing through Sharp Street, particularly in winter. This is one of the Shire's biggest opportunities with an estimated one million people driving through the centre of Cooma each year.

Encouraging an increased proportion to take a break, stop longer or stay overnight would deliver significant economic benefits.

Snowy Mountains

The Snowy Mountains attractions are the magnet for most highway tourists. By Cooma embedding the region's attractions much more in the fabric of its own culture and market positioning there are potentially significant economic dividends.

Additionally, given Cooma's regional gateway status there is an opportunity to encourage the commercial operators of Snowy Mountains and Kosciuszko National Park to open outlets in town. This would give them an additional marketing opportunity and would assist Cooma in its marketing and economic aspirations.

Accommodation Capacity

Cooma has major unrealized capacity with approximately 100,000 room nights available annually. Occupancy is only about 36%. Given the high level of highway travellers, the opportunity to economically activate a greater proportion of room supply is compelling.

Cooma is a great base from which to explore the region. This proposition requires greater comprehension within visitor travel plans and market packaging.

This is particularly important in winter when the highway traffic doubles.

Positioning Cooma as a well placed and cost effective jump-off point could be redeveloped to have a positive impact on occupancy rates. Consideration should be given to the cost-benefit of a snow shuttle bus service perhaps underwritten by an association of accommodation and retail owners.

Leisure & Tourist Attractions

Cooma's most successful single local attraction for out-of-town visitors is the unique Snowy Hydro Discovery Centre. This free entry, gateway attraction welcomes in excess of 60,000 guests a year. It is open seven days a week.

New South Wales Corrective Services Gaol Museum offers free admission five days a week with limited hours.

Raglan Gallery and Cultural Centre in Lambie Street is open five days a week. It has potential as a unique venue for contemporary and historical Monaro and Snowy Mountains visual art and photography with appeal to the tourist market.

Birdsnest retail outlet has developed a destination superstore concept in Sharp Street, near Lambie Street, with increasing success. It opens six days a week.

Recently closed Cooma-Monaro Historic Railway is believed to have hosted up to 10,000 passengers a year. It is understood that the attraction is unlikely to reopen in the short term.

Visitor numbers to Cooma's parks and reserves such as Nanny Goat Hill and Mt Gladstone lookouts, and Aviation Pioneers Memorial areas are unknown. Centennial Park, with Avenue of Flags and Mosaic Time Walk, in the very centre of town has significant visitation.

Lambie Town Walk and Lambie Gorge Trail are pedestrian activities through three notional heritage precincts around Cooma. Visitor participation is unknown. North Ridge Reserve is also a bushwalk trail close to town.

Bike Trails are available along Cooma Creek. Mountain bike trails are available at Mt Gladstone.

However, the most significant attractions positively impacting Cooma are outside the Shire.

The world famous 690,000-hectare Kosciuszko National Park is the major factor drawing visitors to the region throughout the year.

Snow sport is the leading regional leisure activity. Mountain biking (MTR) is gaining momentum as facilities are developed at Thredbo, Crackenback and Jindabyne. Hiking and horse riding are popular year round. Fishing for trout and salmon in the region's rivers and man-made lakes is also popular.

TRA records that main activities for domestic overnight visitors to Cooma are Eating Out, Sightseeing, Pubs & Clubs and Fishing. The non-inclusion of snow sports and MTR points to an opportunity for development. This also feeds into the need to reinforce Cooma's Snowy Mountains market positioning.

Food & Produce

Cooma boasts over 40 restaurants and cafés, yet it does not have a reputation for food. Clearly, the market demand for the quick breaks of highway tourists has generally driven a certain type of food menu. However, given the diversity of produce available from the Monaro and the mountains, the opportunity for product development is obvious.

There are many examples of regional towns developing reputations for gourmet food offerings that feature local produce. Beechworth, Bright, Daylesford, Orange, Mudgee and Dunkeld are food destinations that have a local menu narrative that attracts year round visitors searching epicurean discoveries.

A strategic opportunity could be developed in establishing a cooking school or community kitchen that develops recipes and courses around Monaro and Snowy Mountains produce.

The catalyst could be a local restaurant and producers association or an initiative that sees the establishment of a Jamie Oliver Ministry of Food centre. This type of facility would generate many marketing and PR opportunities.

Monaro Agriculture

The Monaro is a unique geographic feature and agricultural region that has potential for tourism development. In particular, many agricultural activities can be packaged for international arrivals. Farmstays and farm tours are popular with Asian tourists.

There are many options as Canberra's international airport progressively welcomes flights from Asian ports. Already fledgling truffle and private garden tours are being conducted. Others need professional development and appropriate packaging.

A good example is the success of Tasmania's Currunga Farm and Bridestowe Estate, which now attract significant numbers of Asian visitors, in a state that does not have an international airline service.

The opportunities are not limited to leisure tourists. Cooma has already hosted international and national business groups studying farming practices on the Monaro.

Events

Cooma has established a rich portfolio of local and regional events. Most are community based and add dynamism to local society and culture. These are important in showcasing local attributes and nurturing ethos.

The growing recognition outside the Shire of a number of events is drawing new visitors and therefore improved economic outcomes.

Strategically planned events can be a valuable marketing tool to accelerate economic development. It generally requires a two-tier approach.

An annual base schedule that nurtures participation and dynamically activating the town creates an inclusive and colorful community. An overlay of larger strategic events with the objective of drawing large numbers of attendees or participants from outside the Shire is important in bringing new expenditure and material economic impact to Cooma.

These more hallmark events should be developed to underscore the destination's core values and brand personality. Events of this nature can deliver stellar marketing objectives and have major socio-economic outcomes.

Cooma has developed a sound events strategy that is designed to support key local events, encouraging their development and exploring hallmark event opportunities.

Signature events that could be considered include a winter festival, food festival, music event, and national cycling and MTR events perhaps in conjunction with Thredbo and other shires.

Cooma already has the Snowy Ride, various auto events, National Busking Championships and rodeo each capable of greater scale. It also has a number of good event venues close to the centre of town.

Centennial Park is heavily utilized for events. It has been provided with adequate facilities to stage a wide variety of activities. It is a strategic location for economic flow-on to the town's retailers.

Importantly, it is able to flag down through traffic to take a break and explore the activity. This could be tactically effective on Fridays and Saturdays in winter and school holidays when traffic reaches its peak.

Cooma's Multifunction Centre at the Showground is another venue that is well equipped for business conferences and seminars. Polo Flat Racecourse is also underutilized and is another option for large outdoor events close to town.

Visitor Information Centre

In 2014, Cooma's Visitor Information Centre registered over 52,000 visitors. This is over 140 people a day on average, and is similar to Snowy Hydro Discovery Centre's attendance.

However, there has been a progressive decline from regular attendances of around 90,000 a year recorded just 12 to 15 years ago. Despite this decline in traffic, the location of the centre is opportunistically in the heart of town, next to Cooma's main public events venue.

It is believed that by giving the centre greater visibility it can play a more effective role as the human face of the community for locals and visitors alike.

The function of the facility is already transitioning into a broader community information service. This is to be encouraged as a valuable point of contact for tourist, community and economic development information.

The centre should consider enhancing sightlines and improving its "welcome quotient" by extending into Centennial Park with an attractive café annex encouraging visitors to stop.



MARKETING STRATEGY

There are many facets to be considered in delivering economic development for Cooma. It is evident that the Shire has numerous strengths with significant marketing potential.

A professionally coordinated marketing approach that underscores Cooma's core values and develops a distinctive brand posture will be beneficial in generating positive outcomes.

In a practical sense, it is understood that realizing this potential is a long-term objective that requires adequate human and budgetary resources.

The main elements that need to be considered in the long-term development of a marketing strategy include:

- Product
- Price
- Place
- Promotion
- People
- Processes
- Physical Environment

However, the Shire's marketing strategy will initially focus on product presentation and the first stage of promotion in order to create the necessary foundations for Cooma to get out of the starting blocks and progressively move forward in achieving its economic goals.

Product Concept

The initial research and analysis of Cooma's product and its inherent concept has provided necessary insights into the Shire's requirements for sustained economic growth.

Understanding of the dynamics of the product concept in order to showcase its best qualities and most favorable features is of paramount importance.

It is recognized that fine-tuning a destination product is far more complex than reformulating fast moving consumer goods (FMCG) or a services offer. Geography, infrastructure and cost of civil works are factors that make it prohibitive in improving the marketability of many destination products.

Cooma has recognized the need to improve its product concept. In this regard it has initiated a town beautification program. This marketing strategy aims to expand the welcoming nature of the town and directly refer to the wide range of features and activities available to residents and visitors.

This is potentially encouragement for operators to participate in developing and packaging product.

Brand Development

Cooma-Monaro Shire has already adopted a strong corporate brand position as: Capital of The Snowy Mountains. The diversity of Cooma as the main regional service centre and the town's size gives credibility to the claim.

This umbrella leadership proposition, however, requires strategic enforcement through marketing substance to enhance the positioning. One strand of the strategy is for Cooma to exert greater ownership of the Snowy Mountains region.

Cooma-Monaro Shire is the main gateway to the Snowy Mountains region and has credibility in its claim to be the Capital of the Snowy Mountains.

However, this has largely been a latent positioning that has referred to its service centre status rather than integration with the region's attractions. Over several decades, Jindabyne has progressively presented itself as the gateway to Kosciuszko National Park and alpine resorts.

The strategy is for Cooma to reassert its "capital" brand positioning by becoming more integrated in the Snowy Mountains region and proactively resisting the perceptual erosion triggered by Jindabyne's development.

Branding is more than a logo and tagline. It is more to do with emotion, attitude and posture, and is often expressed as goodwill.

Cooma's Capital of the Snowy Mountains brand positioning has long-term application. It satisfies the most important aspect of brand: the need to be differentiated. It is also relevant to the encouragement of economic development. It offers prestige but needs to be enabled through a greater market understanding of Cooma's integration in the region.

Promotion

Among other things, the marketing strategy is to identify common denominators that enable an integrated approach that have potential to achieve tactical synergies across short and long-terms.

In this regard, for integrated marketing activity, Cooma is treated as a destination. Not just for tourists but for new younger residents and families, new business establishments and relocations, new jobs and as a destination for investment dollars.

Quite simply, the objective is to encourage target respondents in each category to come to Cooma.

These individual components of economic development are integrated under the headings: **LIVE, WORK, INVEST, PLAY.**

The following concepts are designed to articulate the strategy and express the communicative style through these examples.

SO
MUCH
TO
LOVE



SO
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SO
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SUMMARY

Building on the Shire's existing strengths and packaging Cooma to appeal to residential, commercial and visitor sectors is the initial marketing strategy for improved economic development.

With limitations to the human and budgetary resources available a more phased and tactical approach is required.

Creating a stronger sense of arrival – not just in Cooma, but Snowy Mountains – will serve the Shire's economic objectives. The warm welcome expressed in streetscape and amenities is designed to position the Shire as the gateway to so many adventures and experiences.

The imagery is crafted to refocus Cooma as the Capital of the Snowy Mountains and at the heart of so many experiences and choice.

Highway traffic is an enormous potential market literally on Cooma's doorstep. Marketers usually have to invest significant resources to achieve this level of traffic.

However, the challenge is convert it to greater economic benefit by getting an increased proportion to stop, shop and consider staying in Cooma in the short and long-term.



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