Central NSW Tourism

Destination Management Plan

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Acronyms

ACT	Australian Capital Territory
ADS	Approved Destination Status
AICST	Asia-Pacific Economic Cooperation International Centre for Sustainable Tourism
ARTN	Australian Regional Tourism Network
Centroc	Central NSW Regional Organisation of Councils
CCIA	Caravan and Camping Industry Association
CNSWT	Central NSW Tourism
DMP	Destination Management Plan
DNSW	Destination New South Wales
FIT	free independent traveller
FEM	festivals/events/markets
ICOMOS	International Council on Monuments and Sites
IVS	International Visitors Survey
LGA	local government area
NGO	non-government organisation
NPWS	National Parks & Wildlife Service
NVS	National Visitors Survey
OBC	Orange, Blayney, Cabonne
RMS	Roads & Maritime Services
RV	recreational vehicle
SME	small and medium enterprise
STCRC	Sustainable Tourism Cooperative Research Centre
T-QUAL	Tourism quality programmes run by the Australian Government Department of Resources, Energy and Tourism
TRA	Tourism Research Australia
TSA	Tourism Satellite Accounts
UNEP	United Nations Environment Programme
UNESCO	United Nations Educational, Scientific & Cultural Organization
UNWTO	United Nations World Tourism Organization
USP	unique selling proposition
VET	Visitor Economy Taskforce
VFR	visiting friends and relatives
VIC	visitor information centre

Glossary

Major stakeholders: government agencies, local government, community groups representing a business sector or region.

Key stakeholders: financially contributing members of Central NSW Tourism.

Tourism: the 'activities of persons travelling to, and staying in, places outside their usual environment for not more than one consecutive year, or leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited.' (Australian Bureau of Statistics, 2005).

Culture: ... 'is that complex whole which includes knowledge, belief, art, morals, law, custom, and any other capabilities and habits acquired by man as a member of society'. (Edward Burnett Tylor, *Primitive Culture*, 1871)

Cultural heritage: ... 'the entire corpus of material signs - either artistic or symbolic - handed on by the past to each culture and, therefore, to the whole of humankind. As a constituent part of the affirmation and enrichment of cultural identities, as a legacy belonging to all humankind, the cultural heritage gives each particular place its recognizable features and is the storehouse of human experience. The preservation and the presentation of the cultural heritage are therefore a corner-stone of any cultural policy'. (UNESCO *Draft Medium-term Plan* 1990 – 1995)

For the purposes of the World Heritage Convention, the following are considered as "cultural heritage":

- monuments: architectural works, works of monumental sculpture and painting, elements or structures of an archaeological nature, inscriptions, cave dwellings and combinations of features, which are of outstanding universal value from the point of view of history, art or science;
- groups of buildings: groups of separate or connected buildings which, because of their architecture, their homogeneity or their place in the landscape, are of outstanding universal value from the point of view of history, art or science;
- sites: works of man or the combined works of nature and of man, and areas including archaeological sites which are of outstanding universal value from the historical, aesthetic, ethnological or anthropological points of view.

Natural heritage: For the purposes of the World Heritage Convention, the following are considered as "natural heritage":

- natural features consisting of physical and biological formations or groups of such formations, which are of outstanding universal value from the aesthetic or scientific point of view;
- geological and physiographical formations and precisely delineated areas which constitute the habitat of threatened species of animals and plants of outstanding universal value from the point of view of science or conservation;
- natural sites or precisely delineated natural areas of outstanding universal value from the point of view of science, conservation or natural beauty.

Intangible heritage: intangible culture is the counterpart of culture which is tangible or touchable, whereas intangible culture includes song, music, drama, skills, crafts, and the other parts of culture that can be recorded but cannot be touched and interacted with, without a vehicle for the culture. These cultural vehicles are called "Human Treasures" by the UN. According to the 2003 Convention for the Safeguarding of the Intangible Cultural Heritage, the intangible cultural heritage (ICH) – or living heritage – is the mainspring of humanity's cultural diversity and its maintenance a guarantee for continuing creativity. It is defined as follows:

Intangible cultural heritage means the practices, representations, expressions, knowledge, skills – as well as the instruments, objects, artifacts and cultural spaces associated therewith – that communities, groups and, in some cases, individuals recognize as part of their cultural heritage. This intangible cultural heritage, transmitted from generation to generation, is constantly recreated by communities and groups in response to their environment, their interaction with nature and their history, and provides them with a sense of identity and continuity, thus promoting respect for cultural diversity and human creativity. For the purposes of this Convention, consideration will be given solely to such intangible cultural heritage as is compatible with existing international human rights instruments, as well as with the requirements of mutual respect among communities, groups and individuals, and of sustainable development.

Legacy tourism: involves journeys where visitors make a pilgrimage to see a site of great personal value to them, their family, community, religion or nationality.

Contents

Executive summary

Where are we now?	Where do we want to be?	How will we get there?	Are we there yet?
The Central NSW region consists of 11 local government areas including the shires of Bathurst, Blayney, Cabonne, Cowra, Forbes, Lachlan, Mid Western Regional, Orange, Parkes, Weddin and Wellington with a **population of 181,042 and annual visitor numbers of 4.5 million.** Our research tells us that growth of the visitor economy in this region has some communities in Central NSW trending well over the past twelve years while others reflect the slower national trajectory. Within this, **intraregional visitation and visiting friends and relatives** are significant and growing components of the visitor economy. **Food, wine and events** have been significant anchors for visitation where the **natural beauty of the landscape and heritage of the region have added value**. The region is well serviced with accommodation, restaurants and pubs, with a **growing use of local produce**. Through workshops, surveys and interviews with industry, key tourism organisations, state agencies, tourism managers and local	This region has identified priorities recognising the vision of both the State and Federal Governments. Within the context of the Federal Government's Tourism 2020 Plan and the State Government's 2021 Plan, this region will implement credible foundations to **double overnight visitation by 2020**. The strategies for this region will deliver on Central NSW Tourism's mission which is to **create partnerships and a model of collaboration** between operators, major stakeholders, community bodies, Councils, ROCs and State Government that **stimulates the development of high quality experiences, increases overnight visitation and builds local economic prosperity**, through planned initiatives and marketing of the region.	**Central NSW operates within a Sustainable Regional Tourism Framework**. Within this framework, seven strategies have been developed for management, marketing and product development: • Advance leadership and motivation • Grow physical capacity • Improve visitor experiences • Revitalise destinations and celebrate local culture • Increase visitor spend and grow local economic benefits • Raise destination awareness and appeal, and • Increase overnight visitation. Within these strategies, the region will target actions that build on **growth sectors for tourism in Central NSW: caravan and camping, sports tourism, ecotourism and domestic leisure tourism**. The region will also target high-expenditure sectors of the tourism market: business events, **Pampadours,**	To know that the region has achieved its goal of doubling overnight visitation, evaluation will need to be undertaken. Evaluation uses SMART principles for its indicators of **Simple, Measurable, Appropriate, Realistic and Timely**. **Each year surveys will be customised** to measure for the outputs and outcomes identified in the Plan.

Where are we now?	Where do we want to be?	How will we get there?	Are we there yet?
government, the research undertaken to develop this Destination Management Plan has identified a significant suite of actions based on identifying our strengths, weaknesses, risks and opportunities. The plan contains a considerable amount of research and number of recommendations. These have been prioritised according to available resources.		**wedding parties and international visitors**, particularly visitors from China. There will also be concerted effort around **improving existing services**. This will be resourced through **collaboration and co-funding** by LGA local tourism organisations coordinated by Central NSW Tourism. **This resource will be leveraged at both the State and Federal level.**	

How will we get there?

Action plan: time frame and responsibilities for implementing the strategies

	Central NSW Tourism	LGAs
2013/14	**Advance leadership and motivation** S1.1: Build wide awareness of the DMP strategies; produce a summary of the DMP (e.g. 12-page colour information brochure) as online PDF and send hard copies to the tourism sector, special interest groups, media. Establish clear roles and responsibilities for LGA tourism managers and CNSWT Executive Officer. S1.2: SP1.2.1 Assist with preparation of an integrated list of whole-of-government support programmes; SP1.2.2 Make accessible information which encourages tourism providers and key stakeholders to apply for funding to improve their sustainability; SP1.2.3 Work with stakeholders in key regions to present information on relevant government programmes for tourism providers; SP1.2.4 Showcase	**Advance leadership and motivation** S1.3: Raise local awareness of the value of tourism to build greater involvement. S1.7: Forge strategic partnerships at a local level. S1.16: Monitor average room rates to identify negative economic impacts. **Grow physical capacity** S2.8: Examine scope for attendance expansion; S2.8.1 Examine management plans for key icon sites e.g. Mr Panorama, CSIRO Radio Telescope, Wellington Caves, Mudgee Food & Wine, Orange shopping; S2.8.2 Examine seasonality and peak times where there might be

	Central NSW Tourism	LGAs
	tourism providers who have taken measures/started these government programmes in PR campaigns; SP1.2.5 Link with local community actions and inform tourism providers via CNSWT monthly newsletter; SP1.2.6 Monitor progress via annual surveys as part of the Sustainable Destination Indicators. S1.5: Maximise relationships; S1.5.1 Forge long-term strategic partnerships with organisations that have high coverage of the source markets, add value to the tourism experience or high penetration of specific visitor segments e.g. NRMA, National Trust, CCIA; S1.5.2 Develop a plan to add value to visitor experience and meet partners objectives; S1.5.3 Integrate added value experiences in promotional materials and websites. S1.6: Conduct Indicators surveys and provide feedback to LGAs and CNSWT members. S1.14: Hold CNSWT board meetings in different regions across the years and invite local operators. S1.15: Establish a monthly newsletter to build awareness of CNSWT activities, encourage feedback and state results. S1.17: Monitor overnight expenditure using the visitor surveys quarterly. **Grow physical capacity** S2.1: Increase dedicated high quality conference and exhibition facilities; S2.1.1. Contact all conference & event venues to learn of any development plans; S2.1.2 Meet with Sydney/ACT wedding and business event organisers to identify key factors that will make the region more competitive; S2.1.3 Prepare a business case for developing the conference, event, market; S2.1.4 Present this to major venue owners, councils and event marketing group which collaboratively promote region to build market sector. S2.5: Maximise use of grant funding; S2.5.1 invite widespread	congestion; S2.8.3 Compare plans with DMP strategies and make recommendations to key stakeholders and key asset partners; S2.8.4 Support responsible growth plans and enhanced visitor experiences. S2.11: Implement an accommodation study to identify necessary accommodation growth opportunities to deliver long-term overnight expenditure increases. An occupancy survey (proposed in the marketing section) will provide evidence of which categories have constraints. **Improve visitor experiences** S3.1: Enhance the destination through interpretation: S3.1.1 Prepare a register of tangible and intangible cultural heritage; S3.1.2 Identify major sites and intangible assets with tourism potential (economic and contribution to conservation); S3.1.3 Plan and implement an interpretation programme for heritage sites and intangible heritage. S3.9 (with CNSWT): Establish a working group with Wiradjuri community members and develop an Aboriginal tourism plan that builds on the success of the Wiradjuri Condobolin Corporation. Consider integrating the Lachlan Catchment Authorities Dreamtime videos, sacred site Mt Canobolas and the songlines, oral histories, performance and art. S3.1.4 Collaborate with special interest groups and community and refine plan; S3.1.5 Brief and involve tourism providers and roll out interpretation plan. **Increase overnight visitation** S7.8: Conduct accommodation occupancy level automated monthly survey. Incentivise participation.

	Central NSW Tourism	LGAs
	participation in workshops that brief on grant funding opportunities from whole-of-government sources; S2.5.2: Provide support information and advice as required. S2.7: Prepare a prospectus for tourism investors. S2.11: Implement an accommodation study to identify necessary accommodation growth opportunities to deliver long-term overnight expenditure increases. An occupancy survey (proposed in the marketing section) will provide evidence of which categories have constraints. **Improve visitor experiences** S3.2: Review and refine the Discovery Tours and attract more Pledge Partners, food and wine and dining experiences to stimulate longer visitor stays. S3.8: Enhance museum experience; S3.8.1 Work with community groups and councils to establish a destination-wide Museum Trail with consistent opening times; S3.8.2 Plan opportunities for use of technology (Augmented Reality); S3.8.3 Enhance exhibitions. S3.15: Conduct twice-a-year visitor qualitative research to learn more about behaviour and attitudes towards the attractions and new product ideas. **Revitalise destinations and celebrate local culture** S4.1: Focus resources; S4.1.1 Audit the events, rationalise the calendar, identify core events which target specific growth segments and that are suitable to raise the destination's unique qualities; S4.1.2 Coordinate calendar with DNSW website; S4.1.3 Maximise access link with public transport. S4.4: Prepare a Wiradjuri tourism economic development plan that offers opportunities and celebrates their cultural heritage. **Increase visitor spend and grow local economic benefits**	

	Central NSW Tourism	LGAs
	S5.1: Build local food & wine producer linkage; S5.1.1 Create an online registry on 100 Mile Diet producers; S5.1.2 Run B2B road show events to tourism providers to encourage greater participation; S5.1.3 Increase the number of producers through networks, markets, council lists and agri lists; S5.1.4 Increase the number of producers on the Discovery Trails; S5.1.5 Conduct surveys during festivals/events/markets to monitor visitor expenditure. S5.5: Monitor, refine and expand the Discovery Tours and the primary method to channel visitors to purchasing opportunities. Increase the number of Pledge Partners food & wine producers to increase the number of visitors who follow the trails. **Raise destination awareness and appeal** S6.1: Build appeal and relevance; S6.1.1 Design a brand identity and design management application manual (who we are, what we do, how we do it); S6.1.2 Apply the brand identity consistently (all key stakeholders) and supply a brand design manual. S6.2: Use the National Trust as an endorsement of the region's outstanding range of cultural heritage attractions; S6.2.1 Audit the cultural heritage assets to select lead attractions; S6.2.2 Present them as lead in attraction on website, brochures; S6.2.3 Produce a travel app for culture tourists which links attractions with food & wine, arts & crafts; S6.2.4 Work with National Trust and special interest groups to include online donation and conservation support programmes to help sustain tourism attractions; S6.2.5 Conduct tourism provider training on attractions. S6.3: Build a comprehensive picture library and video footage which clearly emphasises the destinations unique qualities. **Increase overnight visitation** S7.3: Increase VFR marketing through 100,000 Hand network and local PR to encourage residents to invite visitors.	

	Central NSW Tourism	LGAs
	S7.4: Approach a specialist private tour operator to create packages targeting high net worth visitors. S7.14: Establish strategic alliance with the Hunter Valley and Blue Mountains to grow China market and specific experiences which attract high net worth travellers.	
2014/15	**Advance leadership and motivation** S1.8: Maximise the visitor economy benefits for producers; S1.8.1 Develop a cluster strategy to emphasise differences in the destination and encourage innovation; S1.8.2 Encourage tourism providers to buy local produce that reflects their local area; S1.8.3 Utilise Discovery Tours as a method to channel visitors to purchase opportunities and to interpret the different local characteristics and tourism innovations; S1.8.4 Monitor the uptake, evaluate and refine the strategy. S1.9: Work with major stakeholders to develop a tourism & transport infrastructure plan which should examine the needs of interconnected services between rail, bus and communities, airport development and the Bells Line of Road. S1.10: Work with other major stakeholders to propose critical improvements for mobile phone coverage and internet services to improve the destination's competitiveness. S1.20: Work with key stakeholders to prepare a risk management preparedness and communication plan. **Grow physical capacity** 2.4: Target growth in capacity; S2.4.1 Brief cellar doors, cafes, restaurants and accommodation providers on DMP and growth potential; S2.4.2 Identify those tourism providers seeking to expand their facilities and provide detailed consultation support, council links and grant advice; S2.4.3 Support their growth plans through integration into the DMP review.	**Advance leadership and motivation** S1.24: Source and train regional tourism event volunteers. **Grow physical capacity** S2.2: Continue to increase 'home hosts' to help smaller communities benefit from event and festival visitors to their region; S2.2.1 Announce a 'home host' initiative to the community; S2.2.2 Use the successful Elvis Festival 'home hosts' as a case study example; S2.2.3 Prepare register and link to VIC database and establish information section on website. S2.8: Examine scope for attendance expansion; S2.8.1 Examine management plans for key icon sites e.g. Mr Panorama, CSIRO Radio Telescope, Wellington Caves, Mudgee Food & Wine, Orange shopping; S2.8.2 Examine seasonality and peak times where there might be congestion; S2.8.3 Compare plans with DMP strategies; make recommendations to key stakeholders and key asset partners; S2.8.4 Support responsible growth plans and enhanced visitor experiences. **Revitalise destinations and celebrate local culture** S4.6: Build market days; S4.6.1 Encourage expansion of the Farmers' Markets to be held in the centre of more towns and villages; S4.6.2 Recommend supporting entertainment and extended shopping hours; S 4.6.3 Provide support for decorations and seek promotional opportunities to showcase community 'country life'; S4.6.4 Actively promote Farmers' Markets and seasonal produce. **Increase visitor spend and grow local economic benefits** S5.3: Target weddings; S5.3.1 Audit the wedding venues; S5.3.2 Develop a weddings website with comprehensive wedding planning

	Central NSW Tourism	LGAs
	S2.7: Prepare a prospectus for tourism investors. S2.9: Support local government and regional agencies to target grant funding for infrastructure that supports the DMP. **Improve visitor experiences** S3.4: Provide hospitality training and skills development. Attendees become 'Ambassadors', organise mayors recognition event, local media. S3.6: Campaign to promote 'Ambassadors', establish and maintain strategic network of high quality tourism providers which can act a stimulus for others to join; use the network for PR and case study examples. **Revitalise destinations and celebrate local culture** S4.2: Re-energise Museums/Galleries; S4.2.1 Audit museums and galleries and identify their needs and opportunities; compare with DMP strategic priorities; S4.2.2 Create strategies to refresh their visitor experiences; S4.2.3 Identify opportunities for networking, interpretation and resource needs; S4.2.4 Identify funding sources and additional revenue streams. **Increase visitor spend and grow local economic benefits** S5.2: Build local arts linkage; S5.2.1 Encourage tourism providers to support local arts and crafts though displays in their own business; S5.2.2 Encourage the distribution of information to encourage visitors to buy souvenirs, visit galleries and craft shops; S5.2.3 Create a register of micro businesses which provide services to tourism providers or visitors, communicated in regular e-newsletters. S5.7: Conduct a regular survey to update producers listing, product range, distribution method and new product information (communicated in regular e-newsletters). S5.9: Run capacity-building workshops in collaboration with state	information, local suppliers and link to accommodation, tours, cellar doors, local performers, florists etc.; S5.3.3 Showcase weddings on CNSWT website and optimise for search; S5.3.4 Attend wedding shows and local PR for VFR segment. S5.6: Facilitate linkage between Wiradjuri art and craft producers and tourism providers to encourage promotion and visitor purchase. **Increase overnight visitation** S7.9: Prepare a promotional strategy and media plan to target Canberra and regional NSW residents specifically.

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	development agencies targeting micro enterprise to stimulate economic linkages to tourism. **Raise destination awareness and appeal** S6.4: Produce a PR kit with brand stories (activities, food & wine, accommodation, arts and crafts) and facts and information. S6.5: Feasibility to target New Australians in Sydney and emphasise the historic values of the region. Investigate the opportunities of utilising formal migrant social groups and foreign language radio. Consider community readiness. 6.12: Install large regional entry signs attractively presented and themed to emphasise to visitors that they are arriving in Central NSW. This is particularly important on the Newell and Great Western highways. 6.13: Systematically install town and village ‘welcome’ signs and information boards. 6.14: Attract film/TV production by producing an information brochure with library shots, locations and facilities and target advertising and television production houses. Successful imagery should be used on the CNSWT website and in PR. **Increase overnight visitation** S7.20: Develop a strategic partnership with the National Trust and a tour operator to utilise their membership base for visitor promotions.	
2015/16	**Advance leadership and motivation** S1.18: Work with catchment authorities to support water conservation practices and support water controls during droughts. S1.19: Support government energy efficiency programmes to facilitate tourism providers’ participation. **Grow physical capacity**	**Grow physical capacity** S2.3: Prepare a plan for local councils, the RMS and NPWS that recommends necessary growth in car parking for cars with caravans or mobile homes to reflect growth in Wanderers. Explore ‘Park n Ride’ services during festival and events. Identify partners for developing cycle routes. **Improve visitor experiences**

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	S2.6: Undertake a feasibility study with historical societies for a family history resource which will help to build visitation. S2.11: Implement an accommodation study to identify necessary accommodation growth opportunities to deliver long-term overnight expenditure increases. An occupancy survey (proposed in the marketing section) will provide evidence of which categories have constraints. S2.12: Expand and enhance nature attractions in partnership with stakeholders; S2.12.1 Review NPWS plans of management and compare with DMP strategies; S2.12.2 Determine opportunities for ecotourism activity providers; S2.12.3 Identify opportunities for adventure sports to create new visitor experiences; S2.12.4 Promote the opportunities for activity providers through key stakeholders, local media and tourism providers and provide a business support package. **Improve visitor experiences** S3.5: Improve the quality of tourism accommodation by incentivising participation in accreditation, awards, incentivising their promotion by showcasing 'leaders', grants. S3.16: Identify high quality tourism providers that seek to attract overseas visitors and provide a support programme to help them become 'internationally ready'. **Revitalise destinations and celebrate local culture** S4.3: Wider promotion of art events/retail and bring travelling shows/popular cultural events. S4.5: Event and festival management workshops for community special interest groups that utilise heritage buildings, sites and public spaces. Emphasis given to reflecting the local distinctiveness of each particular area. **Increase visitor spend and grow local economic benefits**	S3.12: Arrange regular VIC staff information days so that when they visit attractions, they are briefed on the facilities to improve local knowledge. **Revitalise destinations and celebrate local culture** S4.8: Provide training for tourism managers to practically apply local economic development strategies to benefit micro businesses and social enterprises in their communities. S4.9: Audit event facilities and identify business event needs for high quality venues. S4.10: Maximise use of council sporting facilities by encouraging both leisure and business event use; S4.10.1 Produce a comprehensive facility register; S4.10.2 Establish case studies to use for demonstration; S4.10.3 Prepare a digital facility/service guide with examples of use by business events; S4.10.4 Distribute information kit to sport event organisers, regional and peak bodies. **Increase overnight visitation** S7.13: Develop 'festival packages' which best highlight Central NSW's USP and work with strategic partners to showcase the region e.g. with an airline.

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	S5.1: Build local food & wine producer linkages; S5.1.1 Create an online registry on 100 Mile Diet producers; S5.1.2 Run B2B road show events to tourism providers to encourage greater participation S5.1.3 Increase the number of producers through networks, markets, council lists and agri lists; S5.1.4 Increase the number of producers on the Discovery Trails; S5.1.5 Conduct surveys during festivals/events/markets to monitor visitor expenditure. S5.6: Facilitate linkage between Wiradjuri art and craft producers and tourism providers to encourage promotion and visitor purchase. S5.8: Develop a community tool kit with retailers and food & beverage providers to encourage day visitors to spend more with local providers. Consider special shopping days, street activities, promotions, sampling and strategic partner support. **Raise destination awareness and appeal** S6.7: Focus branding on festivals, exhibitions and the unique cultural heritage attractions that emphasise the destination's USP to make Central NSW distinctive and appealing. It is essential that the unique qualities of Central NSW's towns and villages are clearly emphasised. S6.8: Establish a long-term strategic value-adding partnership with the NRMA to promote the region's USP through editorial content promoting high quality examples of the region's attractions. **Increase overnight visitation** S7.10: Create Trip Advisor pages for the key assets and sub destination regions and monitor consumer feedback and link to Strategic priority 4 'Improving Visitor Experience'.	
2016/17	**Advance leadership and motivation** S1.21: Reduce risk; S1.21.1 Work with Rural Fire Services and accreditation providers who provide frameworks and examples; S1.21.2 Run workshops on risk management; S1.21.3 Distribute bushfire and	**Increase overnight visitation** S7.16: Encourage regional NSW visitors to book overnight stay with special shopping and large-scale festivals and major sporting events. S7.17: As part of expanding the conference & events & weddings sector,

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	water conservation information to gain wider participation; S1.21.4 Incentivise tourism providers through parallel motivational aims which achieve both preparedness and protection. S1.22: Reduce waste; S1.22.1 Liaise with local councils on landfill volumes during peak seasons and events; S1.22.2 Work with organisers and tourism providers to reduce landfill and increase recycling and reuse; S1.22.3 Publicise progress and build tourism reputation in the community. S1.23: Manage water consumption, meet with catchment authorities and brief them on future visitation levels, identify future requirements. **Improve visitor experiences** S3.18: Partner with NPWS and Forests NSW to develop a strategy for improved signage, parking and interpretation. **Revitalise destinations and celebrate local culture** S4.10: Maximise use of council sporting facilities by encouraging both leisure and business event use; S4.10.1 Produce a comprehensive facility register; S4.10.2 Establish case studies to use for demonstration; S4.10.3 Prepare a digital facility/service guide with examples of use by business events; S4.10.4 Distribute information kit to sport event organisers, regional and peak bodies. S4.13: Build awareness of the heritage assets; S4.13.1 Conduct road show to build tourism providers awareness of tourism product and heritage; S 4.13.2 Produce a digital resource with oral histories and picture library, place on the web for long-term access. **Increase overnight visitation** S7.18: Encourage the target of high net worth visitors by promoting packaged personalised experiences at boutique tourism providers. S7.20: Develop a strategic partnership with the National Trust and a tour operator to utilise their membership base for visitor promotions.	produce a dedicated website which lists venues, table planning, venue facilities and links to local suppliers.

	Central NSW Tourism	LGAs
2017/18	**Advance leadership & motivation** S1.25: Prepare a CNSWT Business Continuity Plan by conducting a SWOT analysis of operations, resources and technical support. S1.26: Prepare a sustainable tourism tool kit to assist 'best practice' and raise tourism quality standards. **Improve visitor experiences** S3.7: Develop Chinese heritage tour in Mandarin which can be targeted to Sydneysiders and international visitors and education tourism VFR. S3.8: Enhance museum experience; S3.8.1 Work with community groups and councils to establish a destination-wide Museum Trail with consistent opening times; S3.8.2 Plan opportunities for use of technology (Augmented Reality); S3.8.3 Enhance exhibitions. S3.17: Source funding to conduct a professional training programme for guides: town, museums and ecotourism. **Increase visitor spend and grow local economic benefits** S5.4: Prepare a plan and conduct workshops to encourage tourism providers to develop experiences which can be 'added' to conferences and school sporting fixtures. S5.8: Develop a community tool kit with retailers and food & beverage providers to encourage day visitors to spend more with local providers. Consider special shopping days, street activities, promotions, sampling and strategic partner support. S5.9: Run capacity-building workshops in collaboration with state development agencies targeting micro enterprises to stimulate economic linkages to tourism.	**Increase overnight visitation** S7.11: Research school syllabus and facilitate tourism providers to cater for field trips to achieve regional 'life-long' visitation. S7.12: Lever motor racing heritage with specialty events through tourism provider e-newsletter, PR and social media.

	Central NSW Tourism	LGAs
2018 – 20	**Improve visitor experiences** S3.11: Increase number of accredited caravan and camping sites where Central NSW has supply gaps and where a range of attractions and activities can encourage expenditure and longer overnight stays. S3.19: Review and update accessible tourism destination planning. **Raise destination awareness and appeal** S6.9: As part of the education tourism taskforce's activities, produce promotional materials which are given to visiting education groups (via participating members of the taskforce) to take home and encourage a family return trip. S6.10: Create a design display system so that all VICs follow the same consistent information presentation to aid visitors in identify the breadth of 'what to do'. **Increase overnight visitation** S7.15: Review government report on Accessible Tourism and promote accessible tourism providers through the online booking facility, VICs and Discovery Tours.	

Overview

The aim of this Destination Management Plan (DMP) for Central NSW Tourism is to double overnight visitor expenditure by 2020 through an integrated programme that takes a holistic and consultative approach to planning and development.

This plan focuses on supporting Central NSW's unique proposition as the **richest cultural heritage region of NSW**, where visitors discover tempting, original and authentic food, wine art, nature and indigenous experiences as they journey through magnificent inspiring landscapes. This focus has been achieved by concentrating on three areas: management, development and marketing, while applying the principles of the Sustainable Regional Tourism Framework (Figure 1).

Growth sectors

Key growth sectors for tourism in Central NSW are:

- **Caravan and camping** – where holiday parks contribute to growing visitor numbers through upgrades and increased visitor activities
- **Sports tourism** – where spectators and participants seek high-quality experiences and use more of their resources to enjoy the wider benefits of their visit
- **Ecotourism** – where international trends indicate a growth rate of three times that of general leisure tourism
- **Domestic leisure tourism** – where visitors seek high-quality experiences which help them reconnect with themselves, their loved ones or their country – experiences that hold nostalgic significance and are personalised and authentic.

High-yield sectors

To meet the NSW Government's goal for economic growth, this plan identifies the following high-yield sectors:

- **Business events** – where spend is above average holiday visitor expenditure rates
- **Pampadours** – visitors who spend on indulgence and rejuvenation
- **Wedding parties** (weddings and parties or wedding parties)– where spend on accommodation, venues and a range of services can have strong local economic linkage
- **Emerging international visitors** (from China) – where spend is at double the rate of visitors from mature international source markets.

Strengths and opportunities

The DMP acknowledges the region's strengths and opportunities:

- **Wanderers** – the largest 'travel mindset' segment visiting Central NSW who are motivated to discover and explore Australia;. They have the flexibility to increase overnight stays as they take their accommodation with them
- **Visiting friends and relatives** (VFR) – the largest Central NSW visitor segment that can be encouraged to increase their stay to enjoy local festivals, events and reconnect through family history
- **Cultural heritage** – the large number of valuable cultural heritage attractions which can entice cultural heritage visitors (who have a higher than average expenditure rate) to stay longer and see more of Central NSW's treasures including over 1100 nationally significant natural and cultural heritage sites (source : ICRT 2012)

- **Food & wine** – the wide range of boutique vineyards, provedores, organic producers, farmers' markets and dining that promote seasonality, localism and emphasise the magnificent cultural landscape
- **Popular culture** – nationally admired attractions like the CSIRO Radio Telescope, and events like the Parkes Elvis Festival and Bathurst 1000 which are capable of drawing visitors to the region.

Overall the DMP seeks to stimulate the visitor economy by delivering local economic development through partnerships, concentrating on:

- **sustainable supply chain management** – developing stronger links between tourism providers and products and services to grow the local market
- **100 Mile Diet programme** – developing wider tourism participation, seasonal menus and stockists
- **arts & crafts** – developing links between festivals, events and local creative skills and resources
- **festivals & events** – developing stronger communities through a coordinated promotional programme.

Sustainable Regional Tourism Framework

The DMP process embraces the overarching principles of good governance, sustainable development and responsible marketing so that CNSWT and tourism stakeholders can make the destination a better place to live in and a better place for people to visit. Figure 1 below illustrates the framework for sustainable regional tourism adopted by Central NSW Tourism.

Figure 1: Sustainable Regional Tourism Framework

Good governance | Sustainable development | Responsible marketing		
Sustainable destination planning and management	Sustainable destination development	Sustainable destination marketing
The pursuit of strategies and practices that facilitate balanced, sustainable administration and management of the destination	The pursuit of a type, style and level of tourism that contributes to the social, cultural, political and environmental sustainability of a place to live, to work and to visit	The promotion of tourism both within and outside a destination to attract and influence appropriate target segments
"Making better places for people to live in, and better places for people to visit"		

Adapted by Warren, C. (2013) from Dredge, D. 2008. Managing Local Tourism Master Class: Eastern Metropolitan Regional Council Workshop Materials, Southern Cross University, Tweed Heads, Australia.

This Destination Management Plan encompasses the following three key components:

Sustainable destination planning and management

Developing this DMP has involved consultation with tourism providers, major stakeholders and key stakeholders to devise a collaborative plan which reflects a shared vision. Following the support of key stakeholders, CNSWT has established a management structure which is sustainable. It provides strategic support for the long-term planning of tourism by providing leadership, sharing market research information, developing strategic partnerships and administering programmes.

Sustainable destination development

One of the purposes of tourism in Central NSW is to support community sustainability. Consequently this plan concentrates on local economic development, with priorities to minimise economic leakage, strengthen linkages and assist in building a strong market for local suppliers. Focus has also been given to the value chain by actions to increase visitation and expenditure from farm gate, to manufacturers, retail and dining. In short the DMP strategies strive to deliver wide benefits from the visitor economy for the whole community.

The DMP's responsible marketing strategies strongly support the destination's cultural capital, its festivals, events, built heritage, folklore, performances and art as well as its high-quality recreation facilities, local food & wine and agritourism. The plan also recognises the need for sustainable growth and commends the actions by some stakeholders to produce organic food & wine and to conserve scarce resources. The DMP therefore provides support for industry and whole-of-government water wise and energy efficiency policy and planning.

Sustainable destination marketing

A focused and holistic approach to marketing has been taken to maximise the most efficient use of CNSWT and key stakeholder resources. CNSWT's role is to 'enable' tourism providers, communities and key stakeholders by targeting programmes that package the destination to encourage an increase in expenditure and overnight stays.

Sustainable destination indicators

The DMP process has also been assisted by the use of sustainable destination indicators (Appendix 1) to guide the planning process and provide benchmarks. These indicators will help the destination develop more sustainable tourism, better experiences and support whole-of-government planning and investment.

CNSWT recognises that its competitiveness as a destination is linked to its ability to provide high quality food and wine produce, to offer a pristine natural environment, to contribute to a prospering community and to conserve heritage assets that attract visitors and contribute to the community's sense of place.

Sustainable tourism includes community involvement, its economic value to the community and level of employment. It also includes the quality of the attractions, visitor satisfaction, infrastructure, travel and transport, and the effective use of use of resources. CNSWT acknowledges that tourism providers must act responsibly to use resources mindfully and play their part in developing the visitor economy to benefit the community. This can be achieved by reducing negative environmental impacts through energy efficiency, advanced water conservation and reducing waste. They can also maximise the benefit of tourism's economic inflow by linking to community special interest groups, micro enterprises, purchasing local produce, promoting local arts and crafts and supporting social enterprises. This approach supports the clean green and high-quality strategy identified by both the Australian Government and the Visitor Economy Taskforce.

The VET report recommended the use of "indicators to measure the progress" (Taskforce, 2012). CNSWT implemented a research monitoring system to review the destination's sustainability. Four areas were selected for review, based on the European Commission's Sustainable Destinations Indicator System and adapted by the International Centre for Responsible Tourism - Australia to meet specific local needs:

- destination management
- economic criteria
- social criteria
- environmental criteria.

These were researched using three studies:

- destination management survey (to be undertaken annually)
- tourism enterprise survey (to be undertaken annually)
- visitor survey (to be undertaken quarterly).

The CNSWT Destination Management Steering Committee will set targets to seek continuous improvement. By annually updating the Tourism Indicator results, CNSWT will be able to monitor its progress and set new targets to continuously improve the region's sustainability.

Value of tourism to Central NSW

The benefits that can be derived from growing the visitor economy are summarised in Figure 2 below. They illustrate the important role tourism plays in Central NSW. By adopting the Sustainable Regional Tourism Framework, tourism contributes widely to the local economy, community and environment through good governance and collaboration.

The strategic priorities set out in Section 13 of this DMP aim to deliver an increase in visitor expenditure and improved productivity for tourism providers, as well as the benefits of indirect linkage and local employment. They also encourage improvements to community facilities, conservation of heritage, a broader and deeper appreciation of nature and the mindful use of resources through consultation and collaborative action.

Figure 2: Summary – the 'value' of tourism to Central NSW

Quadruple bottom line criteria	Resources within Central NSW	Benefits for Central NSW
Economic	Tourism operators	Income generation
	Suppliers, trades	Indirect income
Social	Employment/workforce	Income generation, social enrichment, skills and knowledge sharing and transfer
	Community facilities	Healthy and inclusive society
	Cultural distinctiveness	Creation and preservation of culture; social enrichment
	Rich and diverse heritage	Appreciation and conservation of heritage assets, cultural values and knowledge
Environmental	Natural heritage	Appreciation and conservation of ecological and aesthetic assets
Governance	Regional tourism entity	Leadership, inclusiveness, collaboration, focus, evaluation and efficiency

1 Introduction

There is now broad recognition by the community, tourism providers and all levels of government that tourism is vitally important to the future success of regional Australia. This pro-tourism mindset seeks to create resilient communities in rural areas by encouraging the visitor economy to flourish.

The Australian Government has responded to the challenges and emerging opportunities for tourism by identifying strategic priorities in its Tourism 2020 plan (Department of Resources, Energy and Tourism, p. 2009). Three areas are specifically relevant to regional tourism and are reflected in this Central NSW Tourism (CNSWT) Destination Management Plan (DMP) – the need to:

- build resilience, productivity and quality
- increase supply of labour, skills and Aboriginal participation, and
- build competitive digital capacity.

At the State level there is a commitment to doubling overnight visitor expenditure by 2020 and a preparedness to invest in sound businesses cases which will help to achieve this aim. The Visitor Economy Taskforce (VET) (Visitor Economy Taskforce, 2012) identified seven strategic imperatives which need to be addressed to grow tourism. These are to:

- increase visitation
- grow physical capacity
- renew and revitalise destinations
- improve the visitor experience
- increase visitor spend
- make NSW more competitive, and
- change of mindset.

Central NSW Tourism (CNSWT) acknowledges these priorities and they are integrated into the Plan's strategic priorities. Working with key stakeholders, CNSWT is actively committed to growing the visitor economy and it has implemented initiatives which establish credible foundations to double overnight visitor expenditure by 2020.

Central NSW is rich with natural and cultural heritage. There are national parks; important river systems and waterways; significant agricultural production including wool, wheat and wine; unique Wiradjuri culture; historic villages and nationally valuable architecture and folklore; all of which makes Central NSW a treasure trove of attractions.

Central NSW has tremendous tourism potential which can be generated from sports tourism and events, cultural heritage, food & wine and festivals and their integration into a rich mix of visitor experiences, as shown from three surveys conducted by CNSWT for this DMP (CNSWT 1, 2013) (CNSWT 2, 2013) (CNSWT 3, 2013).

Brand development research was undertaken to look at travellers' perceptions in terms of their impressions, awareness of geography and tourist attractions, emotional experiences and the metaphors travellers use to describe the character of the area. This research highlights the region's inherent strengths, being on the edge of cultivation and wilderness, and combining creativity in food and wine. The Central NSW brand has the potential to link to popular culture through our region's ability to stimulate exploration, inspiration and to build friendships through real life experiences (Hearts and Minds, 2010).

Tourism worldwide is a rapidly evolving and competitive industry. Today in regional NSW the challenges faced are from Australians increasingly travelling abroad, consumers 'shopping around' with ease online and the tightening of discretionary spending (Visitor Economy Taskforce, 2012). Research shows that today's visitors seek authentic experiences which are personalised (Murphy, 2010), provide a high standard of service (Pine, 1999) and result in cherished memories (Tourism Australia 2007)

CNSWT has developed this DMP to tackle these challenges. The plan is based on research, consultation, and the integration of consumer demand and tourism supply so that we can make a strong contribution to the future of Central NSW.

"Best practice Destination Management is a process that ensures tourism adds value to the economy, social fabric and ecology of our communities ... to meet the needs and aspirations of the communities ... (to achieve) a strong resilient tourism industry" (Australian Regional Tourism Network/Australian Standing Committee on Tourism, 2013).

The VET report emphasises the role that communities play in growing tourism by delivering innovative visitor services, maintaining authentic links between the destination's brand proposition and on-the-ground delivery, and maximising the visitor economy through whole community involvement. This DMP approach has sought strong support from communities and tourism providers in order to help build community pride and liveability (Visitor Economy Taskforce, 2012) in the direct places where tourism is consumed.

Moreover, to achieve the NSW Government's aim to double overnight visitor expenditure, a whole-of-government approach is required (Visitor Economy Taskforce, 2012). Therefore this DMP recognises the importance of matching the DMP purpose with government goals pertinent to tourism (Department of Resources, Energy and Tourism, 2011) (NSW Government 1, 2011) (NSW Government, 2012).

NSW Government goals

The NSW Government goals that have been integrated into the DMP are:

Economic goals

- The NSW Government's aim to rebuild the State's economy, and therefore make it more resilient in the future, includes driving economic growth in regional NSW (Goal 3), strengthening the skill base (Goal 6) through actions to foster long-term economic activity and building community skill base capacity so participants can thrive in the workforce and help make NSW more competitive (NSW Government 2, 2011).
- The Federal Government's Tourism 2020 plan includes building industry resilience through support programmes for small businesses: quality programmes that include grant funding, T-QUAL accreditation and building digital capacity.

Social goals

- Many of the attractions, festivals and events in Central NSW are managed by volunteers from the community. The NSW Government's NSW 2021 plan seeks to strengthen communities, and therefore their resilience, by supporting increased community involvement in local projects (Goal 24), particularly for seniors (Goal 25), fostering partnerships with Aboriginal people (Goal 26) and enhancing cultural and sporting opportunities (Goal 27) (NSW Government 3, 2011).

Environmental goals

- As part of its plan to strengthen communities, the NSW Government seeks to give communities a stronger role (Goal 22) in the protection and conservation of their natural and built environment, (NSW Government 3, 2011). There are features which should be protected against encroachment from other development (Recommendation 19) so that destinations have sustainable appeal (Visitor Economy Taskforce, 2012) enabling tourism to thrive.

CNSWT is delighted with the results of the DMP process and looks forward to working with all stakeholders in delivering this plan and progressively evolving it in the future.

2 About the Central NSW Region

Local government areas

The Central NSW region, as defined by Destination Tourism consists of the following 11 local government areas (LGAs):

- Bathurst Regional Council
- Blayney Shire Council
- Cabonne Council
- Cowra Shire Council represented by Cowra Tourism Corporation
- Forbes Shire Council
- Lachlan Shire Council
- Mid-Western Regional Council represented by Mudgee Region Tourism Inc.
- Orange City Council
- Parkes Shire Council
- Weddin Shire Council
- Wellington Council.

Population

The total resident population of the CNSWT region is 181,042.

Climate

Central NSW spans from the Greater Blue Mountains to the east and the Lachlan Plains and Lake Cargelligo to the west. This gives rise to a wide range of climatic conditions. Average summer daytime temperatures range from 26° c in Orange to 32° c in Parkes. In winter average daytime temperatures can be 9° c in Orange and 14° c in Parkes (Meterorology, Bureau of, n.d.). The mild days and nights of spring and autumn are the region's peak leisure tourism periods of the year.

Transport infrastructure

Central NSW is well served with an extensive highway system that links it to:

- Victoria and Queensland along the Newell Highway
- Sydney and the west along the Great Western Highway
- Regional north-west NSW along the Mitchell Highway
- Canberra and Yass along the Lachlan Valley Way, and
- other regional destinations along the Mid-Western and Olympic Highways.

The easternmost city, Bathurst, is 200 km from Sydney and the southernmost town, Cowra, is 224 km from Canberra. The region extends west to Condobolin and Lake Cargelligo, and north to Wellington and Gulgong.

Trains NSW operate services from Sydney across the state through Bathurst, Orange and Parkes and these services continue with coach services linking the smaller towns and villages. www.trainsnsw.com.au

There are airports at Bathurst, Condobolin, Cowra, Forbes, Lake Cargelligo, Mudgee, Orange and Parkes with scheduled passenger flights in and out of Bathurst, Mudgee, Orange and Parkes.

Aboriginal heritage

The region covers Wiradjuri country, one of the largest Aboriginal nations in Australia.

Natural heritage

Central NSW has several important water resources which provide water and recreation: Lake Wyangala, Chifley Dam, Windamere Dam, Lake Burrendong, Lake Cargelligo, and the Lachlan and Macquarie rivers. There are also extensive national parks: Conimbla, Goobang, Goulburn River, Nangar, Weddin Mountains and Wollemi National Parks. State forests include the popular Mt Canobolas and Pennsylvania State Forests.

Cultural heritage post European settlement

The region has significant built heritage in its towns and villages, and intangible popular culture which includes bushrangers, the prominent literary figures Henry Lawson and Banjo Paterson and the painters associated with Hill End. Central NSW is also home to Australia's first payable gold discovery in 1851 which ignited historic changes across the country.

Sport

Sport is an important part of the fabric of the Central NSW communities. The region has a growing number of significant and world-class sporting facilities. These are supported by strong and vibrant community networks and events which include camp-drafting, horse racing ,harness racing and trotting and popular regional football, netball, tennis, golf carnivals and competitions, as well as car racing, all of which attract visiting friends and relatives (VFR). There have been important investments into sporting facilities, including the Mt Panorama international racing circuit in Bathurst and Glen Willow Sporting Complex in Mudgee.

Agriculture

Agriculture plays an important role in the region's competitiveness. It is a strong and diverse sector with viticulture, wool, cattle, wheat, lamb, oilseeds, dairy, fresh vegetables and orchard fruit growing, making it the third-largest economic contributor to the region (Group, 2011). Agriculture's diversity reflects Central NSW's multicultural history, including migrants arriving from Europe after WW2 and contributing particularly to the wine industry. Today agriculture offers tremendous visitor opportunities through dining on local produce, wine tasting, olive oil tasting, farmers' markets and farm/agritourism experiences which together present linkages that can maximise the value of the local visitor economy and create a stronger regional identity.

Business, industry and government stakeholders

Business tourism is an important contributor to overnight visitor numbers using conference venues and sporting facilities. Central NSW is also home to the CSIRO Radio Telescope; agricultural research centres in Cowra, Bathurst and Condobolin; the Lachlan Water Catchment Authority; the Department of Primary Industries; Charles Sturt University and TAFE Western Institute – all of which are major stakeholders in the long-term success of growing the visitor economy.

Neighbours

All visitors benefit from the strategic attractions found in neighbouring regions, like the Dubbo Zoo to the north, the Blue Mountains to the east, gold mining trails and the lure of the outback to the south and west, and the experiences in the Hunter Valley towards the coast.

Figure 3: Central NSW Discovery Trails map

CENTRAL NSW Discovery Trails

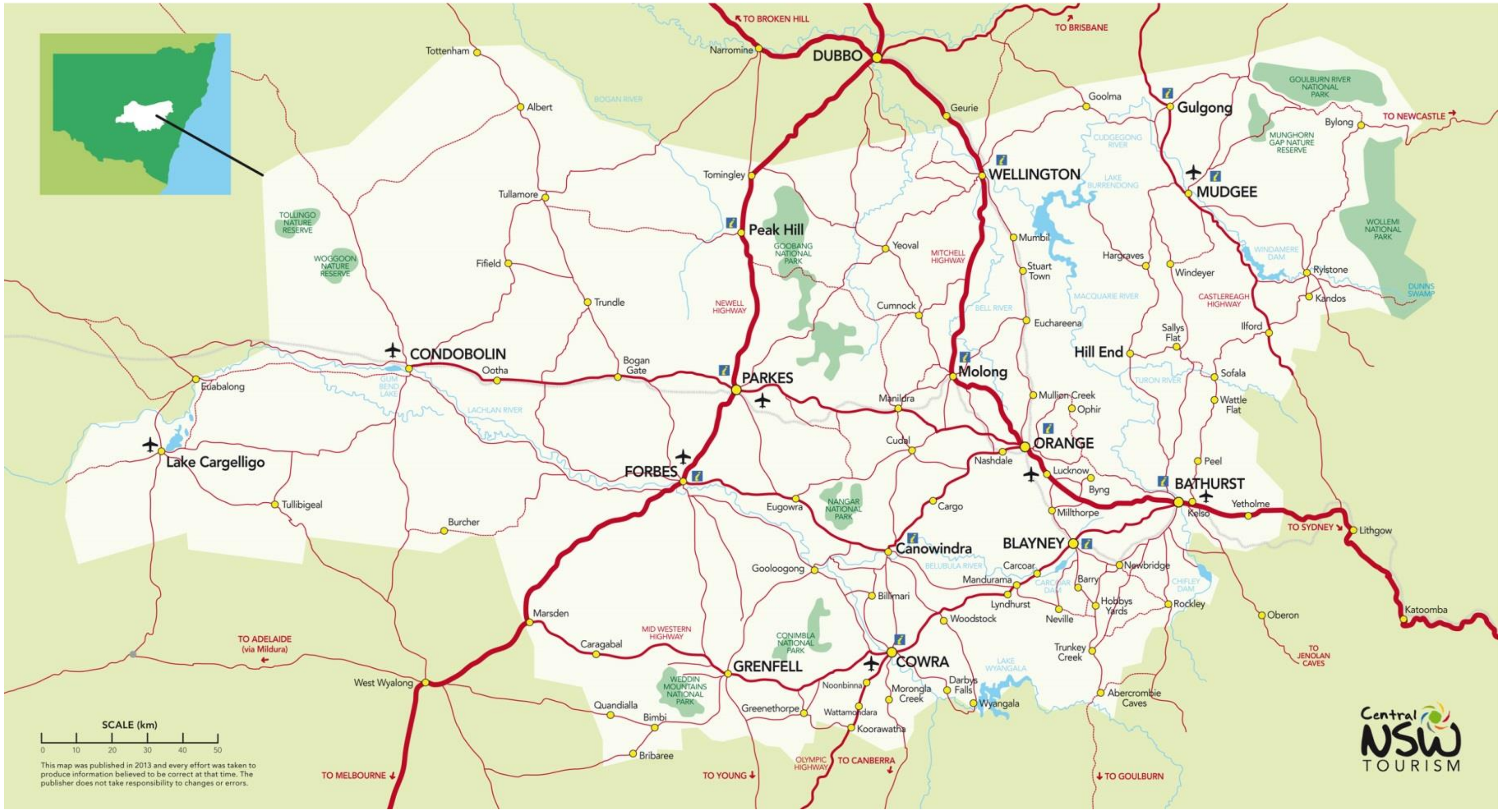
Central NSW is a treasure trove of exciting and interesting natural and cultural history which has helped shape the history of Australia. Your touring holiday will combine the authentic experiences with the warmth of friendly locals who have fascinating stories to tell.

100 Mile Diet
Local Eating For Global Change.

While you travel, enjoy the culinary delights of our 100 Mile Diet experience where you can eat and drink fresh seasonal local food and wine. Look out for this logo and choose the local options for the genuine experience.

Whether you are reconnecting with family and friends on a camping holiday, relaxing in a luxury B&B, or staying at a country pub, you'll soon discover Central NSW is a great place to enjoy a holiday

- Highway sealed
- Connecting road sealed
- Connecting road unsealed
- Rail network
- National Park or Reserve
- Aerodrome
- Accredited Visitor Information Centre



3 Demand trends – quantitative research

This section of the DMP analyses domestic and international visitation trends in Australia and NSW, and the current level of demand in Central NSW.

The NSW Government seeks to double overnight visitor expenditure by 2020 in order to grow the overall economy. The Visitor Economy Taskforce (VET) was appointed to assess the State's current tourism performance and provide strategic recommendations to achieve this aim. The NSW Government accepted the majority of the VET recommendations, covering seven strategic imperatives (Visitor Economy Taskforce, 2012):

1 Increase visitation
2 Grow physical capacity
3 Renew and revitalise NSW destinations
4 Improve the visitor experience
5 Increase visitor spend
6 Make NSW more competitive, and
7 Change of mindset.

Sources of the data

The following statistics have been obtained from the National Visitors Survey (NVS) using an annual sample of 120,000 visitors and the International Visitors Survey (IVS) using an annual sample of 40,000 visitors. Both surveys provide a good indication of trends on a national and state level. There is, at a regional level, a statistical margin of error of 20%. Central NSW data contains visitor numbers from LGAs which were formerly part of the regional tourism organisation (RTO) e.g. Dubbo and Coonabarabran, therefore caution should be used when interpreting the data.

Why show 12-year trends?

The purpose of this plan is to provide strategic insights to assist Central NSW tourism providers, stakeholders and government plan for the future. Travel being discretionary, expenditure is influenced by many factors: economic, socio-cultural and environmental. It is therefore important in planning business investment and community infrastructure to understand long-term trends. Moreover, statistical reliability should also be accounted for, especially at a regional level, because of the sample size involved. Therefore, rather than concentrating on short-term change, this section considers a 12-year period to provide a higher level of confidence in analysis.

3.1 Total visitors – overnight and day trips

The following graph (created from the data in Table 1) displays the total visitor numbers for the period 2000 to 2012. The purpose of showing this graph is to show changes in total visitor numbers and compare Central NSW with Regional, NSW and Australian trends. The aim is to identify if Central NSW has performed in a similar or different manner to the regional, state and national trends. These figures include domestic overnight visitors, domestic day visitors and international visitors.

Graph 1: Total visitors – overnight and day trips (millions)

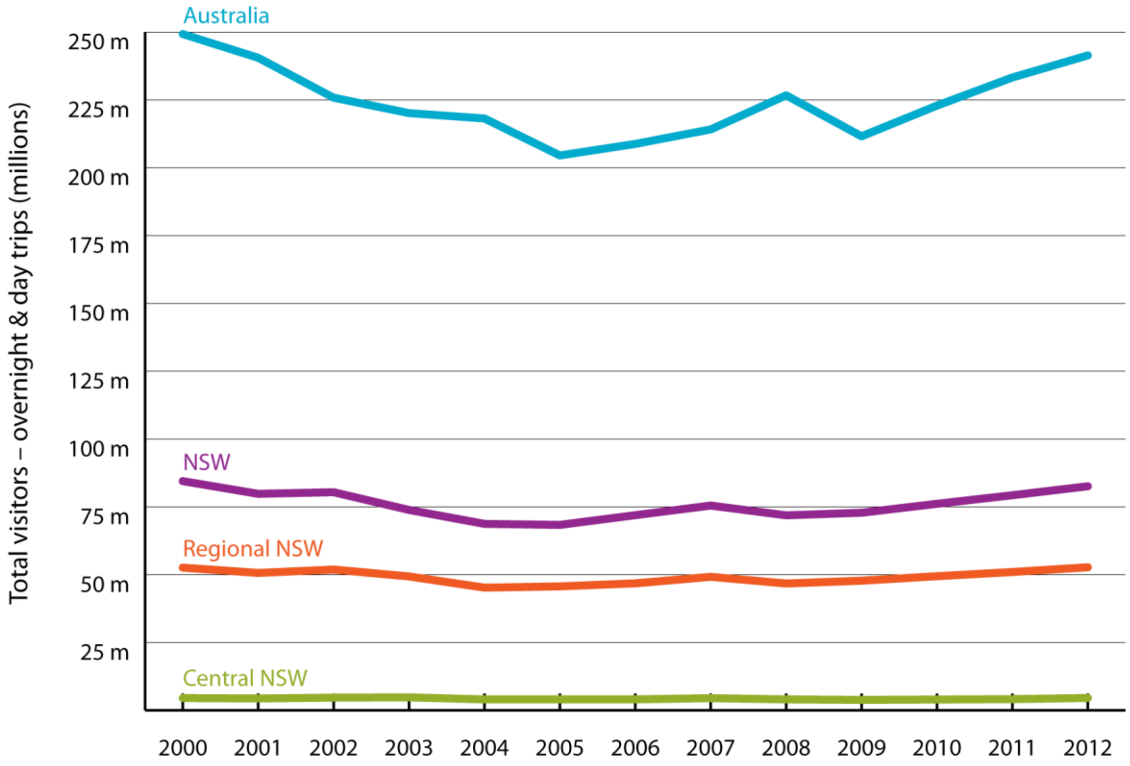


Table 1: 2000–2012 trend – total visitors – overnight and day trips ('000)

	Year ending December: 2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	% change 2000–2012	% change 2008–2012
Australia	249,277	240,525	225,810	220,139	218,158	204,540	208,782	214,124	226,691	211,589	222,913	233,276	241,395	- 3	+ 6
New South Wales	84,507	79,820	80,413	73,880	68,744	68,374	71,952	75,494	71,898	72,848	76,146.5	79,302	82,606	- 2	+ 13
Regional NSW	52,620	50,666	51,905	49,370	45,244	45,707	46,830	49,238	46,774	47,802	49,461	50,999	52,760	0	+ 12
Central NSW	4,540.6	4,394.9	4,696.9	4,804.2	4,060.5	4,060.8	4,070.4	4,510.6	4,060.5	3,881.1	4,014.2	4,149.3	4,580.9	0	+ 11
Central NSW % share of:															
... Regional NSW	8.62%									8.12%	8.12%	8.13%	8.08%		
... New South Wales	5.37%									5.32%	5.27%	5.23%	5.54%		

Source: National Visitors Survey (NVS), YE Dec 12, TRA and International Visitor Survey (IVS), YE Dec 12, TRA

In 2012 total visitation, including day visitors, overnight visitors and international visitors to Central NSW was 4.5 million compared to 52.7 million across regional NSW and 82.6 million for NSW as a whole. Visitation numbers overall have dropped in Australia by 3% and in NSW by 2% between 2000 and 2012. No change was recorded for Regional NSW or Central NSW. However, the past five years have shown a change in direction with a noticeable increase in visitor numbers for Australia (6%), NSW (13%) and Regional NSW (12%). Central NSW does record an 11% increase over the same period. As background information, the global financial crisis (GFC) occurred in July 2007, worsened through to October 2008, and was tackled by Australian Government policy between October 2008 and February 2009 (Canstar, 2012). It should be noted that Sydney hosted the Summer Olympic Games in 2000.

Observations, opportunities and analysis

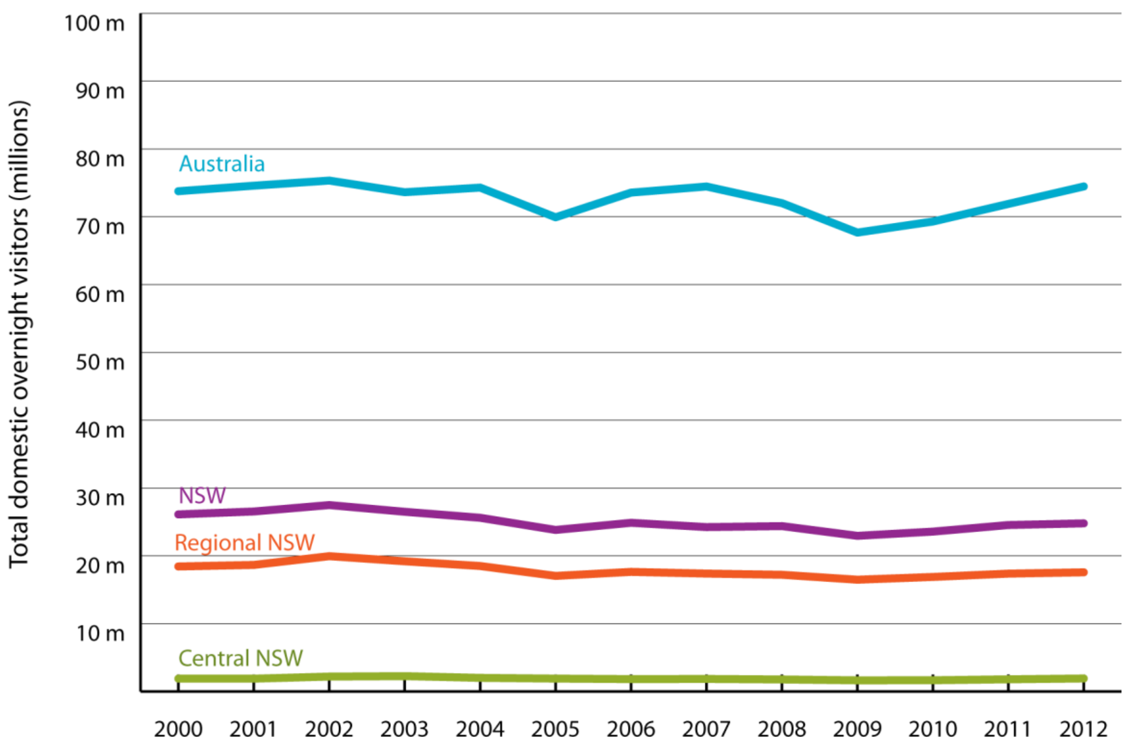
1 Central NSW follows similar trends to Regional NSW, NSW and Australia. Marketing efforts have not revitalised the tourism sector. Despite marketing activities, current demand is at a similar level to demand in 2000. This stagnation is across the board. The GFC has given Australians permission to tighten their purse strings and concentrate on value for money (Childs, 2010). Changes are required to revitalise and improve destination appeal and upgrade the quality of experiences. This requires taking a whole-of-government approach and working in partnership with industry (Visitor Economy Taskforce, 2012) so that what is on offer is not the 'same old' experience (Childs, 2010).

3.2 Domestic overnight visitors

The following graphs (created from the data in Table 2) show 2000 to 2012 trends in domestic overnight visitors comparing Central NSW with Regional NSW, NSW and Australia. The graphs are included because both VET and Destination NSW have indicated that overnight expenditure is the focus for growth (Visitor Economy Taskforce, 2012) (Destination NSW, n.d.).

Domestic overnight visitors are people aged 15 years and over who undertake an overnight trip of one night or more and at least 40 kilometres away from home. Only those trips where the respondent is away from home for less than 12 months are included in the NVS (Tourism Victoria, n.d.).

Graph 2a: Domestic overnight visitors (millions)



Graph 2b: % share of NSW domestic overnight visitors

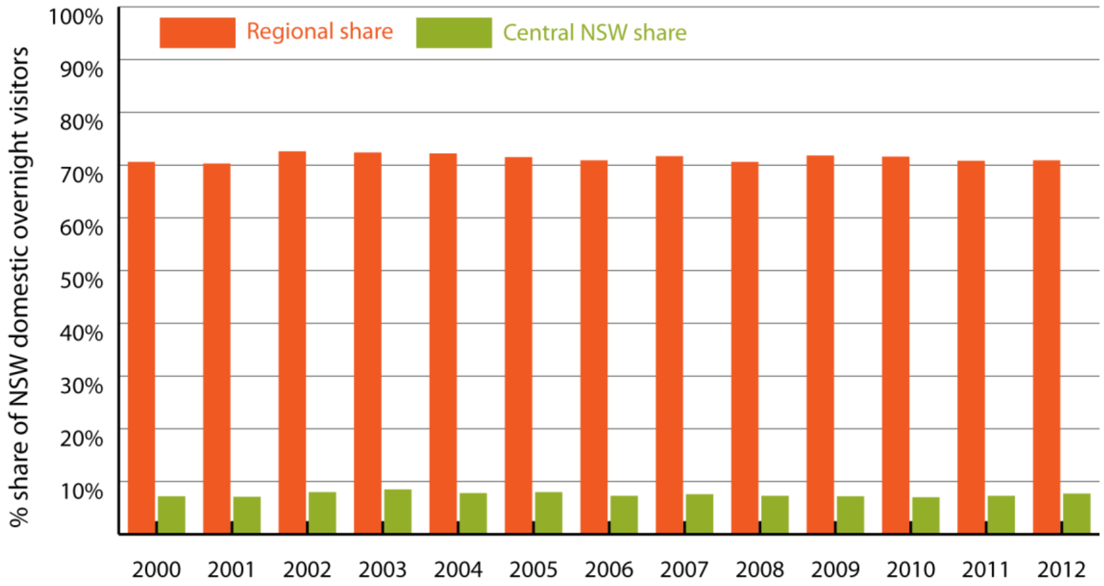


Table 2: 2000–2012 trend – total domestic overnight visitors ('000)

	Year ending December:													% change 2000–2012	% change 2008–2012
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012		
Australia	73,771	74,585	75,339	73,621	74,301	69,924	73,564	74,464	72,009	67,670	69,297	71,895	74,472	+ 1	+ 5
New South Wales	26,111	26,539	27,485	26,497	25,612	23,819	24,873	24,238	24,384	22,949	23,572	24,542	24,790	- 5	+ 1
Regional NSW	18,432	18,658	19,949	19,194	18,499	17,040	17,634	17,383	17,207	16,481	16,887	17,374	17,569	- 5	0
Central NSW	1,888	1,886	2,192	2,258	2,005	1,896	1,820	1,843	1,769	1,641	1,653	1,790	1,912	+ 1	+ 7
% share of New South Wales total															
Regional share	70.6%	70.3%	72.6%	72.4%	72.2%	71.5%	70.9%	71.7%	70.6%	71.8%	71.6%	70.8%	70.9%		
Central NSW share	7.2%	7.1%	8.0%	8.5%	7.8%	8.0%	7.3%	7.6%	7.3%	7.2%	7.0%	7.3%	7.7%		

Source: National Visitors Survey (NVS), YE Dec 12, TRA

Central NSW received 1.9 million domestic overnight visitors during 2012 compared with 17.6 million for Regional NSW. Regional NSW and Central NSW's share of overnight visitors has remained constant and not shown any statistically significant growth of share. During the period 2000–2012, NSW recorded a 5% decline in overnight visitor numbers, down from 26.1 million to 24.7 million.

Observations, opportunities and analysis

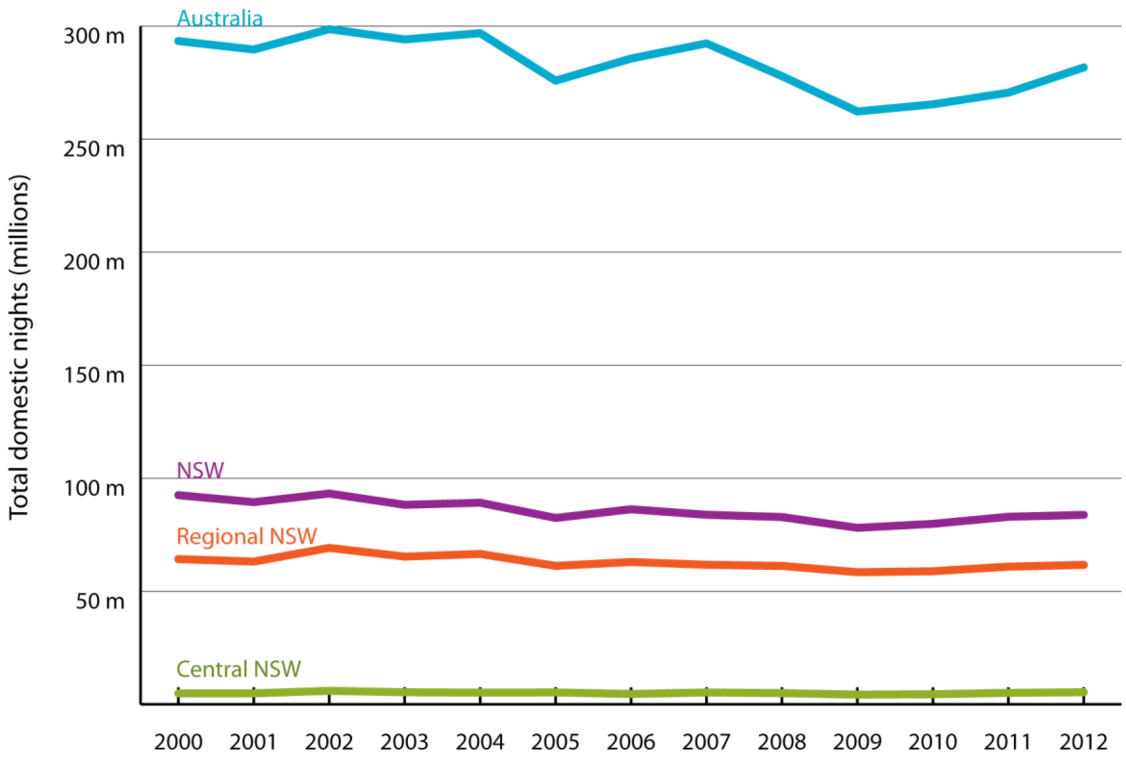
2 The stagnation of tourism is particularly emphasised when looking at domestic overnight visitor numbers. The decline in overnight visitors is compounded by the NSW annual population growth rate of 1.4% 2007 and 2011 (Satatistics, Australian Bureau of, 2012). Therefore the overall performance may be considered weaker than the graph demonstrates. Domestic tourism is not sufficiently relevant to Australians (Collins, 2007). It requires a change in destination brand proposition (Visitor Economy Taskforce, 2012) to make it more relevant to increase the frequency of consumption (Collins, 2007).

3.3 Domestic nights

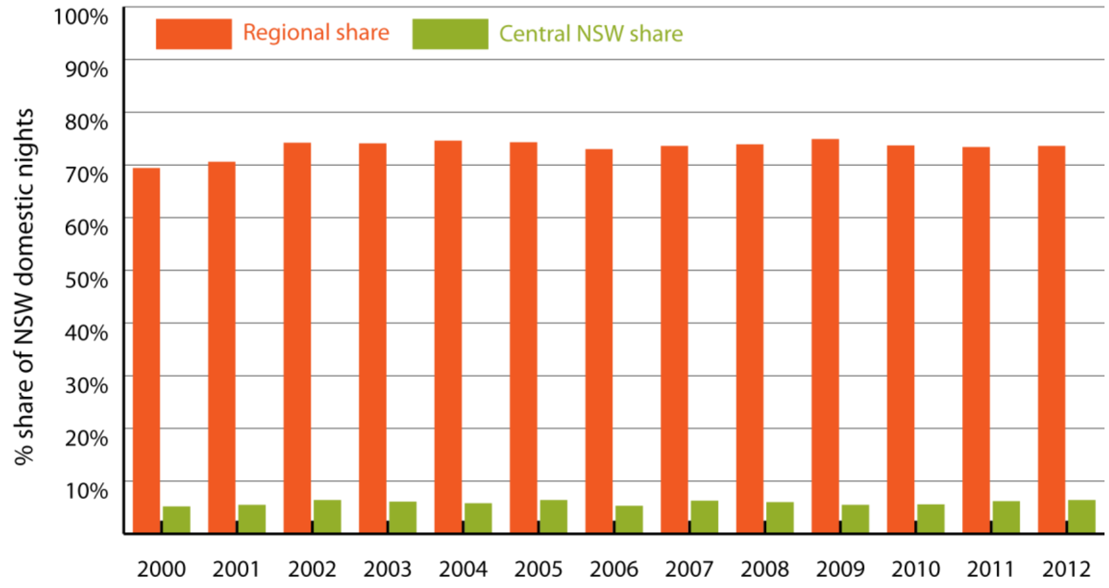
The previous graph (Graph 2a) records the number of visitors who stayed overnight. The following graphs (created from the data in Table 3) show the total number of nights domestic travellers stayed, with a comparison between national, State, regional and Central NSW trends. One of the strategies identified by VET is to increase the length of a visitor's holiday (Visitor Economy Taskforce, 2012).

'Domestic visitor nights' refers to the number of nights spent away from home in association with individual visits (Tourism Victoria, n.d.).

Graph 3a: Total domestic nights (millions)



Graph 3b: % share of NSW domestic nights



Graph 3c: Average length of stay

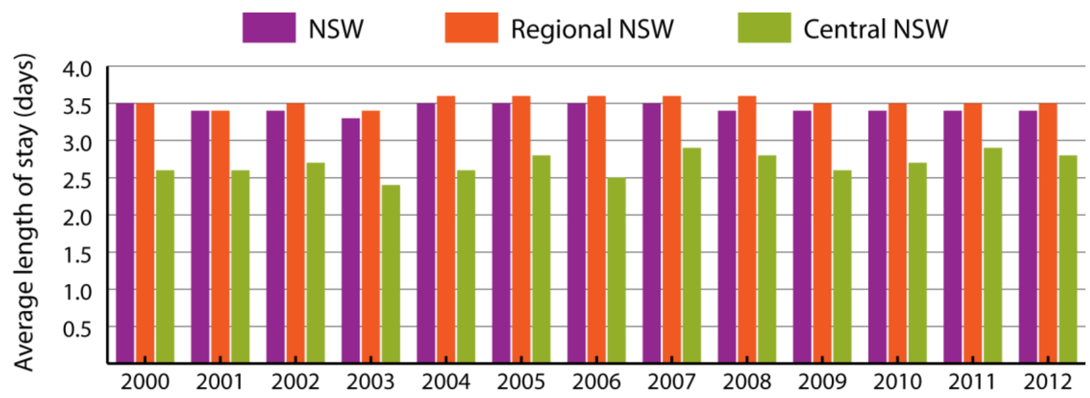


Table 3: 2000–2012 trend – total domestic nights ('000)

	Year ending December: 2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	% change 2000–2012	% change 2008–2012
Australia	293,384	289,644	298,658	294,112	296,877	275,859	285,661	292,354	277,865	262,236	265,393	270,573	281,733	- 4	+ 1
New South Wales	92,540	89,446	93,251	88,259	89,190	82,464	86,294	83,857	82,871	78,084	79,860	82,981	83,809	- 10	+ 1
Regional NSW	64,263	63,160	69,224	65,358	66,529	61,252	62,977	61,744	61,242	58,465	58,893	60,930	61,702		+ 1
Central NSW	4,847	4,892	5,987	5,364	5,200	5,291	4,602	5,280	4,970	4,317	4,488	5,106	5,373		+ 7
% share of New South Wales total															
Regional share	69.4%	70.6%	74.2%	74.1%	74.6%	74.3%	73.0%	73.6%	73.9%	74.9%	73.7%	73.4%	73.6%		
Central NSW share	5.2%	5.5%	6.4%	6.1%	5.8%	6.4%	5.3%	6.3%	6.0%	5.5%	5.6%	6.2%	6.4%		
Average length of stay (nights)															
New South Wales	3.5	3.4	3.4	3.3	3.5	3.5	3.5	3.5	3.4	3.4	3.4	3.4	3.4		
Regional NSW	3.5	3.4	3.5	3.4	3.6	3.6	3.6	3.6	3.6	3.5	3.5	3.5	3.5		
Central NSW	2.6	2.6	2.7	2.4	2.6	2.8	2.5	2.9	2.8	2.6	2.7	2.9	2.8		

Source: National Visitors Survey (NVS), YE Dec 12, TRA

Domestic visitors stayed in Central NSW for a total of 5.3 million nights during 2012. This showed an increase from 4.9 million nights recorded in 2008 (not statistically significant). Regional NSW recorded low growth in the number of domestic nights between 2008 and 2012. Total NSW domestic nights also appear to have had low growth over the same period at 83 million. However, the 2012 State domestic visitor nights are 10% below 2000 level. Australian domestic overnight figures also record a decline (4%) for the same period. Visitors to Central NSW stay for a shorter period of time (2.8 nights) compared with Regional NSW (3.5 nights) and NSW (3.4 nights) in 2012.

Observations, opportunities and analysis

3 There is no statistically significant growth in the number of visitor nights in Regional NSW; Central NSW performs below the regional average. To increase duration of visit (and so double overnight expenditure) a radical change must occur to stimulate growth. Currently Australians are seeking to save money, and expenditure on tourism competes with international holidays and other discretionary spending. The current mindset suggests that any expenditure needs to be justified (Childs, 2010) (Tourism Australia, 2011). To change this trend requires more relevant promotional messages and higher quality experiences (Visitor Economy Taskforce, 2012).

4 There was 25% growth in Central NSW domestic nights between 2009 (base year for VET) and 2012. This is effectively the achievement of one quarter of the growth target over the past 3 years.

3.4 CNSWT source markets and trends

The following chart (created from the data in Table 4) indicates from where overnight visitors have originated. The source of visitors to Central NSW is split between intrastate and interstate and then compared between 2000 and 2012. The overall Regional NSW figures provide a broad benchmark comparison while the Hunter Valley and Blue Mountains provide a comparison with neighbouring destinations. The comparisons illustrate trends in visitation and can be attributed to a variety of factors including population change – for example, the increasing growth of New Australians coming to settle in Sydney (Australian Bureau of Statistics, 2011).

The term interstate refers to a person who visits a state or territory other than that in which they reside. An interstate visitor night is any night spent in a state or territory other than that in which the visitor resides. Intrastate tourism is defined as a person who visits a location in the state or territory in which they reside. An intrastate visitor night is any night spent in the same state or territory as that in which the traveller resides (Tourism Victoria, n.d.).

Graph 4: Source of domestic overnight visitors

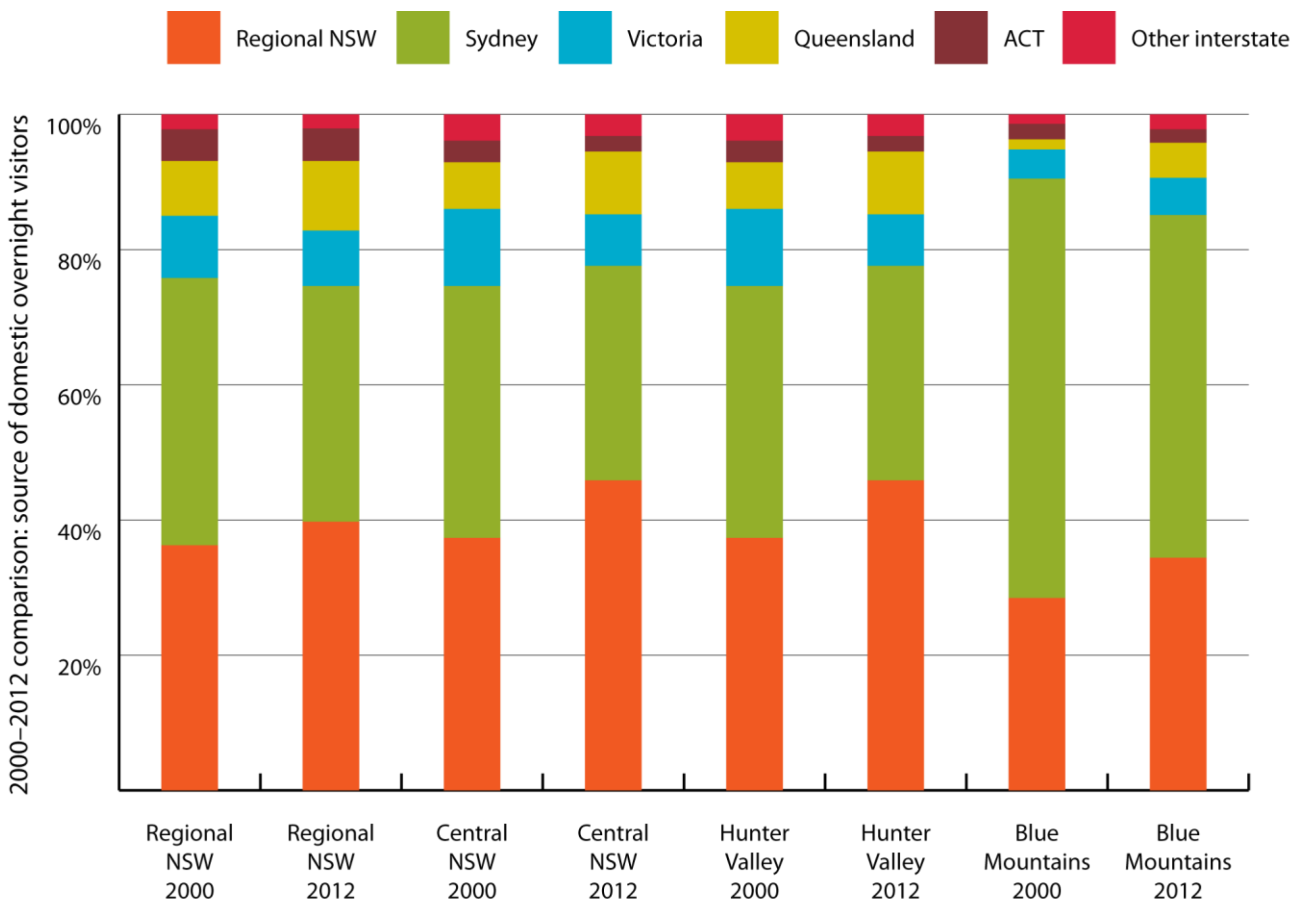


Table 4: 2000–2012 comparison – source of domestic overnight visitors

	Regional NSW		Central NSW		Hunter Valley		Blue Mountains	
Year ending December:	**2000**	**2012**	**2000**	**2012**	**2000**	**2012**	**2000**	**2012**
Regional NSW	36.3%	39.7%	37.4%	45.8%	37.4%	45.8%	28.5%	34.4%
Sydney	39.6%	34.8%	37.3%	31.7%	37.3%	31.7%	62.1%	50.7%
Total intrastate	**75.9%**	**74.5%**	**74.6%**	**77.6%**	**74.6%**	**77.6%**	**90.5%**	**85.0%**
Victoria	9.2%	8.2%	11.4%	7.6%	11.4%	7.6%	4.3%	5.5%
Queensland	8.1%	10.3%	6.9%	9.3%	6.9%	9.3%	1.5%	5.2%
ACT	4.7%	4.8%	3.2%	2.3%	3.2%	2.3%	2.3%	2.0%
Other interstate	2.2%	2.1%	3.9%	3.2%	3.9%	3.2%	1.4%	2.2%
Total interstate	**24.1%**	**25.5%**	**25.3%**	**22.5%**	**25.3%**	**22.5%**	**9.5%**	**14.8%**
Total	100%	100%	100%	100%	100%	100%	100%	100%

Source: National Visitors Survey (NVS), YE Dec 12, TRA

The source of domestic visitors to regional NSW has remained consistent over a 12 year period. 75% of visitors are intrastate, coming from inside NSW. 25% are interstate visitors, arriving primarily from Victoria and Queensland. Central NSW follows a similar pattern but the number of Sydney visitors has fallen from 37% to 32% between 2000 and 2012. The Hunter Valley also records a decline in its Sydney visitor share. The Sydney market decline also appears to have negatively affected the Blue Mountains, which relies heavily on this source market and records a percentage share drop from 62% in 2000 to 51% in 2012.

Observations, analysis and opportunities

5 Sydney residents are taking fewer overnight stays in regional NSW. Meanwhile the city's population has grown and now 40% of its residents were born overseas (Australian Bureau of Statistics, 2011). This represents an opportunity to target New Australians, making Central NSW relevant to their motivations in a new country.

6 Central NSW has recorded continued growth in intrastate regional visitors despite overall long-term visitor numbers remaining flat. Consequently Regional NSW represents a growth market and should be considered for future marketing activity to increase visitor nights and expenditure.

7 Central NSW is close to ACT yet its share of visitors is low. The ACT is a potentially valuable market because residents here have a median weekly household income 25% higher than Sydney and 36% above the NSW state median (Australian Bureau of Statistics, 2011).

3.5 Purpose for visit

In the following chart (created from the data in Table 5), total domestic overnight visitors numbers have been split between those who have arrived in Central NSW on holiday, visiting friends and relatives, travelling on business or 'other reason'. To illustrate the changes, the numbers shared between these four categories have been presented as a percentage and a comparison made between 2000 and 2012. To add analysis a benchmark comparison with total Regional NSW has been provided, plus comparison trends with neighbouring destinations.

Graph 5: Purpose for visit

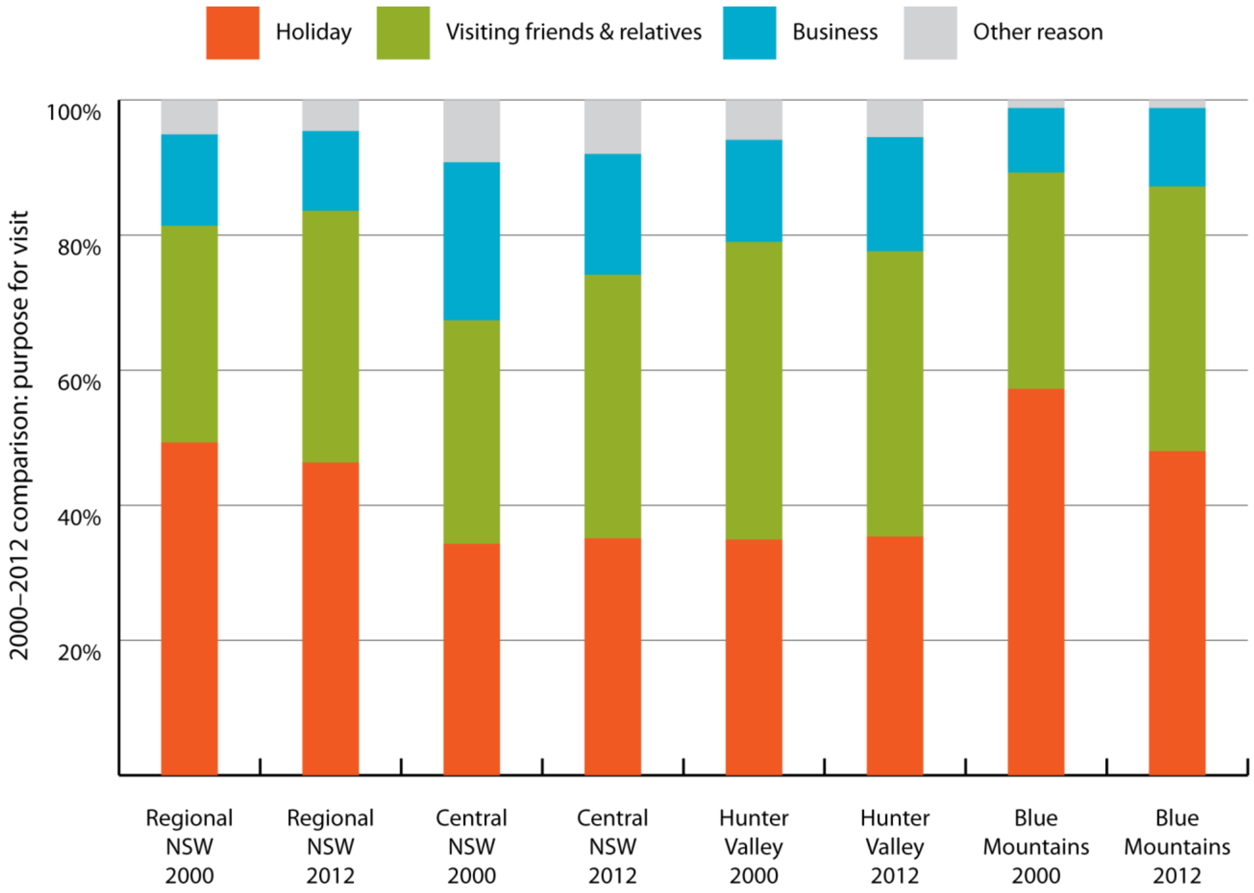


Table 5: 2000–2012 comparison – purpose for visit

	Regional NSW		Central NSW		Hunter Valley		Blue Mountains	
Year ending December:	**2000**	**2012**	**2000**	**2012**	**2000**	**2012**	**2000**	**2012**
Holiday	49.7%	46.7%	34.5%	35.3%	34.9%	35.4%	57.3%	48.0%
Visiting friends & relatives	32.6%	37.7%	33.2%	39.2%	44.1%	42.3%	32.2%	39.2%
Business	13.9%	12.3%	23.7%	18.0%	15.1%	16.9%	9.7%	11.6%
Other reason	5.4%	4.9%	9.3%	8.1%	5.9%	5.5%	1.3%	1.2%
Total	100%	100%	100%	100%	100%	100%	100%	100%

Source: National Visitors Survey (NVS), YE Dec 12, TRA

Regional NSW figures indicate that the number of people holidaying overnight for leisure, entertainment, sport, and shopping, (Victoria, Tourism, n.d.) has declined from 50% in 2000 to 47% in 2012. However, the visiting friends and relatives (VFR) share has increased from 33% in 2000 to 38% in 2012. Business travel, comprising business, work travel for transport crews, attendance at conferences, conventions, exhibitions and trade fairs, and training and research related to employment (Victoria, Tourism, n.d.) has dropped over the same period. These Regional NSW trends are replicated for the entire state. Central NSW has a lower than average regional share of holidays (35%), a higher than average level for VFR (39%) and a higher level for business (18%), though this is in decline. The Regional, Blue Mountains and Central NSW VFR segment is growing. This is not the case in the Hunter Valley where the VFR market appears to be in slight decline, while the Blue Mountains has seen a decline in the holiday segment.

Observations, opportunities and analysis

8 CNSWT should target the growing VFR market segment because reconnecting and nostalgia are strong consumer motivations (Childs, 2010) for taking a domestic holiday, and the VFR market is a natural fit with this consumer desire. However, it will be important to concentrate on encouraging overnight stays at commercial and non-commerical (VFR) accommodation providers in order to achieve the doubling of overnight visitor expenditure under Destination NSW's terms (Destination NSW, n.d.).

9 Central NSW has a lower share of holiday visitors than the overall Regional NSW share. CNSWT could target a specific segment of the holiday sector where it has a competitive edge. Part of this focus should be on the destination's natural and cultural heritage "well-managed protected reserves and restored heritage sites are well-positioned to provide internationally competitive and sustainable tourism experiences" (Visitor Economy Taskforce, 2012).

10 Central NSW needs to improve its competitiveness for business travellers as it is losing share to the Hunter Valley and Blue Mountains. This requires meeting the 21st century needs of conferences, meetings and events in technology, facilities and services.

3.6 Holiday visitors' travel mindsets

This section presents evidence of holiday tourist motivations. The table below explains the five mindsets of leisure tourists as defined by Tourism Australia and summarised here (Central NSW, 2004). The mindsets of the tourists indicate their needs and thus motivations for selecting destinations and tourism products and services.

Table 6: Visitors' travel mindsets

Visitor segment	Travel mindset
Pampadours	The indulgence segment. Pampadours want it all. They seek out new places, new faces, a different culture, climate and food and activities not available or taken up at home. They travel outside school holidays. They avoid caravans, self-contained accommodation, day trips, adventure and risk.
Compatriots	Middle Australia. Compatriots travel with their family. They have to budget and look for value and accessibility. The children of Compatriots often have a role in deciding a holiday destination. Holidays are usually taken in single blocks, to allow maximum recharge.
Wanderers	Independent potterers. Nearly 1/2 of the Wanderers segment is retired. Wanderers take many holidays. They seek out value for money and take their holidays outside school holidays.
True Travellers	They are travellers, not tourists. They often holiday overseas where they immerse themselves in a different culture. They favour spontaneity. They respond to physical activity, personal fitness travel, adventure, risk and things they would not do at home.
Groupies/Peer Group Travellers	A segment with a skew towards youth, males and school and tertiary students. They travel in peer groups and in peak periods. They want party time, bright lights, clubs and pubs. Their trips include fishing or hunting trips for males, girls' weekends, school reunions, etc.

Source: Central NSW Regional Tourism Plan 2004-2007

The following chart and table indicate the percentage split of the five tourist mindsets in Regional NSW. The research is provided by Destination NSW from a visitor analysis of Regional NSW over a two-year period (Australia, 2012). The relevance of this research helps stakeholders reflect on the nature of leisure tourists' motivations and the alignment of current tourism supply. This type of analysis should be undertaken by stakeholders seeking funding, to ensure they have focused on meeting consumer needs. Meeting these needs is essential to double overnight visitor expenditure by 2020 (Visitor Economy Taskforce, 2012).

Graph 7: Travel mindset of holiday visitors to Country NSW

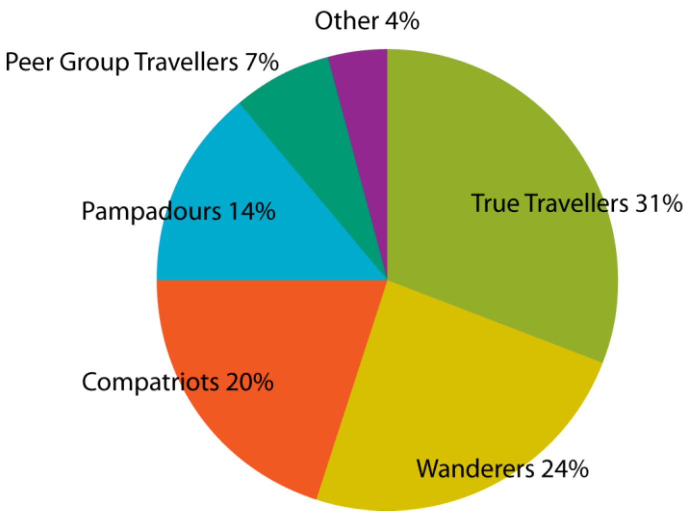


Table 7: Travel mindset of holiday visitors to Country NSW

Visitor segment	% of visitors to Country NSW
Pampadours	14%
Compatriots	20%
True Travellers	31%
Peer Group Travellers	7%
Wanderers	24%
Other	4%

Source % of holiday visitors to Country NSW, 2 years ending December 2012

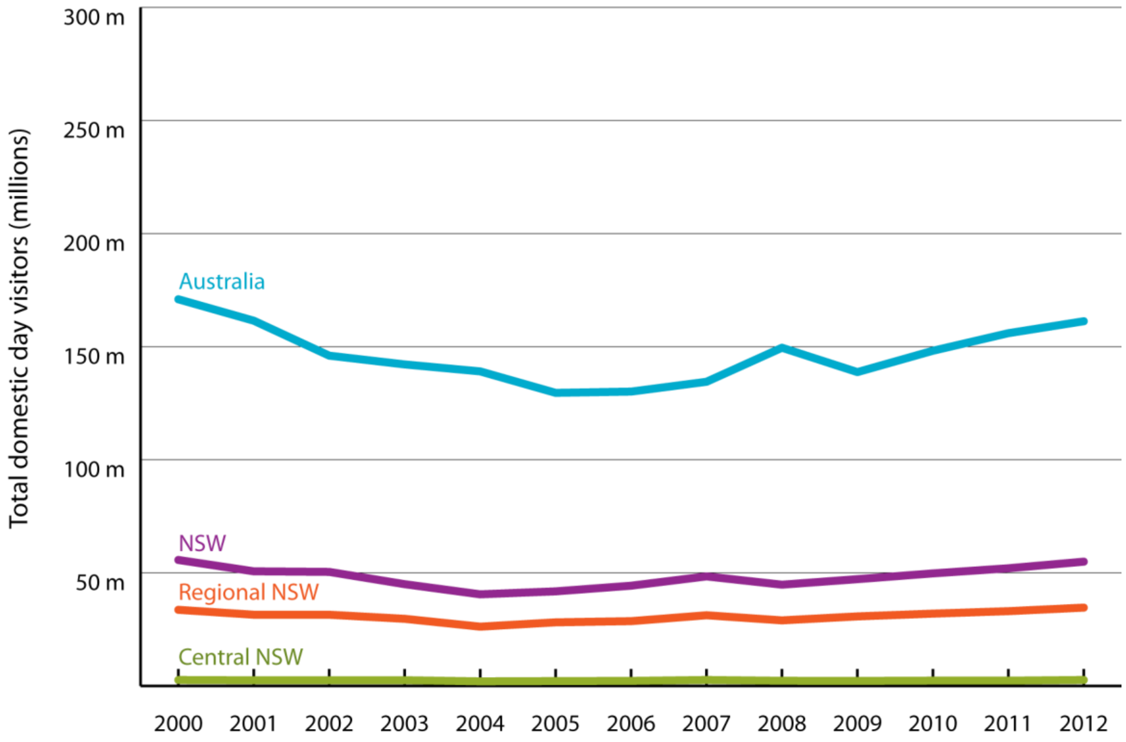
The majority of holiday visitors to Country NSW are True Travellers (31%) and Wanderers (24%) and Compatriots (20%). Note: this table is a guide only because the data covers all of Country NSW and is not Central NSW specific.

3.7 Domestic day visitors

Domestic day trip visitors travel for a round trip distance of at least 50 kilometres, are away from home for at least 4 hours, and do not spend a night away from home as part of their travel. Same-day travel as part of overnight travel is excluded in the NVS (Tourism Victoria, n.d.).

While both VET and Destination NSW have specifically stated that day visitors should not form part of the strategy to increase overnight visitor expenditure (Visitor Economy Taskforce, 2012) (Destination NSW, n.d.), they represent potential tourists who could be targeted to stay overnight.

Graph 8a: Domestic day visitors (millions)



Graph 8b: % share of NSW domestic day visitors

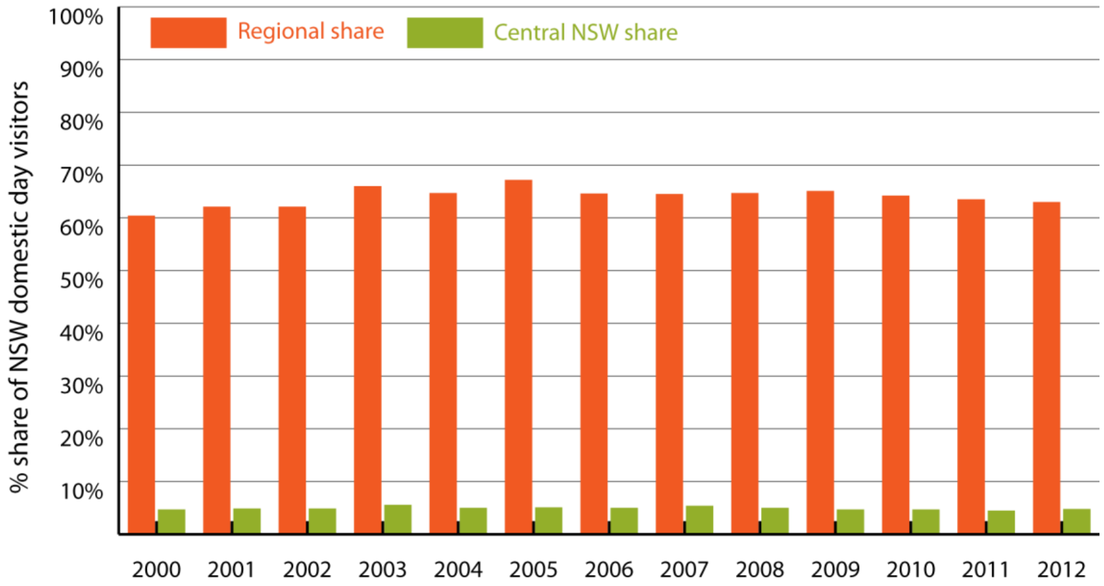


Table 8: 2000–2012 trend – total domestic day visitors ('000)

	Year ending December: 2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	% change 2000–2012	% change 2008–2012
Australia	170,939	161,464	146,008	142,133	139,060	129,568	130,120	134,464	149,516	138,745	148,176	155,942	161,232	- 6	+ 7
New South Wales	55,682	50,662	50,404	44,972	40,491	41,804	44,299	48,418	44,757	47,193	49,744	52,005	54,927	- 1	+ 18
Regional NSW	33,636	31,480	31,465	29,661	26,194	28,111	28,631	31,234	28,974	30,730	31,955	33,043	34,607	+ 3	+ 16
Central NSW	2,615	2,479	2,472	2,510	2,009	2,126	2,216	2,626	2,257	2,200	2,326	2,320	2,630	0	+ 14
% share of New South Wales total															
Regional share	60.4%	62.1%	62.1%	66.0%	64.7%	67.2%	64.6%	64.5%	64.7%	65.1%	64.2%	63.5%	63.0%		
Central NSW share	4.7%	4.9%	4.9%	5.6%	5.0%	5.1%	5.0%	5.4%	5.0%	4.7%	4.7%	4.5%	4.8%		

Source: National Visitors Survey (NVS), YE Dec 12, TRA

Central NSW received 2.63 million domestic day visitors in 2012 compared with 2.61 in 2000, although visitor numbers dropped significantly in 2004 (2 million) and 2008 (2.2 million). Regional NSW figures recorded a similar pattern with a decline in visitation during the middle of the decade, to rise back to close to original figures by 2012 compared with 2000. This trend also matched NSW. There has been no significant statistical change in Regional NSW and Central NSW's share of domestic day visitors.

Observations, opportunities and analysis

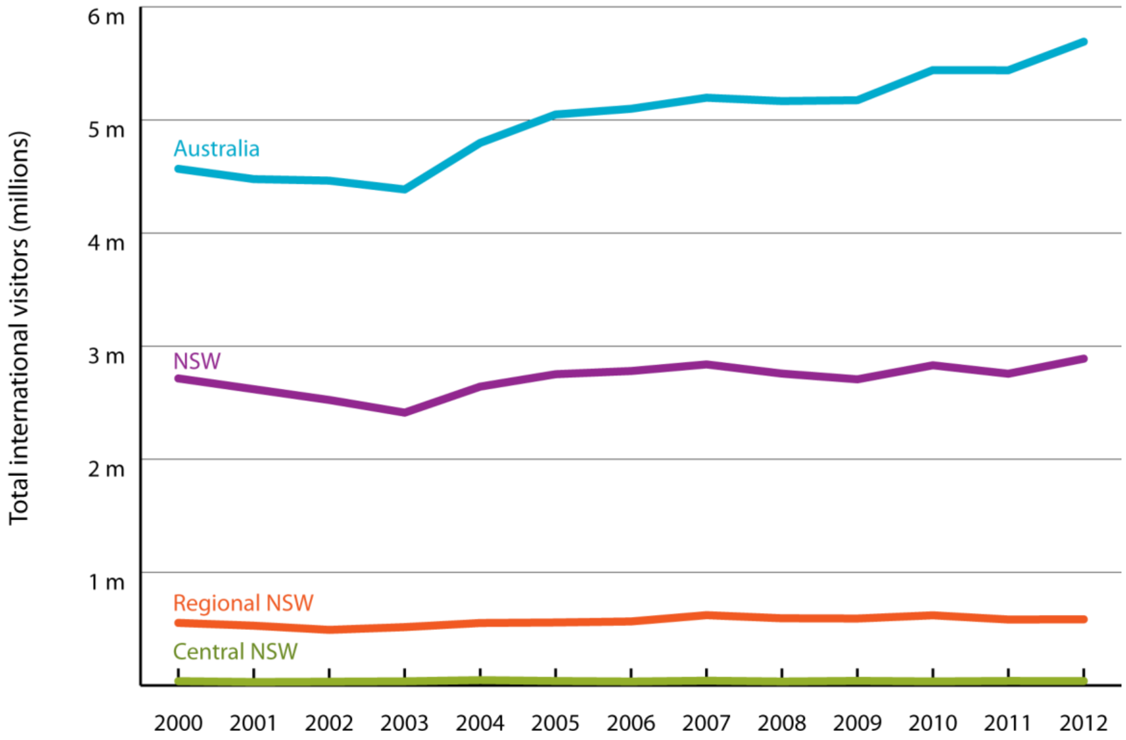
11 While domestic day trips do not form part of the NSW Government's strategy to double visitor expenditure, it is a growing market sector and represents 74% of total visitation for Central NSW. Day visitation involves expenditure in shops, cafes and restaurants. Ignoring the volume of day visitors could have negative economic consequences because a decline in expenditure will reduce local business productivity. This suggests that Central NSW should consider both increasing day visitor expenditure and trying to convert them to staying overnight through products and services that aren't seen as wasting money (Childs, 2010) delivered with high-quality service (Tourism Australia, 2011). This means developing integrated promotions and delivering excellent customer service.

3.8 International visitors

International visitors are seen as an important target segment to enable NSW to double visitor expenditure (Visitor Economy Taskforce, 2012). Graphs 9a and 9b (created from the data in Table 9) record the positive national and State trends. A Regional NSW and Central NSW market share percentage has also been included to demonstrate the scale of Central NSW's share.

Visitors are defined as an international visitor to Australia if they are currently a resident overseas, have been in Australia for less than one year and are aged 15 years or over (Tourism Victoria, n.d.). The figures include leisure tourists, students, medical visitors, business and events visitors.

Graph 9a: Total international visitors (millions)



Graph 9b: % share of NSW international visitors

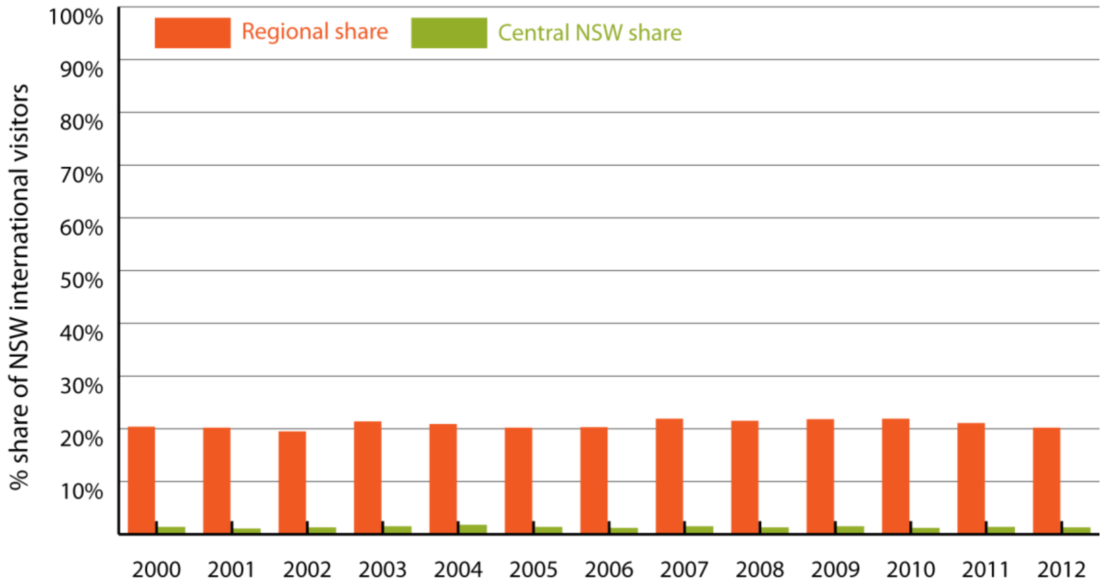


Table 9: 2000–2012 trend – total international visitors ('000)

	Year ending December:														
	2000	**2001**	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**% change 2000–2012**	**% change 2008–2012**
Australia	4,567.8	4,476.9	4,463.2	4,385.5	4,797.1	5,048.2	5,098.8	5,196.5	5,166.8	5,174.7	5,440.9	5,439.3	5,691.8	+ 10	+ 9
New South Wales	2,714.4	2,619.3	2,524.1	2,411.9	2,641.9	2,751.7	2,780.0	2,838.3	2,757.1	2,706.6	2,830.5	2,755.8	2,889.2	+6	+ 5
Regional NSW	552.8	528.1	491.1	515.5	551.7	556.5	565.5	621.0	593.7	591.3	619.8	582.5	584.3	+3	- 1
Central NSW	37.6	29.9	32.9	36.2	46.5	38.8	34.4	41.6	34.5	40.1	35.2	39.3	38.9	+3	+12
% share of New South Wales total															
Regional share	20.4%	20.2%	19.5%	21.4%	20.9%	20.2%	20.3%	21.9%	21.5%	21.8%	21.9%	21.1%	20.2%		
Central NSW share	1.4%	1.1%	1.3%	1.5%	1.8%	1.4%	1.2%	1.5%	1.3%	1.5%	1.2%	1.4%	1.3%		

Source: International Visitor Survey (IVS), YE Dec 12, TRA

International visitors represent less than 1% of total visitors to Central NSW. The source data is small and should be taken as an indication of trend and scale only. Regional NSW share of international visitors remains flat after 13 years. NSW overall has seen an increase of 5% in international visitors from 2.7 million in 2000 to 2.9 million in 2012, while over the same period Australia has seen a 9% increase in international visitation which indicates that NSW is losing market share to other states.

Observations, opportunities and analysis

12 International visitor growth is primarily Sydney-focused. CNSWT and stakeholders should consider strategic partnerships in Sydney to promote Central NSW experiences.

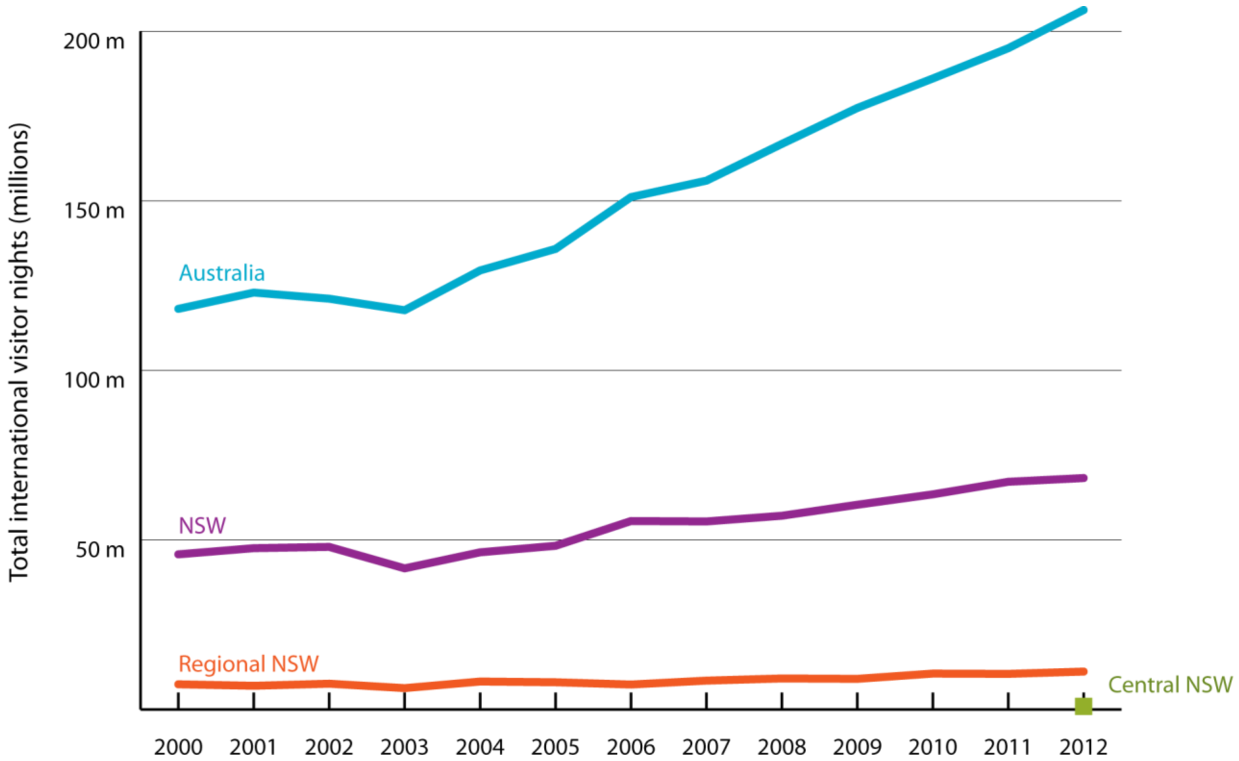
13 VET has recommended targeting high net worth international visitors as a method to achieve expenditure growth. Consequently CNSWT will have to work with the tourism industry in product development, packaging international-ready product and promoting experiences through targeted distribution channels.

3.9 International visitor nights and origin

'International visitor nights' refers to the number of nights spent away from home, in association with individual visits by an international visitor (Tourism Victoria, n.d.).

Increasing the length of stay is one method of doubling overnight visitor expenditure. VET considers that targeting high net worth international visitors is an action that can contribute to achieving the NSW Government's aim for growth (Visitor Economy Taskforce, 2012). Graph 10 (created from the data in Table 10) records the national, State and regional international visitor trends; please note that the sample size for Central NSW is too small to be statistically reliable and only one year's visitation numbers have been reported by Tourism Research Australia (Australia, 2012).

Graph 10a: Total international visitor nights (millions)



Graph 10b: % share of NSW international visitor nights

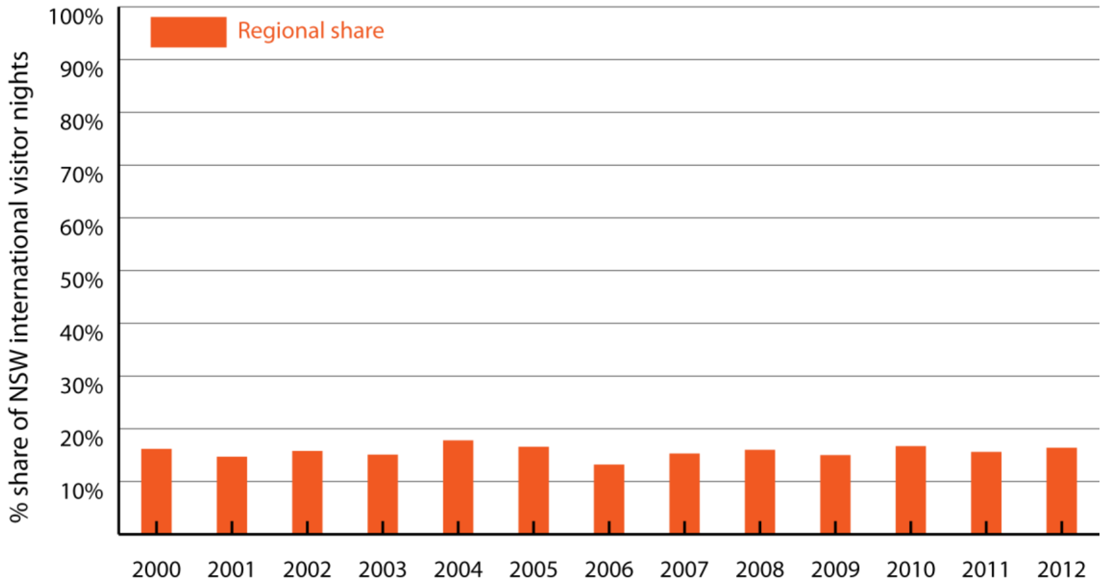


Table 10: 2000–2012 trend – total international visitor nights

	Year ending December:													% change	% change
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2000–2012	2008–2012
Australia	118,136	122,942	121,128	117,742	129,472	135,815	151,102	155,948	166,785	177,385	186,074	194,997	206,275	+ 43	+ 19
New South Wales	45,747	47,562	47,930	41,610	46,341	48,261	55,566	55,442	57,124	60,370	63,434	67,139	68,242	+ 33	+ 16
Regional NSW	7,421	6,975	7,593	6,288	8,230	8,018	7,351	8,499	9,138	9,027	10,574	10,491	11,164		+ 12
Central NSW													912		
% share of New South Wales total															
Regional share	16.2%	14.7%	15.8%	15.1%	17.8%	16.6%	13.2%	15.3%	16.0%	15.0%	16.7%	15.6%	16.4%		

Source: International Visitor Survey (IVS), YE Dec 12, TRA
NOTE: The sample size for Central NSW is too small to be statistically reliable.

83.4% of international visitors go to Sydney and 16.4% visit Regional NSW. Central NSW international visitor nights were 912,000 in 2012 representing 15% of total visitor nights. While caution should be taken in reading this figure because of statistical reliability, it does reinforce that international visitors stay longer than domestic visitors. Regional NSW also records that 15% of its total visitor nights are international. For NSW as whole, average international visitor stay was 23.6 nights compared with the average domestic overnight stay of 3.4 nights.

The following chart indicates the source of international visitors, comparing Sydney with Regional NSW. Sydney is this country's most important entry point for international visitors (Visitor Economy Taskforce, 2012) therefore changes in the source of Sydney's international visitor flow will have repercussions for Regional NSW.

Table 11: 2000 and 2012 comparison – international visitors' origin (% share)

	Sydney		Regional NSW	
Year ending December:	**2000**	**2012**	**2000**	**2012**
New Zealand	11.5%	12.5%	10.9%	15.6%
United Kingdom	13.5%	10.5%	26.2%	18.0%
Germany	3.6%	3.5%	8.4%	7.1%
Scandinavia	n/a	1.9%	n/a	4.1%
Switzerland	n/a	0.9%	n/a	2.1%
Netherlands	n/a	0.8%	n/a	2.1%
France	n/a	2.1%	n/a	2.8%
Italy	n/a	1.3%	n/a	1.4%
United States of America	12.2%	10.0%	12.0%	10.2%
Canada	2.3%	2.6%	4.5%	4.1%
Japan	14.1%	5.6%	2.8%	2.5%
Mainland China	3.4%	13.1%	0.3%	3.9%
Korea	4.8%	5.1%	1.8%	1.9%
Singapore	3.2%	3.8%	1.6%	2.7%
Malaysia	1.7%	2.4%	0.9%	1.6%
Hong Kong	3.3%	3.2%	1.2%	1.1%
Indonesia	1.6%	1.9%	0.5%	1.5%
Thailand	1.4%	1.3%	0.5%	1.2%

	Sydney		Regional NSW	
Year ending December:	**2000**	**2012**	**2000**	**2012**
India	1.4%	2.4%	0.6%	1.3%
Taiwan	3.0%	1.7%	0.6%	1.5%
Other Europe	3.4%	3.7%	4.9%	5.2%
Other Asia	1.1%	2.4%	0.7%	1.8%
Other Countries	6.3%	7.2%	5.7%	6.1%

Source: International Visitor Survey (IVS), YE Dec 12, TRA

Sydney has the largest NSW share of international visitors (83.4%) leaving Regional NSW with a much smaller share (16.4%). Overall the mature international markets of UK and Japan have shown decline between 2000 and 2012. In 2012 the UK and Japan represented 16.1%of total international visitors to Sydney compared with 27.6% recorded in 2000. This decline has been transferred to Regional NSW which has seen the share of visitors from UK and Japan decline from 29% in 2000 to 20.5% in 2012.

Mainland China has shown particular growth, jumping from 3.4% (2000) to 13.1% (2012) in Sydney. The scale of increase has not been as notable in Regional NSW with visitors from China representing 3.9% of 2012 share.

VET has identified India as an emerging market; the NSW research indicates visitor numbers have increased but from a small base and currently represent 2.4% of Sydney's share and 1.3% of the Regional NSW share.

There has been growth in the New Zealand market, particularly for Regional NSW, with visitor share growing from 10.9% (2000) to 15.6% (2012).

Observations, opportunities and analysis

14 International visitor numbers to Australia have grown substantially during the last decade. The growth is fuelled by new emerging markets like China and increasing visitor numbers from New Zealand. However, there is not an increasing share of dispersal by international visitors to Regional NSW. To increase dispersion Regional NSW must offer experiences which meet the needs of the growing market segments of international visitors. This will require service and language skills capacity building. In the case of visitors from China this will include Mandarin language skills. VET highlighted the need for improved service as essential to meet the aspirations of international visitors (Visitor Economy Taskforce, 2012). Domestic visitors are also unhappy with tourism's quality of service overall (Childs, 2010). Cultural awareness training therefore has the benefit of reaching both international tourists and New Australians.

3.10 International visitor numbers: regional comparison

In this graph and table, Central NSW international visitor numbers are compared with surrounding destinations. The aim is to illustrate the need for CNSWT and its stakeholders to work collaboratively with other regions to build the critical mass required to justify development of the international market. Only regions that are geographically close have been listed as potential collaboration partners; they may also wish to target international visitors.

Graph 12: International visitor numbers in neighbouring regions (thousands)

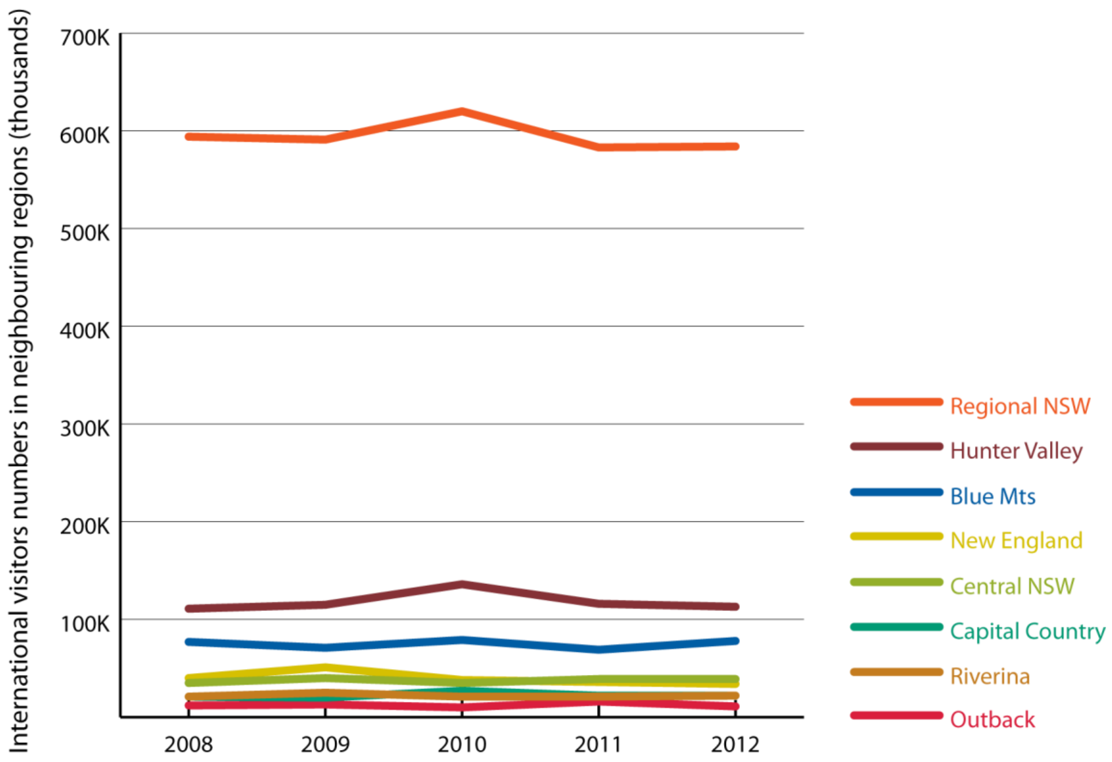


Table 12: International visitor numbers in neighbouring regions

	Year ending December:				
	2008	2009	2010	2011	2012
Regional	594	591	620	583	584
Hunter Valley	111	115	136	116	113
Blue Mountains	77	71	79	69	78
New England	40	51	38	36	34
Riverina	21	25	21	21	22
Capital Country	21	20	27	22	22
Outback	12	13	10	16	11
Central NSW	35	40	35	39	39

Source: International Visitor Survey (IVS), YE Dec 12, TRA

In 2012, Central NSW's international visitor numbers of 39,000 were similar to New England's which were 34,000, but considerably lower than the Blue Mountains which were 78,000 and the Hunter Valley of 113,000. Figures show stagnant international visitation levels.

Observations, opportunities and analysis

15 There are barriers for CNSWT to achieve international visitor growth (particularly from emerging markets which are currently dominated by package tours). Distance from Sydney, awareness of attractions, international reputation, international ready product and high quality experiences impact on competitiveness. Moreover, CNSWT's share is small, making commercial investment more difficult to justify because of the visitor volume. Opportunities may exist working in collaboration with the regions visitors pass through to reach Central NSW (e.g. the Blue Mountains) or with those who have a similar product offer (e.g. food & wine in the Hunter Valley), who have a high-quality product (Wolgan Valley) or who offer a strong 'magnet' experience (Taronga Western Plains Zoo). Links to grow and maximise the visitor flow may justify the scale of investment through regional collaboration linking experiences and packaging.

16 A second opportunity exists through the targeting of international visitors planning their second or third trip (from mature markets: New Zealand, Europe and North America) as research shows they tend to venture further seeking something new. Visitors in their first trip to Australia tend to 'tick off' the 'must see' attractions. Some second-trip visitors seek different and 'undiscovered' attractions.

17 International visitor numbers include education tourists. Central NSW has strong education resources and collaboration with these institutions could result in targeting foreign students who both stay for long durations and also attract VFR inflow.

4 Demand – qualitative research

This section of the DMP summarises qualitative research and segment-specific surveys to provide greater insight into consumer attitudes and behaviour which may affect Central NSW's competitiveness as a destination.

The areas discussed in this section have been chosen based on:

- key criteria identified in the VET report (destination awareness, infrastructure,-transport, expenditure, shopping, cultural heritage, tourism, events)
- Central NSW's visitor segments (Wanderers and VFR)
- strong market sectors relevant to Central NSW's product, which have shown consistent growth: cultural heritage and culinary tourism (Tourism Research Australia)
- improving the competitiveness of tourism and building growth: tourism skills capacity (NSW Government and Department of Resources, Energy and Tourism)
- infrastructure and events: the region's wide range of sports facilities and events, and
- collaboration with key stakeholders.

The research has been extensive and covers academic literature, CNSWT-commissioned research and tourism provider feedback from previous consultation, specialist business leaders, Destination NSW, Tourism Research Australia and the United Nations World Tourism Organization (UNWTO).

4.1 Sports tourism

Sports tourism is growing (CNSWT, 2008) and becoming more complex in the scale, scope and the expectations of the sport tourist. "Sport tourism experiences are subjective and emotional laden with symbolic meaning" (Shipwat, 2012). In other words, the variety of options available (passive form: watching professional/amateur sports or active form: team games, charity runs or cycling events or non-spectator driven adventure activities) and the emotions involved require a far more sophisticated approach to marketing than simply presenting the fixtures or venues. Sports tourism is an experience. Depending on the nature of the sports there are different emotional desires. For example, part of the experience of rock climbing is enjoying the authenticity of adventure, the outdoor life, the camaraderie of friends and a sense of self-rediscovery (Rickly-Boyd, 2012). It is not just the activity of climbing itself but life on the road which sets up the situations making the climb enjoyable. With this consumer insight, each destination needs to consider the broader needs of the visitor. Sports tourists are not simply consuming sport away from home. They are seeking a unique type of experience which varies according to the type of activity involved (Hallmann, 2012).

As with other tourism sectors the destination manager wants to encourage return visitation in order to build organic growth. In some sports tourism activities this requires a strong focus on delivering the facilities and building the event's credibility. For example, research exploring marathon runners' attitudes showed that it was their satisfaction with the event and its image that encouraged them to return again (Wicker, 2012). In the same way spectators at sporting events show different levels of commitment and behaviour depending on their level of attachment to the type of event or team and the overall image and type of side activities. The stronger the attachment the greater the fan will devote their resources and engage in specific activities related to the event/team (Menzies, 2012). Therefore high quality sports events which have appropriate side activities will encourage the committed sport fan/participant. The greater the appeal the longer the duration and spend.

While there is extensive academic research on sports tourism, there is little material at the Sustainable Tourism Cooperative Research Centre or at Tourism Research Australia to assist in detailing market size and dynamics. Even within the academic research there is debate on the need for sport tourism studies to examine the emotions, aesthetics and values which combine to create the visitor experience rather than solely from the marketing perspective (Coghlan, 2012). However, the Australian Sports Commission has identified megatrends which are likely to impact on sport in Australia and can guide the DMP process (Hajkowicz, 2013).

Sports tourism megatrends

There are six megatrends - the tourism implications have been added:

i) **A perfect fit**: personalised sport for health and fitness.

Tourism Opportunity: Australians are becoming more health conscious and increasingly opting to take a run rather than attend an organised sporting event. Visitors would appreciate being able to keep fit when on holiday/business.

ii) **From extreme to mainstream**: the rise of lifestyle sports and their promotion through social media.

Tourism Opportunity: encourage social media distribution of adventure sporting activities in Central NSW

iii) **Tracksuits to business suits**: market pressure and new business models will put pressure on community sports associations as they are replaced by organisations with corporate structures.

Tourism Opportunity: work with the peak regional, State and national bodies.

iv) **More than sport**: the attainment of health, community and overseas aid objectives via sport.

Tourism Opportunity: link sport with charitable fund raising that brings visitors with shared interests.

v) **New wealth, new talent**: economic growth and sports development in Asia.

Tourism Opportunity: targeting China and S.E. Asian international visitors with special events in sporting categories that are of specific interest to these nations, e.g. baseball.

vi) **Everyone's game**: demographic, generational and cultural change.

Tourism Opportunity: Target senior citizens with specific accessible facilities.

Observations, opportunities and analysis

18 Greater attention to sports tourists' motivations would enable tighter marketing, product development and packages to match the needs of the different types of sports tourists to attractions and events in Central NSW. Conducting qualitative market research with the different types of sport tourist groups would provide valuable insights to help grow this sector. Central NSW has a number of key sporting activities (Bathurst 1000 and Orange running events) which could be further enhanced to build loyalty, expenditure and repeat visitation.

19 There are opportunities to link fitness routines to destinations and facilities through tourism information.

20 Social media can be maximised for extensive promotion of adventure sports.

21 CNSWT could take a leadership role in sports tourism development by marketing directly to regional, State and national peak bodies.

22 CNSWT could identify strategic charitable partners to target big sporting events.

23 CNSWT could research market opportunities for staging sporting events which link to foreign students and VFR and/or international package tour groups.

24 CNSWT could work with key stakeholders and tourism providers to develop specific accessible sports tourism products and target the seniors' market.

4.2 Discretionary expenditure

To achieve the aim to double overnight visitor expenditure, consumers will need to spend a great deal more funds on leisure travel and short breaks. Therefore, the dynamics of household income and spending behaviour will have a major impact on achieving the ambitious aim for tourism growth.

Household income is split between non-discretionary and discretionary expenditure:

- Non-discretionary expenditure includes rent, mortgage, groceries, food, utilities, household maintenance, basic clothing, car and petrol expenses etc. With the rise in utility costs this category has risen to account for 56% of total household expenditure (Visitor Economy Taskforce, 2012).
- Discretionary expenditure includes ancillary spending on housing (like renovations), investments, savings, holidays, entertainment, technology, etc.

Research into consumer attitudes towards tourism expenditure has shown that Australian consumers direct their discretionary expenditure into reducing household debt (45%), making financial investments, home improvement, international holidays and domestic holidays (each accounting for 13 to 9 %) and then home entertainment (6%), leisure activities (3%) and charity (2%). Domestic holiday expenditure competes with not only international holidays but also savings, entertainment and other activities (Crouch, 2007).

Observations, opportunities and analysis

25 The domestic market share of wallet is competing with many discretionary categories and not just international holidays. It is also impacted by any change in desire or need to reduce household debt. Consequently tourism is in a very competitive space. CNSWT has to work harder by offering high-quality experiences that can justify greater expenditure than other forms of discretionary and non-discretionary expenditure. This also highlights the risk tourism faces if interest rates climb significantly. To achieve doubling overnight expenditure requires a focus on consumer value and encouraging expenditure on a range of consumables rather than discounting to encourage volume. The consumables must therefore be of special perceived emotional and/or physical value to the visitor.

4.3 Awareness of Central NSW

Consumers' awareness of a destination, its brand image and knowledge of its attractions help to increase the destination's appeal. The greater the appeal the more potential there is to stimulate visitation (Visitor Economy Taskforce, 2012). This aim goes hand-in-hand with the NSW Government goals for Central West of increased regional investment by attracting new residents and businesses, to help regional growth and sustainability (NSW Government 1, 2011) by promoting the region (NSW Government, 2012).

Currently the Central NSW region and its cities and towns do not have a strong regional identity. The following summary (a time order of key points from previous reports) illustrates the low appeal of Central NSW:

- In 2003 research recorded a low level of consumer support for Central NSW attributes, with 19% strongly agreeing it was 'scenic landscape', 18% strongly agreeing it was 'natural attractions or experiencing nature', only 15% strongly agreeing it was 'Arts, crafts, culture, history and heritage' and y 15% strongly agreeing it was 'food and wine or fresh regional produce'. Compared with other regions in NSW, Central NSW ranked 14th region in the State (Morgan, 2003).

- Research showed that visitors only knew of Central NSW icons but had little awareness of other attractions; 'visitor travel patterns reflect a jumping from icon to icon' and that 'awareness of the depth and breadth of product beyond these icons is limited, with many visitors commenting they wished they had allocated more time to enjoy what they now realise the region has to offer' (NSW, 2007).
- In 2007 the need to provide information which cross-promotes attractions and villages was noted, and to develop packages to highlight attractions and encourage destination collaboration (NSW, 2007).
- In a 2012 survey of regional awareness Orange/Bathurst/Mudgee were ranked 12th NSW region by interstate respondents and 12th by NSW residents. (Visitor Economy Taskforce, 2012).
- Subsequently Orange/Bathurst/Mudgee ranked equal 11th for 'appeal of NSW destinations', with 58% interstate residents and 37% of NSW residents rating the region as having low appeal (Visitor Economy Taskforce, 2012).
- The lack of 'awareness' and 'appeal' relate to knowledge of experiences. 63% of Victorian, 48% of Queensland residents had 'no/low awareness' of 'experiences available' in Orange/Bathurst/Mudgee (Visitor Economy Taskforce, 2012).

Observations, opportunities and analysis

26 Increasing awareness of Central NSW's attributes is critical to achieve a doubling of visitor overnight expenditure. Visitors will not choose to visit the region if they have low or no understanding of what it has to offer and what its superior qualities are.

4.4 Main form of transport

A destination's accessibility is a core factor influencing growth. If visitors find it difficult to travel to a destination due to poor roads, traffic congestion or limited air, coach and rail services then growth will be impacted. Furthermore, accessibility within a destination is essential to channel visitors to attractions and thereby stimulate expenditure.

- The NVS indicates the majority of visitors to Central NSW travel by car (89%), air (5.4%), train (2.7%) and bus/coach (1.7%) (Australia, 2012). This is supported by a recent CNSWT survey which indicated that visitors arrived by car (80%), caravan/van/truck (23%), car hire (5%), air (3.5%), coach (2%), motorcycle (2%), train (1.5%) and Bus (1%) (CNSWT 1, 2013)
- Previous CNSWT workshops involving stakeholders recommended that a review of touring signage, maps and interpretation should be undertaken. Partnership packages should be encouraged with airlines for special events/festivals, and opportunities for coach services from accommodation centres and to iconic attractions like the Taronga Western Plains Zoo should be researched (NSW, 2007).

Observations, opportunities and analysis

27 Increasing visitation without encouragement to use public transport and mass transport systems in some areas will put pressure on the road system, parking facilities and the environment and so reduce the visitor experience and the quality of life for the community. Therefore, as Central NSW hosts many caravaners, parking must be large enough to welcome these visitors. For major events a 'park'n'drive' service could ease pressure, e.g. Mr Panorama meetings and the Elvis Festival.

28 Information signs, directional signage and interpretation will encourage wider visitation of attractions and higher levels of visitor satisfaction.

29 Strategic partnership packages with mass transport companies (e.g. railways and coach companies) could help to encourage intrastate visitors to reduce environment impacts and mitigate against the rising costs of roads and fuel. Airline packages could attract interstate visitors at shoulder periods of the year where there is spare accommodation capacity.

4.5 Caravan and camping holidays

The Wanderers' mindset is an important contributor to the leisure travel sector for Regional NSW. Changing trends in this category therefore have an impact on the future growth of Central NSW. The following summarises the key trends within the caravan and camping sector which reflects the Wanderer's mindset.

- According to the Caravan & Camping Industry Association of NSW (CCIA) annual growth rate of the industry is 15% (2000–2007) with 330,000 recreational vehicles RVs) registered in Australia. There are 70–80,000 caravaners travelling on an extended tour around Australia at any one time.
- CCIA predicted a 27% growth in senior (over 55 years) caravan and camping nights from 15.7 million to 20 million by 2011 (NSW, n.d.). Queensland research indicates that 'Grey Nomads' are primarily retirees aged 61–65 years with a combined income of less than $30,000 per annum.
- This growth appears in part due to the consumer demand for better facilities and higher standards in holiday parks which has seen improved quality of services and upgraded cabins. 92% of consumers believe that the caravan, motor home and camping market has 'improved significantly in recent times' (NSW, n.d.).
- Rising petrol prices did not negatively impact on the sale or use of caravans and motor homes. Fuel prices are a consideration but will not stop the tourism experience, though they may stimulate shorter tours, closer to home. Significantly 67% of touring Wanderers travel within their own state (NSW, n.d.).
- In the cooler months, some interstate travellers from Victoria and South Australia prefer to avoid the congested coastal routes and go to Queensland and Northern Territory via inland routes (NSW, n.d.).
- CCIA seeks to deter councils from offering free camping sites, for example in show grounds, because of the negative economic impacts on professionally run licensed holiday parks. This is based on competitive neutrality guidelines for public entities competing with private entities (NSW, n.d.).
- More recent data shows there are two main segments of caravan and camping visitors. 38% are aged 35–54, primarily families; this sector grew 10% in 2012. 28% aged 55–69 and their visitor nights grew 8% in 2012. This sector is forecast to grow as more baby boomers enter retirement (NSW, 2013).
- The appeal of taking a caravan or camping holiday is the freedom to explore, camaraderie of the people you travel with, value and pristine natural environments to wake up in (NSW, 2013).

Observations, opportunities and analysis

30 The caravan and camping market segment is growing and represents an important sector to help CNSWT double overnight visitor expenditure. To increase visitation numbers of caravaners and campers it will be necessary to ensure there is sufficient infrastructure: caravan sites, waste dump/water facilities and parking. This is particularly important because, beside the CCIA forecast growth, improved road links, Newell Highway marketing and an increase in road trains will stimulate traffic and numbers of overnight visitors.

31 Not all caravan and campers are the same. The 35–54 age group, who have disposable income and family needs, will require a different set of facilities and nature recreation activities than the older segment.

32 To maximise visitor satisfaction, natural and cultural heritage sites must be accessible and have suitable parking.

33 Economic opportunities can be enhanced through cross promoting between CNSWT, caravan parks, NPWS, catchment authorities, councils, villages and event organisers. This can be achieved with visitor information, event calendars, caravan & camping site package pricing including event entry, shopping vouchers, special parking facilities and an emphasis on unique experiences and local food & wine, souvenirs and self-guided tours.

4.6 Shopping

Increasing visitor numbers alone is not sufficient to double visitor expenditure. Shopping represents a key opportunity to drive growth. If the purchases are made locally then the economic value for the local community will further enhance the benefit of visitation. This can be capitalised on through merchandising at events and the promotion of the 100 Mile Diet producers.

Currently, for domestic overnight visitors, shopping is the third most popular activity while on holiday (24% in 2012) (Australia, 2012). Shopping is also seen as very important justification for targeting international visitors. However, there are factors which can affect growth in shopping expenditure:

- The cultures of international visitors are not widely understood and can lead to unfavourably negative visitor experiences. It is worth noting that Chinese visitors to Australia account for 21% of total shopping dollars spent in Australia (Visitor Economy Taskforce, 2012). The average shopping expenditure for visitors from Asia (China $718, Korea $336, Taiwan $326) is higher than mature English speaking markets (UK $129, USA $173 and NZ $191) (Tourism Research Australia, 2013).
- Australians are being more mindful of their purchases and are seeking – both economic and emotional value. Luxuries are still acceptable (following the GFC and tightening of purse strings) as long as the purchase is considered and well thought out, rather than impulsive and irresponsible. There has to be a strong, responsible choice as to why we should buy the item. Therefore the merchandise available must be distinctive, less an indulgence than a quality souvenir, or in keeping with the overall holiday i.e. not wasteful (Childs, 2010).
- "Tourists are interested in what is distinctly local and authentic" (Tourism Western Australia, 2007). Merchandise which reflects the character and theme of events and is locally made would be both a good value fit for the visitor and of economic benefit to the community.
- Only 41% of tourism providers are familiar with the 100 Mile Diet campaign (CNSWT 1, 2013).

Observations, opportunities and analysis

34 Good service standards must be achieved and maintained to deliver customer expectations.

35 Doubling overnight expenditure will be more achievable if more shopping opportunities are available, e.g. by extending retailing times, themed shopping events and encouraging shopping at festivals. This requires a holistic process of building the capacity of retailers and festival organisers, coordination of local micro businesses and distribution.

36 CNSWT should lead the 100 Mile Diet's role for tourism and increase tourism provider awareness of the programme.

4.7 Food & wine and dining

Culinary tourism, that is food & wine and dining, offers an excellent opportunity to raise the image and appeal of the destination and its different wine regions. Moreover, Central NSW already offers local food & wine from its distinctive cool climate varietals, rich volcanic soils, orchards and organic food producers. Food and wine is therefore a natural contributor to the visitor experience and an excellent method to build visitor yield. The inclusion of local 100 Mile Diet produce by cafés and restaurants can also promote creative menus and emphasise a strong regional visitor experience. With Central NSW's growing focus on the 'paddock to plate' concept there are market trends which can help double visitor expenditure.

- Tourism includes more than the initial direct services and facilities a visitor may use – it also includes indirect sectors which link to tourism. Together they account for the full value chain of the visitor economy, and food and wine is a major economic contributor and major attribute for a destination (Visitor Economy Taskforce, 2012).
- Central NSW also adds value to local agriculture through its own brands of local cider, beer and spirits.

- ‘Eating out at restaurants’ is the number one activity for domestic holiday makers and has grown from 46% (2000) to 57% (2012) (Australia, 2012).
- NSW ranks third in Australia by non-NSW residents for ‘Which state do you associate with this attribute: food & wine?’ where Victoria leads with a share of 51%, followed by South Australia at 50% and NSW with 37% (Visitor Economy Taskforce, 2012).
- Intrastate (42%) and NSW residents (43%) ranked ‘food and wine’ 3rd as a ‘priority aspect of appeal’ (Visitor Economy Taskforce, 2012).
- Committed wine consumers represent 28% of cellar door visitors, buy frequently, pay medium to high prices and place considerable importance on wine quality, style, regional attributes and individual wine makers and brands. Uninvolved consumers represent 43%, are price sensitive and a ‘positive cellar door experience impacts heavily on purchase behaviour’ (Australia, n.d.). Consumers want more information about where a wine is made and grown, and want to visit the area in which it is made: ‘wine itself is the catalyst for wine tourism.’ (Australia, n.d.).
- From a recent survey, 35% of participating tourism providers do ‘actively select organic agricultural options to offer visitors’ and 23% produce food or wine ‘following certified organic methods or buy organic supplies’ (CNSWT 3, 2013).
- Central NSW has several hatted restaurants and others which are rated in publications such as *The Sydney Morning Herald Good Food Guide* and *Good Pub Guide*.

Observations, opportunities and analysis

37 The food & wine from Central NSW should be used more effectively to promote the region and raise its image. Packaging should carry a distinctive message and information about the region so that it reaches potential visitors in key source markets.

38 CNSWT must maximise its food & wine product, for all tourism segments, by promoting the different regional competitive characteristics and creating stronger appeal. This is because NSW is not top of mind as the leading food & wine state, and other regions in NSW, i.e. the Hunter Valley, have higher visitation numbers and higher association with this attribute than Central NSW. Food & wine is a general term and often is marketed only on a comparative basis. Specific regional characteristics must be emphasised to promote competitive values and encourage visitors to explore the destination to sample its differences. Central NSW has the highest concentration of organic wine & food producers, with Australia’s oldest organic vineyard/winery in Mudgee (7 certified organic wineries in Mudgee, 2 in Cowra and 2 in Orange)

39 The destination’s dining options – pubs, bistros, cafés, clubs and restaurants – should all be encouraged to develop menus that reflect the local seasonal produce and character of Central NSW.

40 The broad range of dining options should be actively promoted to all visitor segments to generate higher expenditure.

41 The food & wine and dining sector should be strongly encouraged to participate in events and festivals, linking opening hours with the duration of the activities and providing purchase opportunities.

42 To increase expenditure more uninvolved consumers, not specifically wine tourists, should be encouraged to visit cellar doors and enjoy a broader cultural experience to engage greater active visitor participation.

43 CNSWT should lead the growth of local food & wine’s integration into the wider tourism experience, particularly focusing on the growth area of organic produce, by targeting greater collaboration between producers and tourism for events, festivals and dining options.

44 There is a clear link between personal fitness and choosing healthier foods. Sports tourism could be linked with 100 Mile Diet, organic, farm gate and dining attractions.

4.8 Visiting friends and relatives

Visiting friends and relatives represents a large and significant segment of domestic tourism. It is CNSWT's largest visitor segment. However, VFR has been largely ignored by marketers worldwide and there is limited research relating to this segment. Australian studies have revealed that VFR are strongly influenced by a region's attractiveness, not solely to visit the host, and they do use commercial accommodation (Backer, 2008) thus making them a relevant target to help double visitor expenditure. The second most popular activity while on holiday for domestic overnight visitors (49%) is 'visiting friends and relatives' (Australia, 2012).

- People visiting relatives have an older profile and spend 83% of the nights at their host's home. They are more likely to go shopping, and more likely to spend money on transport, souvenirs and gifts (NSW, 2010). People visiting friends tend to be younger. 25% spend nights in commercial accommodation, and they tend to spend more on food, drinks, pubs and nightclubs (NSW, 2010).
- This is confirmed in Sustainable Tourism Cooperative Research Centre (STCRC) research which reports that the main purpose for a respondent's last short-break holiday was to visit relatives and friends (29%) (Murphy, 2010).
- There is an 'increasing trend towards VFRs using commercial accommodation as people find themselves going away on trips less often and making the trip as stress-free and independent as possible while still enjoying social connections' (Backer, 2008). VFR visitors seek information primarily from their hosts rather than through marketing channels such as the internet or travel guides.
- Connecting is a very important motivation in taking a domestic holiday ... "an Australian holiday is all about taking the time to reconnect – with myself, with my family, with my friends and also with my country" (Childs, 2010).

Observations, opportunities and analysis

45 Increasing numbers of VFR travellers are using commercial accommodation, on the recommendation of local hosts. This suggests that CNSWT should include the local community in its marketing, particularly when promoting local festivals and events. By demonstrably showcasing such local culture within the community, local pride and civic hospitality can be engendered. It also can help to grow the festivals and events by involving seniors (a NSW Government goal) thereby maximising participation and potential VFR host numbers. In cases when there is insufficient commercial accommodation, key stakeholders and community members could promote 'home hosting' programmes.

46 Local hosts advise on 'what to see & do', therefore CNSWT should consider a Local Ambassador programme whereby hosts can give VFR special promotional packages to stimulate visitation and expenditure and information on attractions ' that only the locals know about'.

47 Reconnecting is a strong motivator. By using existing networks communities could encourage reunions (schools and extended family groups), particularly by ensuring locals, acting as hosts, have access to marketing materials such as visitor guides, apps and tourism websites.

4.9 Growing interest in heritage and culture

Heritage and culture are assets which can help raise awareness of a region and extend visitation. They were identified by VET as a strategic imperative: "improved strategic positioning to emphasise NSW's distinctive competitive advantages through its diverse range of nature and heritage experiences" (Visitor Economy Taskforce, 2012). While culture and heritage should not be the only method to create regional distinctiveness, there are trends which suggest that it has an important role.

- Heritage and cultural tourism is a growth market contributing to 37% of world travel and growing 15% per annum (Australia, 2009).

- Cultural tourism is defined as attending one or more of: festivals or fairs, performing arts or concerts, museums or art galleries, historical or heritage building sites or monuments, art or craft workshops or studios and Aboriginal sites and cultural displays. The Western Australian arts and culture strategy is bonded with tourism. Their plan recognises the benefit of generating extra revenue from tourists whose numbers help increase the length of seasons. The very nature of art and cultural events can increase the length of a visitor's stay. (Tourism Western Australia, 2007).
- In Australia there were 9.3 million overnight and 9.5 million day domestic cultural visitors in 2009. This category has grown 2% per annum since 2000. 20% of overnight visitors participated in two or more activities while only 10% of domestic day visitors went to more than one activity. The majority did not travel as a package (Australia, 2009).
- 51% of international tourists to Australia are classified as cultural heritage visitors because they attend theatre, concerts, museums, galleries, workshops, Aboriginal arts and sites, or visit historical/heritage sites. 29% participated in three or more activities. 19% arrived on a travel package. German (33%), UK (24%) and USA (24%) visitors enjoyed three or more activities (Australia, 2009).
- As an indication of growing consumer interest in cultural activities, 12.3 million visitors crossed the threshold of the 14 Australian member museums of the Council of Australasian Museum Directors in 2011, a group that includes Museum Victoria, Canberra's War Memorial and the National Museum of Australia. The number represents an increase of 900,000 on the previous year and a 2.8-million increase across two years from an average of 9.7 million for the three years prior (Directors, n.d.).
- Museums are progressing from their 'fossilised' position and have introduced new strategies to revitalise the sector like:

  i) 'crowd sourcing' using the internet to get people involved in promoting online content about the museum's exhibits, presentations and curation

  ii) taking the museum to the streets by using unrented shops, mobile displays to raise awareness and community participation and then publicising the actions through social media

  iii) public donations via online facilities to help not-for-profit museums

  iv) making museums accessible for an aging population

  v) embracing 'augmented reality' where QR codes and smart phones can enhance the museum experience through experiences in sound, moving pictures and even feel, and

  vi) recognising that education is changing and that museums have a role in being more active sources of education (American Assocaition of Museums, 2012).
- The VET report asked respondents about history and heritage and 'Which States do you associate with this attribute?'. 44% said NSW, 45% Victoria and 52% Tasmania (Visitor Economy Taskforce, 2012).
- 'Art/culture' and 'Historic' were ranked 6th and 7th as a 'priority aspects of appeal' below nature, wildlife experiences, food & wine, beach & coastline and gardens' (Visitor Economy Taskforce, 2012). Central NSW has a vibrant arts arena with projects like Orange Hospital and the Orange Regional Arts Foundation (ORAF).
- The VET report urges greater collaboration. The exploration and settlement of Central NSW is inextricably linked to the Blue Mountains, suggesting opportunities for tourism providers to work across the wider region (Visitor Economy Taskforce, 2012).
- Nostalgia is a very important motivator in choosing to take a domestic holiday. Consumers are seeking a less complicated world and choose to rediscover things that conjure up early life memories and places to show their children. It forms part of reconnection to country (Childs, 2010).
- The recent Visitor Survey indicated thatvisitors to Central NSW selected the destination primarily because they wanted to visit 'heritage buildings' (33%) with 51% selecting 'other' which covered Cowra POW camp or Wellington Caves (CNSWT 1, 2013). The destination's heritage also features in events. Of

the top ten events held in each of the eleven LGAs, 32% were focused on traditional or local cultural values. The majority of the key stakeholders believe there is scope for developing events in Central NSW (CNSWT 2, 2013).

- Not all the LGAs in Central NSW have included cultural heritage capital in their tourism planning. This restricts responsible exploitation of the assets and conservation to ensure their long-term protection. Although there are heritage reports, most of these do not include intangible cultural heritage and are primarily restricted to built heritage (CNSWT 2, 2013).

Observations, opportunities and analysis

48 Culture and heritage is appealing, attracts higher spending visitors and is a credible sector for NSW. Therefore it represents a strong opportunity for Central NSW which currently does not wholly integrate cultural heritage into its marketing materials.

49 The conservation of cultural heritage precincts could involve special interest groups, further involve seniors in their communities, encourage pride and stimulate VFR visitation through opportunities such as, for example, grandparents sharing treasured memories with grandchildren.

50 The multi-cultural heritage of Central NSW (Wiradjuri, Cornish, Welsh, Irish, Chinese, Italian and Eastern European) represents strong opportunities to target special interest groups and develop tailor-made guided tours and special events.

51 The gold mining industrial archaeology, Lawson/Patterson heritage places, Wiradjuri arts, crafts and science offerings could be targeted to match the school syllabus.

52 There are a large number of small museums which can play a more prominent role in interpreting the region's cultural heritage. CNSWT should coordinate a destination-wide push to revitalise the museums with a programme that considers crowd sourcing and digital content . Community participation and online content could be used to promote the attractions, integrate outdoor museum activities into festivals and events, and integrate special museum projects with donation opportunities targeting community, VFR and leisure visitors. Museums need to maximise the potential for attracting the aging population through improved accessibility and technology (augmented reality) and integrate with the new learning systems of future educational needs.

53 Family history, the migrant camps (Orange and Cowra), the POW WW2 history are all strong links for individuals living outside the area and potential magnets to attract them to visit. Using social networks and providing dedicated visitor information services will facilitate visits, stimulate longer stays and expenditure which can be encouraged for shoulder and out-of-season periods.

54 Open gardens and large estates could be marketed more comprehensively to package and promote more integrated experiences (other attractions and 100 Mile Diet purchasing) which build appeal and justify short-break holidays.

55 To facilitate the integration of natural and cultural heritage into tourism planning, CNSWT needs to facilitate collaboration between local councils, NPWS, special interest groups and tourism providers to develop strategies that use the assets to encourage increased visitation and length of stay.

4.10 Tourism provider capacity

Tourism has a recognised skills shortage (Tourism Research Australia, 2008). Improvement in skills is a core part of Australian's Long-term Tourism Strategy (Department of Resources, Energy and Tourism, 2011). Strengthening the skill base is also a commitment made by the NSW Government in its 2021 Plan (NSW Government 2, 2011). Previous training research highlights the following key focus areas:

- TAFE NSW Western Institute surveyed Central NSW tourism providers and found that many had not undertaken any training within the past two years (36%). 50% of respondents allocated less than $100 a year for training.

Workshops were the preferred delivery mechanism, with only 18% chose online training. (Institute, TAFE NSW - Western, 2007).

- The most popular training topics of interest were computer skills (90%), product knowledge (86%), promotion of products (85%), and general industry knowledge (84%). (Institute, TAFE NSW - Western, 2007).
- Tourism NSW recommended professional development for local tourism managers and tourism providers, establishing an attractions group and increasing industry collaboration and networking opportunities 'Operators are keen to improve their skills in marketing and packaging … seeking networking opportunities and partnerships' (NSW, 2007).
- During 2012 CNSWT arranged 11 operator workshops to help tourism providers develop new products. Findings from the workshops revealed low operator knowledge of the natural and cultural heritage of the destination. The workshops also revealed low operator motivation to sustain learnings and implement business plans. 95% of workshop participants indicated that strategic networking was their priority (Warren, 2012). The workshops used creative break-out groups rather than a formal classroom structure. This achieved high engagement. Tourism trails (Discovery Tours) were designed that integrated the tourism product into themed tours which encouraged operators to learn more about the local region. All the tourism providers signed a pledge agreement to be involved in the Discovery Tours and promote local produce. Over 110 tourism providers committed to the tours. This project demonstrates that training can involve practical product development rather than using theory to develop higher skill levels.
- Tourism's long-term growth will depend on skills development and being able to offer full-time employment to attract people to stay in the region. From recent CNSWT research it appears that only 8% of tourism providers offer internships and 73% of the tourism employment opportunities are seasonal or part-time.

The DMP process has been assisted by the use of sustainable destination indicators (Appendix 1 and Table 13) to guide the planning process and to provide benchmarks. These indicators will help the destination develop more sustainable tourism, better experiences and support whole-of-government planning and investment.

Table 13: Sustainable Destination Indicators: quality and quantity of employment

Indicator	Reason for indicator	2013 benchmark
Direct tourism employment as percentage of total employment	To understand the role of tourism in job creation and the sector's relative value in terms of employment generation.	7% (AEC Group, 2011)
Percentage of jobs in tourism that are part-time	The economic benefit in growing tourism is the stability of full-time employment .	35% re part time jobs (CNSWT 3, 2013)
Percentage of jobs in tourism that are seasonal	A true measure of tourism's employment generation and value needs to consider the seasonal variation in employment.	38% are seasonal jobs (CNSWT 3, 2013)
Percentage of tourism enterprises providing high school/university student internships	The skill level of tourism employees is indicative of the quality of the employment. This indicator helps assess the how many local tourism enterprises are helping to train the next generation of travel and tourism professionals.	8% provide internships (CNSWT 3, 2013)

Observations, opportunities and analysis

56 The development of the Discovery Tours aimed to improve operator product knowledge, stimulate networking and guide visitors to the range of attractions in the region to improve their holiday experience and extend their stay. Signing the pledge encouraged strong involvement and established a network of 114 operators.

57 The National Long-term Tourism Strategy has identified the need to build tourism's digital capabilities as consumers increasingly embrace smart phones and tablets. The strategy includes a tourism e-kit that should be promoted to encourage more appealing operator website content and encourage use of social media and online distribution channels.

58 The Programs and Resources to aid Indigenous Tourism Development (Department of Resources, Energy and Tourism, n.d.) should be integrated into NSW Government (Goal 6) skills development to customise product development programmes (NSW Government 2, 2011). This can help the community build Wiradjuri experiences and encourage wider visitor expenditure and community benefits from tourism.

59 CNSWT should build on the success of the Discovery Tours by running further practical operator engagement workshops. Workshops could improve the selling of tourism services and encourage wider cross-promotion of businesses, helping to improve the visitor experience and promoting greater expenditure on shopping, events, festivals and activities.

60 CNSWT should work with Charles Sturt University and the TAFE NSW Western Institute to develop a student internship programme aimed at building the skills required for tourism's long-term development.

61 CNSWT should support 'home hosting' programmes with training and accreditation-style frameworks to guide 'best practice'.

62 CNSWT should provide 'tool kits' – flexible learning resources – for volunteer groups.

4.11 Leisure events, sporting and business events

In 2004, over 1 million international visitors came to Australia and participated in sport or an active outdoor activity. Also, over 53,000 international visitors reported participating in or watching organised sport as a reason for visiting Australia. Almost 3.3 million domestic overnight trips were attributed to attendance at a sporting event as either a competitor or supporter (Prior, 2008).

- The NSW Events (sport, festivals) calendar generates an estimated $600 million a year in direct expenditure. VET has identified this sector as a driver of region destination re-launches (Visitor Economy Taskforce, 2012).
- Business events (conferences, exhibitions, incentive travel, reward programmes) expenditure in NSW is estimated at $778 million This category represents 7% of tourism expenditure. Business event visitors spend on average $212 per night compared to the average national visitor overnight spend of $136 (Australia, 2010).
- The domestic business event visitors market consists of business meetings (71%), conference/convention/seminar (29%), trade fair/ exhibition (8%) and incentive (1%) (Australia, 2010).
- Projections by Benchmark Planning & Research Pty Ltd indicate that business meeting organisers have new, more refined needs for 21st century meeting spaces. Benchmark has monitored changes in trends since 2008 and found that meeting spaces need to be more 'creative' and provide outdoor space, inspirational and non-traditional 'nooks & crannies' for smaller gatherings and breakout sessions. Future meeting facilities also need to include downloadable apps, easy access mobile sites and dedicated facebook pages. This is very much a creative, flexible and technology focus Benchmark 2013
- Meanwhile the business event market seeks high-quality facilities. Sydney is seen as having lost its attraction with its current range of convention facilities (Visitor Economy Taskforce, 2012). 41% of domestic business event travellers stay in luxury hotels compared to 14% for domestic overnight travellers (Australia, 2010). Australia has been losing ground as an

international event destination of choice, dropping from 4th (2000) to 11th (2010) (Australia, 2011). In 2012 there were 1.6 million visitors who took a trip that was part of a reward provided by their employer. Of these incentive travellers, 50% were domestic overnight visitors, 39% were domestic day visitors, and 11% were international visitors (Australia, 2010).

- Tourism Research Australia acknowledges that the NVS and IVS 'understate the size of the business events sector and its contribution to the economy' (Australia, 2010).
- Place-making has been a successful economic and social model, where public space can contribute to creating pleasurable attractive areas that encourage extended shopping hours because of the overall attractiveness of the place (Goodwin, 2011). Likewise, regeneration of areas for tourism can assisted in local economic development e.g. The Rocks and the transformation of Melbourne Docklands precinct (Australian Government, 2009).

Observations, opportunities and analysis

63 Leisure events can be key to building visitation and raising destination awareness and appeal, but they must be distinctive. The events calendar across the State and including Sydney will become increasingly competitive as other regions seek to use this method to build their visitation. "Tourists are interested in what is distinctly local and authentic" (Tourism Western Australia, 2007), therefore CNSWT's focus should be on the culturally distinctive events.

64 Leisure and business events offer ways to add additional experiences to itineraries that can encourage visitors to stay longer, and provide strong opportunities for economic linkage. Event organisers must be encouraged to work in partnership with communities and tourism providers to package the destination and stimulate longer stays and shopping opportunities.

65 Facilities must be of high quality if a destination is going to be competitive, as demonstrated by Sydney's decline in attractiveness as an event destination.

66 Orange City Council seeks to maximise its strengths in festival and events by establishing an outdoor civic space. This should follow the principles of place-making and engage with the community to enhance their sense of place, introduce entertainment into the commercial precinct and assist in local economic development.

4.12 Weddings and commitment ceremonies

Weddings and ceremonies provide strong links between visitor segments, VFR travel, local producers, support services and venue hire. One booking can contribute significantly to a destination's economy.

- Easy Weddings (the largest online wedding directory and Telstra Small Business Award winner) reports that while wedding celebrations are traditionally held in the bride's home town, there is a trend for couples to choosing to hold their wedding location further afield. This is partly due to friends and family being more scattered in contemporary living (Weddings, 2013).
- A brides-to-be survey (sample 5,320 Australian couples) in 2012 reported that 84% of couples choose domestic wedding destinations and 2/3 of weddings take place in spring and summer (Weddings, 2012).
- 92% of the wedding expenses were met by the bride and groom or shared with parents. The average wedding cost $36,700, with an average of 105 guests (Weddings, 2012).
- 88% of brides-to-be consult wedding specialists (Weddings, 2012).
- From an examination of online wedding websites (www.easyweddngs.com.au and www.weddingvenues.com.au) Central NSW has a very low online presence. For example, there is no 'Central NSW' region while South Coast or Central Coast have clear geographic listings.

- 121,176 couples marry in Australia each year and the number has been increasing over the past five years. These figures exclude commitment celebrations by the gay community (Statistics, 2012).
- Local tourism groups are becoming more aware of the value of the wedding market. For example, Shoalhaven Tourism Board is about to launch a dedicated wedding website.

Observations, opportunities and analysis

67 There is potential to target the wedding market to entice Sydney and ACT brides-to-be and encourage brides-to-be with family links to hold weddings in Central NSW. The economic benefits will be maximised if linkage is made to local food and wine producers, entertainers, car hire, florists and accommodation. Stakeholders should collaborate to produce dedicated digital information which details venues, services and accommodation. Collaboration, cross-promotion and social media should also be considered to maximise promotion.

68 Commitment ceremonies for gay couples are increasingly popular. Gay-friendly tourism products could be packaged and marketed on the CNSWT website. Participating tourism providers should be encouraged to cross-promote and build this sector together.

4.13 Nature tourism

UNWTO has recorded that ecotourism was growing at three times the rate of other tourist sectors worldwide (UNWTO, 2004) (UNWTO, 2012) and is acknowledged to be growing rapidly in NSW (National Parks & Widllife Service, 2008). This has been fuelled partly by visitors increasingly expecting outstanding eco-lodges and personalised activities, for example those found in Tasmania and Kangaroo Island.

There are many different definitions of tourism experiences in natural setting, and with different levels of nature conservation and cultural awareness. This plan seeks to highlight the broad opportunities which exist by utilising Central NSW's considerable number of protected areas and water catchments which offer a wide range of recreational, wildlife and adventure activities. The trends are:

- Rated on world-class beauty and natural environments, Australia ranks first in the world (Blanke, 2011).
- Sustainable nature tourism is one of the fastest growing sectors in the Australian tourism market. It offers the potential to create a distinctive image and competitive point of difference for a destination (National Parks & Widllife Service, 2008) provided that the assets are sufficiently different and not simply comparative (Ritchie, 2003).
- The economic contribution from nature-based tourism is increasing. Spending by international nature-based visitors is up 24% from five years ago. Domestic visitor spend has risen 19% alone in the 2013 March quarter from 2011 (Department of National Parks, Recreation, Sport and Racing, 2013).
- To be successful, destinations need to apply an integrated approach involving government agencies, NPWS and industry in order to create a shared strategic positioning for nature tourism (National Parks & Widllife Service, 2008). Currently the National Landscapes programme (which promotes the Greater Blue Mountains) is the primary vehicle to achieve this in Australia. However, to achieve an increase in expenditure, nature tourism must also be linked with commercial tourism and communities, and not treated as an independent sector.
- Nature tourism is also competitive with other states. Victoria and Western Australia and countries (New Zealand) successfully promote distinctive stories that motivate consumers. NSW needs to make itself more relevant and introduce new products in or outside national parks to improve the quality of experiences (National Parks & Widllife Service, 2008).
- Extreme weather events are partly responsible for a decline in international visitor numbers to national parks. Domestic visitor numbers have climbed, attributed to those parks close to major populations centres (Department of National Parks, Recreation, Sport and Racing, 2013).

- Central NSW has an environment-committed tourism sector with 32% of survey respondents claiming they are “actively supporting protection, conservation and management of local biodiversity and landscapes” (CNSWT 3, 2013).

Observations, opportunities and analysis

69 Nature tourism is a competitive sector. Central NSW must focus on its outstanding points of difference to build awareness and destination distinction. CNSWT should collaborate with Greater Blue Mountains National Landscapes to link to nature tourism visitors.

70 CNSWT, NPWS and the tourism industry should collaborate to create a number of flagship walks and trails incorporating quality eco-lodges, visitor facilities, interpretation and guided tours.

71 Interested stakeholders should develop a nature tourism strategy which determines the scope and scale for using national parks and catchment areas for art and cultural events, education, wellness activities, sports tourism events and Wiradjuri food activities.

5 Influences on future tourism trends

This section of the DMP considers insights which may assist future tourism development by identifying changes in visitor aspirations, technology, government policy and social trends.

The following factors will influence planning and product development for tourism in Central NSW:

- changing visitor aspirations
- changing expectations of quality of experience
- effectiveness of tourism clusters
- growing demand for popular culture
- lower air fares
- changing technology
- legacy tourism
- accessibility, and
- the focus on China.

5.1 Changing visitor aspirations

- To reverse the trend in domestic visitation NSW holidays should be represented as culturally enriching and a time to 'rediscover oneself' in order to make them relevant to today's consumer (Childs, 2010). They should involve active participation rather than passive consumption.
- Marketing and promotional communications needs to tightly fit the consumer needs. 'Travel is either about cultural and intellectual enrichment or bragging rights. Travel within Australia does not fill either of these needs. Trips within Australia are about the end benefit delivered – connecting with family and friends, meeting obligations to them or compensatory needs like pampering. As a result, any marketing effort that uses a travel lexicon is unlikely to succeed' (Collins, 2007).
- Be inclusive. Families, adolescents and ethnic minorities do not feel the current marketing communication 'address their needs'. They have a lack of knowledge and seek information which tells them what they can do. Current communication does not present activities in an inclusive manner (Collins, 2007).
- Utilise diversity to build a 'whole of life' relationship from education, recreation, health, relaxation, business and investment (Visitor Economy Taskforce, 2012).
- Present Australian travel as 'reconnection'. Tapping into nostalgia, security and simplicity with showcased experiences which 'make us feel good about ourselves and the future' (Tourism Australia, 2011)
- 40% of Sydney's population are migrants; they seek to learn about their new country (Australian Bureau of Statistics, 2011)

Observations, opportunities and analysis

72 Central NSW's cultural heritage and country lifestyle offers strong culturally enriching opportunities. The region's history could be presented to New Australians as a way to engage more deeply in their new country. To achieve this CNSWT needs to explain the nature and special values of its assets, showcasing experiences which best enable visitors to 'reconnect' or 'discover' Central NSW through a range of authentic attributes: nostalgia, security, simplicity. New Australians with young families in many cases will want to show their new home to their children. Consideration should be given to the NSW school syllabus and structuring activities, experiences with interpretative information to make an easier proposition.

5.2 Changing expectations of quality of experience

- Consumers are not satisfied with the poor value for money from accommodation experiences when they compare overseas experiences. For example average annual growth between 2001-2011 in departures to Fiji, China, Indonesia the UK and the USA have been all more than 10%. Since 2004 outbound travel has more than doubled. (Tourism Research Australia, 2012).
- ‘Most moderately priced accommodation is felt to be anonymous and poorly integrated into local life. The pensions and bed & breakfasts of Europe were frequently mentioned in this regard as the ideal.’ (Collins, 2007).
- The accreditation standards in Europe are seen as the ‘gold standard’. (Collins, 2007) and helpful to visitors. While in Australia there has been Federal Government committed to the T-QUAL accreditation programme to encourage higher standards, there is low market penetration in Central NSW (ICRT-Austraila, 2013). This is despite the incentive to join a T-QUAL approved scheme because of the potential benefits of grant funding approval (Department of Resources, Energy and Tourism, n.d.) and appeal to Pampadours and Wanderers
- 38% of the CNSWT participants in the tourism provider survey claimed to use accreditation, the majority AAATourism (CNSWT 3, 2013), although VIC information does not appear to track this data (CNSWT 2, 2013)
- Key stakeholders have observed that domestic and international visitors are expecting to easily find good quality food and wine, accommodation with internet services and appealing high quality, shops to be open.
- Increasingly visitors expect child-friendly facilities in high-quality accommodation and are disappointed to find this sector is not sufficiently catered for.
- One method to demonstrate improved quality is through sustainable actions. Research clearly indicates that tourism providers have increased opportunities by focusing on the environment; ‘providing a clean green product and environmentally sustainable experiences’ (Department of Resources, Energy and Tourism, 2009) and encouraging construction using green technologies and sustainable management practices (Visitor Economy Taskforce, 2012).
- In distinguishing quality tourism services or products, eco-friendly and sustainability principles are frequently used by visitors and an indication of quality and a deciding factor when two products tie in the purchase decision (Goodwin, 2011). Quality of experience has come to mean not simply the level of service the customer enjoys but the degree of personalisation (Pine, 1999).
- Both Visit England and Visit Wales have published guides that help tourism providers turn their actions to be more sustainable into better visitor experiences (Font, 2012). This is now a cutting edge for tourism in some of the overseas markets that Australians head for and enjoy: ‘Most moderately priced accommodation [in Australia] is felt to be anonymous and poorly integrated into local life. The pensions and bed & breakfasts of Europe were frequently mentioned in this regard as the ideal’ (Collins, 2007).
- Central NSW appears to have a high level of participation in environmentally sustainable actions as revealed by the tourism provider survey (CNSWT 3, 2013).

Table 14: Sustainable Destination Indicators: environmentally responsible actions

Sustainability indicator	Reason for indicator	2013 Benchmark
Percentage of tourism enterprises who have implemented a climate change scheme to reduce their footprint: solar panels, rain water harvesting, insulation, wind power	Business engagement in mitigation activities is a sign or increased awareness and success of DMO incentives.	30% are involved in a climate change mitigation or adaptation action(s)
Percentage of tourism enterprises that offer tourists recycle waste bins	Reducing the cost of landfill to councils is important. Keeping track of private sector engagement shows the effectiveness of awareness initiatives and the need for incentives in this area.	73% offer recycling bins
Percentage of tourism enterprises with low-flow shower heads and taps and/or dual flush toilets/waterless urinals	Tracking tourism enterprise engagement in water conservation activities helps gauge the success of water conservation initiatives that will result in saving money for enterprises.	85% participate in water saving actions
Percentage of tourism enterprises harvesting/dependent on mains supply their own rainwater	Using rainwater indicates dependency on climate and level of exposure	55% of operators harvest rainwater, 52% of these enterprises are dependent on rain water
Percentage of tourism enterprises that have switched to low-energy lighting	Tracking tourism enterprise engagement in saving energy like using low energy lighting, helps gauge the success of energy-saving programs and initiatives.	72% have switched to low-energy lighting
Percentage of Green Energy purchased as an annual share of total electricity purchased	This indicator tracks the destination's progress in converting to renewable sources of energy.	10% purchase green energy. Green energy amount varies from 100% -10% of their total electricity consumption
Percentage of enterprises participating in any kind of actions to support local biodiversity, landscape protection, conservation and management	Tourism enterprises are significant beneficiaries of investment in protected areas, so it is important to track the sector's contribution to conservation.	32% undertake a land conservation activity

- Consumers are increasingly choosing to book travel via their mobile phone and use travel apps to enhance their holiday experience. Subsequently key stakeholders believe that technology is used to judge the quality of the tourism product or service.
- As outlined in the sports tourism summary above, sports tourists (passive or active) are seeking unique experiences. The experiences must be pertinent to the activity type, and there needs to be a close fit between the specific nature of the experience and the sports tourists' desires. These visitors will then devote more resources to fulfilling and enjoying their holiday.
- Consumers are increasingly searching for healthier foods and organic options which are contributing to organic farming becoming Australia's top growth industry (IBIS quoted in Agriculture Today, 2011). There is also a

tangible link between greener business practices and healthier bottom lines for businesses (Schultz, 2013). Central NSW already has the 100 Mile Diet programme which can be used to further expand this market opportunity.

- The CNSWT tourism provider survey revealed some operators were choosing to meet the public's growing interest in healthy quality food. 35% said they had "a policy to select organic agricultural options", 23% of food and wine producers said they "employ certified organic methods"

Observations, opportunities and analysis

73 Quality means reflecting the local character of the destination in the tourism experience, so that it is has a competitive point of difference and increases the level of customer satisfaction. Technology is a the method to convey this distinctiveness through websites, social media and travel apps

74 One of the methods to encourage high quality standards is through health and safety checks by local councils. CNSWT's research indicates that 55% of tourism providers were assessed for fire safety in the past year (CNSWT 3, 2013). Key stakeholders should utilise whole of government processes to encourage high quality standard through participation incentives.

75 When choosing tourism experiences, eco-friendly values can be a key decision-making factor when products tie. Central NSW has a high number of organic and sustainably accredited tourism operators which could give the destination a marketing edge. Currently there are no online search methods to identify eco-friendly tourism products on CNSWT's website or through general destination-wide marketing collateral found in VICs.

76 Tourism provider's actions to be more sustainable should be refined and responsibly marketed as improved visitor experience e.g. Visit England and Visit Wales. An approach which emphasises clear consumer benefits has been found to have strong appeal and creates unique visitor experiences.

77 High quality (luxury) is driving market growth e.g. ecotourism, accessible, pet friendly accommodation (38 listed by Stayz) and quality caravan facilities. Private sector investment in high quality tourism infrastructure will require a sound business case including how local government and CNSWT will support such commitments to the region. CNSWT needs to provide advice for investors and ensure whole of government support.

78 The T-QUAL approved accreditations can provide helpful frameworks to assist business develop the quality services and facilities. There is also the added incentive to apply for T-QUAL grant funding. CNSWT should use the programme as part of a region wide upgrade of tourism infrastructure. Key stakeholders should ensure visitor information centres and online booking services indicate accreditations

79 Strongly promote the 100 Mile Diet programme through tourism providers, farmers markets and dining menus to focus on fresh local and organic produce. Showcase the organic sector to raise Central NSW's appeal.

5.3 Effectiveness of tourism clusters

The cluster approach to business development, that is, grouping a specific type of business, research, innovation and support sectors, to grow capacity and excellence, has been a successful policy for tourism e.g. Hunter Valley or Barossa Valley for wine tourism. Research in Australia has found clustering is 'eminently suitable for application to tourism' but requires a clear competitive edge achieved through strong local leadership, differentiation and innovation (Jackson, 2006)

However, clustering around a single sector may be too narrow. For example consumers say that 'Range of Attractions and Activities' (58%), 'Festival & Events' (25%) and 'Good Restaurants' (26%) are the 'top three destination features for a Short-Break holiday (Murphy, 2010). But solely concentrating on a specific tourism feature can limit appeal. Successful wine drive touring experiences now require a range of activities, not one theme (Getz, 2003). CNSWT has launched the Discovery Tours which integrate food & wine, with heritage, nature and events. Therefore clusters can be the integration of a holistic tourism package which promotes the competitive advantages of the region and its local distinctive qualities (Warren, 2011).

Observations, opportunities and analysis

80 To raise the quality of tourism CNSWT needs to demonstrate leadership, help to create differentiation and encourage innovation. A capacity building programme which progresses the Discovery Tours and other mechanisms will help to establish clusters of like-minded tourism providers to help establish Central NSW as a centre for excellence.

5.4 Growing demand for popular culture

Popular culture has now successfully been used to stimulate local economic development. A British Government survey shows that more than 50% of the UK population has visited a museum or gallery in the last year. Participation rates are growing in upper socioeconomic demographic groups (British Government, 2013) and museums are now rated the top UK attractions (Kim, 2013) thanks to popular culture exhibits and a broad repositioning of traditional institutions. For example, the exhibition '*David Bowie is*' has experienced the fastest selling tickets in the Victoria & Albert Museum's history (Victoria & Albert Museum , 2013)

The Parkes Elvis Festival is a good example of popular culture which has helped raise the town's awareness and appeal. They have maximised the economic potential by offering 'Home Hosting ' programmes to enable organic growth in the event.

Observations, opportunities and analysis

81 Central NSW has three regional galleries, extensive public space and private sector venues which could be used to hold popular cultural events that raise awareness of the region and strategically position Central NSW to a new target audience.

82 In situations where there is insufficient commercial accommodation capacity, the implementation of 'Home Hosting' programmes should be considered.

5.5 Lower air fares

Low airfares are encouraging more Australian's to travel interstate and increasingly abroad (Visitor Economy Taskforce, 2012).

Observations, opportunities and analysis

83 Regular air services to Central NSW with competitive holiday packages could provide access to new visitors e.g. Melbourne and Brisbane.

5.6 Changing technology

Booking online, apps, guest reviews, Google maps ... the digital age has revolutionised tourism and is therefore a key focus to help double overnight expenditure (Visitor Economy Taskforce, 2012). Visitors are increasingly familiar with using travel apps which can help personalise the experience.

- Digital marketing is critical for a destination and tourism providers. When planning a trip to NSW visitors use internet searches (63%), regional websites (37%), VisitNSW.com (35%) and travel websites/reviews (39%) as the primary source of information sources of information Therefore, lack of tourism product online restricts sales.
- Trip Advisor is growing fast in Australia, together with other social media offer tourism providers and the destination with the opportunity to promote using a channel of choice the public are increasingly preferring (Visitor Economy Taskforce, 2012).
- Consumers choose the internet because they want to easily 'pick and choose' where they trade up or down; save money or splash out (Tourism Australia, 2011). Digital marketing should make choices and buying easy.

Observations, opportunities and analysis

84 Better integration of booking systems will help build sales.

85 Conduct further research on traveller review sites and create Trip Advisor pages for core attractions to both promote the destination and obtain visitor satisfaction feedback.

86 Those businesses better adapted to digital marketing have a competitive edge and greater ability to meet consumer expectations. This should be a prerequisite to being selected to showcase the region in promotional activity.

87 Better promote the museums by creating a dedicated website.

88 Integrate QR codes and a travel app into the heritage trails and at tourism parking

89 Interpretation of experiences is undergoing significant change. Many galleries and museums are making use of digital technology to animate exhibitions through use of sound, moving images, audio and language translation.

5.7 Legacy tourism

Heritage tourism can be split into two main categories:

- heritage tourists are those who visit a site and learn about its heritage, and
- legacy tourists make a pilgrimage to see a site of great personal value to them, their family, community, religion or nationality e.g. Sisters of St Joseph (Perthville) or Cadia Mine (Orange).

The aging population will only increase the number of legacy tourists.

Observations, opportunities and analysis

90 Market ties are an important motivation to travel. CNSWT should conduct further research with family history groups, POW war history and migrant camps. Consideration should be given to using existing social networks.

91 Better coordination and promotion of existing family history resources and building their capacity to provide services should be assessed.

5.8 Accessible tourism

The Investment and Regulatory Reform Working Group/ National Long-Term Tourism Strategy will be announcing the findings of its accessible accommodation study which will indicate: current and future demand, product distribution and consumer information. A major challenge posed by an aging population is that the public require accessible services (note: sports tourism and museums). CNSWT's recent tourism provider survey (CNSWT 3, 2013) found that:

- 46% did have Australian Standards wheelchair accessibility and an accessible bathroom/toilet facility.
- 14% who offered accessible facilities participated in a recognised accredited accessibility scheme.
- None of the accommodation providers in the survey had rooms adapted to the special needs of visitors with disability or with limited mobility.

CNSWT also conducted a Visitor Survey (CNSWT 1, 2013) which found that:

- 9.6% of the sample either themselves had a disability or were travelling with someone with a disability or reduced mobility.
- 37% "Strongly Agree", 58% "Agreed" and 5% were "Neutral" that "This destination takes the special needs of visitors with disabilities into consideration in all areas of its operations".

Observations, opportunities and analysis

92 Combining the size of an aging population and tourism's responsibility (to be accessible for seniors and those with physical disadvantages -Global Code of Ethics) Central NSW needs an accessibility tourism development programme to improve public access to museums, take part in sports, dine and stay at accommodation. The findings from the Australian Government's Regulatory Group would guide this programme and there may be grant funding opportunities. CNSWT should examine this opportunity and identify a strategic accessibility organisation to partner with.

93 CNSWT should lead a strategic programme to provide better accessible facilities at museums, sporting events, arts and cultural shows to maximise on the changing demographics improve the quality of the experience legacy/VFR segment.

5.9 The focus on China

DNSW has indicated that if it can maintain its national share of the China market, which is currently 60%, then this sector will double by 2020 and be the NSW's biggest international source market. DNSW are implementing relevant expansion strategies to maximise this opportunity. To participate destinations have to identify product opportunities and work with wholesalers. Factors to consider are:

- The VET and NSW Government desire to target High Performance Consumer Segments (high net worth individuals) (Destination NSW, 2012).
- The travel trade structure is dominated by Approved Destination Status (ADS) Group Travel (Destination NSW, 2012).
- Forecasters suggest that the FIT (Free and Independent Traveller) will grow (from Beijing, Shanghai and Guangzhou) requiring self-drive, golfing, resorts, food & wine, unique events, luxury and soft adventure. The VET report demonstrates the expectations of high quality experiences with the example of a sea plane trip for a group of 8-10 in a private tasting and lunch at a winery in the Hunter Valley. Experiences to consider would also include photography, wildlife (Destination NSW, 2012).
- Student travel (accounting for 57% of the total Chinese visitation to NSW) has the benefit of additional VFR travel (Destination NSW, 2012).
- The VET report is very specific about the expectations of the new visitors from the Asian Region "understanding, meeting and exceeding … expectations is critical to NSW's success" (Visitor Economy Taskforce, 2012).

Observations, opportunities and analysis

94 There is the political will to support high quality China Ready tourism products. For Central NSW to follow in this slip stream would involve including Mandarin speaking guides, signage, online and offline interpretation and improved retail access. This will require specialised human and financial resources. It will be advisable to identify existing internationally ready product and determine if they are interested to target the China market before embarking on a high level of investment. Currently international visitation is very low to Central NSW and collaborative efforts with Blue Mountains and Hunter Valley might be the most prudent strategy.

95 Consideration should be given to international education tourists (from countries including but not restricted to China) and their VFR .

6 Key tourism assets

Research commissioned by VET shows that in many cases NSW destinations do not appear sufficiently unique to attract visitors. Consequently the CNSWT DMP must address the region's natural and cultural heritage as well as the supply side (commercial tourism operations facilities) and infrastructure, in order to increase the attractiveness of the destination (Visitor Economy Taskforce, 2012).

The relevance of cultural heritage is demonstrated by two Domesticate research reports which clearly identified that Australians' motivation to travel domestically was driven by a desire to reconnect, and nostalgia (Childs, 2010) (Tourism Australia, 2011).

This plan therefore assesses its tourism assets by separating natural and cultural heritage from the supply side (commercial operators and infrastructure). This is because the supply side (Section 7) is presented numerically to illustrate the scale and scope of commercial operators and infrastructure, while heritage is summarised descriptively.

Heritage can be defined as including items that have been inherited, passed down through generations, and wish to be kept for future generations. Heritage is often considered as buildings (houses, public buildings, mines, bridges) but it also includes nature (physical geography and ecosystems) and intangible assets which typically cover : oral traditions, stories, the use of language, performing arts, social practices, festivals, events, knowledge and practice about nature and traditional craftsmanship. In some cases tangible heritage is associated with intangible heritage. Examples may include musical or work instruments, objects, artefacts and cultural spaces associated with a culture (UNESCO, n.d.).

"Destinations must work to integrate arts, culture, events, nature, heritage and other visitor experience development initiatives into their Destination Management Planning. This will allow destinations to strategically position themselves in delivering experiences where they have comparative strengths, building on their key attributes to be more appealing to visitors and providing visitors with a more authentic and satisfying stay" (Visitor Economy Taskforce, 2012) .

The role of heritage therefore can assist in the destination's strategic positioning. Cultural heritage can be a magnet which attracts visitors to consider a destination. For example the cultural experiences of Europe are strongly featured in advertising to attract Australians. Cultural exchange is a positive motivation to travel overseas "It is great travelling overseas to learn about different cultures, how other people live, their food, everything – it makes you richer," (Childs, 2010). But, as discussed above, VET recognises the value cultural and natural heritage can provide in order to differentiate a region within Australia.

Differentiation is achieved by identifying the local distinctiveness of a region, that is its natural and cultural heritage and how it influences community life. By examining and understanding these tangible and intangible assets, their tourism value can be identified (Warren, 2011). The tourism value means:

- their usefulness to attract visitors
- their worth in encouraging local economic development
- their importance as examples of Australian natural and cultural heritage that is desired to be conserved, and
- the regard in which they are held by the local community.

The combination of heritage values helps define the Local Distinctiveness (Warren, 2011). These values can then be expressed by ideas using themes which link disparate areas, or items through interpretation, marketing and development into tourism experiences (Stell, 2007). The heritage thematic values of Central NSW are summarised below and offer considerable scope for product development and high quality visitor experiences which can already be demonstrated by the Discovery Tours developed by CNSWT in 2013.

6.1 Popular culture

Popular culture is defined as contemporary festivals, sporting events and community facilities which have meaning and value locally, but are not necessarily historic or planned to be conserved for future generations. The following popular culture summary has been provided by CNSWT key stakeholders based on their tourism experience of the region. It is not an exhaustive list but is representative of the broad range of activities that draw visitors to the region because of the nature of the events or the destination's high-quality facilities and provides a summary of the major and smaller events which can be enhanced in line with Recommendation 28 from the VET Report (Visitor Economy Taskforce, 2012).

Table 15: Popular culture themes and events

Theme	Popular culture	Context
Sport	Bathurst 1000/ 12 hour motor racing	Large national spectator sporting events and national media coverage
	Condo 750	This is the biggest annual off road navigational rally for motorcycles quads, cars and buggies held in NSW. The programme also enables spectator opportunities to see the vehicles and meet the drivers in the main street of Condobolin
	Orange Sports Tourism – Junior sporting events	NSW U/15 Girls Hockey State Championships, NSW U/14 Rugby Championships, Basketball NSW Western Junior League Finals, NSW Country Gymnastic Championships, Little Athletics NSW State Multi Event Championships, Basketball NSW Western Junior League Finals, NSW U/15 Boys Hockey State Championships, NSW U/14 Rugby Championships,
	Elite Energy Triathlon Series	One of seven regional triathlon events which will attract 1000 participants, accompanying relatives/friends and officials to Orange
	B2B Cyclo Challenge	Blayney to Bathurst challenge the first programme in Australia that followed the concept of European style Cyclo Sportif

Theme	Popular culture	Context
	Regional sporting events	Range of sporting events (rugby, rugby league, golf, horse racing, harness racing, netball cricket), car racing mens', womens' , and junior carnival events held in Mudgee and Bathurst
	Competitive sporting events	Parkes is home of the national Local Government Touch Football Carnival
	Gold Crown Carnival	10 days programme involving harness racing, social and charity events in Bathurst
	Forbes Camel Races	Annual spectator sporting event with 8 camel races, entertainment and activities
	Canowindra Balloon Challenge	Very popular event which draws over 15,000 spectators and participants and has wide ranging links to food & wine experiences
	Colour City Running Festival	Local run which raises funds for charity in Orange
	Fisherama	Annual amateur angles competition which has run for ten years at Lake Cargelligo, NSW's largest inland lake. The event is part of community efforts to improve the condition of this important wetlands area
	Horse racing events	Large crowds are drawn to TAB & picnic race meetings, including harness racing in every Central NSAW LGA which are regular fixtures across the year
Indulgence	Mudgee Wine & Food Festival	Distinctive region with boutique producers and famous for its Chardonnay. Mudgee has a Food and wine events that showcase the region
	Orange and Bathurst Food & Wine events	Recognised cool climate winemaking region. Orange, Cabonne and Blayney host FOOD Week, Wine Week, Frost Fest, Slow Summer, Bre&d Week and other events which showcase the region's local produce and wine
	Cowra Food & Wine events	One of the national leaders in organic and sustainable vineyard practices Annual Cowra Wine Show Weekend
	Trundle Bush Tucker Day	'Bush & country' experience which is growing in popularity, held in Trundle
	National BBQ Championships	A growing participatory event, held in Forbes annually
Music	Huntington Estate Music Festival	This chamber music event has been held annually for 23 years in the Barrel Room of Huntington Estate Winery, Mudgee

Theme	Popular culture	Context
	Elvis Festival	The Parkes Elvis Festival is internationally renowned and draws high visitation and The Kings's Castle Elvis Museum home to the largest collection of Elvis memorabilia (donated by former Yellow Wiggle Greg Page
	Eisteddfods	Held in Bathurst, Cowra & Gulgong and draw sizable VFR visitation
	A Day on the Green	Running for over 1 years this is part of a high quality Australasian music events programme in Mudgee
Art	Kalari Lachlan River Arts Festival	A rich range of performance, activities and creatively that seeks to celebrate the creativity of country folk and their resilience, held at Robertr Oatley Vineyards in Mudgee
	Blue Waters Art Exhibition	Arts and crafts in 66 categories, held in Lake Cargelligo
	Bunnamagoo Mudfest	International short film festival held under the stars at Bunnamagoo Estate, Mudgee
Culture	Tullamore Irish Festival	Irish song, dance, stories and food that celebrates the early settlers from Ireland
	Kalari-Lachlan River Festival	Bi annual event celebrating local art & culture in Forbes
Science	CSIRO Parkes Radio Telescope	'The Dish' is a major attraction; visiting it is a 'pilgrimage' for many visitors

6.2 Cultural heritage

Heritage evaluation criteria

The following sources were used to compile the heritage list:

- The NSW Heritage Office
- Oral histories from the communities
- The Wiradjuri community
- The National Trust
- The Department of Sustainability, Environment, Water, Population and Communities : Australia's Heritage
- Local council heritage plans
- NSW Roads and Maritime Services, and
- The CSIRO NSW Office.

The assessment of heritage values and tourism has been undertaken in two ways; i) considering its socio/economic value (Torre, 2002), and ii) recognising tourism's responsibility to conserve heritage and its economic value to local communities (Goodwin, 2011). This DMP has chosen to consider heritage values in terms of their social, cultural and economic values as guided by:

i) the Sustainable Regional Tourism Destination Framework

ii) NSW Government's 2021 plan which seeks to make communities more sustainable (NSW Government 3, 2011)

iii) VET Strategic Imperative 3 Recommendation 19 which strives to protect key assets from encroachment (Visitor Economy Taskforce, 2012)

iv) CNSWT and its key stakeholders who aim to double overnight visitor expenditure.

Tourism at heritage sites can provide interpretation and encourage conservation, through public donations. Heritage is defined as: monuments, groups of buildings, sites, natural features, geological and physiographical formations and natural sites (UNESCO, 1972) and intangible values (UNESCO, 2003).

Its value to tourism in Central NSW can be judged firstly by the degree to which it reflects the diversity of Central NSW's communities (Australia ICOMOS, 1999), including respecting cultural diversity and all aspect of community belief systems (World Heritage Committee, 1995) (United Nations, 1976).

Secondly, by the level of involvement local communities or interested parties have in the maintenance and conservation of heritage so that tourism's involvement is sustainable (Pedersen, A., 2002).

Thirdly, that the heritage significance and need for its conservation can practically be communicated (ICOMOS, 1999) to the public and thereby assist in its appreciation and conservation.

Finally, to be aware of the potential to list places on the Australian heritage listing and so by reinforce the importance of the destination's heritage (Australian Government, 1999) and help build its appeal to visitors.

The method to score the heritage assets was qualitative, based on stakeholder input (special interest groups, tourism providers, NPWS, RMS, visitor centre staff, tourism mangers, National Trust volunteers and museum volunteers). Qualitative methods "elicit cultural values more effectively (than quantitative)" (Torre, 2002).

The following list is a representative snapshot of the assets in Central NSW:

- Nationally significant copper and gold mining site (Cadia Hill, Northparkes Mine)
- One of the most important living cultural heritage sites in Australia (Hill End)
- First and second settlements West of the Blue Mountains - Bathurst Court House and Wellington Convict Mission
- Australia's home of motor racing Mt Panorama
- Australia's leading literary figures of Henry Lawson and the poet Banjo Paterson
- Australia's first payable gold site at Ophir, gold mine archaeological heritage at Lucknow and O'Brien's Hill
- Home to some of the country's most famous gold rush bushrangers like Ben Hall and Frank Gardiner and lesser known convict bush rangers like William Poole
- Home to the largest Aboriginal nation in NSW, Wiradjuri and their remarkable carved tree art as well as the important reconciliation site at Maynggu Ganai, Wellington
- Important engineering sites in railways, bridges, Cobb & Co (Bathurst was the NSW headquarters for Cobb & Co) infrastructure, convict roads
- Buildings of national value from humble convict barns (Stoke's in Carcoar), timber shearing sheds (Lachlan Shire), to the Bathurst Courthouse, St Mary's Catholic Church (Mudgee), Duntryleague Guesthouse (Orange), Abercrombie House (Bathurst) and country houses as well as examples of important generational homes such as Miss Trail's House (Bathurst)
- Iandra Estate (Greenethorpe) is an important site which demonstrates Australia's first shared farming principles and has a historic home.
- Leaders of their nation – Australia's 16th Prime Minister Ben Chifley, Henry Parkes and Windradyne, the Aboriginal warrior and resistance leader of the Wiradjuri nation
- One of the country's most important WW2 sites (Cowra Prisoner Of War Camp)
- Agricultural heritage, Chinese market gardens, agricultural research centres at Cowra, Orange and Bathurst, Iandra (wheat species), saltbush lamb (Old Man Saltbush grows across Central NSW which gives the lamb a unique flavour), Packham Pears (Molong) and Central NSW (as the food basket for the colony was critical in the survival of Port Jackson).

The National Trust lists over 1100 geographic and scientific sites of value in the region. This excludes local government and State Heritage listed items and all intangible heritage.

Cultural heritage assets

The following table lists tourism cultural heritage assets which are grouped under a theme (thematic value). They are listed here because the DMP serves as a living plan which introduces a holistic approach to the development of tourism in Central NSW. As such it lists tourism supply assets and includes the natural and cultural heritage, which can be used to improve visitor experiences, stimulate new products or drive promotion campaigns by individual tourism providers, community groups tourism mangers or collectives. The list also seeks to emphasise the rich cultural heritage that exists in Central NSW and justify its role as a strong competitive point of difference and one of the foundations for visiting the region. The heritage is therefore, in economic terms, cultural capital and as such a contributor to the economic goals of tourism.

Table 16: Cultural heritage assets

Theme	Tangible and intangible cultural heritage	Context
Artists	Sites: Hill End, Sofala, Gulgong Russell Drysdale, Donald Friend, Janet Mansfield	Hill End and Sofala have been the inspirational home to three generations of Australian artists. Since the Second World War when Russel Drysdale and Donald Friend visited the area artists like John Olsen, Margaret Olley and Jeffrey Smart have worked there. Annual residencies are available to applying artists to continue this tradition. Australia's ambassador for ceramics, Janet Mansfield, created a centre of excellence in Gulgong.
Politics	Ben Chifley: home, train, meeting venues, grandfather grave in Wattle Flat Sir Henry Parkes	Australia's 16th Prime Minister, Ben Chifley, originally a train driver and union leader, rose from simple beginnings. The sites one can see demonstrate the man and his 'plain speaking' character. There are few examples of collections of heritage places showcasing Prime Ministers like Sir Henry Parkes and his role in building the nation and his legacy in Parkes, Moat Cottage.
Gold Rush	Sites: Ophir, O'Brien's Hill, Ironbarks, Hill End, Bushmans Hill, Fifield, Peak Hill, Lucknow, Cadia, Abercrombie River (Mt Gray), Wattle Flat, Red Hill Villages/Towns: Gulgong, Grenfell, Rockley, Trunkey Creek, Forbes, Lake Cargelligo, Condobolin, Sofala, Hargraves, Windeyer	The gold rush changed Australia. It commenced with the first payable gold being discovered at Ophir near Orange, and resulted in hundreds of thousands of prospectors arriving from all corners of the world. Their legacy can be seen today in the form of important industrial archaeology, villages, and in folklore.

Theme	Tangible and intangible cultural heritage	Context
Mining	Cornish: Cadia Hill, Byng, Hill End, Northparkes Mine Wiradjuri: Lake Cowal, Ochre	Before gold was discovered, Cornish miners arrived and used their knowledge of copper mining to establish thriving communities in Cadia and Byng. Remains of Cornish roasting pits can be seen in Hill End. The Cadia Hill Mine is of national significance. Mining has been practised by the Wiradjuri people for thousands of years for stone tools and special clay used in important decoration. These were valuable commodities traded far and wide outside the region. Today Northparkes Mine is a major contributor to mine tourism projects.
Bushrangers	Convict bushrangers William Poole, Ribbon Gang, Ribbon Gang Lane, Abercrombie Caves Gold Rush Bush Rangers Ben Hall: cave, home, grave, Escort Rock Frank Gardiner: Escort Rock, Carcoar Captain Thunderbolt: Cooyal John Bow, Johnny Gilbert Lady bushranger Jessie Hickman: Kandos, Dunns Swamp Chinese bushranger Sam Poo: Mudgee Road	Bushrangers are part of the fabric of Australian folklore and Central NSW is home to some of the most infamous including Ben Hall, Frank Gardiner, Jessie Hickman and Captain Thunderbolt. They appeared during the gold rush era, but prior to this was an era of escaped convicts trying to reach China, Timor or the Great Inland Sea. Their stories are rich and fascinating.
Writers	Henry Lawson (Grenfell, Gulgong and Mudgee) and Banjo Paterson (Orange, Yeoval, Ironbarks, Overflow)	Henry Lawson was perhaps the first Australian-born writer who looked at Australia with Australian eyes and expressed the life circumstances of real people. His work still has a world-wide following. Banjo Paterson is a much loved writer whose style romanticised the country. Both Lawson and Paterson wrote about places and events in Central NSW and this justifies any regional ambition to develop associated art and literature experiences. There are two Henry Lawson festivals (Grenfell and Gulgong) and the 'Man from Ironbark' festival celebrating Banjo Patterson, held in Stuart Town.
Victorian Villages	Carcoar, Millthorpe	There are few examples of mid to late Victorian villages which have been left almost intact. Both Carcoar and Millthorpe are listed by the National Trust. Visitors can experience authentic street scapes with often well restored buildings such as the Court House in Carcoar.
Railways	Stations at Blayney, Carcoar, Cowra, Woodstock, Bathurst Engine Yard at Cowra Station complex at Canowindra Cowra Railway Bridge	The railways changed Australia by linking resources with the growing city of Sydney. The expansion of the railways is a demonstration of confidence in the colonies future, and the introduction of industrial revolution technologies brought from the other side of the world. The high quality of the original stations and infrastructure offer visitors excellent examples of the railways of the 1880s without later development distracting from their design integrity.

Theme	Tangible and intangible cultural heritage	Context
	Condobolin Railway Museum	
Churches & Cemeteries	Holy Trinity (Kelso), St Mary's Catholic Church (Mudgee), All Saints Anglian Cathedral (Bathurst) Sisters of St Joseph (Perthville)	The region has many listed cemeteries which are very valuable for legacy and heritage tourists. There are also architecturally important churches which add tremendous value to the streetscapes. Mary McKillop, Australia's first saint, was responsible for the Sisters of St Joseph Church in Perthville near Bathurst.
Motor Racing	Mt Panorama and Gnoo Blas	Central NSW has two motor racing circuits of fame, where famous drivers like Bob Jane and Jack Brabham started their careers. Although Gnoo Blas is no longer used (it held races during the romantic early years of motor racing) today Jack Brabham Park regularly welcomes classic car enthusiasts. While Mt Panorama is showcased worldwide with the annual endurance race.
Road Transport	Cobb & Co (Molong and Vittoria) Western Highway Convict roads (Goulburn Rd) Bridges: Warroo, Paytens, Denison, Queen Charlottes, Abercrombie, Wallaby Rock	The construction of the Bue Mountains crossing is one of the major engineering feats of Australia's early history. Once Bathurst was established, the construction of the road system using convict labour across Central NSW opened this region and was vital to the colony's survival. To this day visitors can see convict road workings, state heritage listed bridges and the original Cobb & Co staging posts. The routes add considerable interest to scenic drive tours; bridges are often named after local people or important political figures. The roads were used to transport food and gold to Sydney. As a result there is local folklore attached to these routes, many of which may have originally been Aboriginal Songlines. The routes follow ancient Indigenous trading and ceremonial networks.
Early settlements	Old Government House Bathurst Wellington Convict Mission – Maynggu Ganai Chinaman's Bend	Port Jackson was under threat of disbandment after droughts showed that the land around Camden was not suitable for agriculture nor to feed the growing colony. The move over the Blue Mountains was a quest to find land that could be cultivated to ensure the viability of the colony. Old Government House in Bathurst and The Wellington Convict Mission are important in expressing the early years of the region and the colony. Chinaman's Bend – the location of Fredrick Valley Station was a stopping place between the two settlements and it later became a Chinese Market Garden. Maynggu Ganai 'People's Place 'is the new name for the Wellington Convict Mission. It has been recognised as a place of reconciliation where combined elements tell the multicultural story of Australian in the last 200 years and offer legacy, heritage and education tourism potential. Moreover, they can justify a Central NSW claim to showcasing important Australian heritage.
Historic buildings	Stoke Stables, Miss Trail's House, Chifley Home, Bathurst Court House, Iandra Estate, Abercrombie House, Bridge View Inn, Duntryleague House, Bowen Terraces in Orange	Convict buildings (Stokes Stables), modest dwellings (Miss Trail's House and Ben Chifley's home), architecturally unique (Iandra), grand houses (Abercrombie), houses built from gold era profits (Duntryleague) and properties demonstrating a Victorian Italianate style (Bowen Terrace).
Cinema	Amusu	The oldest continuously operating cinema in Australia, held within the same family.
Market Towns	Mudgee , Rylstone (Bridge View Inn),	Towns which are agricultural centres for rural areas which hold farmers markets

Theme	Tangible and intangible cultural heritage	Context
	Molong	and events that as a way of life celebrate the agricultural heritage of the region.
Struggle	POW Camp Cowra, Japanese Cemetery, Peace Bell, Windradyne (Peel), Bathurst War Memorial Carillon Ribbon Gang Lane	With the expansion of the colony west of the Blue Mts came conflict. The Wiradjuri people, led by Windradyne, fought to protect their land. The Ribbon Gang were escaped convicts in who were captured and hung in the last mass hanging in Australian at the site of Ribbon Gang Lane. The Bathurst War Memorial Carillon and its location between the Courthouse and the Cathedral provides a notable place where their bells ring daily. The Cowra Breakout by Japanese POWs in 1944 is an important historic event from WW2 which eventually led to reconciliation and Cowra receiving the World Peace Bell.
Chinese Early Chinese settlers	Hill End, Windeyer Water Race, Sam Poo (bushranger), Chinaman's Bend, Stuart Town (bakery)	Chinese migrants arrived in the initial gold rush and they have played an important role in the development of Central NSW. There are rare examples of their engineering skills (water race), folklore with Sam Poo the Chinese bushranger, examples of Chinese gold mining (Hill End), market gardens (Chinaman's Bend).
Rural way of life	Picnic Races (e.g. Wellington Boot), folklore of early settlers, Royal Bathurst Show, Australian and Small Farm Field Days	Horse racing was probably the first sport enjoyed by the early settlers as they loved the challenge of racing each other through the bush. Bushrangers were known to take several hours putting horses through their paces so they could select the finest to outpace the police. One of the earliest examples of a race course can be found at Wattle Flat and Rylstone. With formalised racing came the picnic races which are still enjoyed today, as are registered race meetings across the region. The agricultural shows and field days are traditional events which showcase the region's important agricultural contribution to NSW and the character of the region. The activities offer excellent opportunities for urban-based families to see and learn about farming and country life in regional NSW.

6.3 Natural heritage

Table 17: Natural heritage assets

Theme	Tangible and intangible natural heritage	Context
National parks	Conimbla NP	Conimbla NP is a 'bush island' rising to 500 metres above comparatively flat agricultural land between Cowra & Grenfell. Eastern grey kangaroos, wallaroos, swamp wallabies, little red flying-foxes, possums and gliders. Primarily wildlife watching and bush walking.

Theme	Tangible and intangible natural heritage	Context
	Weddin Mountains NP	Weddin Mountains NP is a rugged range of mountains with panoramic views, bush walks and Ben Halls' Cave. Rich in birdlife with 151 known species including the Peregrine falcon, Wedge Tailed Eagle and large flocks of the threatened Superb Parrot.
	Woggoon NR and Tollingo NR	Of high scientific values Woggoon and Tollingo NR contain communities of Mallee, poplar box and white cypress woodland.
	Goobang NP	Goobang NP is extensive with red-necked Wallabies, Swamp Wallabies, Eastern Grey Kangaroos, Echidnas, Koalas and Long-eared Bats. Bird species include Regular Honeyeater, Glossy Black Cockatoo and Superb Parrot.
	Nangar NP	Three main types of vegetation are evident: eucalyptus-blackpine, scribbly gum-blackpine and blackpine-ironbark. Many beautiful shrubs can be seen, including spider flowers, thyme spurge, nodding blue lily and waxlip orchids. Six woodland communities are located within the park – grey box, white box, Blakely's red gum/white cypress pine, red stringybark/ scribbly gum, mugga ironbark/ red stringybark and tumbledown gum.
	Dunns Swamp (Wollemi NP)	Created by a weir for Kandos this serene waterway on the Cudgegong River has scribbly gums and striking pagoda rock formations. There are wallabies, Purple Swamphens, Greater Gliders, Long-necked Turtles and Platypus.
Memorial	The Camping Tree Mudgee	In 1822 Blackman and Lawson traced a route from Wallerawang to Dabee, near Rylstone. The first settlement of Mudgee was at 'The Camping Tree' on Menah, just across the present old railway line and down the Wilbertree Road, where George and Henry Cox, William Cox the road builder's sons, settled in 1822, soon followed by others. Explorer and botanist Allan Cunningham came in 1822. The Camping Tree still sits beside the river on the Wilbertree Road. The first gaol was there, virtually a round-backed timber cage where inmates were chained to the walls.
Recreation	Wyangala Dam, Chifley Dam, Carcoar Dam, Gum Bend Lake, Lake Burrendong	Human engineered water resources provide recreational areas and habitat for wildlife and water sporting experiences.
Dinosaurs	Ages of Fishes Museum, Australian Fossil & Mineral Museum Bathurst, Wellington Caves	The discovery of large fish fossils near Canowindra has become one of the most amazing geological discoveries in Australia. The Bathurst Mineral & Fossil Museum is home to the valuable fossil Somerville Collection and the fossils discovered in the Wellington Caves helped to unravel the ancient history of Australia.
Cultural landscapes	Mt Panorama, Wiradjuri Study Centre (Forbes), Mt Canobolas, Munghorn Gap, Hands on Rock, Lake Cargelligo	Central NSW has many important Wiradjuri sacred sites which include Mt Panorama where the Indigenous people could watch for travellers, Mt Canobolas has a rich Dreamtime story, Hands on Rock is an important women's area. Lake Cargelligo has been an important meeting place for thousands of years.

Theme	Tangible and intangible natural heritage	Context
Night sky	Wiradjuri, ‘The Big Ear’ – ‘The Dish’	The CSIRO Radio Telescope is today a popular cultural attraction. At 30 degrees latitude, Central NSW provides one of the best views into the heart of the Milky Way. Three quarters of the 2,000 Pulsars (neutron stars) in our night sky were discovered in Central NSW (Hearts and Minds, 2010) . The telescope is recognised by the Wiradjuri people as the ‘Big Ear’, for the Aboriginal people the night sky is a very important part of Dreamtime stories and a source of wonder for all.
Caves	Abercrombie and Wellington	The Abercrombie Caves have the largest natural arch in the Southern Hemisphere while the Wellington Caves provided significant fossils that helped to determine knowledge about Australia’s history.
Japanese gardens	Cowra and Wellington	Cowra has the largest Japanese gardens in Australia and is complimented by the gardens in Wellington.
Gardens	Country houses: Iandra Estate, Abercrombie House Orange Botanical, Cameron Park Wellington, Burrendong Botanic There are open garden weekends annually right across the region.	Gardens are very popular tourist attractions and there are open garden weekends across the region. Central NSW has two valuable botanic gardens (Orange with its vintage apple trees and rose garden) and Burrendong with its exotic plants) as well as heritage listed country houses.
Carved trees	Yuranigh Grave (Molong), Goobothery (near Condobolin) also in Lake Cargelligo and Millthorpe museums	The art of tree carving is foremost in the central west of NSW. Identified by early explorers and brought to Sydney where they were recognised for their artistry and skill. There are several sites visitors can appreciate carved trees in (Molong & Condobolin) NSW, they are evidence of the sophisticated Wiradjuri culture.
Agricultural landscapes	Forbes Pavilion. Forbes Livestock Exchange, Cudal Scenic Route, timber shearing sheds, travelling stock routes	There are many agricultural sites heritage listed including the Forbes Sheep Pavilion, many timber shearing sheds across the Lachlan region and the extensive Travelling Stock Routes which are now ecologically rich and offer great recreational opportunities.
Farms	Seaton’s Farm and Dripping Rock Homestead	These are two farms which are now part of national parks & they offer visitors special opportunities to see historic settler’s homes, facilities and the struggle of life in rural NSW.

Observations, opportunities and analysis

96 Central NSW has substantial tangible and intangible cultural heritage. Combined with the natural environment, these important assets can help to create a regional competitive edge and should be integrated into LGA and community group tourism plans. The heritage is cultural capital and as such a contributor to the economic goals of tourism.

97 Cultural heritage offers opportunities for greater collaborations. There is a Gold Trail heritage tour, involving Weddin, Bathurst, Forbes and Parkes together with neighbouring councils. This provides opportunities to further exploit the full range of gold rush history that extends over Central NSW (which is not actively part of the Gold Trails project) and thus extend overnight stay. Likewise the Greater Blue Mountains. (National Landscape) represents opportunities for linkage in Mid-Western and Bathurst.

98 To maximise the potential value of heritage, tourism providers should have good local knowledge to be able to direct visitors to attractions and indicate their significance so that itineraries. This would have the benefit of justifying longer stays and raising customer satisfaction.

99 The value of heritage can also be linked to local agriculture, food, recipes and menus. Traditional grape and apple varieties could also be linked to early settlers, folklore and history to create distinctive brand stories. The packaging of such products which reach markets outside the region could also create awareness and appeal to potential visitors.

100 There are very strong Aboriginal cultural heritage sites, some shared sites and important art and crafts heritage which represent opportunities for communities to economically benefit from tourism. They represent opportunities for links with the wider tourism sector and with Aboriginal experiences in the Greater Blue Mountains.

101 Heritage trails and interpretive signs need to convey the intangible heritage, where practical use of QR codes could facilitate greater interpretation and linkage to shopping, food & wine attractions.

102 Consideration should be given to scope of using heritage within sport tourism, particularly spectator sports and events.

103 The Discovery Tours should be researched to optimise tour routes, appeal of heritage sites and operator knowledge.

104 Interpretation and building visitor appreciation of heritage sites should be done in consultation with the communities to encourage sustainable site management and improve visitor satisfaction.

105 CNSWT should demonstrate leadership by facilitating collaboration between local councils, community tourism and special interest groups that maximise the cultural capital within visitor information, accessibility and interpretation.

106 CNSWT should find channels to motivate councils and tourism providers/community groups to participate in commercial partnerships to re-use heritage properties and natural assets (Visitor Economy Taskforce, 2012).

7 Tourism supply

This section of the DMP presents the 'supply' side of Central NSW tourism: the commercial facilities and services that visitors choose, use and experience.

The details were provided by the respective council tourism department or tourism organisation in each LGA, and Centroc.

7.1 Accommodation segments by city, town, village

The accommodation sector is essential in doubling visitor expenditure. Accommodation's geographic spread and type together with visitor seasonality impact on strategies to grow overnight visitor expenditure. The table below indicates the geographic spread of the accommodation by type.

In terms of total number of accommodation providers Mudgee (144), Bathurst (81) and Orange (79) offer the main concentration with many smaller communities providing a low spread of operators. There is no list of accredited accommodation providers available from key stakeholders and therefore no objective measure of quality.

Accommodation capacity, by type, is not available. However, distribution of the accommodation types indicates strong destination variations across Central NSW. The biggest share of accommodation provider is holiday homes primarily concentrated in Mudgee. The second largest category is B&Bs which are concentrated in Mudgee, Bathurst and Orange. Motels have a broad spread with some concentration over the southern and western regions. Paid-for caravan and camping sites are spread across the destination.

Table 18: Central NSW accommodation segments, by region and for the region as a whole

Region	Hotels	Motels	Pub hotels	Caravan parks	Camping sites	Serviced/ Self-contained	Boutique properties	B&B	Holiday homes	Back packer	Total
Mudgee		14	13	7	4		3	30	73		144
Rylstone			2	1	2						5
Kandos		2	1		1		1				5
Gulgong		3	4	1	2						10
Sofala			1		2		2	2			7
Hill End		1	1	2			1	1			6
Bathurst	2	13	5	1	2	7	3	19	29		81
Rockley			1		1		1				3

Region	Hotels	Motels	Pub hotels	Caravan parks	Camping sites	Serviced/ Self-contained	Boutique properties	B&B	Holiday homes	Back packer	Total
Chifley Dam					1				1		2
Neville							1				1
Blayney		3		1	1						5
Millthorpe		1	2			6	1	2			12
Carcoar			1		2			2			5
Cargo			1		1						2
Canowindra	3	2		1	2		2	4		1	15
Cowra		10	5	2	3	3	2	4	4		33
Wyangala Waters				1	1				1		3
Grenfell	4	1	4	1	2	1	1	3	4		21
Forbes	3	7	2	4			1	4	1		21
Eugowra	1			1	2			3			7
Orange		9	11	2	2	26	2	12	14	1	79
Cudal	1	1		1	1						4
Cumnock	1										1
Yeoval	1				1						2
Molong	2	1		1	1		1	1	1		8
Stuart Town				2							2
Wellington	6	4		3		6		5			24
Manildra	1			1	1			1			4
Parkes	1	13	7	4	3			4			32
Peak Hill		3	1	2	2						8
Trundle			1	3	1						5
Fifield			1							1	2
Tottenham			1	1							2
Condobolin		3	4	1						1	9

Region	Hotels	Motels	Pub hotels	Caravan parks	Camping sites	Serviced/ Self-contained	Boutique properties	B&B	Holiday homes	Back packer	Total
L. Cargelligo		2	2	1							5
Total/whole region	26	79	71	45	41	49	22	97	128	4	561
Share	5%	14%	13%	8%	7%	9%	4%	17%	23%	0%	100%
Number accredited											unknown

7.2 Seasonality

No destination occupancy figures exist but three LGAs report levels between 44% to 80% through the year. This indicates there is potential spare capacity which could be filled during shoulder and low seasons which would be around spring and autumn with high availability in winter.

Table 20: Seasonal variation in occupancy levels

	Bathurst	Cowra	Forbes	Lachlan	Mid-Western	OBC	Parkes	Weddin	Wellington
January									
February									
March									
April									
May									
June									
July									
August									
September									
October									
November									
December									

Key:

	= strong occupancy
	= low occupancy

Observations, opportunities and analysis

107 CNSWT should show leadership to develop the accommodation sector by instigating occupancy measures throughout the year by each category. This would assist in targeting specific tactical promotions to maximise capacity.

108 CNSWT should: compile an audit of accredited accommodation providers to identify market gaps for future development; motivate accommodation providers to participate in accreditation schemes so that CNSWT and VICs can provide a consistent level of accommodation details to visitors, provide detailed categorising of accommodation providers with special services e.g. pet friendly, to better meet visitor needs. Not all accommodation providers support accreditation, but it is a nationally supported (Department of Resources, Energy and Tourism, n.d.) and incentivised tourism to participate through the T-QUAL grants (Department of Resources, Energy and Tourism, n.d.). Not all visitors use accreditation as a guide (Warren, 2013), but it does offer a framework to aid development. CNSWT should show leadership with key stakeholders to build the capacity of tourism providers and support appropriate grant applications. Those operators who decline involvement but seek to promote their qualities, will need to demonstrate quality through visitor services and added values that should be verified by the local tourism managers and VIC staff. All accommodation providers who seek to market themselves in a professional manner should be incentivised through benefits e.g. participating in a promotional campaign, the Discovery Tours or integrating Trip Advisor pages into CNSWT's digital materials.

109 To lead development CNSWT should prepare a business case for accommodation investors that includes premium accommodation

7.3 Conference, meeting and function venues

The conference, meeting and function market is important because of the higher than average overnight spend (Australia, 2012) . The table below indicates the range of facilities in the destination. There are 5 venues with accommodation that can take a capacity of more than 200 people. There are 34 wedding venues for less than 200 guests which are primarily in Orange/Blayney/Cabonne and Bathurst and Cowra where there is also accommodation capacity. There are 17 wedding venues that can provide for wedding parties of larger than 200 yet local accommodation supply in Parkes and Lachlan particularly would make it difficult fit all the guests.

Table 21: Range of facilities for conferences, meetings and functions

Venue capacity	Bathurst	Cowra	Forbes	Lachlan	Mid-West	OBC	Parkes	Weddin	Wellington	Total
Venue 0–200	6	6	0	0	6	17	3	3	6	47
Venue 200+	4	4	4	6	8	7	3	0	1	33
Venue with accommodation 0 –200	6	3	0	1	2	13	6	0	1	32
Venue with accommodation 200+	1	0	1	0	1	2	1	0	0	5
Wedding venue 0–200	5	5	0	0	1	14	7	2	1	35
Wedding venue 200+	3	1	0	3	4	2	4	0	1	18
Total	25	19	5	10	22	55	24	5	10	170

Observations, opportunities and analysis

110 There are current supply weaknesses e.g. Parkes and Lachlan where the venue guest capacity would be difficult to match with accommodation availability. There are likely gaps between large capacity business event venues and quality accommodation e.g. Bathurst, Cowra, Lachlan and Mid-Western. CNSWT needs to show leadership in working with venues and accommodation providers to develop an integrated plan so that valuable events can be targeted and visitors accommodated. A more detailed audit should be undertaken to include venues at restaurants and a register provided to all VICs, community groups and tourism mangers.

111 CNSWT needs to encourage investment in the supply side that better fulfils the potential business and leisure event market opportunity, particularly linking with commercial centres of Orange and Bathurst and particularly with the wedding market because of the strong VFR market ties. It also needs to coordinate marketing programme to better target the demand side.

112 Opportunities exist for CNSWT and its key stakeholders in focused marketing that links supply side venues with integrated support services; tour operators and local producers, entertainers, florists, hire car, accommodation providers to offer a comprehensive information source.

7.4 Sports facilities

Sports tourism is an expanding segment, as described above. CNSWT's key stakeholders see maximising investment in high-quality sports facilities as a strategic priority. Specifically the aim is to target leisure and business events. The majority of the resources are in Orange/Blayney/Cabonne where there is 23% of the total number of accommodation providers. Investment into high-quality sports facilities have been made in Mudgee and Parkes. The highest numbers of facilities are for soccer (40), cricket (36), tennis (36), netball (28) and ruby league (27).

Table 22: Sports facilities types and locations

	Bathurst	Cowra	Forbes	Lachlan	Mid-Western	OBC	Parkes	Weddin	Wellington	Total
Athletics	2	1	2			1	1		1	8
Soccer		2	1	2	1	31	4		2	43
Rugby	1	1	1	2	1	11	2	1	3	23
AFL	1	1		4	1	2	1			10
Rugby league	3	3	1	7	5	7	2	1	3	31
Cricket	7	9	9		6	7	7		3	48
Polo			1	8					1	10
Netball	1	1	1	8	3	12	1	2	10	39
Basketball	1	1	1	12	1	5	1			22
Tennis	3	4	2		4	21	1	6	8	46
Indoor pool	3		1	4		4			2	15
Outdoor pool	1	2	1	6	3	8	1	1	3	25
Golf	1	3	1		3	10	1	1		18
Marathon	1			3	1	1				6
Bowls	2	4	1	3	3	11	2	6		29
Cycling	3			2		1				6
Motor cycle	1	1			2					4
Performance car track	1			6						7
Horse racing	2	1	3	1	3	1	1	1	2	15
Harness racing	1	1	2			2	2			8
Greyhound	1	1		1						3
Other		1		3		12		2	15	33

Observations, opportunities and analysis

113 CNSWT to take leadership role in developing a dedicated sport tourism marketing plan. This should include targeted strategies to attract peak body events, international sporting events, charitable events, senior's fitness facilities and targets general fitness routes for visitors maintaining their health regime while on holiday/work.

7.5 100 Mile Diet producers and stockists

Centroc has developed a 100 Mile Diet programme which facilitates producers with processors, farmers' markets and dining experiences.

Table 23: 100 Mile Diet producers located in Central NSW

	Bathurst	Cowra	Forbes	Lachlan	Mid-Western	OBC	Parkes	Weddin	Wellington	Total
Bakery	1	3				7	1		2	12
Cheese					2					2
Beverage						2		1		3
Eggs					1	1				2
Garden nursery	3	3			1	8	1		3	16
Fish					1					1
Honey & preserves	3	6	1		5	7	1		1	19
Nuts					2	3				5
Fruit & vegetables	9	3	2		3	16			1	34
Mushrooms	1					1				2
Meat	1	2			2	3			2	10
Olives & olive oil		3	1		4	6	1		1	13
Dressing						6	1			7
Others		2			1	1				2
Total	18	22	4		22	61	5	1	4	119

Table 24: Distribution channels for 100 Mile Diet

Farm gate	60%
Direct delivery	77%
Sell at markets	87%

Table 25: Distribution of 100 Mile Diet stockists (non market) and wine cellar doors

	Bathurst	Cowra	Forbes	Lachlan	Mid-Western	OBC	Parkes	Weddin	Wellington	Total
100 Mile Diet stockists		7			1	14	5			20
Wine cellar doors	6	4	1	0	38	35	0	0	2	86

Observations, opportunities and analysis

114 Centroc and CNSWT have successfully developed the 100 Mile Diet programme to promote local food producers. The majority are currently concentrated in three LGAs. Geographic expansion would enable more tourism providers (cafes, restaurants, venues and accommodation) and visitors to engage with local producers with subsequent flow on benefits.

115 Expansion of 100 Mile Diet stockists, farm gate and cellar doors would increase distribution and purchase opportunities to buying local. Doubling the overnight visitor expenditure and channelling marketing attention to the local producers would have wider economic benefits to the community.

7.6 Festivals, events and markets

Festivals and events are important magnets to attract visitors and with farmers markets offer potential to increase visitor expenditure through shopping. The events/festivals/markets (FEM) information was provided by the tourism managers from the 11 LGAs and summarised. The following table illustrates the number of FEMs, their geographic coverage and visitor numbers. There are 108 festival/events in the destination which covers 400 days. Some events are small community led programmes with local council support e.g. Lachlan and Weddin, while others have strong tourism provider and food & wine sector support e.g. Orange and Mid-Western. While there are only 3 farmers markets they run for 96 days per year. Historically there has been no destination research on the economic value from FEMs. Consequently there is no data which measures total in scope expenditure to the event, direct leakage and economic impact/output which is ‘best practice’ (Jago, 2006).

Table 26: Distribution of festivals, events and markets

	Bathurst	Cowra	Forbes	Lachlan	Mid-Western	OBC	Parkes	Weddin	Wellington	Total
Number of festival events	38	6	6	8	16	24	9	7	8	122
Total number of days	155	28	15	17	48	118	20	14	20	435
Total attendance	n/a	27,000	16,500	7,200	21,110	134,300	27,000	10,500	20,000	257,960
Av. attendance per day		964	2,750	424	440	1,138	1,350	750	1,000	593
Av. number of tourism business participating	n/a	59	>5	15	15	23	16	13	n/a	14.
Number of markets	3	1	3	0	3	1	0	0	2	11
Total number of days	36	12	10	0	36	12	0	0	16	106
Av. attendance to market days	n/a	n/a	1,350	0	1700 e	2,000	0	0	n/a	n/a

e: estimated

The following summarises the top ten festivals/events in each of the destinations eleven 11 LGAs. The attractions which hold a strong local cultural relevance are indicated in bold. The ranking is based on the level of visitor numbers. There are many popular cultural events which are unique to the region and therefore have long-term investment value in raising awareness of the destination, for example in sports tourism (Bathurst 1000, Wellington Boot Race and Canowindra Balloon Championships & Festival, Condo 750, Gold Crown Festival, Gnoo Bas Car Show, Cowra Picnic Races & other regional horse race & harness race meetings, Forbes Camel races), indulgence (Mudgee Wine & Food Festival, Orange Food Week, Wine Week Slow Summer & Frost Fest, Cowra Wine Show National BBQ Championships), cultural (Henry Lawson Festival, Sakura Matsuri-Cherry Blossom, Tullamore Irish Festival, Ben Hall Festival, Gold Fest, Man from Ironbark), and performance & art (Elvis Festival, Kalari Lachlan River Arts, Cowra and Bathurst Eisteddfods).

Table 27: Top ten festivals/events in each LGA

	Bathurst	Cowra	Forbes	Lachlan	Mid-Western	OBC	Parkes	Weddin	Wellington
1	**Bathurst 1000**	**Sakura Matsuri – Cherry Blossom Festival**	Forbes Camel Races	Condobolin Show	**Wine & Food Festival**	**Food Week**	Parkes Elvis Festival	**Henry Lawson Festival**	Vintage Fair (swap/meet)
2	**Royal Bathurst Show**	**Festival of International Understanding**	Australia Day	Condo 750	**Small Farm Field Days**	**Wine Week**	Parkes Picnic Races / June Long Weekend events	**Grenfell Gold Fest**	**Wellington Boot Race Meeting (Horse racing)**
3	Bathurst Spring Spectacular	**Cowra Wine Show Weekend**	**Kalari Lachlan River Arts Festival**	Garden Festival	**Day on the Green**	Australian National Field Days	**Tullamore Irish Festival**	Grenfell Jockey Club Races	Wellington Show
4	B2B Cyclo Challenge	**Canowindra Balloon Challenge**	Forbes Show	Condobolin Picnic Races	**Henry Lawson Festival**	4. Major event (Nitro Circus)	**Trundle Bush Tucker Day**	Grenfell Picnic Races	**Man from Ironbark festival (Stuart Town)**
5	**Gold Crown Festival**	Cowra Eisteddfod	National BBQ Championship	Tullibigeal Races	Huntington Music Festival	Sporting event (Little Athletics)	Trundle ABBA Festival	Grenfell Show	Blackwattle Fair (Mumbil
6	Party in the park	**Cowra Picnic Races**	Forbes Motor Show	Tottenham Races	Bunnamagoo Mudfest short film festival	Sporting event (gymnastics)	Astrofest	Caragabal Sheep races	Geurie Markets
7	Edgell Jog	**Cowra Breakout Anniversary**	Forbes Flatlands Hand Gliding Championships	Fisherama at Lake Cargelligo	Mudgee Race Meetings	Bird show	Country Music Festival	Tour de Greenethorpe	Wellington Markets
8	Rockley Rodeo	Cowra Gem & Collectors Fair	Forbes Spring Racing Carnival	Lake Cargelligo Show	Rylstone StreetFeast	Kinross Fair	Parkes Car Enthusiasts Weekend	Weddin Mountain Muster	Geurie Rodeo
9	Bathurst Eisteddfod		Relay For Life	Pony Club Events	Kandos Street Machine and Hot Rod Show	**Gnoo Blas Car show**	National Local Government Touch Football Carnival	**Guinea Pig Races**	Carols in the Caves

	Bathurst	Cowra	Forbes	Lachlan	Mid-Western	OBC	Parkes	Weddin	Wellington
10	**12 Hour (motor racing)**		**Ben Hall Festival**	Garden Festival	Bike Muster	New Year's Eve Fireworks	Back Yamma Bigfoot (Mountain Bike endurance race)	Iandra Castle Open Day	Burrendong fishing comp
% with strong local culture	50%	75%	20%	0%	40%	30%	20%	30%	20%

Observations, opportunities and analysis

116 CNSWT to progress FEM development by introducing an economic measurement survey which measures the value of the FEM, so that resources can be focused to deliver an increase in overnight visitor expenditure.

117 Farmers' Markets have strong attendance numbers and should be one of the areas of concentration of resources.

118 Destination-wide FEM progamme should integrate the different themes and the timing of the events to enable targeting specific visitor and encouraging longer stays.

119 Focus should be given to distinctive local events which can help differentiate the destination and become flagships to help revitalise communities and precincts (Visitor Economy Taskforce, 2012).

120 CNSWT to build the capacity of some areas' (Lachlan, Forbes, Wellington) special interest groups/communities to create more locally distinctive festival/events.

7.7 Museums

Central NSW has 47 museums which vary in scale and availability of resources and this affects their opening times, and their opportunities to generate additional income streams. Bathurst for example has extensive research resources (copies of newspapers since the 1800s and hundreds of photographs) and The Colonial Inn in Mudgee has over 80,000 exhibits and is part of a local network. However, museums in Weddin and Lachlan have limited opening times and no additional revenue sources. Subsequently the visitor experience is inconsistent across the region. The following table demonstrates areas of strength, e.g. Cowra and Parkes, and areas which need revitalising e.g. Lachlan.

Table 28: Distribution of museums

	Bathurst	Cowra	Forbes	Lachlan	Mid-West	OBC	Parkes	Weddin	Wellington	Total
Number of museums	17	3	2	3	7	15	1	1	2	49
Museums with guided tour	10	3	2	3	7	3	0	0	n/a	28
Av. number of days open	3	7	7	1.7	5.6	2.1	7	0	n/a	4.2
Av. adult entry fee	$7	$9.50	$6.50	$1.70	$5*	$0.33*	$10	0	n/a	$4.79
Total number of visitors per annum	n/a	88,000*	n/a	300*	n/a	n/a	15,000	n/a	n/a	n/a
Museums with additional income source	6	2	1	n/a	0	5	1	0	n/a	15
Museums participating in strategic network	n/a	3	0	n/a	7	10	0	0	n/a	20

* *incomplete data*

Observations, opportunities and analysis

121 Central NSW has 47 museums with just over half of these offering guided tours and a quarter benefiting from an additional retail enterprise. There is insufficient data to assess visitation but the average days museums are open are 1.7 days in Lachlan to 7 days in Cowra and Parkes. CNSWT should lead a destination wide programme which revitalises the museums so that they can play a full part in tourism development. There is a large number of small-sized museums which could play a more prominent role in interpreting the cultural heritage.

122 To revitalise the museums, CNSWT should coordinate a destination-wide programme that considers strategic involvement in festivals events & investment in technology.

123 NSW Governments goal to more fully involve seniors in their communities (NSW Government 3, 2011) supports a programme of crowd sourcing, generating greater community and special interest involvement. It also supports the need to improve museum accessibility to meet the needs to the aging population and VFR segment.

124 CNSWT should facilitate museum income development with enterprise development, local councils and community to improve their economic capacity. This could further integrate 100 Mile Diet producers, arts and crafts made locally, paid for guided tours and souvenirs including branded merchandise.

7.8 Art galleries and art events

There are 24 art galleries in the destination with 15 having additional income potential and only seven participating in a strategic network.

Table 29: Distribution of art galleries and art events

	Bathurst	Cowra	Forbes	Lachlan	Mid-West	OBC	Parkes	Weddin	Wellington	Total
Number of galleries	4	4	2	2	3	6	4	1	5	31
Av. number of days open	2.8	4	7	2.5	6	5		5		4.6
Galleries with guided tour	1	3	1	1	1	2				9
Number of art shows	8			2	30	4				34
Galleries with additional income source	2	4	1		2	7				16
Galleries participating in a strategic network	2	4				1				7

Observations, opportunities and analysis

125 CNSWT to develop an integrated plan with Arts OutWest and Orana Arts to develop joint communication campaigns and foster strong strategic networking to build audience numbers and greater community participation (Arts OutWest, 2013) (NSW Government 1, 2011) which in turn would drive the VFR market.

126 CNSWT and its key stakeholders to directly integrate galleries and art events into visitor information.

127 CNSWT and Arts OutWest and Orana Arts identify commercial Aboriginal art and cultural opportunities for the Wiradjuri community.

128 CNSWT, key stakeholders, Arts OutWest and Orana Arts to coordinate and art events calendar with Central NSW tourism festivals and events to maximise integrated promotional opportunities to encourage visitors to stay longer and purchase local arts and crafts.

7.9 Activity providers

Activities are products and services which facilitate active involvement in outdoor experiences like bike hire or guided ecotourism walks. Central NSW has a large number of natural environments but offers limited paid-for activities. There are 31 providers, of which four are accredited.

Table 30: Activity providers

	Bathurst	Cowra	Forbes	Lachlan	Mid-West	OBC	Parkes	Weddin	Wellington	Total
Number of activity providers	1	3	1	2	7	12			5	31
Number accredited	1	0			0	3				4

Observations, opportunities and analysis

129 Visitors are seeking personalised high quality experiences. The lack of activity providers clearly indicates a strong commercial opportunity for the private sector, particularly given the total number of overnight visitors (1,9 million) (Australia, 2012) to the region. CNSWT should collaborate with tourism providers, NPWS, Forests NSW and catchment authorities to develop a strategy to increase the number of operators.

130 CNSWT to work with NPWS, Forests NSW and Catchment Management Authorities to develop a nature tourism activity plan which identifies commercial opportunities for accredited businesses.

7.10 Experiences of Aboriginal culture

While Central NSW has a rich Aboriginal cultural heritage there are currently few opportunities for visitors to experience Wiradjuri culture. Currently there are no Aboriginal tourism plans nor has there been any direct contact with Wiradjuri community to develop tourism collaboratively (CNSWT 2, 2013).

Table 31: Aboriginal cultural sites

Region	Self-guided/Interpreted			Not interpreted site	
	Site	Method of interpretation	Restrictions e.g. women only	Site	Restrictions e.g. women only
Condobolin	Goobothery Monument	Signage			
Cowra				Lachlan Bridge	
Burcher	Manna Mountain	Signage			
Forbes	Wiradjuri Dreaming Centre	Signage			
Mid-Western				Dunns Swamp/Ganguddy	
Mid-Western				Munghorn Gap	
Parkes Shire (near Peak Hill)	Snake Rock (managed by NPWS)	Under development	Must be escorted by guide		
Parkes Shire (near Peak Hill)	Bulgandramine Mission			N/A	Operated by Community. Permission to enter must be obtained
Cabonne	Yuranigh's Grave	Self guided	National Parks' property		
Cabonne	Mt Canobolas	Self guided			
Blayney	Golden Memories Museum, Millthorpe	Self guided			
Wellington	Maynguu Ganai	Signage to be introduced			

Observations, opportunities and analysis

131 Key stakeholders have identified nine Aboriginal experiences. These are currently self-guided with either limited or no interpretation. This suggests an opportunity to provide visitor experiences, link the sites as a tour and provide art, craft and other Wiradjuri business opportunities.

132 CNSWT with key stakeholders should approach the Aboriginal Land Councils and discuss opportunities for the community to either directly participate in tourism or indirectly benefit from in-direct economic linkage.

7.11 Commercial experiences of Aboriginal culture

Table 32: Commercial Aboriginal experiences

LGA	Name of business	Type of experience
Forbes	Ancient Stories	Camp fire, walking tour with storytelling
Forbes	Craft Activity	Basket waving
Forbes	Dance	Performance/theatre event
Forbes	Tour	Bush tucker medicine plants, cave/rock art
Forbes	Aboriginal run accommodation	
Forbes	Aboriginal gallery	Souvenirs
Lachlan/ Condobolin	Wiradjuri Arts Group	Aboriginal gallery / souvenirs
		Basket weaving
		Dance
Lachlan/ Condobolin	Condobolin Wiradjuri Study Centre	Aboriginal gallery / souvenirs
Mid-Western	Southern Cross Kayaking	Kayaking tour of Dunns Swamp
Mid-Western	Indigearth	Making tea/bush tucker cooking using native ingredients

Observations, opportunities and analysis

133 There are currently limited Wiradjuri tourism businesses or economic and cultural links to tourism. As visitors are seeking cultural enrichment and discovery this sector has strong growth opportunities but will require capacity building and strategic networking to prosper.

134 To assist in the new product development programme CNSWT, key stakeholders and tourism providers should consider ROC (Respect Our Culture) accreditation to provide a helpful framework on protocols and to assist creating positive outcomes.

8 Economic value from tourism

This section of the DMP provides a review of the statistical indicators combined with an assessment of tourism's economic value in Central NSW using the VET report's strategic imperatives: increased visitor spend, growth, improving visitor experience and ARTN's vision for social sustainable growth (Visitor Economy Taskforce, 2012) (Australian Regional Tourism Network/Australian Standing Committee on Tourism, 2013).

The VET report highlighted broader economic impacts from tourism, not solely assessing 'tourism and events' (Visitor Economy Taskforce, 2012). This is because tourism is consumed at the point of production; visitors come to destinations and purchase services and products. In other sectors of the economy production is distributed away from the source. It is the linkage between tourism, community, SME and micro businesses, local government, protected places and education that enables the destination to flourish. To maximise the positive impacts requires planners and tourism businesses to maximise economic linkage and minimise leakage while managing tourism's costs (Warren, 2 2012).

The NW Government's aim, to double over night visitor expenditure, contributes to the NSW 2021 plan that includes regional growth, improved community and environmental sustainability (NSW Government 1, 2011). Tourism is therefore a system to fulfil wider economic, social and environmental goals. The results from tourism's economic benefits are to help revitalise destinations and precincts so that they can sustainably continue to attract visitors (Visitor Economy Taskforce, 2012). Consequently tourism can have far reaching social benefits, beyond the superficial assessment of 'tourism and events'. It provides a local market for goods and services, bring spending power to the local economy with subsequent benefits for communities such as employment, skills, and poverty reduction (Goodwin, 2011).

8.1 Visitor expenditure statistics

Tourism is economically important to Central NSW accounting for 5.1% of the local economy, ranking the region 7th most economically important tourism region in NSW. By comparison tourism in the Hunter Valley, ranked 12th, and Blue Mountains, ranked 9th, proportionally contributes less to their local economies. Across Australia, Central NSW is ranked 18th largest in terms of tourism expenditure (Tourism Research Australia, 2012).

The term Visitor Economy is increasingly used to reflect a broader economic value of tourism in communities. This is because the Visitor Economy includes 'both the direct contribution of tourism activities, along with indirect effects via the supply chain, the impact of capital investment and collective Government expenditure in relation to the visitor economy' (Visitor Economy Taskforce, 2012).

The NSW Government aims to double overnight visitor expenditure, using the Tourism Satellite Account (TSA) statistics as an indicator. NSW State's overnight visitor expenditure was $18.3 billion in 2009 and Central NSW accounted for $579.8 million, $553 million was domestic overnight expenditure and $26.8 million from international visitors.

To achieve a doubling of NSW's overnight visitor expenditure to $36.6 billion by 2020, Central NSW's contribution would become $1,159.6 billion.

The 2012 accounts indicate that Central NSW's total overnight visitor expenditure was $804m where $749m was domestic overnight and $55m international overnight. Including in-direct expenditure, estimated by TSA at a multiplier of 0.92. Therefore if Central NSW was to double overnight expenditure the visitor economy would be worth over $2 billion by 2020.

The Tourism Satellite Account uses the NVS and IVS to estimate regional visitor expenditure, and figures have a margin of statistical error. The National

Satellite Accounts do not take into account the added benefit of the VFR market from the expenditure by the hosts.

One indicator of the visitor economy is the TSA overnight visitor expenditure, but other indicators can be are used to measure progress (Visitor Economy Taskforce, 2012). The following table lists additional indicators which can be used to measure tourist destinations (European Commission, 2013). These indicators were surveyed by CNSWT in 2013 and can be compared with the TSA to provide a broader range of indicators and facilitate better planning. The CNSWT findings show similarities but care should be taken in comparing NVS/IVS figures with CNSWT's research because survey methods and sample size differ. However, the research findings do broadly concur. Day visitors account for about an additional 1/3 of total visitation, overnight visitor expenditure needs to double to $280 by 2020, average overnight stays need to grow from 2.6. Tourism providers are active in collaborative marketing (88%) but only two thirds of the key stakeholders are working directly with tourism providers. Key stakeholders receive approximately 15% active support from participating tourism providers. Average room rates would also need to increase from their current level to help achieve a doubling of overnight visitor expenditure.

Table 33: Sustainable destination indicators: tourist flow and tourism enterprise performance

Indicator	Reason for indicator	Benchmark
Number of tourist nights per month	Identify low/shoulder seasons to refine future promotional strategies	• Central Region av. 159,333 per month, (Australia, 2012) • 115,500 in four CNSWT LGAs: Bathurst, Forbes, OBC, Parkes (CNSWT 2, 2013)
Number of 'same day' visitors in high season and low season as share of total visitors	Seek to increase number of overnight visitors	• 33% day visitors (CNSWT 1, 2013) • Central Region av.219,166 average monthly. Indicates 37% more day visitor (Australia, 2012)
Daily spending per tourist (overnight): accommodation, food and drinks, other services	Seek to increase expenditure	• $143.06 (CNSWT 1, 2013) • $139 (Australia, 2012)
Average length of stay of tourists (nights)	Increase length of stay	• 2.56 (CNSWT 1, 2013) • 2.8 (Australia, 2012)
Percentage of CNSWT's LGAs actively involved in cooperative marketing activities with tourism enterprises	The indicator measures to what extent LGAs are seeking to collaborate with tourism enterprises.	• 66% of tourism managers actively involved in marketing activities with tourism enterprise (CNSWT 2, 2013)
Percentage of tourism enterprises activity involved in the cooperative marketing activities with LGAs	Working collaboratively is an indication of the level of trust. The indicator measures to what extent tourism businesses are collaborating with LGAs.	• Estimated at less than 15% (CNSWT 2, 2013)

Indicator	Reason for indicator	Benchmark
Formalised collaborations in cooperative marketing initiatives	Working collaboratively is an indication of the level of trust among members of the tourism community and it ensures diverse perspectives are included in sustainable tourism development. The indicator measures to what extent tourism businesses have strategic networking partnerships.	• High proportion of tourism providers collaborating • 88% participate in cooperative marketing activities • 75% are members of community tourist group • 28% share website • 17% are members of a strategic partnership and 17% operate shared booking services (CNSWT 3, 2013)
Occupancy rate in commercial accommodation per month and average for the year	Occupancy rates measure the efficiency of accommodation stock utilisation. A sustainable destination fills up its rooms year-round.	• 63% annual average • May, June, July, August, September appear to have higher occupancy at 68% (CNSWT 2, 2013)*
Average price per room in the destination	Price per room is important because it reflects the revenue the destination gains from accommodation. When combined with occupancy rates it reflects the revenue potential of the destination.	• $100.4 (CNSWT 2, 2013)* • $124.1 (CNSWT 3, 2013)

** Sourced from 3 LGAs only, not statistically significant*

Observations, opportunities and analysis

135 The VFR market is a large market segment which can be encouraged to use commercial accommodation and therefore should be a target.

136 For many communities in Central NSW the visitor economy is an identified sector of the economy targeted for growth (Bathurst Regional Council, 2011) (Blayney Shire Council, 2011) (Cabonne Council, 2006) (Mid-Western Regional Council, 2008) (Orange City Council, 2011) (Weddin Shire, 2010)(Weddin Shire , 2010). For many communities the visitor economy is a major part of the overall economy (Visitor Economy Taskforce, 2012).Therefore, care must be taken to nurture tourism so that it grows a strong local market for goods and services to help sustain communities. This requires planning and coordination to maximise linkages, distribution points and promotion.

137 Destination NSW will provide support for business cases which 7% overnight visitor expenditure growth with grant funding on a matched $ for $ basis. (Destination NSW, n.d.). CNSWT should promote the grant funding opportunities and mentor applications to ensure they are maximising their economic potential.

138 To achieve a $2 billion visitor economy CNSWT must be adequately resourced. CNSWT and key stakeholders should review all tourism and local economic development roles to achieve greater operational efficiency.

139 CNSWT should establish indicators (as shown in the table above) with the active participation of key stakeholders, to measure the value of tourism and its responsible growth and provide these indicators to grant applicants to assist them in developing sustainable development.

140 Key stakeholders need to engage more widely in collaborative marketing with tourism providers to offer broader strength in cross promotion and stimulating higher expenditure.

141 Key stakeholders should introduce promotional shopping campaigns which incorporate other activities e.g. festivals, late night shopping, special 100 Mile Diet dining menus to switch days tripper to overnight stays.

142 Accommodation rates need to increase to stimulate higher overnight expenditure; care should therefore be taken to ensure that there is no oversupply. CNSWT and key stakeholders should develop an accommodation capacity plan in consultation with tourism providers to ensure the market offers high quality, diversity and not focus on competition which can put downward pressure on pricing.

8.2 Increased visitor spend

Overnight visitors spend more in the Outback ($171), Riverina ($165) and Blue Mountains ($161) than in Central NSW ($139). These figures illustrate that visitors do currently spend in regional NSW at a higher daily rate than currently recorded for Central NSW.

Domestic day visitors to Central NSW spend $126 which is one of the highest rates in NSW, with Riverina having the highest spend at $145 pp per day (Australia, 2012). Currently domestic day visitors spend $332 million in Central NSW (NVS 2012). Day visitation involves expenditure to cafes, restaurants, food takeaways where almost one quarter of tourism employment is based, plus the employment in shops (Visitor Economy Taskforce, 2012).

Table 34: Domestic visitor expenditure ($), for the year ending December 2012

Region	Day visitors	Overnight visitors
New England	160	112
Capital Country	84	126
Hunter Valley	98	134
Blue Mountains	103	161
Riverina	145	165
Outback	76	171
Central NSW	126	139
Regional average	103	138

Source: NVS 2012

One way to achieve the ambitious growth aim in NSW is to target high spending visitors (Visitor Economy Taskforce, 2012). This can be done by marketing to a specific tourism sector, by developing personalised experiences and by premium priced product. Research indicates that:

- ACT residents have higher than average Sydney and Regional NSW earnings (Australian Bureau of Statistics, 2011).
- Pampadours like to indulge (Collins, 2007).
- Highly valued sport tourism events attract enthusiasts who are more likely to devote resources if the event has a high profile and offers additional experiences which are expected as part of the overall programme (Menzies, 2012).
- Business travellers have above average expenditure (Australia, 2012).
- Culture and heritage tourists spend above average visitor expenditure (Australia, 2009).
- International Cultural Heritage Visitors spend $6,280 per trip compared average $3,832. This is due to the longer duration of their holiday (45 nights) compared with international visitors of 23 nights.

- Domestic overnight Cultural Heritage Visitors spent $9.6 billion in 2009 which was $188 per day and $1,030 per trip compared with visitors not participating in culture and heritage at $159 per night and $578 per trip.
- The Boston Consulting Group claims that consumers are willing to pay up to 10 times traditional prices in exchange for a premium experience; new 'luxury consumers' are seeking recognition of their needs and want a personalised experience; (Australia, n.d.).
- Short-break visitor expenditure depends on socio-economic variables. Over 50% of consumers estimate they spent up to $500 on their short-break holiday, equal to $166 per person per night, where the average stay is three nights. 11% claimed to have spent $1,550, which would equal $500 per person per night (Murphy, 2010). Doubling overnight expenditure without doubling capacity and visitation will require CNSWT targeting high net worth individuals.
- VET concluded that to achieve the expenditure target high net worth tourists from China and Asia should be targeted (Visitor Economy Taskforce, 2012). This is because visitors from these markets tend to spend more than double the daily rate as tourists from mature markets (Tourism Research Australia, 2013).

Observations, opportunities and analysis

143 The volume of day visitors makes a strong contribution to the economic viability of tourism supply and therefore should not be ignored. Marketing projects which promote events and festival can also be targeted to neighbouring regions for day visitation with options to encourage overnight stays. This will help support the local market.

144 A 7% increase in overnight visitor expenditure equals $9.73 (multiplier effect) in the first year. This would multiply with the preceding increase annually over the eight years, from the current amount of $804 million to achieve an overnight expenditure figure of $1,381 million by 2020 (where figures are based on domestic overnight visitation). A 9% growth rate over eight years would increase the overnight expenditure for Central NSW to $1,602 million by 2020. To achieve this growth all stakeholders must focus on spending in their communities. This involves a coordinated approach to festival & events, availability of products, extended shopping hours and the support of the 100 Mile Diet and local producers. Promotion must focus on purchases (product or services) that are quality, authentic, which reflect the distinctive differences of the region and that justify their discretionary expenditure so as to be seen as a worthwhile investment. CNSWT and key stakeholders must set a quality threshold which defines products and services that can be showcased and given prominence.

145 Develop high quality sport tourism events.

146 Target high value business events.

147 Heritage tourism should be encouraged by promoting the wealth of sites, museums, tours and landscapes.

148 CNSWT should guide tourism to target high spending visitors by utilising the destination's heritage, by encouraging boutique vineyards and their winemakers to engage with a wider audience promoting medium to high priced wine, and by working with luxury holiday homes/boutique accommodation providers to target high spending visitors.

8.3 Economic growth

Growth opportunities can be stimulated through encouraging the effects of visitor expenditure to flow on to the wider economy through sustainable supply chain management practices (Font, 2008). The following table illustrates CNSWT survey results which indicate there is scope to increase tourism's economic linkage and retain expenditure locally. Many LGAs do not have a policy to specifically promote food and wine to visitors, nor a policy to encourage tourism providers to buy local. Subsequently there are no tourism plan strategies that integrate local food and wine producers specifically into the supply chain with tourism providers (Blayney Shire Council, 2011) (Cabonne Council, 2012) (Cowra Tourism Corporation, 2012) (Forbes Shire, 2008) (Weddin Sire Council, 2013). There is scope to increase awareness of the 100 Mile Diet and increase their expenditure on local food and beverage.

Table 35: Sustainable destination indicators: supply chain

Indicator	Reason for indicator	2013 Benchmark
Percentage of CNSWT's LGAs that have a written tourism policy promoting local food and wine	Implementing a policy to promote responsible purchasing helps to leverage the purchasing power of the destination to provide a greater amount of local, sustainable, and fair trade products and services.	• 66% do not have a policy to promote local food and wine • 78% do not have a policy to actively encourage tourism providers to buy local produce and service (CNSWT 2, 2013)
Percentage of tourism enterprises aware of the 100 Mile Diet programme	The 100 Mile Diet is an important Centroc initiative. The level of tourism enterprises' awareness can be compared with level of action	• 41% familiar with 100 Mile Diet programme (CNSWT 3, 2013)
Percentage of tourism enterprises that have a policy to prioritise local products and services purchases	Implementing a policy to purchase local products and services increases the economic value of tourism.	• 75% purchase more than half their goods and services locally within their LGA (CNSWT 3, 2013)
Percentage of tourism enterprises sourcing a minimum of 25% of food and drink from local/regional producers	Sourcing local products increases the economic value of tourism. Tracking this figure will help Central NSW Tourism explore ways to increase the connection between tourism and local agriculture.	• 69% purchase (25% or more) of their food and drink locally (CNSWT 3, 2013)

Some councils are seeking to attract growth by encouraging investors to set up tourism businesses in Central NSW through the Evocities programme (Orange City Council, 2009) and develop physical capacity.

There are also strategies for growth by managing local economic development benefits which directly encourage diversity and reduce competition. This stimulates the variety of experiences which visitors can enjoy thus making the destination more appealing. 'In an increasingly differentiated and competitive market there is commercial advantage in operating in, and to, destinations which offer a rich mixture of experiences and activities.' (Goodwin, 2004).

Growth can also come from increasing the length of overnight stays, particularly in the shoulder periods. Research indicates that:

- Wanderers have the time to choose to stay longer in a destination.
- Education tourism, attracting foreign students, provides long duration of stay with the added potential of VFR visitation.

Observations, opportunities and analysis

149 Sustainable supply chain management requires an agreed policy commitment, strategies and wide tourism participation. Training maybe required.

150 Accommodation capacity growth requires an accommodation plan that assists investors.

151 Auditing the nature of tourism product will assist gap analysis and support diversity planning.

152 CNSWT should collaborate with Regional Development agencies and key stakeholders to devise economic growth plans for micro and SME.

153 Promotions should target Wanderers to stay longer.

154 CNSWT to work with education stakeholders.

8.4 Improve visitor experience: quality not quantity

The VET report (Visitor Economy Taskforce, 2012) emphases that the target for growth is ambitious, and could be achieved by:

- not relying on increasing visitation alone, but also concentrating on increasing visitor expenditure per visitor by providing an 'authentic, high quality experience', because 'many NSW destinations are simply not unique enough to have sufficient domestic appeal'
- quality of service.

Collaboration is essential in creating a shared vision to enable agreement on a unique selling proposition (USP) and link this to individual products and experiences (Australian Regional Tourism Network/Australian Standing Committee on Tourism, 2013). Results of CNSWT stakeholder engagement are reported in Section 2. However, earlier workshops conducted in Central NSW reveal that tourism provider awareness of the value of learning about the local features increases following skills training (Warren, 2012).

One indicator of the destination's quality of service is customer satisfaction. CNSWT conducted a recent survey to determine customer satisfaction and to provide a benchmark indicator (CNSWT 1, 2013). As a total, 55% said they "Strongly Agree", 44% said they "Agree" and 1% were "Neutral" to "Overall I am satisfied with my visit". The table below illustrated the regional variations. 30% of visitors returned within 5 years.

Table 36: Sustainable destination indicator: destination quality (Responses to 'Overall, I am satisfied with my visit to this destination')

	Bathurst	Orange	Mudgee	Cowra	Cabonne	Parkes	Wellington
Strongly agree	42%	63%	82%	54%	30%	65%	45%
Agree	58%	34%	18%	46%	70%	35%	55%
Neutral		3%					
Disagree							
Strongly disagree							

Observations, opportunities and analysis

155 CNSWT should encourage broader industry collaboration. Currently 23% have tourism boards/council tourism departments which represent all the local city/town/villages within the region, and five of the LGAs do not have a strategic partnership programme (CNSWT 2, 2013). Key stakeholders should more deeply involve communities and strategic partners in developing an authentic competitive point of difference.

156 Increasing expenditure requires partnerships which link quality activity providers, professionally run tours with a high degree of personalisation

and shopping. Strategies which focus on quality packages should be encouraged.

157 Tourism providers need to be given information to identify the local distinctive features of their area, to help them refine their product experience so that it is more representative of the special qualities of where they are located e.g. Discovery Tours.

158 Tourism providers should be working in strategic networks and cross-promoting so they can personalise itineraries for visitors and extend their stays.

8.5 Social benefits

Increasing local economic advantage from tourism can be achieved through:

- maximising the employment of local people, providing training and career development
- working with micro enterprises and giving them access to tourism to ensure supplies for local produce, arts, crafts and technical skills are locally sourced.

The VET report recognised the benefits of celebrating NSW experiences and building 'civic pride' (Visitor Economy Taskforce, 2012) as a method to build tourism from the bottom up. This can require identifying what is culturally important to the local community and creates the area's local distinctiveness (Warren, 2011). Acknowledging and celebrating heritage precincts and intangible cultural heritage can both positively build the community's sense of place, property value and local economic development. Art, popular culture and heritage can also become economic drivers which create jobs, improve property values and encourage environmental stewardship. There are good international examples. In Louisville in Kentucky USA they have measured the economic benefits of heritage precincts (conserved areas of the town which keeps its traditional integrity) and shown them to have a positive benefit (Gilderbloom, 2009). The Mersey Partnership in Liverpool UK has rejuvenated a dockland area with popular cultural facilities, as has the new Louvre Gallery in Lens (northern France). The community must be involved in the development of tourism because it is in local communities where tourism generally occurs. Without community sustainability tourism development is unlikely to be sustainable (Waddilove, 2010). This requires very much a 'bottom up approach' to tourism development rather than a 'top down' policy led process. If regional tourism entities build the capacity of communities which want to develop social enterprise or take advantage of micro business opportunities, then broader benefits can be achieved. For example tourism is a service industry and has a high labour focus, is reliant on micro and small enterprises and easily links to indirect products like arts, crafts farm gate and food provedores.

However, there has to be an active process of engagement with communities, product development and whole of government support. Many social enterprises fail because they do not have strong leadership, awareness of market conditions or hold a coherent organisational structure. (Weppen, 2012)

Observations, opportunities and analysis

159 Emphasising Central NSW's heritage can be done through formalising heritage precincts for example through branding, interpretation and council incentives, which showcase competitive heritage streetscapes and build civic pride.

160 There is an opportunity for greater collaboration between CNSWT, Arts OutWest and Orana Arts to take advantage of potential economic benefits CNSWT must facilitate community capacity building programmes to benefit micro businesses, special interest groups and SMEs.

9 Marketing communications

9.1 Key communication channels

The following table is a summary of CNSWT and its key stakeholder existing use of communication channels.

Table 37: Communication channels coverage, advantages and disadvantages

Channel type	Coverage of destinations assets	Profile of this channel	Advantages	Disadvantages
[*e.g. visitnsw.com*]	*[Approximate % of destination assets showcased through this channel*]	*[What level of visitor engagement does this channel offer e.g. 200,000 unique visitors p.a.?]*	[*What advantages are there of using this channel to showcase our destination assets e.g. It is ranked highly on Google?*]	[*What challenges do you expect to face using this channel? How will you overcome them e.g. maintaining content?*]
Website: each key stakeholder has their own website and CNSWT	80%	Estimated at 500,000 visitors p.a.	The majority of key stakeholders are ranked within the top 3 Google listings	Require constant updating
Visitor Information Centres	90%	284,412 visitors pa	Provide details and personalised itineraries	High cost per contact and predominantly concentrates on visitors already in market
Visitor guides	70%		Provide details and enable visitors to create their own itineraries, helps to improve experience	Primarily for visitors in market, not to entice new visitors. Limited to LGA coverage
TV	10%		Raises awareness and appeal	Cost of production and high media rates for a long campaign
Press	20%		Raises appeal	Cost of production and media rates for a long campaign
Radio	20%	280,000	Low production cost and high frequency	No visual image, good as support medium
Public relations	n/a	Widely used to position the destination	Focuses on specific experiences and economic use of budget for the coverage received	Increasingly weakening media opportunities for travel

Channel type	Coverage of destinations assets	Profile of this channel	Advantages	Disadvantages
Discovery Tours	80%	60,000	Encourage visitors to see and do more thus improving their experience, encourages expenditure	Require training tourism providers
E-newsletters	40%		Encourage return visitation	Focus on existing visitors and not new visitors
Events/consumer shows	40%	Over 500,000	Promote the region to new prospective visitors	Cost per contact, have to sustain attendance each year to reach new prospective visitors
Facebook and other social media	10%	Estimated at 30,000	Builds relationship with previous visitors, opportunity for word-of-mouth distribution, utilises the 100,000 Hands project	Low penetration of market
Visitnsw.com.au	10%		Directs referrals to participating tourism providers	Low level of tourism participation and lack of SME websites to link to
YouTube	commencing	commencing	Shows the experiences	Expertise in production

This table shows that the destination has historically chosen key communication channels (websites, visitor centres and producing guides) which primarily concentrate on conveying information rather than raising awareness. While campaigns have been run using mass media, budgetary constraints have not permitted these to be long-term activities. Key stakeholders are increasing use of social media, though this is at an embryonic stage.

Observations, opportunities and analysis

161 Central NSW has low awareness and subsequently low appeal. Increasing awareness is important if visitor expenditure is to grow by the ambitious target of 7%. Therefore sustained investment in mass media and public relations is required. Local council budgets need to commit consistent funds, supported by the NSW Government grants, to enable CNSWT to maintain long-term brand building communication.

162 The use of the Discovery Tours, VICs and guides can help in increasing overnight expenditure because they provide itineraries which list experiences that involve consumer spending. A benefit of the Discovery Tours is that they cross geopolitical boundaries (guides are limited by LGA) so this concept should be expanded through wider distribution (printed and online).

163 Social media within the community (100,000 Hands) is very important as a method to inform about local events and new attractions. This would help to encourage increased VFR overnight stays. Local media relations to reach households should be included to encourage visits from family and friends.

164 To stimulate increased overnight stays websites must be linked to online booking services e.g. ‘Siteminder’. Currently this is not maximised to achieve conversion.

9.2 Brand communication assets

CNSWT does have access to high-quality images of the key attractions and some consumer segments. However, much of the image library material differs from those of the LGAs and therefore:

- does not have consistent style
- does not portray a consistent consumer profile across attractions which are spread over geopolitical boundaries, and
- is in some instances dated, or does not include changes to the attractions.

There is also limited video material.

Observations, opportunities and analysis

165 A photographic library is required which can include some of the existing high-quality images, but new material is required to create a consistent image across the region, address the VFR market and showcase the cultural heritage in particular.

10 Planning framework and process

10.1 Role of CNSWT

Tourism is a complex sector which involves many industries (travel and transport, agriculture, construction), public infrastructure (roads, railways, power, water) the community, heritage and the natural environment. The sector involves many stakeholders, local government, special interest groups and the community. For these reasons tourism should be managed in a consultative manner, where collaboration achieves a shared vision and is monitored on an ongoing basis (Australian Regional Tourism Network/Australian Standing Committee on Tourism, 2013). Consultative planning is now recognised as the most effective approach (Bath & North East Somerset Council , 2012) because tourism planning needs to involve a broad cross section of stakeholders and facilitate a whole-of-government approach to tourism development (Visitor Economy Taskforce, 2012).

Central NSW Tourism's role is to:

- responsibly lead tourism in this region (Cape Town Declaration for Responsible Tourism in Destinations , 2002)
- foster cooperation
- celebrate and promote the local distinctive qualities of the region
- use tourism to stimulate local economic development making it beneficial for the host communities (UNWTO, 1999)
- encourage sustainable supply chain management (Anon., n.d.)
- build the capacity of tourism providers to create a dynamic competitive sector
- facilitate investment in tourism
- encourage and support tourism not only for families and the young, but also to make it accessible for seniors and people with physical disadvantages (UNWTO, 1999).

Central NSW Tourism seeks the benefits from tourism to progress local economic development through job creation, diversification and increase in visitor expenditure, positively influence community pride and encourage local traditions, and to conserve natural resources (Tourism Queensland, 2013).

Core responsibilities

Central NSW Tourism has three core responsibilities:

- **Management**: Plan tourism development through consultation and cooperation with key stakeholders, major stakeholders, tourism providers, and the community. Monitor, review, assess and steer tourism to achieve the collectively agreed vision.
- **Product development**: Inform tourism by conducting and sharing research and analysis. Stimulate and support destination diversification and product development.
- **Marketing**: Develop collaborative strategies to position product, raise awareness and appeal and communicate the destination to target segments.

Central NSW Tourism is an incorporated association which employs a full-time executive officer who is managed by a volunteer skills-based board of directors. It is funded by annual subscriptions from member councils, state government and investments from the private sector.

CNSWT vision

Drive a vibrant, unique and progressive destination which reflects civic pride in the region's qualities.

CNSWT mission

Create partnerships and a model of collaboration between operators, major stakeholders, community bodies, Councils, ROCS and State Governments that stimulates the development of high quality experiences, increased overnight visitation and build local economic prosperity, through planned initiatives and marketing of the region.

10.2 Stakeholder consultation

Destinations are highly complex, involving the interests of residents, micro businesses and SMEs, special interest organisations, non-government organisations, government agencies, infrastructure and transport providers, and protected land and water catchment authorities. While these parties have varying levels of interest in tourism, CNSWT recognises that it must collaborate with all in order to effectively deliver a plan that doubles visitor overnight expenditure by 2020. This aim will require a shared vision, collaborative programmes and the coordination of resources to deliver responsible growth that directly benefits the community, stimulates local economic development, promotes the character of the destination in a manner that builds community pride, while managing the impacts of visitors.

Objectives of consultation

An essential component of CNSWT's Destination Management Plan was the consultation process and the integration of the findings. A broad and deep consultation process was undertaken to:

- understand the community attitude towards tourism, the sense of place and community aspirations
- work with tourism providers to determine new product opportunities and a shared sense of strategic brand direction
- collaborate with community groups, major stakeholders as strategic partners
- reflect key stakeholder interests to create a plan that is reflective of the overall destination, and
- determine the most effective Destination Management structure to deliver the plan and achieve results in harmony with stakeholders' aspirations.

Consultation methods

There is a growing recognition that successful sustainable tourism development requires government to be an 'enabler' rather and a 'provider' directing the focus to communities and tourism providers to be involved in a bottom up approach to tourism planning (Vernon, 2005). This requires stakeholder engagement and contribution from tourism providers who might have been 'voiceless' previously. It can lead to tensions because of the conflicting goals that stakeholders may have. In such situations it is beneficial to focus on the shared goals and find creative solutions to pragmatic problems (McCool, 2009). This was the approach favoured for this DMP development.

There were different types of stakeholder groups and information needs identified:

- Major stakeholders: government agencies, local government, community groups representing a business sector or region
- Key Stakeholders: financially contributing members of Central NSW Tourism
- Tourism providers, producers (wine and food) and special interest groups (voluntary groups for markets, museums) who reflect tourism supply and would ensure representativeness (Wray, 2011)

It was also identified that, if the DMP is to be sustainable, it requires benchmarks that offer access to knowledge and opportunities for learning, thereby fostering effective strategic partnerships (Wray, 2011) for the long term.

The consultation methods were guided by best practice guidelines, as used by a NSW council (Tweed Shire Council) and reflect the timeframe, objectives and the nature of the target groups. The methods were selected to "encourage the involvement of stakeholders" and offer "adaptability and flexibility of the consultation methods" (Tweed Shire Council, 2004). The method included:

i) Tourism providers were invited to workshops as part of a training programme which included stimuli to encourage involvement and to consider tourism development using projective techniques, team work and a Future Thinking game 'Travelopoly' to identify their vision. There were eleven workshops with tourism providers and special interest groups in two phases during 2012. These were held in Mudgee (2), Bathurst (2), Orange (2), Parkes (2), Cowra (2) and Molong (1). In total almost 200 tourism providers and special interest groups were represented. The workshops were facilitated by a qualified TAE trainer. The Executive Officer of CNSWT and tourism managers attended and worked with the participants. The report is available in Appendix 2. Workshops were advertised and a nominal entry fee charged to build a commitment from the tourism providers.

ii) Interviews with 29 major stakeholders; a complete list of organisations is provided in Appendix 3. Given the large number of stakeholders and the wide geography some interviews were conducted by telephone using a pre-set questionnaire with open questions and probing to facilitate collaboration and partnership.

iii) Key stakeholders were engaged through two structured stages: the first involved a pre-set questionnaire, the second involved sending a draft plan to each key stakeholder and then conducting a workshop.

iv) Two additional surveys were undertaken with tourism providers and visitors at VICs.

v) Throughout the process the Destination Management Steering Committee attended telecoms and meetings, their purpose being to ensure effective and fair planning (McCool, 2009). The committee consisted of representatives from councils, tourism management, and the private sector.

vi) As part of the evaluation and review phase and in time for the next phase of RVEF granting applications, CNSWT will undertake citizen juries and provide community consultation workshop(s) to review and revise this 'living' plan. This phase aims to build wider community trust in the future planning and ownership of the plan. (Wray, 2011)

The consultation approach reflects the aim of best practical tourism destination management planning in Australia (Visitor Economy Taskforce, 2012) (Australian Regional Tourism Network/Australian Standing Committee on Tourism, 2013).

Gathering information and presentation

It is recommended to take a creative approach to gathering information from participants and to use both qualitative and quantitative approaches (Tweed Shire Council, 2004). The Future Thinking game 'Travelopoly' enabled the consultant to collect data during the course of the workshop. It follows the principle of using a social learning approach through a task-oriented action group that is dynamic and interactive (Wray, 2011) . The tourism provider stakeholder consultation process enabled the consultant to observe the individual operators and provide education to facilitate their learning and identify market needs.

The consultant undertook an extensive literature review of the market trends in tourism, summarised the key findings and shared these with the Destination Management Steering Committee.

The consultant also designed three research questionnaires, the committee arranged the survey field work and the consultant then collated and analysed the data. Each survey was presented as a summary report and the total findings incorporated into the DMP. This was an important step in the planning process as it enabled the consultant to advocate strategies to the committee supported by findings from the surveys. This process was essential to build consensus (McCool, 2009).

Preparation of the report involved analysis of the workshops through an action research report (Appendix 2) and the analyses of surveys and interviews (CNSWT 1, 2013) (CNSWT 2, 2013) (CNSWT 3, 2013). The important values from these phases were organised under the common structure of social, environment and environmental (triple bottom line) approach as identified in the Destination Management Framework which seeks "a planned sustainable future for destinations" (Australian Regional Tourism Network/Australian Standing Committee on Tourism, 2013).

Key stakeholders and committee prepared a SWOT analysis (Appendix 4) which was also used in the assessment of priorities and risk management planning.

10.3 Feeding back outcomes and decisions

The draft plan was circulated to the key stakeholders and committee. Comments and feedback were collected and the consultant revised the draft.

The following summarises the key findings using the triple bottom line approach (Australian Regional Tourism Network/Australian Standing Committee on Tourism, 2013). The findings are presented in separate tables for the tourism providers' workshops, major stakeholders interviews and key stakeholders, but follow a common triple bottom line structure.

Tourism providers

Table 38: Findings from tourism providers' workshops

Vision for tourism	Economic	Social	Environmental
a) To work more cooperatively with other tourism providers b) To seek more effective promotion of their community	• Economic decline of some communities • Wineries under increasing financial pressure as sales & visitation drop • Felt "things are getting financially tighter for everyone" • Acceptance that they compete with the well know Hunter Valley, the lure of the Coast and shopping trips to Melbourne • Positive that the Elvis Festival was growing, yet fear of loss of momentum • Scope for involvement with the Wiradjuri people • Insufficient time, energy or money to develop new ideas • Expect tourism authorities to lead	• Loss of staff to Sydney • Loss of oral Aboriginal history • Awareness that school children are learning more Aboriginal culture • Operators feel they are competing with rather than cooperating with other Central NSW communities • There was little awareness of sports tourism or use of sporting facilities (except in Bathurst) • There was high awareness of popular cultural attractions e.g. The Dish and Mt Panorama • Low awareness of the destinations cultural heritage	• Droughts and Climate Change • Insufficient balance between mining and tourism • Floods (2012) dramatically effected business (Lachlan) • Felt the night sky was under used as an attraction • Operators demonstrated strong local pride and emphasised that the landscape, nature and agricultural heritage were strong features • Recognition that food & wine are a critical part of what attracts visitors

Observations, opportunities and analysis

166 Operators are aware of growing environmental risk and some are already taking steps to mitigate and adapt.

167 Require wider accommodation options.

168 Operators seek an appropriate channel to approach Wiradjuri people and engage them in tourism and to provide cultural visitor experiences.

169 Stimulate organic growth of markets so visitors enjoy the ‘hustle and bustle’.

170 Bike hire and cycle ways to farm gates.

171 Promote alliances which channel visitors from central located areas to rural communities.

172 Operators’ coaching to develop new products.

173 Recognition of existing operator networks which are proudly supported.

174 Seek tourism industry networking and greater knowledge about the area

Major stakeholders

(Government agencies, local government, community groups representing a business sector or region)

Table 39: Findings from major stakeholders

Vision for tourism	Economic	Social	Environmental
While tourism is recognised as an important sector there is not a common vision for tourism in the region • 14 of the 29 saw tourism of major importance • 1/3 of stakeholders do not have a strategic plan • Only 10 stakeholders could share their plans	• Recognition that economic development should be the local focus rather than economic consumption • Tourism should more effectively capitalise on local arts, crafts, culture which could be through cohesive trails guiding tourists from the larger cities and towns to the villages • Local tourism is negatively affected by inconsistent product quality and lack of conference facilities • Fear that regional airlines are being squeezed out of Sydney slots • National Broadband Network seen as essential, wide recognition that tourism was dependent of mobile technology • Need for more luxury accommodation, coordinated diversified range of packages to attract an airline and innovations to stimulate market growth	• Poor connection between rail and bus service. Rail timetables not tourist friendly • Bathurst Bullet a success but not targeted to tourists • Need to change Sydneysider perception of road access to west. The Bells Line of Road was widely supported • Need for stability when big business leaves the region it destabilises the community • Food product is threaten by young people leaving farming	• Water conservation and water usage are almost of unanimous concern • River systems were seen as an important part of local culture • The majority of stakeholders do not have a risk management plan nor low natural disaster planning • Some stakeholders are taking climate change mitigation steps; groups like Cowra Wine Growers want wider support for sustainable farming practices so that the region is seen as an environmental leader. CCIA have t Gumnut accreditation, Wiradjuri have sustainability focus in Condobolin centre • Recognition that keeping the natural environment pristine was important for tourism

Observations, opportunities and analysis

175 The vast majority of stakeholders want to collaborate and are prepared to attend structured meetings. A shared vision should be established

176 The rail and bus companies do not consider tourism a focus, airlines and airports do not see tourism as a priority; a collaborative tourism strategy is required

177 There are strong opportunities to share market intelligence and surveys on a formal basis particularly with Taste Orange, Western Research Institute and Newell Hwy Committee

178 Using the DMP process CNSWT can support stakeholder grant funding applications where they fit overarching strategic directions, like upgrading tourism product and growing conference facilities

179 Strategic partnership with NRMA (accreditation and online booking) National Trust with joint marketing

Key stakeholders

(Financially contributing members of Central NSW Tourism)

Table 40: Findings from key stakeholders

Vision for tourism	Economic	Social	Environmental
To double overnight tourism expenditure to directly benefit our communities by promoting the iconic attractions, vibrant history, rural experiences and improving the quality of tourism services and facilities	• Aware that there is too little visitor research information • Mt Panorama racing offered strong growth potential • Strong support for evolutionary progress in developing more sophisticated food and wine events i.e. greater emphasis on cool climate, cooking schools • marketing is not achieving sufficient 'cut through' • mixed level of working with strategic partners • Concern for high AUS $ rate • Large council projects reduce funding scope for tourism • Budgets are tighter • Weak or no mobile coverage	• Recognition of the need for community involvement in tourism development • Full agreement that events and festivals offer good potential to stimulate visitation • Destination has an emphasis on family history, family ties and the importance of the VFR market • Move from voluntary event staff to professional management • Cultural heritage sites have often have no or poor signage • Recognition of low standards and quality infrastructure • Concern over LGA amalgamations • Consumer trends towards organic/100 mile diets • The multi-cultural heritage (Chinese and migrants) underutilised	• Awareness of extreme weather event dangers: floods and bush fires • Scope to for activities in the natural environment like cycle ways, footpaths, greater water related sports facilities • Scope for astronomy related tourism experiences and events • The open spaces food and wine were felt to be opportunities to attract international visitors

Observations, opportunities and analysis

180 Signage: directions, interpretation, information, multilingual.

181 Marketing communications need to be integrated, with wider distribution and better packaging.

182 Extended shopping hours during festivals and events.

183 Improved national park facilities and sealing of access roads.

184 Establish strong cooperative partnerships.

185 Family History resource centre.

186 Stronger rural mobile phone coverage.

187 New cycle ways, public transport improvements.

188 Target major sporting and business events.

189 New cultural–art centre.

190 Facilitate the development of a ‘gold’ theme park (like Sovereign Hill).

191 Extend the brand equity in Mt Panorama and ‘The Dish’.

11 CNSWT market position

11.1 Current position

The VET report recommended that the NSW Government should showcase the best in the State through "appealing, authentic and high-quality visitors' experiences" (Visitor Economy Taskforce, 2012). CNSWT will play a strong role in doubling visitor overnight expenditure by focusing on delivering and exceeding visitor expectations by presenting experiences which are:

- appealing: reflecting the special 'country' character of the region
- authentic: presenting a large number of nationally and State significant cultural heritage assets, tangible and intangible, and
- high-quality: delivered by passionate entrepreneurs and with genuine community pride.

The following tables summarise Central NSW's key assets, assets for development and key infrastructure.

11.2 Key assets

Key assets are the magnets that draw visitors to a region. The following top ten assets have been identified following a visitor survey, consultation with the eleven tourism mangers, visitor centre staff and analysis of the Tourist Asset list. Some of the assets are individual items, others are heritage site collections which represent together a single theme that draws visitors. While some of the key assets are well-established, e.g. Mt Panorama, others like food & wine are still growing and would appeal to the emerging international visitor sector as well as holding strong appeal for weddings and event visitors.

Table 41: Top ten key assets

Gateway iconic experiences	Rationale	Consumer appeal
Mt Panorama	Home of motor racing in Australia, the Bathurst racing attracts 100,000s visitors and the venue offers considerable scope for event development.	The thrill of driving the track and living the history
Wellington Caves	One of the most important geology sites in Australia, the caves attracts 45,000 per annum.	Be taken to another world
CSIRO Radio Telescope	The most recognised Australian space exploration site, 'The Dish" attracts over 100,000 visitors per annum	Pilgrimage to an Australian icon
War & Peace Heritage Collection: POW Camp/Japanese	Draws over 50,000 visitors to a unique and growing inter connected range of attractions in Cowra that together are unique to Australia	ANZAC spirit, respect and reflection

Gateway iconic experiences	Rationale	Consumer appeal
Gardens/Japanese & Australian War Graves, Peace Bell		
Wine tasting Mudgee Region; food & wine events Cowra, Bathurst, Orange	National award winning wines, the Wine & Food Festivals attract visitors and is supported by Mid-Western Orange, Cabonne, Blayney, Bathurst and Cowra	Boutique vineyards relaxed wine tasting with panoramic views of the Cudgegong Valley
Shopping and tasting local food & wine	The Orange region has a reputation of high quality boutique stores, food and restaurants and is showcased through FOOD week, Wine Week, Apple Festival and Farmers Markets that together attract 55,000 and its credentials are emphasised by Australian National Field Days with 20,000 visitors. Eating out at restaurants is the top Regional NSW visitor activity, and is growing (54%, 2012) (CNSWT 1, 2013)	Buying local, tasting fresh food and enjoying quality menus with friends and family
Experiencing nature: bush walking, lookouts, bird watching	The Nature Collection includes: The Weddin Mountains NP, Mt Canobalas SF, Munghorn Gap NR, Goobang NP; Aboriginal Cultural Heritage Landscapes: Mt Panorama, Mt Canobalas; Agricultural heritage Travelling Stock Routes	Exploring and rediscovery
Gold Rush Collection: O'Brien's Hill, Lucknow, Ophir, Hill End, Sofala, Stuart Town, Gulgong	The locations of the first payable gold discovery in Australia which changed the county and resulted in gold rush towns, mines and folklore	Learning about Australia's history while surrounded by authentic living heritage
Lake Cargelligo	The largest inland lake in NSW, attracts recreation, bird life and holds ancient Aboriginal heritage sites	Relaxation and rejuvenation
Quaint Village Collection: Carcoar, Millthorpe, Rockley, Rylstone, Canowindra, Molong, Gulgong, Hill End	'Visiting heritage buildings', 'relaxation' and 'shopping' are 3 key activities Central NSW visitors enjoy most (Australia, 2012)	Relaxed exploring meeting friendly locals and buying unique handmade items

11.3 Assets for tourism development

Central NSW has additional assets which, following development, could be strong supporting magnets for the top ten assets listed above. This list has been prepared following assessment of the major stakeholder interviews, level of community involvement and the opportunities identified in the section on Influences on Future Tourism Trends. This list will form part of the sustainable destination development programme of activities.

Table 42: Assets that can be developed

Area	Attractions	Rationale
Orange	Food Week & related events	Extend the capacity and become a wider inclusive event the builds visitation to neighbouring communities. Supported by rail and bus packages. Develop a strong seasonal calendar
Whole of destination	Farmstays and agritourism	Provide high quality experiences which offer active participation and personalised activities which are unique and enable reconnection and nostalgia. Particularly relevant to compatriots and VFR. This could also appeal to many South East Asian visitors
Whole Destination	Family history services	Genealogy is increasingly popular, Central NSW has extensive records e.g. Bathurst Historical Society and special interest groups e.g. Parkes Shire Historical Society.
Weddin, Mid-Western	Henry Lawson: Festival, birthplace, residences, museum	Considered one of Australia's most influential writers and the first poet to capture the Australian way of life (ABC/Schools TV , n.d.) (Australian Government, n.d.). Meeting the reconnection and nostalgia needs of domestic tourists.
Orange	Shopping & local produce, arts & crafts	By extending shopping hours and integrating cellar door and local arts and culture increased expenditure can be encouraged and local economic development. Targeting high net worth visitors and Pampadours.
Cowra, Cabonne, Mid-Western	Sustainable farming e.g. Windowrie, Rosnay, Ochre Arch Farm, Lowe Wines, Twisted River, Nanima Saltbush Lamb	There is a growing public interest in organic wine and more sustainable food production. Central NSW has award winning producers, the third largest Organic wine show in Australia and a growing Farmers Markets and 100 Mile Diet experience. They are all authentic culturally enriching visitor experiences for urban visitors and producers want to build the regions reputation (CNSWT, 2013) . These boutique experiences fit closely to the rejuvenation values for Pampadours.
Lachlan	Wiradjuri Condobolin Corporation	International visitors want to see authentic Indigenous cultural experience, the national syllabus includes higher Aboriginal content, the Newell Hwy can attract visitors, and this Wiradjuri community enterprise is actively seeking to build its economic potential (CNSWT, 2013). This can be supported by strategic partners like CCIA
Whole of region	Arts and cultural	Present large scale popular cultural shows e.g. building on the Elvis Festival, sharing resources and encouraging drive tourism to visit villages, markets and cellar doors supported by key stakeholders like NRMA, RMS, Orange Airport and airlines
Whole Destination	Heritage (tangible and intangible)	Thematic interpretation of the regions rich history: bush rangers, early settlers, artists, writers, poets, and the gold rush. Expanded the Discovery Tours through professionally delivered local guided tours, innovative interpretation. Increase the number of Pledge Partners so build the interconnecting trails which link museums, festival, 100 Mile Diet producers, accommodation providers, cafes and restaurants
Whole destination	Events and Festivals which reflect the heritage of Central	Bring focus and a coordinated calendar to truly special and unique activities, which showcase the intangible cultural heritage, involve widely the community and encourage friends and family to visit

Area	Attractions	Rationale
	NSW	
Whole destination	Expand sport tourism	Introduce high quality spectator sports, participatory sports events e.g. cycling racing and water sports events to utilise the waterways
Whole destination	Adventure Sports	Adventure sports are growing in popularity. Investment in infrastructure could encourage visitors to stay longer. The social media potential will help to raise destination awareness and appeal.
Whole destination	Nature tourism	Encourage high quality ecotourism accommodation and guided activities and bird watching. This represents strong Aboriginal income potential and linkage to arts and crafts
Whole destination	Night Sky	Magnificent natural wonder that city residents can't see. It offers opportunities for activity providers and Aboriginal interpretation
Parkes, Orange, Cabonne, Blayney, Lachlan	Modern Mining	Peak Hill Open Cut Experience, Cadia and Northparkes Mine with physical experiences which immerse visitors in a truly memorable experience for Wanderers, Compatriots and educational tourism
Parkes	Museums	Expansion of Henry Parkes Centre and other museums through 'crowd sourcing' generating higher participation, involvement in wider regional events, encouraging donations and 'Augmented Reality' providing a high degree of interactivity
Whole destination	Supply chain	Grow the visitor economy by building a stronger local market through encouraging tourism providers to source locally. The regions food & wine, arts and crafts assets can be linked more closely

11.4 Key infrastructure

Tourism growth in Central NSW depends on the following key infrastructure. This list was prepared following the consultation. CNSWT will be taking an active role in the future development of this infrastructure to ensure that visitor growth targets are not restricted by changes, and that tourism's growth does not negatively impact on the infrastructure.

Table 43: Key tourism infrastructure

Product/service	Function	Tourism role
Great Western Hwy	Links Sydney with Central NSW	Essential road access to the region
Internet access	Vital for tourism	Method to promote the region and conduct transactions
Wyangala Dam, Chifley Dam, Lake Windamere, Lake Burrendong, Lake Cargellico	Water reservoirs	Provide fresh water for some of the 5.3 million domestic visitor nights (excludes international visitor nights) household, business and agricultural irrigation (Australia, 2012)
Mt Panorama	Race track	Attracts 100,000 visitors a year and is used by competitive motor sport
CSIRO Radio Telescope	Observatory	Renowned tourism magnet

Newell Hwy	Links Melbourne to Brisbane	Majority of interstate visitors use this route
Mid-Western Hwy and Olympic Hwy	Links Central NSW to south western NSW and ACT	Important entry routes to the region
Railway	Links Sydney with Bathurst, Orange, Parkes	Potential to carry a larger share of visitors
Railway	Link from Blayney to Cowra	Potential heritage attraction
Orange, Bathurst, Mudgee, Parkes airports	Regional airline departures	Business travellers and potential for leisure travellers

11.5 Marketing focus

Central NSW's unique selling proposition

Central NSW is the richest cultural heritage region of NSW, where visitors discover tempting original boutique food, wine and art experiences as they meander through magnificent inspiring landscapes just 3 ½ hours from Sydney or Canberra.

Supporting our USP is research which identifies consumer perceptions of the destination's strongest attributes (Hearts and Minds, 2010). The research has been used to identify the brand essence, to express this through links to popular culture and to provide guidance to shape brand stories.

Expressions of the brand essence

Source: Hearts and Minds (2010)

Consumer research findings showed that there were links between the essence of the CNSWT brand and popular culture. This is illustrated in the following diagram.

Links from CNSWT's brand essence to popular culture

The brand planning project identified that CNSWT's brand essence (the values which create its point of difference and relevance to consumers) can be linked to popular culture. The chart below outlines how the brand essence might be linked to concepts, for example "exploring unchartered terrain" could be used as a proposition for an ecotourism tour experience which also links to "Awaken the frontier spirit".

Source: Hearts and Minds (2010)

The CNSWT brand essence supports the following brand stories:

- ‘go with the flow’ : kicking back into the pace of rural life (life on a farm, country lifestyle and wandering stories, picnic frontier style, survival strategies of the early settlers)
- ‘seeing stars’: the thrill of sharing exploration and discovery (quasars and the size of the universe, learning about space, space and technology, Aboriginal stories)
- ‘safari’ : letting go and running wild on safari (five choices safaris of Central NSW, five great animal spotting adventures, understanding the personality and psychology of animals, rare and endangered)
- ‘savouring the moments’ : being in the moment of sensorial pleasure (the local table, wine tasting tips, campfire gourmet, food and wine season wheel, family recipes)
- ‘restoring the land’ : loving and restoring the land (the science behind Peter Andrews natural sequence farming, principles behind carbon based farming, why good farming practice leads to great flavour, land lovers meet wine lovers, direct from the producer)
- Additional stories: volcanic landscapes, artists at Hill End, Gold Rush, resilient spirit, haunts and hideaways of bushrangers, self-sufficient crafts of cottage industries.

CNSWT will focus its resources and concentrate on specific market segments to deliver a doubling of overnight visitor expenditure by 2020 using these brand stories. The following table summarises the target segments. The segments have been arranged in order of visitor numbers. This does not necessarily equal the volume of visitor expenditure. Further research is required to identify the expenditure rates and number of overnight stays of each segment into to refined future marketing initiatives. Key assets, infrastructure and strategic opportunities for tourism development are also listed in subsequent tables.

11.6 Key source markets and consumer segments

The following source markets and consumer segments have been identified using the NVS and IVS, CNSWT visitors survey and the key stakeholder market knowledge, identified through the consultation process (Australia, 2012), (CNSWT 1, 2013) (CNSWT 2, 2013).

Table 44: Key source markets and segments

Source markets		LGA	Consumer segment	Reason for visit	Growth potential
1	Regional NSW, Sydney, Interstate (Tasmania, Victoria, South Australia, Western Australia and Queensland)	Whole Destination	**Wanders** (39% Visitors Survey 24% NVS), travellers exploring regional NSW or passing through (25% visitors survey)	Curiosity as they travel the Newell Hwy, Kidman Way, Lachlan Valley Hwy and Olympic Hwy; exploring NSW seeking the iconic attractions	Caravan and camping segment is growing; better signage, parking, overnight site capacity and linking iconic attractions with other activities will grow this segment and increase expenditure they are able to reconnect
2	Regional NSW, Sydney, Australia	Whole Destination	**Visiting Friends and Family** (20% visitors survey, 39% NVS)	Relaxation, reconnection, rediscovery	15% increase (2000 – 2012). Increase growth by promoting wedding places, family history and events; increase expenditure by encouraging use of commercial accommodation with extending shopping hours and better information that links other neighbouring retail opportunities
3	Sydney, Regional NSW, ACT	Mid-Western and Orange (region)	**Relaxation** (20% visitor survey, 14% Pampadours NVS) **Romantic** (2.5% visitors survey)	Escape from the city and enjoy the peace, quiet and indulge in life's pleasures	High quality, personalised experiences help them reconnect with each other, air packages to interstate markets will target new segments
4	Sydney, Regional NSW	Whole Destination	**Family** (13% visitor survey, 20% Compatriots)	Exploring and learning about NSW or attending a sporting event	Promoting high quality cultural heritage, popular cultural and nature based activities experiences that encourage reconnection and enable parents to show their children 'their' country will grow this segment. Specific communication required to target New Australians in Sydney
5	Sydney, ACT, Regional NSW	Bathurst, Orange, Mid-Western, Parkes, Forbes	**Business** (18% NVS)	Meeting, conference , event (sports)	Targeted high quality sports events and improved conference facilities will grow this segment
6	Regional NSW, Sydney, Interstate	Whole Destination	**With Friends** (10% visitor survey, 7% Peer Group NVS)	Exploring NSW, enjoying camaraderie enjoying the natural beauty	Special events, group packages will grow this segment
7	International students	Bathurst, Orange	Currently 1% of the market NVS	Education	Continuing growth in education tourism, increase the number of foreign students and subsequent VFR visitation. Charles Sturt University represents an strong regional partner for CNSWT

12 Managing the risks

Risk management can be divided into four categories:

- Prevention: identifying hazards, risks and mitigating the dangers. This has been traditionally focused on legislation, building codes and land use, as recommended by AICST (Robertson, 2006) UNEP (UNEP , 2008) recommend destinations involve communities to determine what is best to reduce (bush fire) risks using their local knowledge.
- Preparedness: develop a preparedness plan and training (a specific area of emphasis in the Australian Standards). The more operators have planned and implemented mitigation actions the better they will be in handling any crisis event (Brent W. Ritchie, 2011).
- Response: led by government emergency services.
- Recovery: set in motion steps to return the destination back to its original state

Currently there is destination awareness from the threat of extreme weather events and some tourism providers are taking action to be prepared. Table 45 outlines the scale of awareness and action.

Table 45: Sustainable destination indicators: natural threats and tourism provider preparedness

Indicator	Reason for indicator	Benchmark
Percentage of the CNSWT LGAs in extreme weather event prone area (flood, drought, fire)	This indicator is designed to raise awareness of climate-related vulnerability.	Bush Fires: Cowra and Mid Western 'high' threat. Bathurst 'moderate', Weddin 'low' threat Drought: Cowra, Mid Western and Parkes 'high' threat, Bathurst and Weddin 'moderate' threat Flood: Cowra 'high' threat (CNSWT 2, 2013)
Percentage of enterprises that have been inspected for fire safety in the past year	Keeping track of which properties have been inspected improves inter-departmental coordination and helps ensure an enterprise does not consistently avoid inspection	45% have not been assessed for fire safety in the past 12 months (CNSWT 3, 2013)
Percentage of enterprises that have a risk management plan for bush fires, floods, cyclones, droughts	This indicates the level of preparedness of tourism enterprises	47% do not have a risk management plan for natural disasters (CNSWT 3, 2013)
Percentage of enterprises that have a business continuity plan in the event of a natural disaster, supply problem, computer fault, and breakage in electricity supply or water supply	This indicates the level of resilience of tourism enterprises	65% do not have a continuity plan (CNSWT 3, 2013)

More detailed research would assist planning greater destination collaboration (key stakeholders, major stakeholders, community groups CNSWT) and should focus on helping tourism operators and communities protect their livelihoods.

Limited resources means there should be a focus on prevention and preparedness because reducing the risk of an extreme weather event's impact is a better strategy than coping with its results and costs afterwards.

This DMP has commenced the process of addressing transport, environmental, social and economic risks:

- The transport infrastructure risks have been addressed in S 1.9.
- The economic and social risks require a collaborative strategy of pooling resources and working cooperatively with strong leadership and a shared vision as identified in S 1.5, S 1.7, S 1.9, S 1.10, S 1.11 and S 1.14.

The following table summarises a wider set of key risks. It is recognised that CNSWT will need to undertake a thorough risk management mitigation and adaption programme as identified in Strategic Priority S1.21. This strategy should consider motivating tourism providers through parallel actions, i.e. to encourage them to take action which achieves a goal that is directly relevant to their needs but which also has the benefit of reducing risks. The result of this approach could be to create better experiences, charge higher prices for quality of experience, improve operator local knowledge and develop new product concepts, which could in some cases involve the Wiradjuri and land management practices (Warren, 2013).

Currently regional tourism in Central NSW enjoys support at the Federal, State and local levels.

Table 46: Summary of risks to tourism in Central NSW

Risk	Likelihood	Impact	Mitigation strategy	Revised risk
Political risks				
Change in State policy	Unlikely			
Change in Federal policy	Likely			
Member Councils cease support, particularly as Councils are relatively “new”	Highly Likely	High	192 Educate councils on the value of tourism	
Road over Blue Mountains – non action on Bells Line of Highway	Highly Likely	Medium	193 Prepare a tourism travel plan with major stakeholders and lobby	
Environmental risks				
Extreme weather events: bushfire and floods damage the environment	Highly Likely	High	194 Conduct workshop and collaborate with RFS	
Droughts restrict water usage	Highly Likely	High	195 Promote water wise conservation policies	
Droughts reduce attractiveness of landscape from the perception of city visitors	Highly	High	196 Concentrate on the towns and village events, festivals and food & wine	
Droughts reduce harvest	Likely	High	197 Broaden marketing focus to arts and crafts, not solely food & wine	
Extreme weather events: bushfire and floods damage the environment and reduce its appeal	Likely	High	198 Awareness raising and building networks	
Social risks				
Travelling abroad is a strong magnet – the attractiveness of ‘novelty’ and the ‘new’	Highly Likely	Medium	199 Emphasise the rich cultural heritage ‘on your door step’ the great opportunities to reconnect and quality nostalgia experiences to enjoy	
Non-competitive options to impact on outbound offers – we’re not giving compelling reasons not to go abroad	Highly Likely	Medium	200 Work with tourism providers to improve visitor experience, expand the Discovery Tour, interpretative signage	
Interstate visitors have low awareness of Regional NSW (VET)	Highly Likely	Low	201 Signage and visitor information on Newell Hwy	

Risk	Likelihood	Impact	Mitigation strategy	Revised risk
Intrastate visitors have low awareness of Regional NSW (VET)	Likely	Medium	202 Target New Australians in Sydney	
Participation of Wiradjuri community in tourism	Unlikely	Low	203 Establish a working group to develop a Wiradjuri tourism plan	
Missing opportunities in the international market	Highly Likely	High	204 Rapidly respond to growing capacity in this region	
Undefined Brand image	Highly Likely	High	205 Concentrated marketing programme which coordinates advertising, events and produce with a clear single minded brand image. Impact will depend on funding and collaborative support	
Qualified and attentive staff	Highly Likely	High	206 Training and capacity building. Looking for alternative education providers that are tailored to the local needs – short course tailored existing programming needs to be marketed	
Technological risks				
Poor internet and mobile phone coverage for the region	Highly Likely	Very High	207 QR codes on signage and at VICs 208 VICs provide online booking and telephone service	
Lack of technologically capable resource in the region	Highly Likely	High	209 Run workshops and provide list of support services	
Lack of uptake by tourism providers	Likely	High	210 List on www.visitnsw.com.au	
Economic risks				
Continued lack of investment	Highly Likely	High	211 Work with strategic partners	
Competitive domestic destinations – Hunter, cheap flights & deals, Victorian holidays & promotion of in mainstream press	Highly Likely	Medium	212 Develop strong PR campaign based on the regions cultural heritage 213 Develop high profile sport teams events and strong social media exposure	
Increasing cost of fuel impacts on the drive market	Likely	Low	214 Develop a tourism and travel plan of action to develop tourism potential on the rail network	
Australian dollar	Likely	Low	215 Emphasis value: personalised experiences and high quality reconnection and nostalgic experiences	

Risk	Likelihood	Impact	Mitigation strategy	Revised risk
Increased cost of utilities	Highly Likely	Medium	216 Distribute information on energy and water use efficiencies. Incentive use by indicating verified sustainable tourism operators in tourist information	
Legal risks				
Laws around holiday rentals in residential	Likely	High in some areas	217 Encourage compliance with social responsible guidelines: waste, noise, insurance and safety	
Insurances meaning that activities are happening less	Highly Likely	Medium	218 Investigation into an umbrella policy for the region, advocacy	

13 Strategic priorities for Central NSW

Assessing the findings from the research into consumer demand, tourism supply and the visitor economy, drawing on consultation with our stakeholders and using the Sustainable Destination Indicators, the DMP process has identified seven strategic priorities for Central NSW:

DESTINATION MANAGEMENT

1. Advance leadership and motivation

DESTINATION DEVELOPMENT

2. Grow physical capacity
3. Improve visitor experiences
4. Revitalise destinations and celebrate local culture
5. Increase visitor spend and grow local economic benefits

DESTINATION MARKETING

6. Raise destination awareness and appeal
7. Increase overnight visitation

Strategic Priority 1: **Advance leadership and motivation**

Establish a strong management framework supported by a team of tourism professionals, an industry-experienced board, key stakeholder resources and strategic partners to coordinate sustainable destination management, tourism development and marketing programmes to double visitor expenditure by 2020.

Best practice regional destinations:

- work in a consultative approach
- establish taskforce teams to utilize resources and specialist knowledge
- share information and develop coordinated plans
- apply a whole-of-government approach
- maximise visitor expenditure, and
- seek to minimise negative environmental impacts.

Recommendation

There is a need to motivate all players and demonstrate tourism leadership by applying 'best practice' procedures and to create a shared vision.

Table 47: Strategies for advancing leadership and motivation

Strategies		Observations, opportunities and analysis	Partners	Status
S1.1	Build wide awareness of the DMPs strategies; produce a summary 12-page DMP colour information brochure as PDF online and send hard copies to the tourism sector, special interest groups and media. Establish clear roles and responsibilities for LGA tourism managers and CNSWT Executive Officer.	136, 166, 169, 171, 172	CNSWT	

Strategies		Observations, opportunities and analysis	Partners	Status
S 1.2	Improve environmental sustainability; SP1.2.1 Assist the preparation of an integrated list of whole-of-government support programmes. SP1.2.2 Make accessible information which encourages tourism providers and key stakeholders to apply for funding to improve their sustainability. SP1.2.3 Work with stakeholders in key regions to present information on relevant government programmes for tourism providers. SP1.2.4 Showcase tourism providers who have taken measures/started these government programmes in PR campaigns. SP1.2.5 Link with local community actions and inform tourism providers via CNSWT monthly newsletter. SP1.2.6 Monitor progress via annual surveys as part of the Sustainable Destination Indicators.	75, 76, 79, 166, 194–198	CNSWT	
S1.3	Raise local awareness of the value of tourism to build greater involvement	24,47,95,131,190,215	CNSWT & key stakeholders	
S1.4	Stimulate broad community support for flagship events that take place in smaller towns and villages so that they can be self-sustaining and attract a greater level of VFR visitation	19, 32, 46, 48, 95, 123	Key stakeholders & community groups	
S1.5	Maximise relationships; S1.5.1 Forge long-term strategic partnership with organisations that have high coverage of the source markets, add value to the tourism experience or high penetration of specific visitor segments e.g. NRMA, National Trust, CCIA. S1.5.2 Develop a plan to add value to visitor experience and meet partners objectives S1.5.3 Integrate added value experiences in promotional materials and websites.	24, 28, 31, 31, 85, 96, 123, 126, 173,177,182, 209	CNSWT & major stakeholders and key stakeholders	
S1.6	Conduct Indicators surveys and provide feedback to LGAs and CNSWT members.	24,31,137	CNSWT & key stakeholders	
S1.7	Encourage LGAs to forge strategic partnerships at a local level	28,95, 96,104,105, 132,173,182,188,196, 209	Key stakeholders & major stakeholders	
S1.8	Maximise the Visitor Economy benefits for producers; S1.8.1 Develop a cluster strategy to emphasis differences in the destination and encourage innovation. S1.8.2 Encourage tourism providers to buy local produce that reflects their local area. S1.8.3 Utilise Discovery Tours as a method to channel visitors to purchase opportunities and to interpret the different local characteristics and tourism innovations. S1.8.4 Monitor the uptake, evaluate and refine strategy.	79,87,98,145,182, 195,196	CNSWT & key stakeholders & producers & tourism providers	
S1.9	Working with major stakeholders to develop a tourism & transport infrastructure plan which should examine the needs of interconnected services between rail, bus and communities, airport development and the Bells Line of Road.	26,27,28,82,150, 174,185,191,212	CNSWT & key stakeholders & major stakeholders	
S1.10	Work with other major stakeholders to propose critical improvements for mobile phone coverage and internet services to improve the destination’s competitiveness	83,85,184	CNSWT & major stakeholders	
S1.11	Invite major stakeholders to an annual destination review to coordinate plans and actions, encourage the sharing of market research	68,89,175	CNSWT & key stakeholders & major stakeholders	

Strategies		Observations, opportunities and analysis	Partners	Status
S1.12	Resource promotions and communications to coordinate all local campaigns and collateral – as required	85,136	CNSWT & key stakeholders	
S1.13	Support the employment of a regional events manager to coordinate festivals, events and increase operators skill base	21,32,136	CNSWT & key stakeholders	
S1.14	CNSWT board meeting held in different regions across the years and invite local operators	171,172	CNSWT & key stakeholders	
S1.15	Establish a monthly newsletter to build awareness of CNSWT activities, encourage feedback and state results	124,126	CNSWT	
S1.16	Monitor average room rates to identify negative economic impacts	134,137,175	Key stakeholders	
S1.17	Monitor overnight expenditure using the visitor surveys quarterly	134,137,175	Key stakeholders	
S1.18	Work with catchment authorities to support water conservation practices and support water controls during drought	214	CNSWT & Centroc & key stakeholders & major stakeholders	
S1.19	Support government energy efficiency programmes to facilitate tourism providers participation	74,75,77,164,214	CNSWT & Centroc & key stakeholders & tourism providers	
S1.20	Work with key stakeholders to prepare a risk management preparedness and communication plan	192,194,195	CNSWT & key stakeholders	
S1.21	Reduce risk; S1.21.1 Work with Rural Fire Services and Accreditation providers who provide frameworks and examples. S1.21.2 Run workshops on risk management. S1.21.3 Distribute bushfire and water conservation information to gain wider participation. S1.21.4 Incentivise tourism providers through parallel motivational aims which achieve both preparedness and protection.	192	CNSWT & key stakeholders & tourism providers & special interest groups	
S1.22	Reduce waste; S1.22.1 Liaise with local councils on landfill volumes during peak seasons and events. S1.22.2 Work with organisers and tourism providers to reduce landfill and increase recycling of reuse S1.22.3 Publicise progress and build tourism reputation in the community	4,69,	CNSWT & key stakeholders	
S1.23	Manage water consumption, meet with catchment authorities and brief them on future visitation levels, identify future requirements.	193,214	CNSWT	
S1.24	Source and train regional tourism event volunteers	61	Key stakeholders	
S1.25	Prepare a CNSWT Business Continuity Plan by conducting a SWOT of operations, resources and technical support		CNSWT	
S1.26	Prepare a sustainable tourism tool kit to assist 'best practice' and raise tourism quality standards	48,74,75,77,78,103, 104,173,214,215,216	CNSWT	

Strategic Priority 2: **Grow physical capacity**

To double overnight visitor expenditure, Central NSW must increase capacity to enable the required growth.

Best practice regional destinations:

- grow tourism in consultation with the community
- choose strategies that reflect the character and heritage of the region
- identify opportunities which will support local economic development
- seek employment opportunities for the local community, and
- build tourism provider resilience.

Recommendation

Identify and support growth opportunities that enhance tourism supply by offering high-quality tourism experiences that promote the destination.

Table 48: Strategies for growing physical capacity

Strategies		Observations, opportunities and analysis	Partners	Status
S2.1	Increase dedicated high quality conference and exhibition facilities; S2.1.1. Contact all conference & event venues to learn of any development plans S2.1.2 Meet with Sydney/ACT wedding and business event organisers to identify key factors that will make the region more competitive. S2.1.3 Prepare a business case for developing the conference, event, market. S2.1.4 Present this to major venue owners, councils and event marketing group which collaboratively promote region to build market sector.	1,24,64,72,109,144	CNSWT	
S2.2	Continue to increase 'home hosts' to help smaller communities benefit from event and festival visitors to their region; S2.2.1 Announce a 'Home Host' initiative to the community. S2.2.2 Use the successful Elvis Festival 'home hosts' as a case study example. S2.2.3 Prepare register and link to VIC database and establish information section on website.	44,45,60,81,206,214	Key stakeholders & community groups	

Strategies		Observations, opportunities and analysis	Partners	Status
S2.3	Prepare a plan for local councils, the RMS and NPWS that recommends necessary growth in car parking for cars with caravans or mobile homes to reflect growth in Wanderers. Explore 'Park n Ride' services during festival and events. Identify partners for developing cycle routes	31, 32,54,68,127, 168,181,185	CNSWT & key stakeholders	
S2.4	Target growth in capacity; S2.4.1 Brief cellar door, cafes, restaurants and accommodation providers on DMP and growth potential. S2.4.2 Identify those tourism providers seeking to expand their facilities and provide detailed consultation support, council links and grant advice. S2.4.3 Support their growth plans through integration into the DMP review	44,108,202	Key stakeholders and tourism providers	
S2.5	Maximise use of grant funding; S2.5.1 invite widespread participation in workshops that brief on grant funding opportunities from whole of government sources. S2.5.2 Provide support information and advice as required	96,99,100,103,104,135, 176	CNSWT	
S2.6	Undertake a feasibility study with historical societies for a family history resource which will help to build visitation	52,89,90,183	CNSWT & special interest groups	
S2.7	Prepare a prospectus for tourism investors	69,76,108,110,148,170, 188,202	CNSWT	
S2.8	Examine scope for attendance expansion; S2.8.1 Examine management plans for key icon sites e.g. Mr Panorama, CSIRO Radio Telescope, Wellington Caves, Mudgee Food & Wine, Orange shopping. S2.8.2 Examine seasonality and peak times where there might be congestion. S2.8.3 Compare plans with DMP strategies; make recommendations to key stakeholders and key asset partners S2.8.4 Support responsible growth plans and enhanced visitor experiences	29,30,31,32,44,45,47, 105,139,180	CNSWT & key stakeholders	
S2.9	Support with local government and regional agencies to target grant funding for infrastructure that supports the Destination Management Plan	26,27,77,135,176	CNSWT	
S2.10	Conduct a feasibility study to determine if there is an opportunity to establish a large regional centre for the arts that can take world exhibitions or popular shows	80,187	CNSWT & major stakeholders & key stakeholders	
S2.11	Implement an accommodation study to identify necessary accommodation growth opportunities to deliver long term overnight expenditure increases. An occupancy survey (proposed in the marketing section) will provide evidence of which categories have constraints	44,109,148,165	CNSWT & key stakeholders	
S2.12	Expand and enhance nature attractions in partnership with stakeholders. S2.12.1 Review NPWS plans of management and compare with DMP strategies. S2.12.2 Determine opportunities for ecotourism activity providers. S2.12.3 Identify opportunities for adventure sports to create new visitor experiences. S2.12.4 Promote the opportunities for activity providers through key stakeholders, local media and tourism providers and provide a business support package	19,31,32,54,68,69, 127,128,145,181	CNSWT & key stakeholders & major stakeholders	

Strategic Priority 3: **Improve visitor experiences**

Delivering great visitor experiences which are easily available, meaningful, offer passive and active participation relevant information.

Best practice regional destinations:

- provide a variety of information channels including VICs, internet, signage and interpretation
- offer consistent presentation of information
- offer civic hospitality and friendly information and services
- maintain consistent quality of facilities, and
- offer inclusive tourism experiences.

Recommendation

There is an immediate need to provide coordinated leadership, through planning and consultation, to ensure product is developed and tourism is presented in a focused and consistent manner to deliver this plan and the growth in visitor expenditure

Table 49: Strategies for improving the visitor experience

Strategies		Observations, opportunities and analysis	Partners	Status
S3.1	Enhance the destination through interpretation: S3.1.1 Prepare a register of tangible and intangible cultural heritage. S3.1.2 Identify major sites and intangible assets with tourism potential (economic and contribution to conservation). S3.1.3 Plan and implement an interpretation programme for heritage sites and intangible heritage. S3.1.4 Collaborate with special interest groups and community and refine plan. S3.1.5 Brief and involve tourism providers and roll out interpretation plan.	8,97,103	CNSWT & special interest groups & community & tourism providers	
S3.2	Review and refine the Discovery Tours and attract more Pledge Partners, food and wine and dining experiences to stimulate longer visitor stays	36, 37,53,58,63, 87,102, 117,118,169	CNSWT & key stakeholders	
S3.3	Progress improvement on attraction accessibility: parking, road quality, facilities, signage	26,27,100,178,199	Key stakeholders & major stakeholders	
S3.4	Provide hospitality training and skills development. Attendees become ‘Ambassadors’, mayors recognition event, local media	13, 33, 38, 72, 73, 74, 75,76,77,171,204	CNSWT & key stakeholders & tourism providers	

Strategies		Observations, opportunities and analysis	Partners	Status
S3.5	Improve the quality of tourism accommodation by incentivising participation in accreditation, awards, incentivising their promotion by showcasing ‘leaders’, grants	1, 4,24,30,107,135, 146,176	CNSWT & key stakeholders & tourism providers	
S3.6	Campaign to promote ‘Ambassadors’, establish and maintain strategic network of high quality tourism providers which can act a stimulus for others to join; use the network for PR and case study examples	24,38,42,169,171,197, 214,215,216	CNSWT & key stakeholders & tourism providers	
S3.7	Develop Chinese heritage tour in Mandarin which can be targeted to Sydneysiders and international visitors and education tourism VFR	8,93,	CNSWT & DNSW	
S3.8	Enhance museum experience; S3.8.1 Work with community groups and councils to establish a destination wide Museum Trail with consistent opening times.S3.8.2 Plan opportunities for use of technology (Augmented Reality). S3.8.3 Enhancement of exhibitions	51,71,145	CNSWT & key stakeholders & special interest groups	
S3.9	Establish a working group with Wiradjuri community members and develop an Aboriginal tourism plan that builds on the success of the Wiradjuri Condobolin Corporation. Consider integrating the Lachlan Catchment Authorities Dreamtime videos, sacred site Mt Canobolas and the songlines, oral histories, performance and art	57,70,99,125,131, 166,201	CNSWT & key stakeholders & community groups	
S3.10	Niche markets; S3.10.1 Identify niche market opportunities from DMP. S3.10.2 Develop micro websites with third party content that showcases for example regional family history, bird life, and events; encourage tourism providers to have website links. This will enable then to provider more detailed information to prospective visitors quickly without competitor content. S3.10.3 Promote sites through special interest groups, social media and PR	42,48,52,64,70,158	CNSWT & special interest groups	
S3.11	Increase number of accredited caravan and camping sites where Central NSW has supply gaps and where a range of attractions and activities can encourage expenditure and longer overnight stays	29,30	CNSWT & key stakeholders	
S3.12	Arrange regular VIC staff information days when so that when they visit attractions, they are briefed on the facilities to improve local knowledge	124,132,197,204,206, 214	Key stakeholders & tourism providers & special interest groups & community groups	
S3.13	Identify student work experience positions to grow local skills and provide support labour to SME	33,57,61	CNSWT & tourism providers & major stakeholders	
S3.14	Establish an Education Tourism Group to develop the product mix to target school field trips.	16,152	CNSWT & major stakeholders	
S3.15	Conduct twice a year visitor qualitative research to learn more about behaviour and attitudes towards the attractions and new product ideas	69,71,89,	CNSWT	
S3.16	Identify high quality tourism providers that seek to attract overseas visitors and provide a support programme to help them become ‘internationally ready’	12,14,15,24,72,93,202	CNSWT & DNSW	

Strategies		Observations, opportunities and analysis	Partners	Status
S3.17	Source funding to conduct a professional training programme for guides: town, museums and ecotourism	33,51,71,122,123, 170,172	CNSWT & community groups & tourism providers	
S3.18	Partner with NPWS and Forests NSW to develop strategy for improved signage, parking and interpretation	31,54,68,103,127, 178,181,205	CNSWT & major stakeholders & tourism providers	
S3.19	Develop an accessible tourism destination plan	91, 92	CNSWT & key stakeholders & major stakeholders & tourism providers & special interest groups & community groups & Centroc	

Strategic Priority 4: **Revitalise destinations and celebrate local culture**

Grow local festivals and farmers' markets as a celebration of community life and as a tourism attraction which offers authentic cultural experiences of Central NSW.

Best practice regional destinations:

- acknowledge that community festivals are a key part of the local social capital and should be celebrated
- recognise that tourism can help sustain festivals and are a way to revitalise a destination
- reflect the unique character of places and people through the delivery of authentic holiday experiences, and
- ensure the destination precincts maintain their integrity and that the visitor economy supports their protection.

Recommendation

Commence a systematic development programme with special interest groups and tourism providers to devise actions to celebrate and protect local culture and sense of place.

Table 50: Strategies for revitalising destinations and celebrating local culture

Strategies		Observations, opportunities and analysis	Partners	Status
S4.1	Focus resources; S4.1.1 Audit the events, rationalise calendar, identify core events which target specific growth segments and that are suitable to raise the destination's unique qualities. S4.1.2 Coordinate calendar with DNSW website. S4.1.3 Maximise access link with public transport	17, 21, 32, 64, 123,126,169,185	CNSWT & key stakeholders & special interest groups & community groups & DNSW	
S4.2	Re-energise Museums/Galleries; S4.2.1 Audit museums and galleries and identify their needs and opportunities; compare with DMP strategic priorities. S4.2.2 Create strategies to refresh their visitor experience S4.2.3 Identify opportunities for networking, interpretation and resource needs. S4.2.4 Identify funding sources and additional revenue streams	51, 80, 86, 88, 120, 121,205	CNSWT & key stakeholders & special interest groups	
S4.3	Wider promotion of art events/retail and bring travelling shows/popular cultural events	32,42,62,85,117, 118	CNSWT & major stakeholders	
S4.4	Prepare a Wiradjuri tourism economic development plan that offers opportunities and celebrates their cultural heritage	8,57,70,99,125,195	Key stakeholders & community groups	
S4.5	Event and festival management workshops for community special interest groups that utilise heritage buildings, sites and public spaces. Emphasis given to reflecting the local distinctiveness of each particular area	8,62,119	Key stakeholders & special interest groups & community groups	
S4.6	Build market days; S4.6.1 Encourage expansion of the Farmers Markets to be held in the centre of more towns and villages. S4.6.2 Recommend supporting entertainment and extended shopping hours. S 4.6.3 Provide support for decorations and seek promotional opportunities to showcase community 'country life' S4.6.4 Actively promote Farmers Markets and seasonal produce	32,38,113,116,139,167, 169,180		
S4.7	Establish a public space in Orange to improve the pleasure of shopping and to enjoy performance art	10,65,117,118,139,180	Key stakeholders	
S4.8	Provide training for tourism managers to practically apply local economic development strategies to benefit micro businesses and social enterprises in their communities	33,40,63,147,158,172,1 95	CNSWT & key stakeholders	
S4.9	Audit event facilities and identify business event needs for high quality venues	1,100,143	CNSWT	
S4.10	Maximise use of council sporting facilities by encouraging both leisure and business event use. S4.10.1 Produce a comprehensive facility register S4.10.2 Establish case studies to use for demonstration S4.10.3 Prepare a digital facility/service guide with examples of use by business events S4.10.4 Distribution information kit to sport event organisers, regional and peak bodies	9,18,20, 21	CNSWT & key stakeholders	
S4.11	Local Government to streamline DA applications for events which responsibly seek to change existing permits e.g. Al Fresco dinning to further support the change in social behaviour during events)	32,38,42	CNSWT & key stakeholders	

Strategies		Observations, opportunities and analysis	Partners	Status
S4.12	Work with the regional arts groups to encourage communities to produce materials as souvenirs which reflect the character of the community and its history	34	CNSWT & major stakeholders	
S4.13	Build awareness of the heritage assets S4.13.1 Conduct road show to build tourism providers awareness of tourism product and heritage. S 4.13.2 Produce digital resource with oral histories, picture library, place on the web for long-term access	8,72,145,205	CNSWT & key stakeholders	
S4.14	Monitor development plans to ensure they don't encroach on in popular tourism precincts	48,104,105,145	Key stakeholders	

Strategic Priority 5: **Increase visitor spend and grow local economic benefits**

Increasing visitor expenditure is a key component to achieving the overnight expenditure target by 2020, but it must also have direct benefits to the local community.

Best practice regional destinations:

- channel visitor expenditure to locally owned business which in turn are encouraged to buy local
- target visitor preference to spend on retail shopping, food and wine by developing sustainable supply chain management practices
- encourage added value to local production through the value chain delivered by other local businesses
- promote consumption of culturally relevant products and services because they enhance the overall destination experience.

Recommendation

Concentrate on building networks using existing community projects, local innovative businesses and through building the capacity of micro business entrepreneurs.

Table 51: Strategies for increasing spend and growing local economic benefits

Strategies		Observations, opportunities and analysis	Partners	Status
S5.1	Build local food & wine producer linkage; S5.1.1 Create an online registry on 100 Mile Diet producers S5.1.2 Run B2B road show events to tourism providers to encourage greater participation S5.1.3 Increase the number of producers through networks, markets, council lists and agri lists. S5.1.4 Increase the number of producers on the Discovery Trails. S5.1.5 Conduct surveys during festivals/events/Markets to monitor visitor expenditure	35, 6,37,41,43,78,111, 113,114,115,122,146, 169,	CNSWT & Centroc & Key stakeholders & Tourism Providers & Producers	
S5.2	Build local arts linkage; S5.2.1 Encourage tourism providers to support local art and crafts though displays in their own business. S5.2.2 Encourage the distribution of information to encourage visitors to buy souvenirs, visit galleries and craft shops. S5.2.3 Create a register of micro businesses which provide services to tourism providers or visitors, communicated in regular e-newsletters	80,122,158	CNSWT & Centroc	
S5.3	Target weddings; S5.3.1 Audit the wedding venues S5.3.2 Develop a weddings website with comprehensive wedding planning information, local suppliers and link to accommodation, tours, cellar doors, local performers, florists etc. S5.3.3 Showcase weddings on CNSWT website and optimise for search S5.3.4 Attend wedding shows and local PR for VFR segment	44,46,66,67111,113, 146,163	CNSWT & key stakeholders	
S5.4	Prepare a plan and conduct workshops to encourage tourism providers to develop experiences which can be 'added' to conferences/school sporting fixtures research	97,99,172	CNSWT	
S5.5	Monitor, refine and expand the Discovery Tours and the primary method to channel visitors to purchasing opportunities. Increase the number of Pledge Partners food & wine producers to increase the number of visitors who follow the trails	41, 42.58,63,87,113, 172,198	CNSWT & key stakeholders	
S5.6	Facilitate linkage between Wiradjuri art and craft producers and tourism providers to encourage promotion and visitor purchase	57,70,85,122,131	NCSWT & community groups	
S5.7	Conduct a regular survey to update producers listing, product range, distribution method and new product information (communicated in regular e-newsletters)	78,97,114, 115,119,	CNSWT	
S5.8	Develop a community tool kit with retailers and F&B to encourage day visitor to spend more with local providers. Consider special shopping days, street activities, promotions, sampling and strategic partner support	32,38,61,85,138,139, 180	CNSWT & key stakeholders	
S5.9	Run capacity building workshops in collaboration with state development agencies targeting micro enterprise to stimulate economic linkages to tourism	56,58,59,63,195	CNSWT & DNSWT & Centroc	
S5.10	Training on digital marketing including travel apps which guide visitors to purchase opportunities of local produce, arts, crafts and services using maps and visitor reviews. Updates of extended shopping opening hours	9,83,179, 180,207	CNSWT & key stakeholders & tourism providers & special interest groups	

Strategic Priority 6: **Raise destination awareness and appeal**

Provide ongoing brand awareness and destination education campaigns which clearly identify Central NSW's USP in a motivating and distinctive manner.

Best practice regional destinations:

- Recognise that destination appeal is essential to building visitation]
- Generate their brand personality through the destination's unique attributes
- Research and asses visitor aspirations to target campaigns
- Responsibly market the destination
- Promote the original cultural qualities of the destination

Recommendation

Work to address the awareness issues both in the destination and through an integrated media approach

Table 52: Strategies for raising destination awareness and appeal

Strategies		Observations, opportunities and analysis	Partners	Status
S 6.1	Build appeal and relevance; S6.1.1 Design a brand identity and design management application manual (who we are, what we do , how we do it) S6.1.2 Apply consistently by all key stakeholders and supply a brand design manual	2, 25, 36, 62, 98, 160,189,197,203	CNSWT	
S6.2	Use the National Trust as an endorsement of the region's outstanding range of cultural heritage attractions S6.2.1 Audit the cultural heritage assets to select lead attractions S6.2.2 Present them as lead in attraction on website, brochures. S6.2.3 Produce a travel app for culture tourists which links attractions and links with food & wine, arts & crafts. S6.2.4 Work with National Trust and special interest groups to include online donation and conservation support programmes to help sustain tourism attractionsS6.2.5 Conduct tourism provider training on attractions	8,39,42,48,49, 51, 71,72, 87,95,172,197	CNSWT & major stakeholders & Special interest groups	

Strategies		Observations, opportunities and analysis	Partners	Status
S6.3	Build a comprehensive picture library and video footage which clearly emphasises the destinations unique qualities	39,46,71,164	CNSWT, key stakeholders & major stakeholders	
S6.4	Produce a PR kit with brand stories (activities, food & wine, accommodation, arts and crafts) and facts and information	37,42,164,194,195,197, 203,210	CNSWT & key stakeholders	
S6.5	Feasibility to target New Australians in Sydney and emphases the historic values of the region. Investigate the opportunities of utilising formal migrant social groups and foreign language radio. Consider community readiness	3, 4,49,71,98,197,200	CNSWT	
S6.6	Present the business case for investing in a destination brand building programme ad its fit to Evocities, attracting investment and retaining skilled labour, to key stakeholder councils to establish a long-term commitment to above-the-line advertising to the Sydney surrounds region	1,25,29,34,37,71,203	CNSWT & key stakeholders & Centroc	
S6.7	Focus branding on festivals, exhibitions and the unique cultural heritage attractions that emphasis the destination's USP to make Central NSW distinctive and appealing. It is essential that the unique qualities of Central NSW's towns and villages are clearly emphasised	2,3744,62 ,98,157,162,164,	Key stakeholders	
S6.8	Establish long-term strategic value added partnership with NRMA to promote the regions USP through editorial content promoting high quality examples of the regions attractions	3,24,72,177	CNSWT & major stakeholders	
S6.9	As part of the education tourism taskforce's activities, produce promotional materials which are given to visiting education groups (via participating members of the taskforce) to take home and encourage a family return trip	49, 50,51,197	CNSWT & major stakeholders & tourism providers	
S6.10	Create a design display system so that all VICs follow the same consistent information presentation to aid visitors in identifying the breadth of 'what to do'	25,161	Key stakeholders	
S6.11	The airline strategic partner is a promotional channel to be maximised via inflight materials, online booking data and loyalty club	77,82,83,164	CNSWT	
S6.12	Install large regional entry signs attractively presented and themed to emphasise that visitors are arriving to Central NSW. This is particularly important on the Newell and Great Western highways	25,27161	CNSWT	
S6.13	Systematically install town and village 'Welcome' signs and 'Information Boards'	25,27,161,197	CNSWT & key stakeholders	
S6.14	Attract film/TV production by producing an information brochure with library shots, locations and facilities and target advertising and television production houses. Successful imagery should be used on the CNSWT website and in PR	1,160,197	CNSWT	

Strategic Priority 7: **Increase overnight visitation**

Build cooperative marketing communication strategies which integrate tourism providers and key stakeholders with targeted campaigns that promote the quality of the visitor experience.

Best practice regional destinations:

- focuson priority source markets and market segments
- recognise the value of digital and cooperative marketing, and
- build trust with tourism providers to create successful cooperative marketing campaigns.

Recommendation

Understand the marketing needs, collaborate with tourism providers to convey a consistent message targeted at priority segments

Table 53: Strategies for increasing overnight visitation

Strategies		Observations, opportunities and analysis	Partners	Status
S 7.1	Develop promotional plans to promote shoulder periods (March, May and August, November) including targeting Newell Hwy Wanderers. Explore promotional opportunities with CCIA	29,30,63,82,83,106,151,179,208, 213	CNSWT & key stakeholders	
S7.2	Coordinate Events Marketing Group to implement campaigns targeting the Business events (midweek)	42,82 83,98,101	CNSWT & key stakeholders	
S7.3	Increase VFR marketing through 100,000 Hand network and local PR to encourage residents to invite visitors	7,48,52,123,162,211	Centroc	
S7.4	Approach a specialist private tour operator to create packages targeting high net worth visitors	13,96,111,146,	CNSWT	
S7.5	Digital Marketing (online booking/Trip advisor destinations)	9, 83,84,107,206,208	CNSWT	
S7.6	Develop a coordinated sports tourism strategy to target regional events	17, 18, 20, 21,22,23,112,186	CNSWT	
S7.7	Sports events targeting high net worth spends	25,42,47,211	CNSWT & key stakeholders	

Strategies		Observations, opportunities and analysis	Partners	Status
S7.8	Conduct accommodation occupancy level automated monthly survey. Incentivise participation.	84,106,148,163	Key stakeholders & tourism providers	
S7.9	Prepare a promotional strategy and media plan to target Canberra and Regional NSW residents specifically	5, 6, 37, 39, 41, 42, 47, 49, 52, 74, 76, 89, 90, 151,156,179, 197, 213	CNSWT	
S7.10	Create Trip Advisor pages for the key assets and sub destination regions and monitor consumer feedback and link to Strategic priority 4 'Improving Visitor Experience'	9, 84, 208	CNSWT	
S7.11	Research School syllabus and facilitate tourism providers to cater for field trips to achieve regional 'life-long' visitation	50,152	CNSWT & Centroc	
S7.12	Lever motor racing heritage with specialty events through tourism provider e-newsletter, PR and social media	8, 19,101,151	Key stakeholders	
S7.13	Develop 'festival packages' which best highlight Central NSW's USP and work with strategic partners to showcase the region e.g. with an airline	26,28,101,123,179	Key stakeholders	
S7.14	Establish strategic alliance with the Hunter Valley and Blue Mts. to grow China market and specific experiences which attract high net worth travellers	11,47,179	CNSWT	
S7.15	Review government report on Accessible Tourism and promote accessible tourism providers through the online booking facility, VIC and Discovery Tours	23,76,87, 91,92	CNSWT	
S7.16	Encourage Regional NSW visitors to book overnight stay with special shopping and large scale festivals and major sporting events	10,21,42,45,139, 141, 142,151,157,179	CNSWT & key stakeholders & tourism providers	
S7.17	As part of expanding the conference & events & weddings sector, produce a dedicated website which lists venues, table planning, venue facilities and links to local suppliers	42, 64,66,76,111	CNSWT	
S7.18	Encourage the target of high net worth visitors by promoting packaged personalised experiences at boutique tourism providers	12, 14,47,142	CNSWT & DSNW Tourism providers	
S7.19	Develop a cooperative accommodation referral system to maximise bookings	44, 107,140,179	Key stakeholders & tourism providers	
S7.20	Develop strategic partnership with National Trust and tour operator to utilise their membership base for visitor promotions.	85,197	CNSWT	
S7.21	Plan international student growth plan with Charles Sturt University	16,94,152	CNSWT & Centroc & major stakeholders	

14 CNSWT resources

Human resources

Central NSW Tourism employs one full-time executive officer.

Key stakeholders (members of CNSWT) employ a tourism manager/local economic development manager.

The DMP action plan will use these resources and coordinate with local government departments, tourism providers, special interest groups and major stakeholders to partner in special projects to implement the plan.

Financial resources

CNSWT has two sources of income: i) membership fees as shown in the table below and ii) a 10% administration fee charged on demand funding applications.

Table 54: CNSWT sources of income

Council member	Membership fees 2010/2011	Population	Invoiced fee
Bathurst	$11,422	39,915	$20,000
Blayney	$2,331	7,259	$5,000
Cabonne	$3,695	13,351	$10,000
Cowra	$3,703	12,957	$10,000
Forbes	$3,314	9,748	$5,000
Lachlan	$2,561	6,844	$5,000
Mid Western	$6,607	22,860	$15,000
Orange	$12,607	39,329	$20,000
Parkes	$5,422	15,192	$10,000
Weddin	$1,735	3,780	$1,500
Wellington	$3,046	8,875	$5,000
Total membership	$56,443	180,110	$106,500

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Central NSW Tourism

Destination Management Plan Appendices

June 2013

Prepared by: Christopher Warren, Director International Centre
for Responsible Tourism – Australia.

Appendix 1: Sustainability indicators

Sustainable Destination Management Indicators

CNSWT recognises that Central NSW's competitiveness as a destination is linked to its sustainability to provide high quality food and wine produce, to offer a pristine natural environment, to contribute to a prospering community and to conserve heritage assets that attract visitors and contribute to the community's sense of place.

The sustainable tourism includes community involvement, its economic value to the community and level of employment. It also includes the quality of the attractions, visitor satisfaction, infrastructure, travel and transport, and the effective use of use of resources. CNSWT acknowledges that tourism providers must act responsibly to utilise resources mindfully and play their part in developing the visitor economy to benefit the community. This can be achieved by reducing negative environmental impacts through energy efficiency, advanced water conservation and reducing waste. They can also maximise the benefit of tourism's economic inflow by linking to community special interest groups, micro enterprises, purchasing local produce, promoting local arts and crafts and supporting social enterprises. This approach supports the clean green and high quality strategy identified by both the Federal Government and the Visitor Economy Taskforce.

The VET report recommended the use of "indicators to measure the progress" (Anon., n.d.). CNSWT has implemented a research monitoring system to review the destination's sustainability. Four areas were selected for review based on the European Commission's Sustainable Destinations Indicator System (2013) and adapted to meet specific local needs and cover:

- destination management
- economic
- social
- environmental .

The findings set out below provide information on Central NSW's sustainability and guides future Destination Management Planning. Each indictor is summarised. The research result is presented in red and the reason for measuring the indicator is outlined. The findings have been incorporated into the Destination Management Plan (2013) for CNSWT and have been related to the Action Plan.

Sustainable Destinations Indicator System

Warren, C. (2013) adapted from the European Commission: Sustainable Tourism Indicator System (2013)

	Category		Indicator	Performance	Reasons for measuring
Destination Management	1 Sustainable Tourism Policy 1.1	**1.1**	**Local council's request for community involvement in the future planning and development of tourism** *(other than DA applications)*	**90% include tourism in their community planning which has had community consultation**	Consultation is vital to sustainable tourism. This indicator seeks to understand if interested residents are engaged with tourism planning, and if so, if they are satisfied with their involvement and influence.
		1.2	**Percentage of CNSWT LGA destinations with tourism boards which represent all local communities (city, towns, villages)**	**23% of destination have tourism boards which represent local city/towns/villages within LGA**	Ensuring communities are represented is crucial to sustainability. This indicator measures the extent to which they are included.
		1.3	**Level of CNSWT LGA destinations with Active strategic partnership**	**2 with Strong and 2 with Moderate partnership programmes, 5 with no partnership programmes**	Working with other partners in the region helps to create shared visions, share costs and promote local events, festivals and attractions
	2.Sustainable Tourism Enterprise Management	**2.1**	**Percentage of tourism enterprises/establishments using certification scheme**	**38% have certification**	Certification is an indication of industry interest and implementation of sustainable business practices. Some certification scheme achieve a TQUAL accreditation and access to grant funds
	3. Customer Satisfaction	3.1	**Percentage of visitors that are satisfied with their overall experience in the destination**	**"Overall I am satisfied with my visit": 55% Strongly Agree, 44%**	The quality of the visitor experience affects the ability of the destination to generate economic

				Agree and 1% Neutral	benefits. This indicator investigates visitor satisfaction.
		3.2	**Percentage of repeat/return visitors (within 5 years)**	**30% returned within five years**	Visitors who return and become loyal, repeat visitors are often more economically beneficial to the destination.
	4. Information and Communication	4.1	**Percentage of visitors aware of sustainability efforts for bushfire and water management**	**73% aware of information about safety and bush fire and mindful use of fresh water**	Public awareness of the threat of fires and the mindful use of water is important
		4.2	**Percentage of tourism enterprises which have a bush fire survival plan**	**53% have a risk management plan**	Information to guide visitors on taking responsible action is critical
Economic	5. Tourism Flow	5.1	**Number of tourist nights per month**	**Spring and Autumn are peak periods** **Central Region av. 159,333 per month** **NVS/IVS** **115,500 in four CNSWT lgas: Bathurst, Forbes,OBC, Parkers**	The number of tourist nights is a primary indicator of tourism volume in the destination. This indicator measures average volume per month throughout the year, revealing seasonal patterns in the destination.
		5.2	**Relative contribution of tourism to the destination's economy (% GDP)**	**2.7% (Centroc) 3.9% (Regional NSW)** **AEC Group 2011**	This measure shows how important tourism is to a destination. A high percentage may suggest economic vulnerability due to over reliance on tourism.
		5.3	**Number of 'same day' visitors in high season and low season**	**33% day visitors(sample was collected from visitor information centres)**	Comparing day and overnight visitors is important. While overnight visitors have a higher trip

				Central Region av.219,166 average monthly NVS. Indicates 37% more day visitor (sample by telephone interviews)	spend, day visitors are often important for retailers.
		5.4	**Daily spending per same day visitor**	**$ 77.51 Visitors Survey** **$126 NVS**	To better understand the spending patterns and economic impact of day visitors and compare these patterns over time with overnight visitors
		5.5	**Daily spending per tourist (overnight): accommodation, food and drinks, other services**	**$ 143.06 Visitor Survey** **$139 NVS**	Monitoring tourist spending is a good way of showing the direct economic impact of tourism to the destination.
		5.6	**Primary motivation for holiday**	**Visitor Survey: 39% Exploring NSW, 25% Passing Through, 20% VFR, 20% Relaxation, 13% Family Holiday, 10% with friends** **NVS data: 31% True Travellers (seeking real experience), 24% Wanderers (exploring), 20% Compatriots(families) 14% Pampadours (seeking luxury), 20% Compatriots (families), 7% Peer Group (friends), 4% others**	Monitoring the type of holiday tourists seek enables better marketing and development of packages which deliver wider economic benefits to the community
	6. Tourism Enterprise(s) Performance	6.1	**Average length of stay of tourists (nights)**	Visitor Survey 2.56	The economic value of tourism multiplies as the length of visitor stay increases. Monitoring average

					length of stay is an important pulse on enterprise and destination performance.
		6.2	**Percentage of CNSWT's LGAs actively involved in cooperative marketing activities with tourism enterprises**	**66% of the destination's LGA Tourism Managers are actively involved in marketing activities with tourism enterprise**	The indicator measures to what extent LGAs are seeking to collaborate with tourism enterprises.
		6.3	**Percentage of tourism enterprises activity involved in the cooperative marketing activities with LGAs**	**Estimated at less than 15%**	Working collaboratively is an indication of the level of trust. The indicator measures to what extent tourism businesses are collaborating with LGAs.
		6.4	**Formalised collaborations in cooperative marketing initiatives**	**High proportion of tourism providers collaborating** **88% participate in cooperative marketing activities** **75% are members of community tourist group** **28% share website** **17% are members of a strategic partnership and 17% operate shared booking services**	Working collaboratively is an indication of the level of trust among members of the tourism community and it ensures diverse perspectives are included in sustainable tourism development. The indicator measures to what extent tourism businesses have strategic networking partnerships.
		6.5	**Occupancy rate in commercial accommodation per month and average for the year**	**63% annual average (three LGAs provided figures) May, June, July, August, September appear to have higher occupancy at 68%**	Occupancy rates measure the efficiency of accommodation stock utilisation. A sustainable destination fills up its rooms year-round.
		6.6	**Average price per room in the destination**	**$100.4 for seven LGAs, four do not measure**	Price per room is important because it reflects the revenue the

				$124.1 from Enterprise Survey	destination gains from accommodation. When combined with occupancy rates it reflects the revenue potential of the destination.
	7. Quality and Quantity of Employment	7.1	**Direct tourism employment as percentage of total employment**	**7% (AEC Group 2011)**	To understand the role of tourism in job creation and the sector's relative value in terms of employment generation.
		7.2	**Percentage of jobs in tourism that are seasonal**	**38% are seasonal jobs**	A true measure of tourism's employment generation and value needs to consider the seasonal variation in employment.
		7.3	**Percentage of tourism enterprises providing high school/university student internships**	**8% provide internships**	The skill level of tourism employees is indicative of the quality of the employment. This indicator helps assess the how many local tourism enterprises are helping to train the next generation of travel and tourism professionals.
	8. Health & Safety	8.1	**Percentage of tourism enterprises inspected for food hygiene safety**	**n/a**	Public safety is a key component of destination management and business standards. Food hygiene safety represents a risk to visitors

		8.2	**Percentage of tourism enterprises inspected for fire safety in the last year**	**55% have been inspected for fire safety in past year**	Keeping track of which properties have been inspected improves inter-departmental co-ordination and helps ensure an enterprise does not consistently avoid inspection
	9. Supply Chain	9.1	**Percentage of tourism aware of the 100 Mile Diet programme**	**41% familiar with 100 Mile Diet programme**	The 100 Mile Diet is an important Centroc initiative. The level of tourism enterprises' awareness can be compared with level of action
		9.2	**Percentage of CNSWT's LGAs that have a written tourism policy promoting local food and wine**	**33% have a policy to promote local food and wine 66% do not 22% have a policy to actively encourage tourism providers to buy local produce and service 78% do not**	Implementing a policy to promote responsible purchasing helps to leverage the purchasing power of the destination to provide a greater amount of local, sustainable, and fair trade products and services.
		9.3	**Percentage of tourism enterprises that have a policy to prioritise local products and services purchases**	**75% purchase more than half their goods and services locally within their LGA**	Implementing a policy to purchase local products and services increases the economic value of tourism.
		9.4	**Percentage of tourism enterprises sourcing a minimum of 25% of food and drink from local/regional producers**	**69% purchase 25% or more of their food and drink locally**	Sourcing local products increases the economic value of tourism. Tracking this figure will help Central NSW Tourism explore ways to increase the connection between tourism and local agriculture.

Social & Cultural	10. Community and Social Impacts	10.1	**Number of tourists/visitors per 100 residents per LGA**	1654 visitors to every 100 residents	The density of tourists/visitors in comparison to residents offers a suitable indicator for understanding the social impact of tourism on residents. This is referred to as the 'saturation ratio'.
		10.2	**Percentage of tourism accommodation with rooms accessible to people with disabilities**	0% accommodation providers have an adapted room for visitors with disabilities or limited mobility	It is important for a destination to be able to accommodate people with disabilities. This measurement will help raise awareness of the accessibility of the destination. Where the percentage is very low, it may also draw the attention of hoteliers who identify a market opportunity as 1 in 10 Australia adults have a recorded physical disability and the aging population suggests that inclusive services is important
		10.3	**Percentage of attractions that are accessible to people with physical disabilities**	46% have Australian Standards wheelchair accessibility and accessible bathroom/toilet facilities	CNSWT needs to ensure that people with disabilities have access to attractions
		10.4	**Percentage that participate in a recognised accessibility scheme**	14% of total sample	Participation in an accessibility scheme indicates level of recognition that this is a potential market segment to target

		10.5	**Percentage of visitors satisfied with the accessibility of the destination for those with disabilities or specific access requirements**	**37% Strongly Agree, 58% Agree and 5% Neutral**	Monitoring visitor satisfaction with accessibility helps planners know whether they are meeting visitor needs.
	11. Protecting and enhancing cultural heritage, local distinctiveness and assets	11.1	**Percentage of CNSWTs LGAs that have a current heritage survey that covers all communities, towns in the council area**	**55% of councils have a recent heritage survey, 44% do not. Low intangible content**	The cultural heritage of a destination is very important to conserve so that it enriches the tourist experience. Having a current survey and using it in policy planning to identify, protect and enhance the built (tangible) and other expressions cultural heritage e.g. music, (intangible) is vital to the sense of place and resident pride. This information can be used to create better tourism activities or market the destination. Measuring this clearly identifies any shortfall.
		11.2	**Percentage of CSWT's LGA's biggest events that are focused on traditional/local culture and assets**	**Only 32% of the biggest local events are focused on traditional or local culture and assets** **90% of Key Stakeholders see scope for building events. 6 opportunities were identified with local cultural content and 9 no local cultural content.**	Holding events focused on local culture can be an effective means of increasing pride.
		11.3	**Percentage of CNSWT's LGAs which have an Aboriginal Tourism Plan**	**No Aboriginal Tourism Plans and No Wiradjuri community**	Identifying the scale of Aboriginal tourism planning helps to identify

			which the Wiradjuri community can participate	participation	gaps and opportunities
		11.4	Percentage of tourists who seek cultural heritage, festivals, food & wine experiences	51% local iconic attraction (natural, built or historic) 33% heritage building 29% quaint villages 25% food & wine 11% bush walking 5% festival or event 3.5% bird spotting 1% Wiradjuri culture	Identifying the type of leisure pursuit assists in marketing planning
Environmental Impact	12. Reducing Transport Impact	12.1	Percentage of tourists and same day visitors using different modes of transport to arrive at the destination (public/private and type)	Visitor Survey: 80% private car 23% caravan/van/truck 5% car hire 3.5% aeroplane 2% motorbike 1% bus NVS: 88% private car 3.7% aeroplane 2.4% bus/coach 2.1 railway 1.3 rental car	Tracking the mode of transport used by visitors helps flag the need to increase the availability of sustainable transport options.

		12.2	**Percentage of visitors using public transport, bicycles, walking to get around the CNSWT LGAs**	**98% car, bus, taxi** **31% walking** **2% bicycle** **1.5% local public transport**	Tracking the use of traffic reducing, environmentally-friendly (soft mobility) transport options can help to inform local transportation policies.
		12.3	**Source markets for tourists**	**64% NSW, 10% OLD, 9% Vic, 5% S.A., 5% W.A., 2% ACT, 0.5% N.T., 3.5% international, 2% not stated**	It is important to know where the destination's visitors originated to enable better targeting of marketing and to be aware of the average travel distance by tourists
	13. Climate Change	13.1	**Percentage of the CNSWT LGAs in extreme weather event prone area (flood, drought, fire)**	**33% confimed high extreme weather prone, 22% moderate and 44% unaware of level**	This indicator is designed to raise awareness of climate-related vulnerability.
		13.2	**Percentage of the CNSWT LGAs that have included tourism in climate change adaptation strategy or planning**	**None**	Including the whole destination in climate change initiatives is important. This indicator monitors how much is missed in order to encourage inclusion.
		13.3	**Percentage of tourism enterprises which have an extreme weather event risk management plan**	**53% do have a risk management plan for droughts, bush fires, floods**	This indicates the level of preparedness of tourism enterprises
		13.4	**Percentage of tourism enterprises which have a business continuity plan**	**65% do not have a continuity plan**	This indicates the level of resilience of tourism enterprises
		13.5	**Percentage of tourism enterprises who have implemented a climate change scheme to reduce their footprint: solar panels, rain water harvesting, insulation, wind power**	**30% are involved in a climate change mitigation or adaptation action(s)**	Business engagement in mitigation activities is a sign or increased awareness and success of DMO incentives.

	14. Waste Management	14.1	**Percentage of tourism enterprises that offer tourists recycle waste bins**	**73% offer recycling bins**	Reducing the cost of landfill to councils is important. Keeping track of private sector engagement shows the effectiveness of awareness initiatives and the need for incentives in this area.
	15. Water Management	15.1	**Percentage of tourism enterprises with low-flow shower heads and taps and/or dual flush toilets/waterless urinals**	**85% participate in water saving actions**	Tracking tourism enterprise engagement in water conservation activities helps gauge the success of water conservation initiatives that will result in saving money for enterprises.
		15.2	**Percentage of tourism enterprises harvesting/dependent on mains supply their own rainwater**	**55% of operators harvest rainwater, 52% of these enterprises are dependent on rain water**	Using rainwater indicates dependency on climate and level of exposure
	16. Energy Usage	16.1	**Percentage of tourism enterprises that have switched to low-energy lighting**	**72% have switched to low-energy lighting**	Tracking tourism enterprise engagement in saving energy like using low energy lighting helps gauge the success of energy-saving programs and initiatives.
		16.2	**Percentage of Green Energy purchased as an annual share of total electricity purchased**	**10% purchase green energy. Green energy amount varies from 100% - 10% of their total electricity consumption**	This indicator tracks the destination's progress in converting to renewable sources of energy.

	17. Landscape and Biodiversity	17.1	**Percentage of tourism enterprises which have a policy to select organic agricultural options**	35% actively select organic options	Tourists consume food and wine making an impact of agricultural resources, by providing organic choices tourist enterprises help to reduce impacts on biodiversity
		17.2	**Percentage of tourism food and wine producers which employ certified organic methods**	23% follow certified organic methods or supplies	This indication shows the level of progress to more sustainable production methods and meeting increasing consumer needs
		17.3	**Percentage of local enterprises in the tourism sector actively supporting protection, conservation, and management of local biodiversity and landscapes.**	32% participate in any kind of conservation, biodiversity management	Tourism enterprises are significant beneficiaries of investment in protected areas, so it is important to track the sector's contribution to conservation.

Warren, C. (2013) adapted from the European Commission Sustainable Tourism Indicator System (2013)

Appendix 2: Consultation with tourism providers

Tourism Providers Consultation workshops: Central NSW Tourism

12th May 2013

Observations, Community Vision for Tourism and Mind Mapping

Consultation facilitated by:
Christopher Warren
International Centre for Responsible Tourism
www.icrtourism.com.au

Introduction

Central NSW Tourism recognises that it is critical to gain tourism provider support in the region's development and marketing initiatives because they are the primary conduit to deliver experience that will help double visitor expenditure by 2020.

Listening to the views and understanding the aspirations of tourism providers is therefore an essential part of the Destination Management Planning process. Central NSW Tourism arranged tourism provider consultation workshops to:

- Identifying tourism provider awareness of their region's attributes
- Encourage them to consider their region's competitive edge and requirements for the future
- Learn the nature of their business aspirations for the future.

Consultation workshops

The International Centre for Responsible Tourism – Australia was commissioned to design and facilitate the workshops.

There were eleven workshops: Mudgee (2), Bathurst (2), Orange (2), Parkes (2) , Cowra (2) and Molong (1).

Over 200 tourism providers and special interest community groups attended the workshops.

The workshops contained: presentation of tourism visitation figures, findings from interviews of tourism professionals (Hearts & Minds), tourism trends and the nature of current visitor attitudes.

The workshops were facilitated by a qualified Cert IV TAE trainer and assessor (Christopher Warren) and involved projective techniques, games and mind mapping exercises.

Working hard during the workshop: example of Orange and Parkes workshops

(Photographs: C. Warren)

Summary of findings

Factors effecting growth in tourism

Risks

Climate Change, lack of water

Loss of oral Aboriginal history

Elvis Festival continues to grow (negative impacts or threat of loss of momentum)

Economic decline (Wellington)

'No balance' between mining and tourism (environmental devastation and miners utilisation of accommodation leads to loss in capacity)

Weak changes

Social: Aging population, skill shortage and dual incomes necessary for farmers and other families. Highway becoming busier

'GFC things are getting financially tighter for everyone'

Loss of staff to Sydney

Environmental issues of the land

Sudden changes

Mining is having a negative impact on tourism both in terms of taking accommodation but also economically and politically

Floods

Resources

Awareness of build heritage, Agriculture and produce, 'The Dish' and natural attractions e.g. caves. Infrastructure: airport and railway. Note that galleries and museums were rarely mentioned. No mention of churches and other community places. Lakes, rivers, dams, caves and wildlife although there was no specifics on wildlife. TAFE and University. No mention of sports tourism or use of sporting facilities.

Trends

Participants held a lack of awareness of consumer trends that were affecting their market e.g. the significance of the VFR market.

Awareness that school children are learning more about Indigenous culture.

Require wider accommodation, visitors like markets and shopping.

Wineries are under financial pressure as sales and visitation drop

More racing at Bathurst, more classic car touring groups.

Competitors

Operators feel they are 'competing with' rather 'cooperating with' other Central NSW destination.

Acceptance that they may compete with the Hunter Valley, the Coast and short breaks in cities e.g. Melbourne for shopping and entertainment.

Observations on individual operators/destinations

Boutique Brewery (Parkes workshop)

The young lady who runs the pub came to the workshop to enjoy a day away from her ‘hands on’ work. Being a small business she doesn’t have the time and energy to develop. Over time her energy levels will drop. Yet by all account the pub is a perfect example of rural hospitality. Currently it only sells standard beer. We discussed the idea of developing a boutique brewery fed by harvested rainwater. The concept revolves around rainwater harvesting, as a qualified agronomist this concept appealed to her. This is a good example of a concept which could evolve but requires partnership with another boutique brewer prepared to expand/develop their base business. The next steps would be to develop a concept plan to approach potential partners who in turn could develop a business plan using their expertise. The concept plan should include a researched trial period where a strategic alliance with existing boutique beers (e.g. Lord Nelson Sydney) could be sold alongside a menu using the pubs vegetable garden and local livestock. Further, the harvested rainwater could be promoted further in the pub, used in guest showers (natural chemical free bathing with local handmade chemical free soap). The pub’s vegetable garden would also be irrigated from harvested water.

The trail period would enable data to be collected to support a business case for investment. TQUAL or other funding could be an option to realise the dream.

Heritage trails Bathurst, Parkes and Cowra

While they have different angles e.g. built heritage, family history and farm history, they could benefit from working as a collective. For example they would benefit from learning about interpretation, new technologies, how to integrate their findings and services for the wide benefit of tourism operators, pricing, promotion and maybe sharing resource costs like a website.

The Dish/CSIRO

A visitor plan needs to be prepared which embraces the big opportunity of education and cultural tourism whilst responsibly respects the scientific nature of the facility. Funding opportunities may be available through TQUAL as they are a Federal body and not able to access state funds. There is scope for immediate involvement with the Wiradjuri people and local tourism operators is also required.

Cowra

A single focused partnership programme is required to build bridges between operators, harmonise destination positioning and build on the Peace Bell and the newly announced grant. The positioning can be adjusted to target different markets e.g. the grey nomads, young families and couples.

The Mill

The unique heritage building could be used further to build the business. Currently the sole focus is on wine/tasting but could be extended into several other income generating opportunities to maximise its central location. The owners have thought of diversifying. A concept and then business plan needs to be swiftly developed.

Mudgee Market Town/Villages

A collective needs to be established so the concept of a Market Town can be grown *organically*. Critically it must involve producers, restaurants, local newspaper, key cultural assets (churches), pubs etc. It is not simply about being able to buy the produce, but during the holiday experience enjoying the hustle and bustle of a market town, sampling (stall holder give you free product to taste) the fun of selecting local produce, eating it is the pub, enjoying fine dining and strolling through the streets (without cars) to learn and reflect on the heritage and culture (Lawson). An experience of all the senses. New products fit into the over arching concept with their **real** story to tell about the producers, recipe, varieties of ingredients. Maybe there is even a bike ride to some of the farm gates. Bike hire is now a growing phenomenon in European cities like Paris and London and always enjoyed in towns like Cambridge.

Wellington

Wellington needs to generate greater economic value from tourism to help the local community. This means linkage. Establish a partnership programme and build on referrals which promotion local heritage food and wine. Promote the alliance through new communications which guide the visitor to attractions from this centrally located base using a theme based on 'discovery' learning about local history and natural heritage.

Central NSW

Establish a Crisis Communication Plan which ensures one voice for the Tourism sector in the event of crisis. Interlink with media plans, online communication and coordination with LGAs and emergency services.

The 'Voice of Tourism' is also required to explain the economic and social benefits of tourism to local communities so that they support participation. This needs to address the perception that Central NSW destinations are competing with each other, rather than "working the market" and encouraging referrals and stimulating longer stays enjoying the breath of the region has to offer.

Conclusion from the discussion and presentations

Operators have a various levels of knowledge of their area with some demonstrating very low levels of awareness.

Whilst there are some strong local opportunities for better focused experiences through and develop new product operators had in many cases either a low capacity to implement or insufficient time/energy. This will ultimately hold back tourism development unless addressed.

Everyone needed to take a closer look at their Local Distinctiveness, their own strengths and weaknesses and reflect on the trends. For these reasons there were limited visions for the future of tourism. However, the majority of participants agreed with negative trends being mining, local skill base and low productivity.

The most successful aspect of the workshops was the strategic partnership section where operators could work with other local businesses to discuss how they might cooperate. It is at this level that CNSWT has its biggest opportunity, to bring disport strands of tourism together, share information and create a common goal which includes greater commercial cooperation.

What do the mind maps tell us?

The mind maps are of course subjective, being created only by workshop participants. While this is perfectly acceptable, further research should be undertaken to build on and refine the mind maps to reflect the depth of Local Distinctiveness. In other words, explore the details about certain attributes that will give you a competitive edge.

In general we can see from the charts that there appears to be strong potential points of difference within the region at each destination to develop new visitor experiences.

The mind maps have been modified slightly:

1 Single lines have been added to identify links. Double links emphasis the strong bonding between sectors.

2 A few additional features have been added to build on a direction e.g. Night Sky at Parkes and the scientific opportunities.

3 Coloured circles have been added to denote clusters that suggest the main thrust of creative development.

In most cases there is more than one circle that groups features. This offers the opportunity of building two or three integrated regional combinations of experiences which hold at least a comparable advantage. To give them a competitive edge (add value over the long term) the experiences must draw on the core destination point of difference e.g. Cowra = peace & tranquillity because of the Peace Bell, Organic food production, Reconciliation. In the case of the Wiradjuri chart there is only one circle because of Aboriginal belief system closely interlinking between nature, time, life and the intertwined oral culture.

Conclusions from the mind maps

Bathurst

Ÿ Bathurst was overwhelmingly felt to stand for heritage, despite a growing food and wine sector. There does appear an opportunity to extend the theme of the built heritage and folklore into concepts which add value to visitor attractions e.g. the pub, villages, churches, not only museums. However, many participants hold a broad knowledge and find if difficult to develop thematic concepts for their own businesses.

Ÿ Bathurst was also identified to have strength in sports. There appears scope for clustering sporting activities and targeting young families, adventure/motor sports competitive field sports and so on.

Ÿ Even if the food and wine sector is growing in importance, it was not top of mind for participants

Villages

Ÿ A mind map was produced for the outlying villages around Bathurst. Participants identified links between their regional heritage (people and their history), the landscape and traditional country activities e.g. the pub, walking and fishing.

Ÿ Hill End was recognised as unique place

- There were participants who were six or even seven generations from the same area. There appears to be a number of established agricultural tourism experiences run by families with important historic ties to the region.

Mudgee

- Participant's talked a lot about combining Mudgee's streetscape, food markets and agricultural strengths which combined, present a comparatively strong "market town" positioning. This was seen as a concept which could be extended to the regional villages. The concept of a 'market town' also included community, safety and variety of social "things to do" in a town/village
- There were examples of restaurants using local produce to inspire special menu items but it was noted that this was rare
- However, participants found it hard to identify local points of difference in the geography, folklore and produce that would help them create theme for their tourism experience
- Participants also pointed out the local planning barriers (street displays and wooden cobbling of the street) which were seen as restrictive in helping build the 'market town' concept.
- Participants were proud of the Mudgee region and its overall values, but were unclear how they might collectively work together to achieve a stronger tourism competitive advantage.
- Surrounding villages and Gulgong were noted for their community values and museums, rather than any top of mind specific heritage values. It was not clearly evident that the participants had a high level of local history knowledge. Many of the tourism providers had moved to the area from Sydney because of its country life values.

Orange

- Interestingly the Orange participants emphasised "people" and their creativity, knowledge and "down to earth" values. These were conveyed more strongly than food and wine values. This is despite wine and food sector presence (the first workshop was held in a vineyard and wineries were present, the second venue was in a restaurant and wineries were present).
- Overall participants took the food and wine regional strengths as already accepted and did not necessarily create a distinctive quality of the area.
- However, some of the accommodation providers recognised that food & wine was a critical part of what attracted visitors to the region.
- The majority of accommodation providers were proud of their tourist network, the cooperative nature of referring bookings and their website's effectiveness to secure bookings (private sector led initiative)

Wellington

- Wellington was seen as having a heritage cluster with historic events and heritage Agri Cultural produce.
- Nature and activity strengths were water, caves and wildlife.
- Seen as geographic cross roads, Wellington was thought to enable visitors to easily visit attractions within a 1 hour radius. Wellington combined wildness, history and traditional foods.

Lachlan catchment

- Parkes was immediately associated with 'The Dish' its attraction of national (and international) significance

- It also had proven local hospitality through the Elvis Festival, and now other communities area were seen to be joining in with their own festivals. These events were seen as positive extensions of their country values.
- Nature and Aboriginal heritage were also recognised as positive features.
- Overall, however, tourism participants did not have a deep knowledge of the history of the region. Instead this was held by special interest participants who did not actively link with tourism providers as a matter of course. Subsequently participants found it difficult to conceptualise a tourism vision
- Participants from the Lachlan Shire and regional areas of Parkes Shire clearly held low expectations and felt at a disadvantage to better known regions of CNSWT

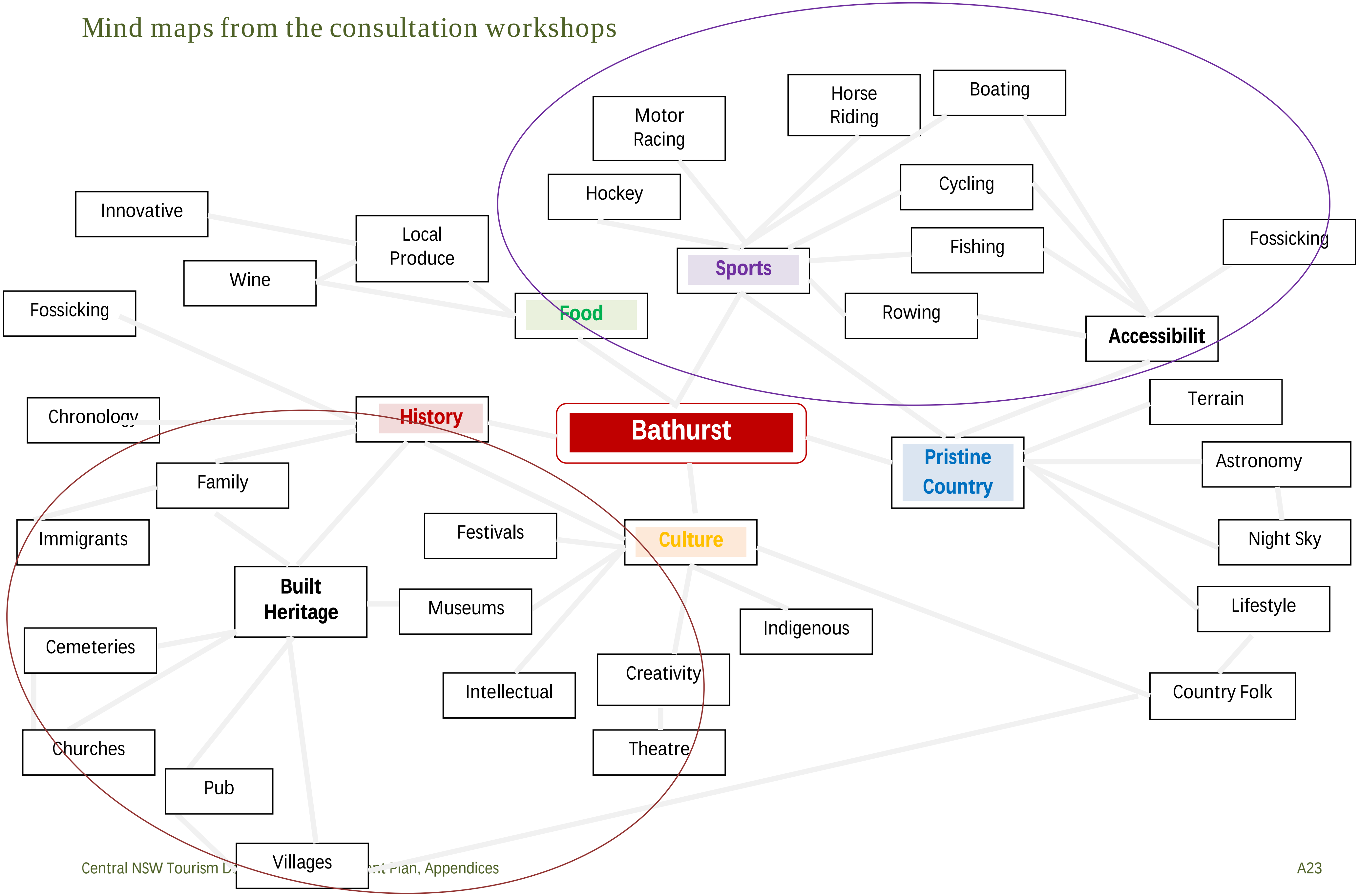
Wiradjuri

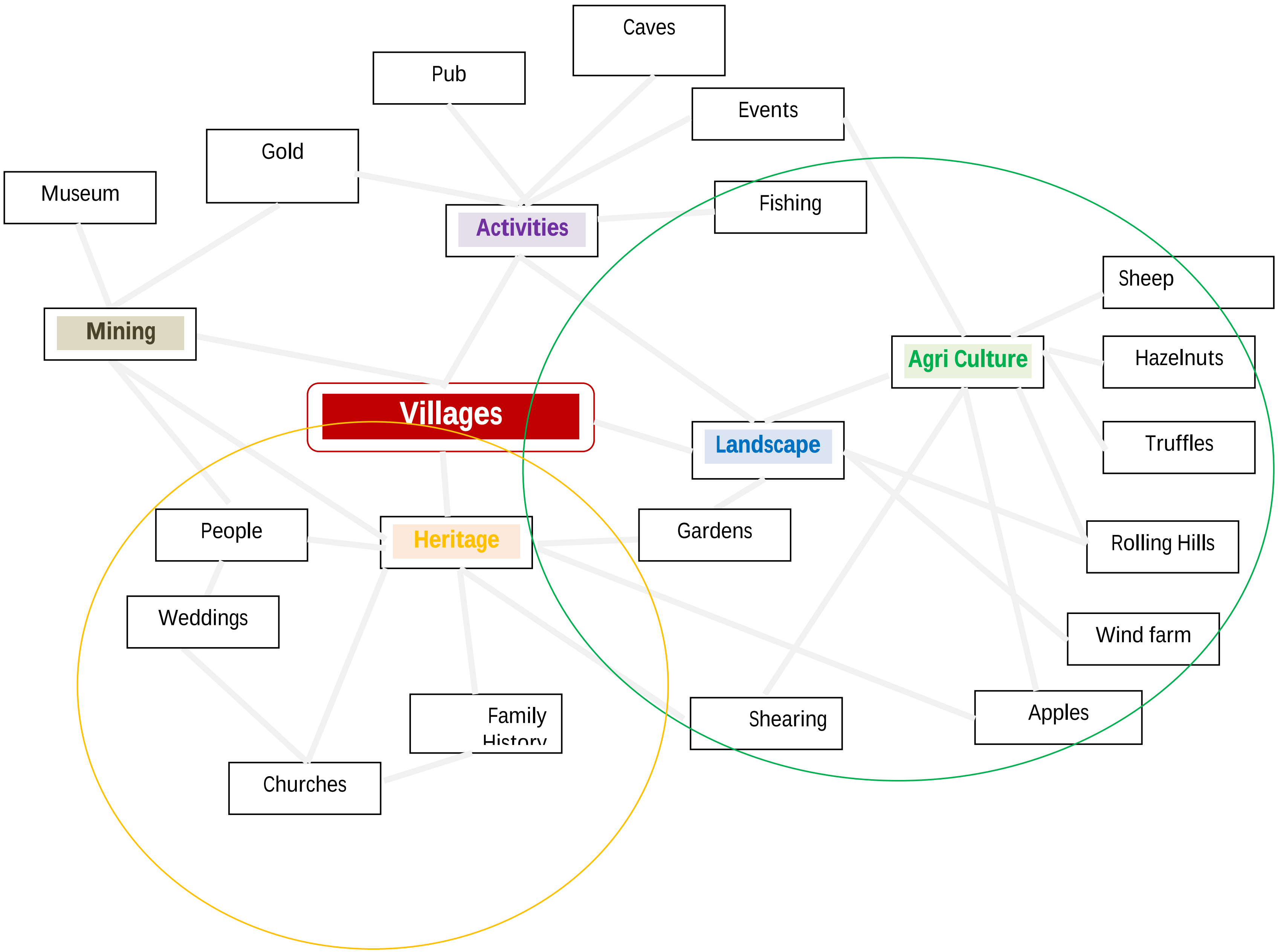
- A Wiradjuri community member developed their own mind map. There was noticeable enthusiasm from the rest of the participants to learn about the Aboriginal Cultural Heritage of the region.
- Every landmark and every star tell a story
- Through the emphasis of reading the night sky and transferring the galaxies and perceived creatures into daytime stories it was flet there was much to tell.

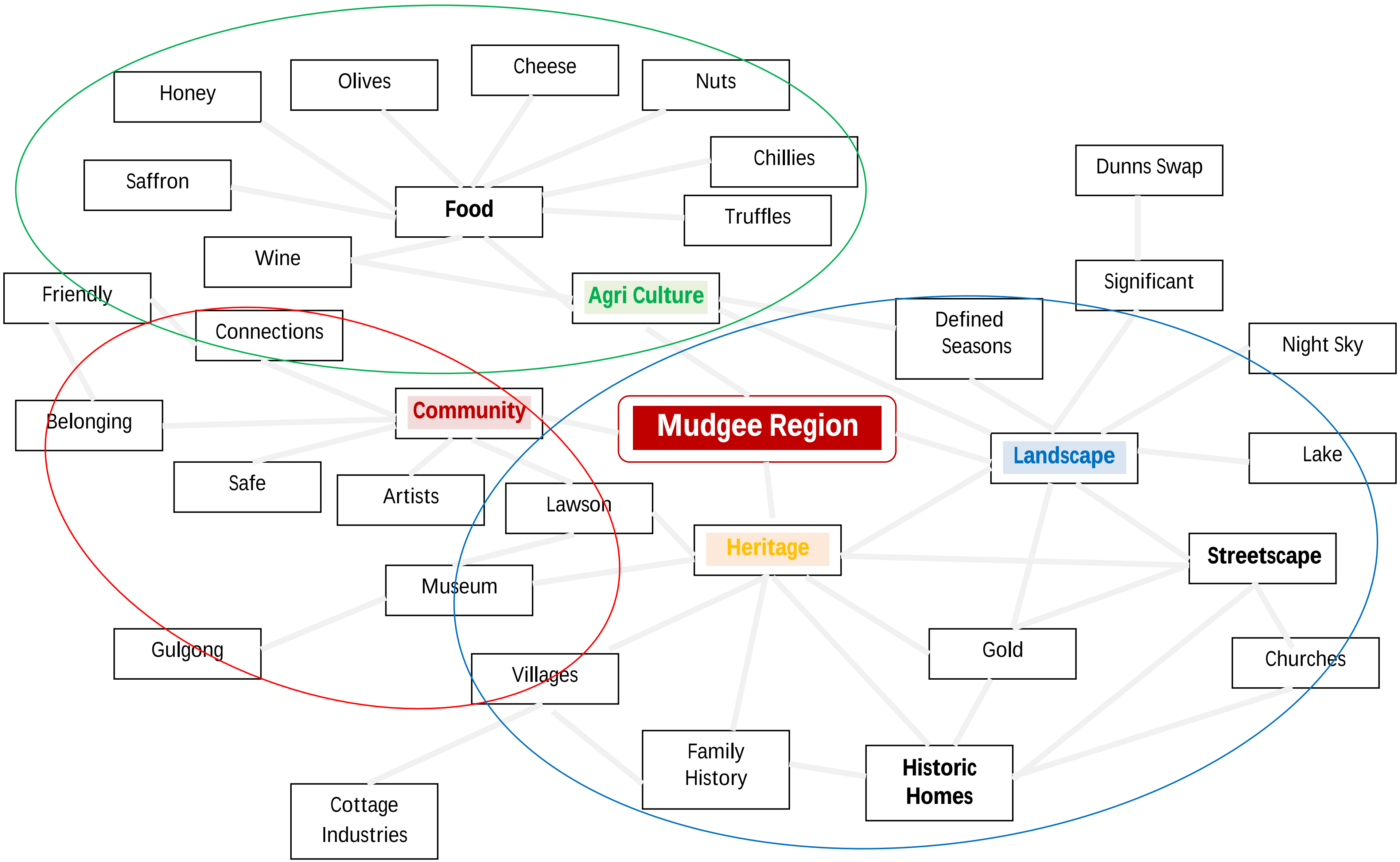
Cowra & region

- Cowra and region were seen to have four distinct qualities: History, People, Artists and Food.
- The History and People sectors were enthusiastically emphasised through the POW Camp and the International Peace Bell. These were felt to be strong competitive points of difference.
- Some of the participants felt much more could be made of the peace values of the district.
- Again special interest groups held a high level of knowledge of the region. However, there is little interaction (outside the workshop) between such sources of information and the general tourism sector. Subsequently tourism providers find it difficult to know how to apply the comparative features of the region into their experience.

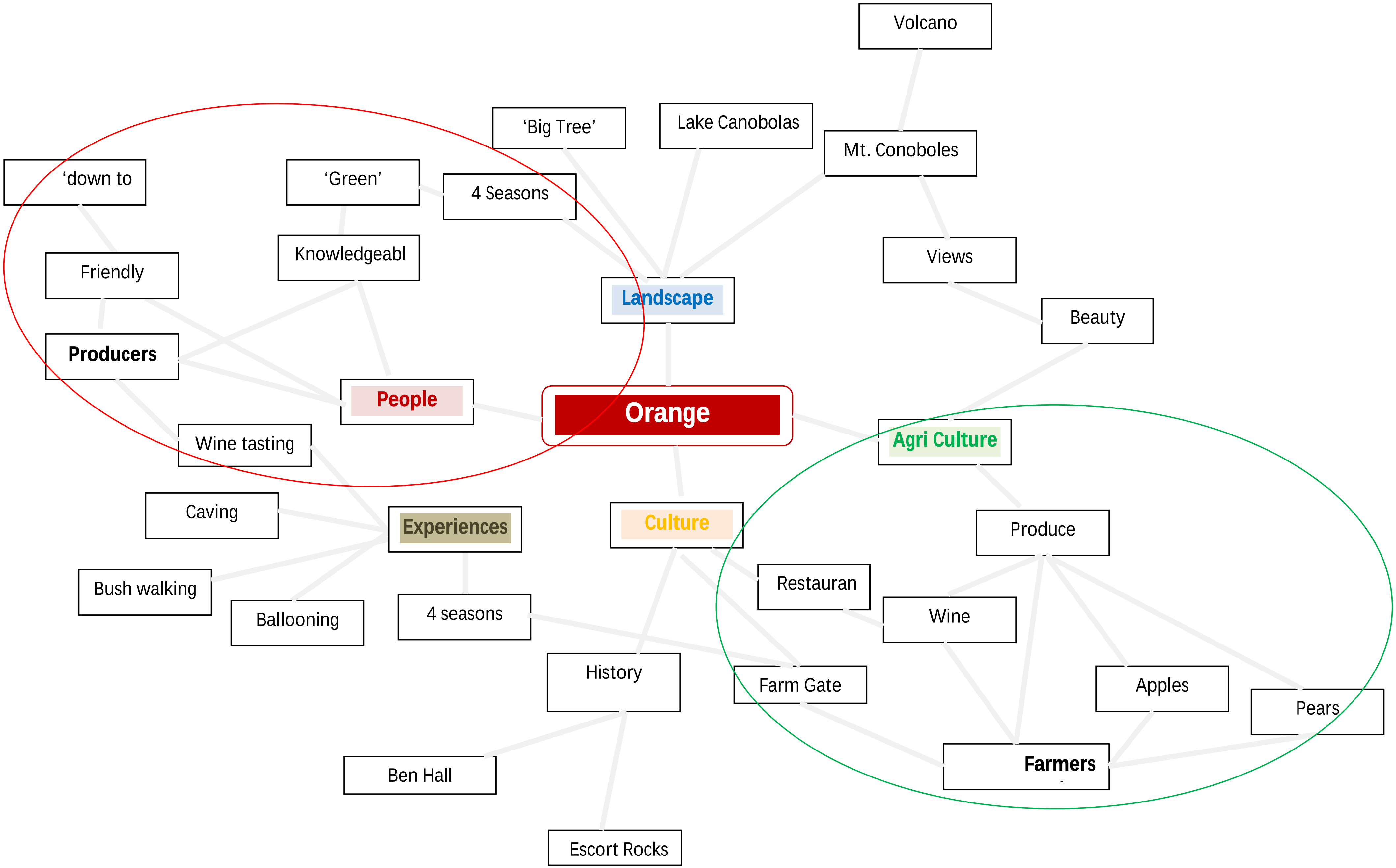
Mind maps from the consultation workshops

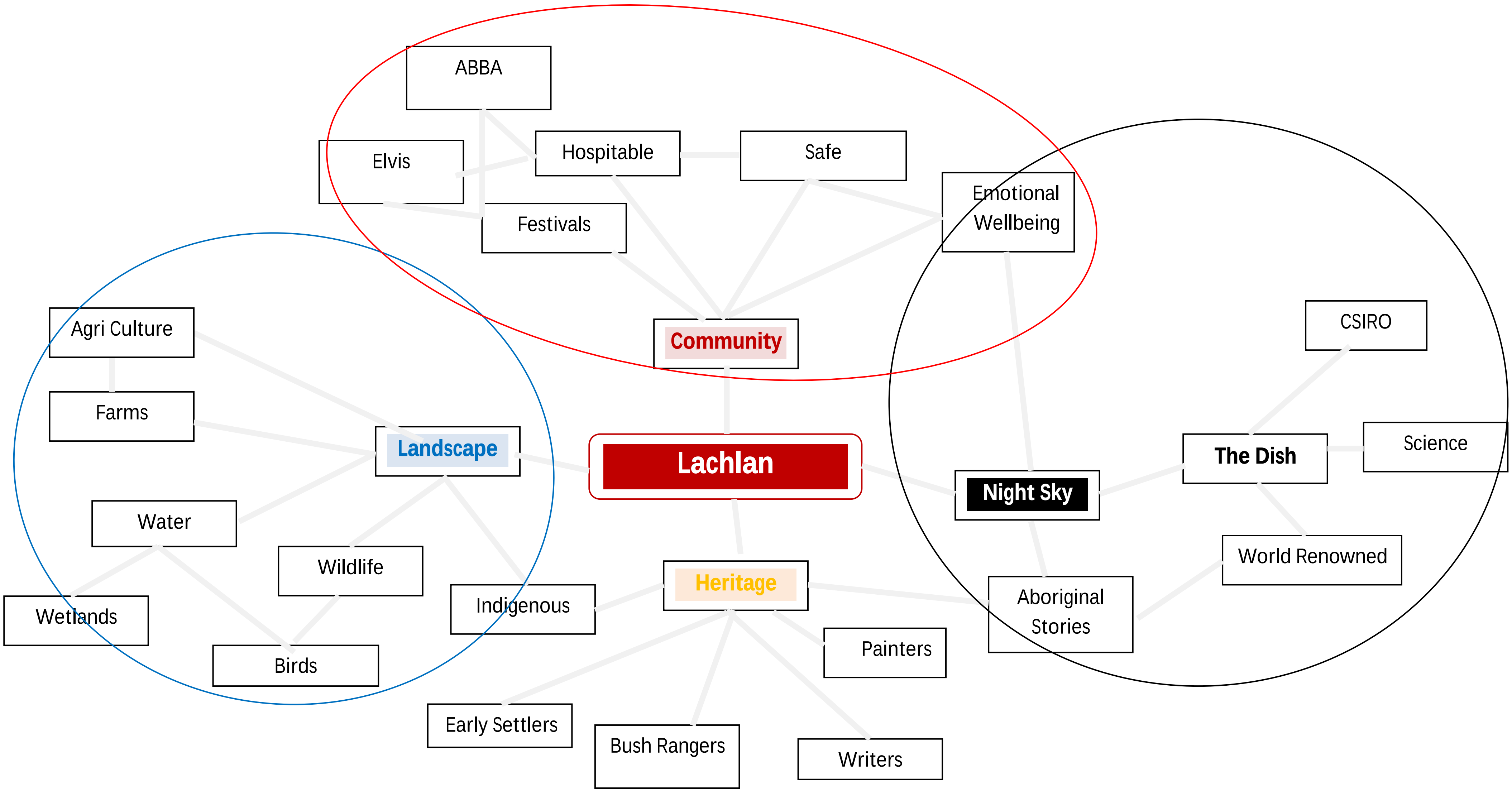


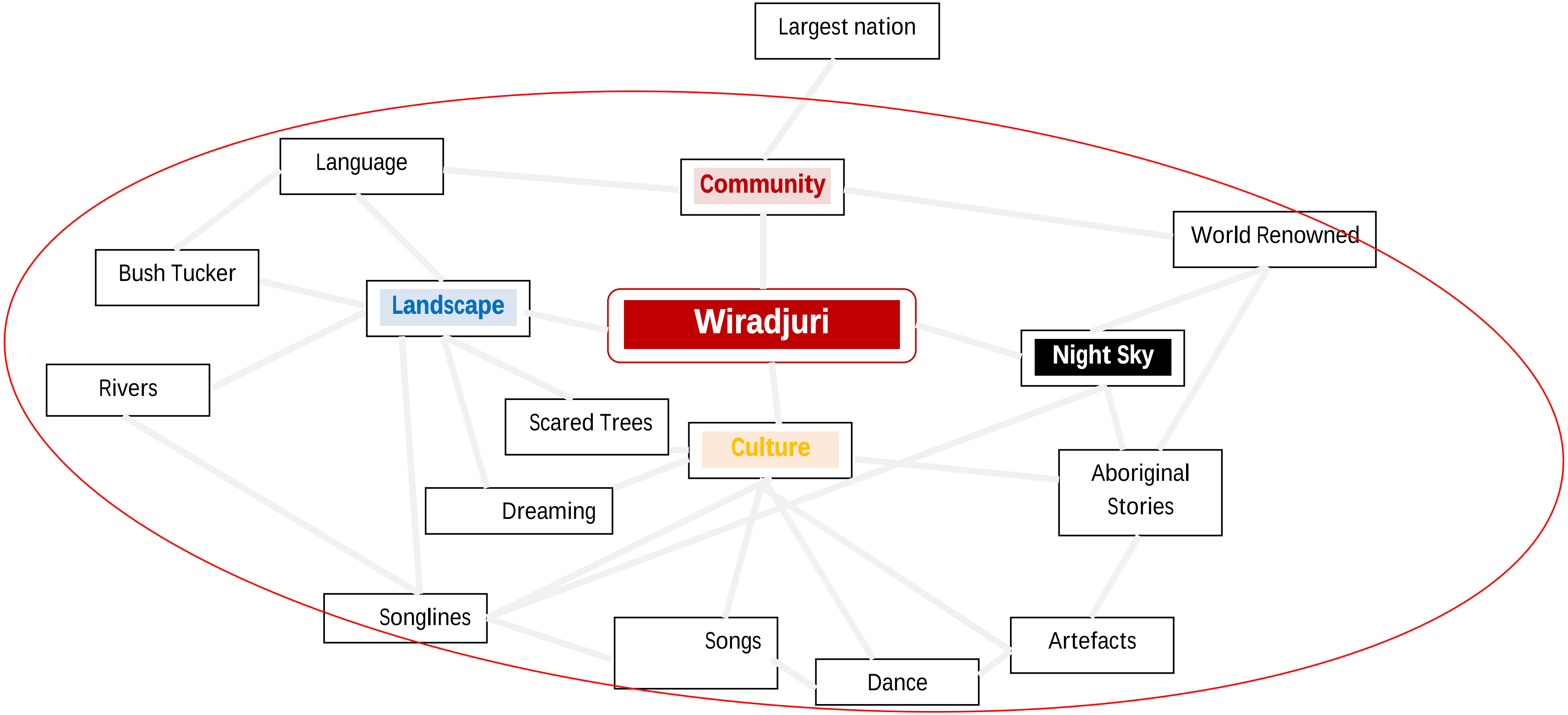

Caves
Pub
Events
Gold
Museum
Fishing
Activities
Sheep
Mining
Agri Culture
Hazelnuts
Villages
Landscape
Truffles
People
Heritage
Gardens
Rolling Hills
Weddings
Wind farm
Family History
Shearing
Apples
Churches

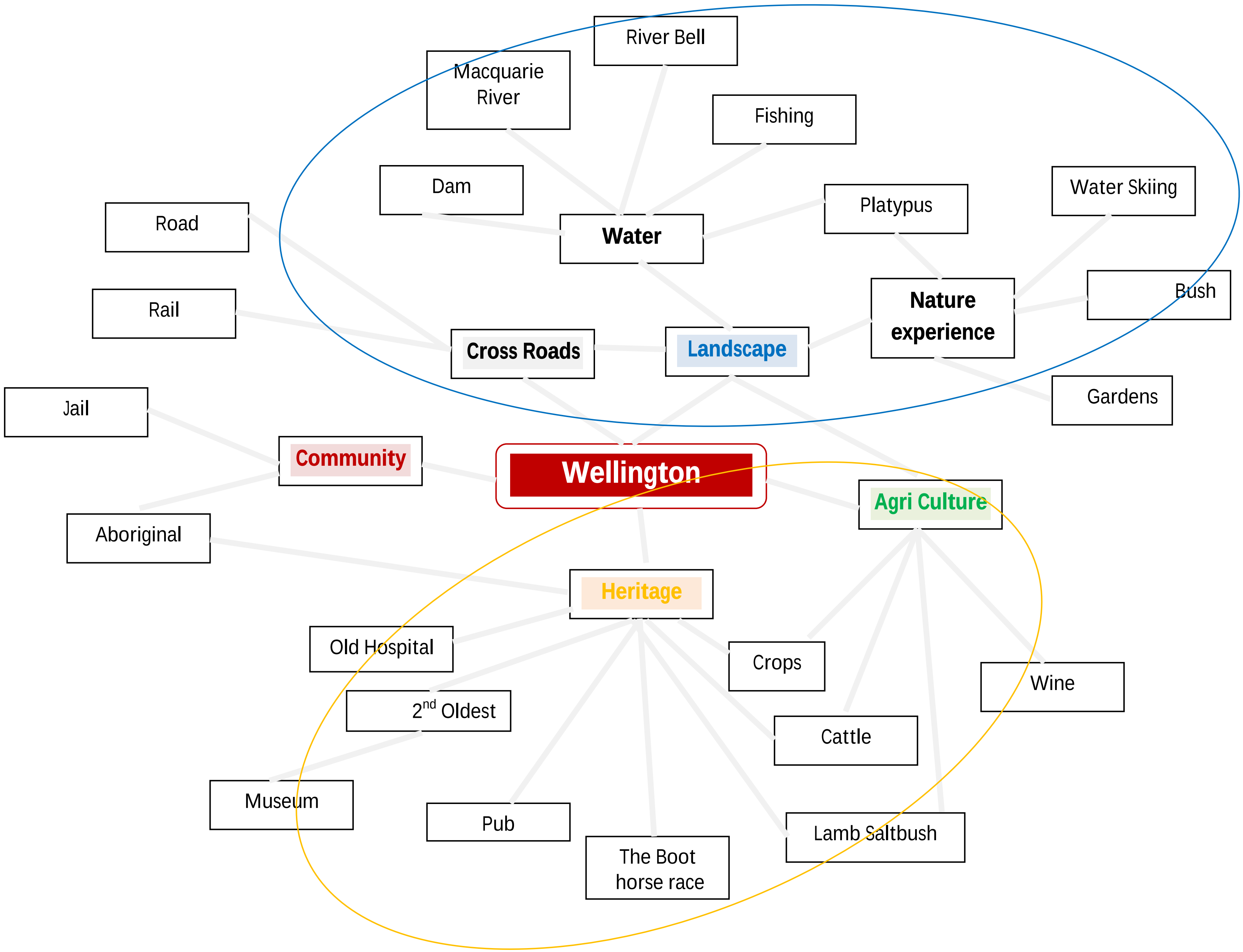


Honey
Olives
Cheese
Nuts
Saffron
Food
Chillies
Truffles
Wine
Agri Culture
Dunns Swap
Significant
Friendly
Connections
Defined Seasons
Night Sky
Belonging
Community
Mudgee Region
Landscape
Lake
Safe
Artists
Lawson
Heritage
Streetscape
Museum
Gulgong
Villages
Gold
Churches
Family History
Historic Homes
Cottage Industries

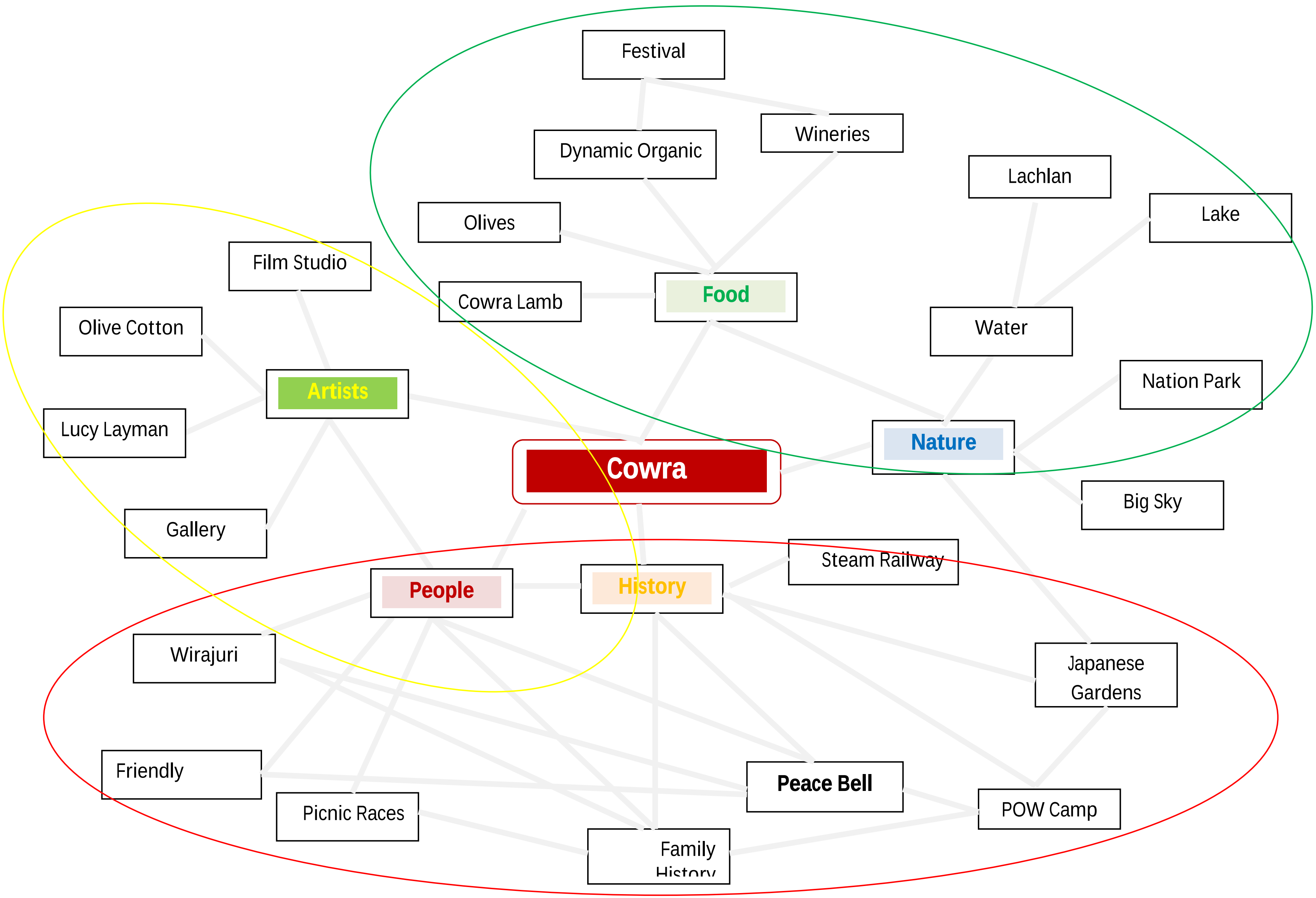

Volcano
'Big Tree'
Lake Canobolas
Mt. Conoboles
'down to
'Green'
4 Seasons
Knowledgeabl
Friendly
Views
Landscape
Beauty
Producers
People
Orange
Wine tasting
Agri Culture
Caving
Experiences
Culture
Produce
Restauran
Bush walking
Wine
Ballooning
4 seasons
History
Farm Gate
Apples
Pears
Farmers
Ben Hall
Escort Rocks


ABBA
Elvis
Hospitable
Safe
Festivals
Emotional Wellbeing
Community
Agri Culture
Farms
Landscape
Lachlan
Night Sky
The Dish
CSIRO
Science
Water
Wildlife
Wetlands
Birds
Indigenous
Heritage
Aboriginal Stories
World Renowned
Painters
Early Settlers
Bush Rangers
Writers


Largest nation
Language
Community
World Renowned
Bush Tucker
Landscape
Wiradjuri
Night Sky
Rivers
Scared Trees
Culture
Aboriginal Stories
Dreaming
Songlines
Songs
Dance
Artefacts



River Bell
Macquarie River
Fishing
Dam
Water
Platypus
Water Skiing
Road
Nature experience
Bush
Rail
Cross Roads
Landscape
Gardens
Jail
Community
Wellington
Agri Culture
Aboriginal
Heritage
Old Hospital
Crops
Wine
2nd Oldest
Cattle
Museum
Pub
The Boot horse race
Lamb Saltbush


Festival
Dynamic Organic
Wineries
Lachlan
Lake
Olives
Film Studio
Cowra Lamb
Food
Olive Cotton
Water
Artists
Nation Park
Lucy Layman
Nature
Cowra
Big Sky
Gallery
Steam Railway
People
History
Wirajuri
Japanese Gardens
Friendly
Peace Bell
Picnic Races
POW Camp
Family History

Summary report from Phase Two Workshops

November 2012

Introduction

Questionnaires were handed out at the beginning and end of the workshops. This measured attitudinal changes in the tourism providers' capacity in to develop their businesses. Additional opened questions provided insights. The participants' level of commitment to develop their businesses was measured by a voluntary commitment - Pledge to partner in tourism trails.

Overall the workshops provided a high level of participant satisfaction and a universal commitment to the tourism trails. There was a positive change in the level of strength participants gave for acquiring more knowledge on the region's heritage and product knowledge. The primary KPI, to improve product knowledge by 50%, was surpassed. 96% of workshop participants claiming they had very strongly, strongly, increased their level of product knowledge.

Recommendations

1. Launch the Discovery Tours to build confidence in the process and encourage greater tourism provider service improvements
2. All participants attend a networking launch event to build on their enthusiasm and visitor experiences
3. Activity briefs prepared for the Local Economic Development managers to actively search for tourism investment in active participation tourism providers
4. The 100 Mile Diet programme requires extensive development if it is to deliver real results
5. Interpretation is required at heritage sites, en route using CDs, apps, brochures
6. Further tourism provider training should be conducted to build on the networking relationships

Findings from the surveys

Table 1 Importance of Cultural and Natural Heritage Knowledge					
"How important/unimportant is it to your business to know about the natural and cultural attractions of your region?"					
	Very important for my business	Important for my business	Neutral	Unimportant for my business	Very unimportant for my business
Prior to workshop	72%	25%	3%	0%	0%
After workshop	**80%**	19%	1%	0%	0%

Table 2 Importance of other Tourism Provider knowledge					
"How important/unimportant is it to your business to know about other tourism providers?"					
	Very important for my business	Important for my business	Neutral	Unimportant for my business	Very unimportant for my business
Prior to workshop	68%	30%	2%	0%	0%
After workshop	**84%**	16%	0%	0%	0%

Table 3 Importance of Networking					
"Do you think the value of networking is…"					
	Very important for my business	Important for my business	Neutral	Unimportant for my business	Very unimportant for my business

Prior to workshop	73%	25%	2%	0%	0%
After workshop	**81%**	19%	0%	0%	0%

Table 4 Prior to workshop: Participating in an existing network	
"Have you established a tourism industry network for your business?"	
Yes	65%
No	35%

Table 5 End of workshop: Established a new network with potential	
"Did you begin to form an industry network at this workshop that you would like to progress?"	
Yes	**75%**
Maybe	18%
No	7%

Table 6 Product Knowledge change from workshop			
"The workshop today…."			
Very strongly increased my product knowledge	Strongly increased my product knowledge	Increased my product knowledge	Did not increase my product knowledge
35%	**29%**	**32%**	4%

Table 7 Rationale for change in product knowledge	
"Why do you say that?"	
Respondents answer to Table 6 question	*Open ended responses*
Very strongly increased my product knowledge	"It created another perspective in viewing tourism as a cohesive community to increase own business success" *Jo Gaigals* *"..allowed us to start working together" Jennifer Beasley* *"Nice to be among likeminded people" Tony Hubeard* *"I believe that collaboration with other businesses is vital to our individual prosperity and survival" Tony Hatch* *"It has made me aware that other businesses' , that I had no awareness of, can hold mutually feasible benefits…[they] actually exist – probably with huge potential for increased revenue" Daine Harnes* *"…learning about my environment is imperative to the success of Rydes and associated businesses as a whole" Hessie Haley* *"Opened up doors with LGA's such as Grenfell, which will continue to be developed" Belinda Virgo* *"Because people have to have a reason to visit your business" Janet O'Donnell* *"Can always learn more" Andrew Hudson* *"I learned about other businesses, landmarks, networked and formed alliances, created connections which will enable me to build networks" Joe Cuningham* *"I was unaware of the history that our area offers and how this integrates with our business goals. The workshop provide lots of 'food for thought'" Leigh Sargent* *"I was not aware of the power of heritage and local assets" Des Brubollark* *"Understanding the importance of history/heritage and how to my own business" Kate Clementson*

	"The concept develop was a fresh way of looking at marketing business and enhancing the visitor experience.." Liz Edmunds *"Broadened the possibilities for tourism via the trails and what Grenfell has to offer" Gale Mendham*
Strongly increased my product knowledge	*"Learnt about other businesses and how to network with them" Jan Kerr* *"Opened my eyes to linking with other likeminded (not just the same) businesses" Judi Zerbst* *"I am vert new to the tourism industry and every bit of information and networking will help!" Gai Rayner* *"Because I knew nothing much about tourism operators in Mudgee" Marilyn Keirle* *"I didn't learn about new products but I learnt more about products I already knew a bit about: Auburn Carr* *"I have learnt to include other themes from other businesses to foster and improve my business by networking" Mike Holmewood* *"It gives me a new slant on how to enhance the experiences guests have when visiting us" E Molloy* *"Topic well presented, relationships renewed and formed – increased awareness of tourism possibilities" Dorothy Lincoln* *"I was unaware of the enormous range of significant heritage product available in our region and now wish to research further: Christine Le Fevre* *"It brings together many of the historic societies, but needs support from other groups" D Balcomb* *"Showed me how to look further afield for points to project my business" Margo Wellington* *"Gave me ideas and themes which I had not considered before" Sally MacDougal* *"Made me aware of the importance of local uniqueness and history. The NSW Tourism Trails is a very important initiative" Neil Watts*

Increased my product knowledge	*"I have been to a few workshops, have over 20 years' experience dealing with tourists and business plans so any increase is good!" Tony Moody* *"Became aware of other tourist producers available in the region" Randall Edwards* *"A stimulating day, but I feel for my type/style of business I am adequately working on my business" Betty Wilson* *"Increased my awareness to develop a unique experience for cellar door/vineyard visitors" Peter Hedberg* *"There is so much to know, only moved to the region 18 months ago" Leianne Murphy* *"Realised that people don't necessarily know our hours of business/music sessions" Jodi Fekkes* *"As a VIC have a lot of knowledge and know where to find more , but always wonderful to find more" Felicity Barnes* *"….made me realise the importance that our towns' stories have" Jannelle Jeffs* *"Different people provide different knowledge and points of view" Ken Saywaker*
Did not increase my product knowledge	*"Because our museum is involved in existing networking and marketing and I am part of that team" Elaine Kaldy* *"Already aware of operators and businesses " David Buckland* *"Has encouraged me to address some added value points of interest issues" John Gransden*

Feedback on the training experience

Table 7 Feedback on Facilitator and Content				
" You made the subject as interesting as possible"				
Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree

44%	53%	0%	3%	0%
"Overall I am satisfied with the training"				
Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
37%	**59%**	4%	0%	0%
"The training had a good mix of theory and practice"				
Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
37%	**57%**	15%	05	0%
"I developed the skills expected from this training"				
Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
28%	**57%**	15%	0%	0%

Table 8 Feedback

"What were the greatest strengths of the course?"	**"How could this course be improved?"**
· Tourism trails concept · Networking, encouraging co-operation and interaction, greater understanding · Setting up a business action plan · Experience and knowledge of the trainer · Creative thinking, stretching imagination, thinking outside the square · Recognition of key regional assets · Relaxed but structured workshop, encouragement and focusing	· Wanted more businesses to be present · Better venues, lightening and cooling · Printed handouts · Scale of information · Preferred tow short courses rather than one long session · Name tags · Time management and less teacher class format · "Draft of final product should have been clearer from the start of the course to

	increase participation from operators. I understand the constraints due to information collection stage” Belinda Virgo

Voluntary commitment

Participation in the trails was universal. 71 tourism providers signed the pledge making commitments to:

- integrate the themes of the trails into their businesses
- promote the trails
- participating in establishing strategic networks
- promote the 100 Mile Diet
- update their Get Connected listing.

Appendix 3: Major stakeholders

CNSWT: Major Stakeholder Consultations May 2013			
Key Stakeholder	**Contact**		**Organisation's Role**
Bathurst Business Chamber Inc.	Angus Edwards Ph: 6331 2911	a.edwards@kennyspring.com.au	To promote and advocate for the interests of business in the region.
Mudgee Chamber of Commerce	Leonie Cridland, President Ph: 6373 8486	info@mudgeebusiness.com.au	To support and grow a vibrant business community by: providing information to businesses, liaise with LGAs and other organisations , and encourage business through events, networking and education. (50 members)
Orange Business Chamber Inc.	Tony Healey, President Ph: 6362 6921 / 0419 441 017	www.orangechamber.com.au orangechamber@bigpond.com	To keep local businesses up to date on new legislation, networking, support promotions and events in collaboration with Taste Orange
Canowindra Business Chamber	Eddy Wilkinson Ph: 0419 226 730 / 6344 2051	president@canowindrabusinesschamber.org.au	To promote the growth of businesses in the Canowindra district
Parkes Business Chamber	Peter MacGill Ph: 6863 4158	peterglepks@bigpond.com	To promote business and support local promotions and events (such as Elvis Fest). To encourage the "shop locally" concept. Over 100 members - 30 very active.
Central West Orana Region Business chamber	Vicki Seccombe, Regional Manager 63620596 / 0437871535	vicki.seccombe@nswbc.com.au	Work with regional chambers. A voice for small business in the region.

Arts Out West	Tracey Callinan, Executive Officer 0418 618 688 / 6338 6589	artsoutwest@csu.edu.au	To provide advice and assistance about arts development, funding and resources and to develop audiences through a program of communications, promotions and marketing
Orana Arts	Alicia Leggett - Regional Arts Development officer Ph: 0427 777586	rado@oranaarts.com	One of 14 regional arts boards promoting the facilitation and inclusion of arts and cultural activities to enhance the vitality of the arts in the region
Wiradjuri Condobolin Corporation (another contact for Wiradjuri stakeholder is **Wiradjuri Arts Group**, Heather Blackley)	Terry Williams CEO WCC Ph: 6895 4664	terry.williamswsc8@bigpond.com	To develop a sustainable economic base for Aboriginal people of the Condobolin area through business development, employment opportunities and training
Roads and Maritime Services	Tony Hendry, Roads Safety and Traffic Manager, Western Region Ph: 6861 1687	tony.hendry@rms.nsw.gov.au	The role of RMS in the region is great, but regarding tourism specifically, one of the fundamental roles is that of representation on TASAC (Tourist Attraction Signposting Assessment Committee)
Caravan and Camping Industry Association	Lyndel Grey CEO 9615 9900 / 0408 972 557	lyndel.gray@cciansw.com.au	Very important to region. Biggest provider of holiday accommodation. 26% of visitor nights in regional NSW in caravan parks.
NRMA TRAVEL	David Ovendale, General Manager 9276 7385	'David.Ovendale@nrmatravel.com.au'	Outbound international is biggest market - much less in regional NSW. Majority of domestic tourism markets is in states other than NSW. However, NRMA Travel has 2.4 million members in NSW & ACT so there is potential.
Brand Orange - trading as Taste Orange	Rhonda Sear, Executive Officer Brand Orange	rsear@ozemail.com.au	T.O. aims to create an effective umbrella for the marketing, promotion and development of the Orange region, based primarily on wine and food tourism but encompassing the whole business community of Orange, Blayney and Cabonne for the purpose of economic development.
Rotary Orange Farmers Markets and Orange Apple Festival	Cath Thompson 0425 259 350	ccthomo@bigpond.com	The Rotary Orange Farmers' Market is a monthly community event showcasing authentic, regional products of the greater region (not just Orange) . Farmers' Markers humanise products by bringing producers and consumers together.

F.O.O.D.	Edwena Mitchell, President 0419 642 053	president@orangefoodweek.com.au	F.O.O.D has been promoting regional food and wine producers through marketing and events for 22 years. In recent years, with the introduction of Taste Orange, FOOD has focused on event management, namely FOOD Week and associated events.
Canowindra@home	Margaret Wallington, Treasurer 6344 7153	margaret@wallingtonwines.com.au	Dedicated to promoting local food, wine and producers and the concept of eating locally and sustainably. Four events/year including Twilight Markets (Balloon Festival) and 100 Mile Lunch
Country Link (rail and coach) - rebranded as of 1 July 2013	Nadine Clench - Dep General Manager Country Link NSW	media@transport.nsw.gov.au	From 1 July 2013, Country Link will be disbanded and replace with new sub-brand under a new "NSW Train Link" brand. New plans and vision statements will be in-house in June/July, but not publically available, possibly for months.
Buslines - Bathurst, Lithgow,	Geoff Ferris - Group Operations Manager (Syd)		"No tourism market".
Ogden Coaches - Mudgee, Wellington	Mandy Ogden		Refused survey
Age Of Fishes Museum, Canowindra	Fiona Ferguson, Manager 6344 1008	aof@colourcity.com	The AOF is a multi-faceted service provider offering a unique visitor experience, visitor information service, volunteer opportunities and community support of events such as the Balloon Challenge.
Western Research Institute, Bathurst	Andrew Johnson CEO 6333 4000		WRI is a NFP regional development organisation providing economic and social research capacity
Cowra Region Vineyard Association (CRVA)	Sam Statham, President 0428 667 317	sam@rosnay.com	Network of local wine growers designed to improve knowledge skills, market and promote the region

Mudgee Wine and Grape Growers Association (MWGGA)	Andrew Stein, President 6373 3991 /0414 844755	andrew@robertstein.com.au	Promoting the wines, cellar doors and vineyards of Mudgee and to disseminate industry information to members.
Orange Airport (OCC)	Kel Gardiner, Commercial and Emergency Services Manager/Airport Manager OCC, 63938172	kgardiner@orange.nsw.gov.au	Orange airport sees it's role as extremely important to the region. Markets using the airport include business (95% of market), medical, government, educations, freight and tourism
Rex Airlines	Maurice Tehan, Marketing Manager NSW/Qld 6622 6177 / 0419 245 653		Rex provides essential services to the region. Markets in order of importance include; business, VFR, medical and tourism* see end note
Regional Development Australia - Orana	John Walcomb, Chair 0419 843233	admin@rdaorana.org.au	Building partnerships and ensuring government and stakeholders are responsive to the priorities and needs of the region. A conduit between Gov. and local communities and an information source.
NSW National Trust	Meredith Hutton, NSW Board member and Chair or Illawarra/Shoalhaven branch	'meredith@mergecommunications.com.au'	Nat Trust is a conservation body for the built and natural environment. It advocates and represents heritage issues on behalf of the community. Non-political, independent, self-funded. Nat Trust owns properties and includes privately owned properties on its register
Newell Highway Promotions Committee	Katrina Dwyer, Vice Chair (South) and Manager Tourism Marketing Parkes	katrina.dwyer@parkes.nsw.gov.au	NHPC promotes the Newell Highway as the preferred touring route between Melbourne and Brisbane. Promote events and attractions along route. Produce a range of marketing collateral, attend shows, access funding. Last year joined Inland NSW Tourism
Mudgee Readers Festival	Melanie Trethowan, Chair 6342 4410		Focus point for the celebration of reading culminating in a festival each August. Also support and promote "Regional Writers" with published works. Regional Writers event growing from Mid Western LGA focus to include all regions west of Blue Mts

Appendix 4: SWOT

Strengths	Weaknesses
· 1130 nationally significant natural and cultural heritage sites (National Trust 1987) · Popular culture: Mt Panorama · Abundance of natural attractions – caves, national parks, lakes, largest indigenous language area in State	· Heritage sites are poorly mapped, interpreted and promoted · Lack of operator product knowledge
· Region is still regarded as 'undiscovered' and a novelty · New frontier in visitor experiences	· Lack of unifying brand and appeal · Lack of direct consumer programme
· Innovative wine producers · 100 Mile concept adopted and implemented in events	· Lack of operator product knowledge · Lack of operator networking
· Authentic, real country experiences on offer · High safety factor · Proximity to Canberra and Sydney	· Signage – poor quality and insufficient amount of interpretive signage at attractions · Loss of sales due to lack of international ready product (food, signage, language) · No consistency of closing days of business (eg. Museums close mid-week, retail limited on weekends) · Unwelcoming for new Australians
· High level of collaboration among Tourism Managers / regular meetings · Centroc support · Tier One status	· Insufficient funds to dramatically change brand awareness · Lack of infrastructure including transport · Insufficient leveraging of opportunities with regional partners (Blue Mountains)
· Awareness of social and environmentally responsible tourism	· Accommodation – not meeting consumer needs (eg. fires in winter)

Identification of principal opportunities and threats:

Opportunities: Low		Medium		Strong	
Threats: Low		Medium		Strong	

Social	**Leverage existing sporting infrastructure**	**Travelling abroad is a strong magnet – the attractiveness of ‘novelty’ and the ‘new’**
	Creating popular cultural trails	Non-competitive options to impact on outbound offers – we’re not giving compelling reasons not to go abroad
	Educational tourism – better interpretation via apps for improved experiences	Interstate visitors have low awareness of Regional NSW (VET)
	Leveraging existing events & extending stay via operator offers	Intrastate visitors have low awareness of Regional NSW (VET)
	Operator alignment to school curricula	Participation of Wiradjuri community in tourism
	Farm to plate experiences	Negative impact from mainstream TV and resulting PR (eg Underbelly)
	To position Central NSW as Australia’s leading cultural heritage destination	

	Popular cultural events which tie into traditional cultural way of life (farming field days, picnic races)	
	Packaging with neighbouring regions (Blue Mts. and Hunter Valley both have a much higher level of awareness with interstate and NSW residents VET)	
	Encourage more inter/intra state events	
	Market Ties: Australians value ‘family’ VFR can be further encouraged	
	VFR of new Australian families	
Environmental	Differentiate the region through organic wines and progressive agriculture	Extreme weather events: bushfire and floods damage nature environment and reduce its scenic quality

	Sustainable supply chain management : producers to restaurant experiences	Droughts restrict water usage, reduce attractiveness of landscape
	Develop ecotourism experiences	Droughts reduce harvest
	Develop exclusive soft nature experiences for High Nett Worth Chinese and International travellers	
Economic	Link heritage attractions, activities with local economic development	Floods, fire, drought (Easter 2012 floods devastated some CNSWT operators
	Collaborate with the University to target international students	Road over Blue Mountains – non action on Bells Line of Highway

	Local economic development with visitors buying locally made produce, arts & crafts		Outcome of recent local government elections may result in loss of investment in local tourism and result in loss of IP
			Continued lack of investment
			Competitive domestic destinations – Hunter, cheap flights & deals, Victorian holidays & promotion of in mainstream press
			Increasing cost of fuel impacts on the drive market
			Trains NSW does not include tourism in its Central NSW strategy