



Destination
Central West NSW

Central West NSW Destination Management Plan

2022-2030



This Destination Management Plan was prepared by Destination Marketing Store.

ACKNOWLEDGEMENTS

Destination Marketing Store would like to acknowledge the First Nations Communities associated with the Central NSW region. We also acknowledge the valuable input of the Destination Central NSW Board and the input of various visitor economy stakeholders consulted to support this Destination Management Plan.

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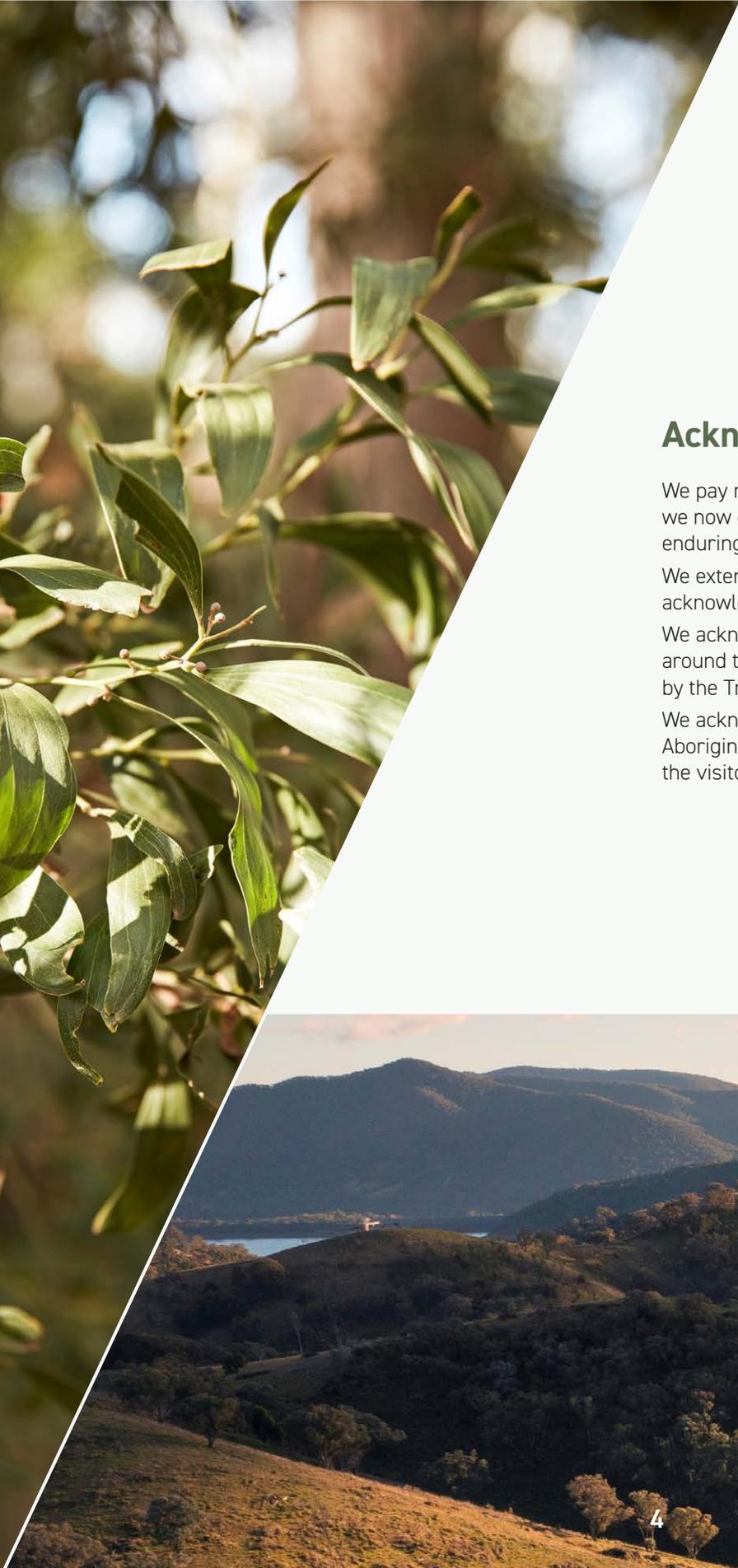
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LIST OF ACRONYMS

ATDW	Australian Tourism Data Warehouse	NATOC	NSW Aboriginal Tourism Operators Council
CCIA	Caravan and Camping Industry Association	NIAA	National Indigenous Australians Agency
CMCA	Campervan and Motorhome Club of Australia	NPWS	NSW National Parks and Wildlife Service
CBC	Cross-Border Commissioner	NSW	New South Wales
DMP	Destination Management Plan	REDS	Regional Economic Development Strategies
DNCO	Destination Country and Outback NSW	RTO	Regional Tourism Organisation
DNCW	Destination Central West NSW	TNSW	Transport NSW
DNPMG	Destination Network Project Management Group	TRA	Tourism Research Australia
DNs	Destination Networks	VES	NSW Visitor Economy Strategy 2030
DNSW	Destination NSW	VFR	Visiting Friends and Relatives
DPE	Department of Planning and Environment	Y/End (YE)	Year End
DRM	Destination Riverina Murray		
DRNSW	Department of Regional NSW		
EA	Ecotourism Australia		
FCNSW	Forestry Corporation of NSW		
Govt	Government		
GSP	Gross State Product		
GVA	Gross Value Add		
JO	Joint Organisation		
LALCs	Local Aboriginal Land Councils		
LGA	Local Government Area		
LTO	Local Tourism Organisation		

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Acknowledgement of Country

We pay respect to the Traditional Custodians of the land we now call New South Wales and acknowledge their enduring culture and continued connection to Country.

We extend our respect to Elders, past and present, and acknowledge future generations of Aboriginal people.

We acknowledge visitors from across Australia and around the world are made welcome on Aboriginal lands by the Traditional Custodians of NSW.

We acknowledge the significant contribution made by Aboriginal people to the development and promotion of the visitor economy.

Message from the Central West NSW Board

It is our pleasure to present the inaugural Destination Management Plan (DMP) for the newly formed Destination Network Central West ("DNCW"). The DMP which covers the period 2022-2030 aligns with the NSW Visitor Economy Strategy 2030 and guides the work that DNCW will champion over the coming years to grow the visitor economy in this unique region of NSW.

The travel restrictions associated with the COVID-19 pandemic have been a game changer for our region, with many people from metropolitan areas and beyond taking the opportunity to experience the outstanding food and wine offerings, stunning landscapes, cultural offerings and country hospitality for the first time. Our region has always benefited from visitors feeling a strong connection to people and place. In fact, visitors coming to visit family and friends has historically been one of our largest markets. This Plan aims to capitalise on the momentum created by the pandemic and ensure that a new cohort of visitors feel that strong connection to our region and continue to return year after year.

The DMP encourages greater collaboration across sectors and between industries, local government areas and stakeholders to underpin and guide strategic destination development and management. Our aim is to provide an inspiring and effective approach to grow the visitor economy right across the Central West. In developing the DMP, we undertook extensive research and consultation, including analysing the trends influencing visitor demand as we recover from the pandemic.

We are grateful to all those who took valuable time to provide input, feedback, advice or assistance to ensure we could deliver a robust plan to grow our visitor economy and encourage more people to visit and return to the beautiful Central West.



Overview

Destination Central West is one of seven Destination Networks (DNs) in regional NSW. Its principle role is to represent and coordinate the growth and development of the Central West visitor economy.

The Central West region comprises twelve local government areas: Bathurst Regional Council, Blayney Shire Council, Cabonne Council, Cowra Council, Forbes Shire Council, Lachlan Shire Council, Lithgow City Council, Mid-Western Regional Council, Oberon Council, Orange City Council, Parkes Shire Council, and Weddin Shire Council. Each has their respective vision for the future, and projects and priorities, which are relevant to the sustainable growth of the region.

The Central West NSW visitor economy supported around 2,254 tourism businesses and attracted just over 5.2 million visitors and 6.3 million visitor nights for the Year Ending December 2019¹.

The Central West NSW Destination Management Plan (DMP) has been prepared to create a collaborative framework to guide the work of local, regional and state tourism stakeholders to grow, develop and promote the region's visitor economy to 2030 and contribute to the NSW Government's target to achieve \$25 billion in visitor expenditure by 2030.

This Plan sets out five strategic objectives and an associated plan of action for the region from 2022 to 2030, reflecting current market trends and local priorities, and aligning with State Government's NSW Visitor Economy Strategy 2030:

1. Road to Recovery: Support the Central West NSW visitor economy to recover and be sustainable, capable and resilient
2. Build the Brand: Position and promote Central West NSW and its destinations to align to the Feel New brand
3. Showcase Our Strengths: Facilitate and enable the development or enhancement of world-class visitor experiences and accommodation
4. Invest in World Class Events: Facilitate and enable the development or enhancement of world-class events
5. Facilitate Growth: Provide an enabling environment to attract investment in the Central West NSW visitor economy

¹ YE December 2019 (pre-COVID-19 health pandemic) Tourism Research Australia visitation data is used as a base measure to recover and grow the visitor economy



Vision

Inspire and facilitate collaboration to grow a sustainable visitor economy for Central West NSW and contribute to the NSW regional overnight visitor expenditure target of \$25 billion by 2030.

Mission

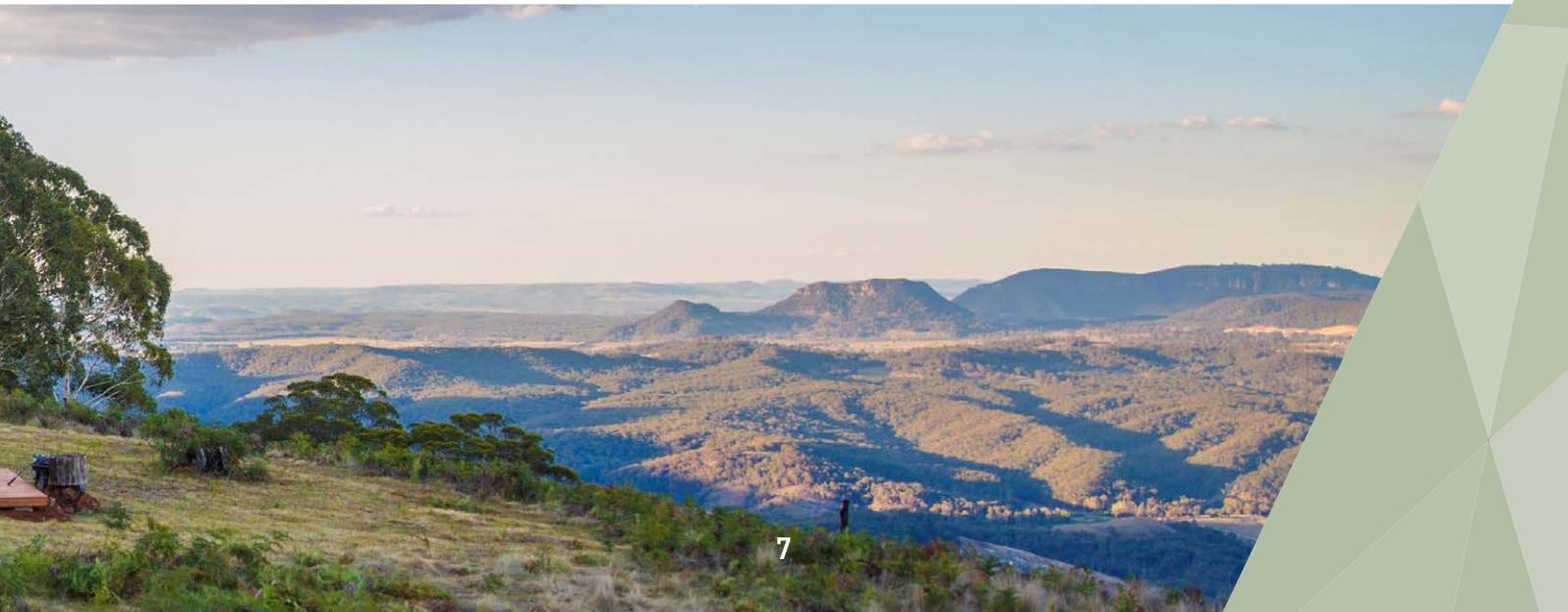
To achieve this vision, the mission of DNCW and the region's stakeholders is:

Facilitate the development, enhancement and promotion of signature visitor experiences and events that create meaningful connections between the region, its cultural experiences, communities, characters, producers and businesses with visitors.

Positioning

The Central West NSW positioning statement frames the region's competitive advantage or point of difference and experience offering that visitors seek.

Indulge in the richness of a region immersed in nature and rural landscapes, enlivened with arts and culture and brimming with culinary delights, outstanding drink, food and produce to revitalise your senses.



Introduction

The Central West NSW Destination Management Plan has been prepared to create a collaborative framework to guide the work of local, regional and state tourism stakeholders to grow, develop and promote the region's visitor economy to 2030.

The Central West NSW DMP 2022 to 2030 has been developed to align with the directions of the NSW Visitor Economy Strategy 2030 (VES).

The VES 2030 acknowledges regional NSW as a key to the future of the NSW visitor economy. The NSW statewide target for 2030 is \$65 billion in total visitor expenditure. Regional NSW will contribute \$25 billion in overnight visitor expenditure to this target.

Tourism is identified as one of seven 'engine industries' expected to drive regional NSW economies over the next 18 years and is identified as one of 50 new priorities to drive long-term stimulus impact².

Following a review of regional tourism in 2017 the NSW Government, through Destination NSW (DNSW), established six administrative zones, referred to as Destination Networks (DNs). In July 2022, one additional DN was added, Destination Central West NSW, and several other changes were made to DN boundaries to assist the growth of the NSW regional visitor economy.

The seven DNs are:

- Destination Central West NSW
- Destination Country and Outback NSW
- Destination North Coast NSW
- Destination Riverina Murray
- Destination Southern NSW
- Destination Sydney Surrounds North
- Destination Sydney Surrounds South

A Destination Network Project Management Group (DNPMG) was established in September 2021 that comprises the General Managers of each Destination Network as well as the General Manager, Engagement and Visitor Economy Development at DNSW.

Importantly, the DNPMG committed to working collaboratively to deliver a suite of seven new Destination Management Plans (DMPs) (2022 to 2030) that are aligned to the NSW Visitor Economy Strategy 2030.

A Destination Network DMP planning framework was established to create a consistent and collaborative approach to guide the work of the Destination Networks, consultants and local, regional and state tourism stakeholders to consider how to grow, develop and promote the NSW regional visitor economy to 2030.

Dr Meredith Wray (Wray Sustainable Tourism Research & Planning) was engaged by the DNPMG to coordinate the development of the suite of DMPs and alignment to the VES.

Specialist agency, Destination Marketing Store (DMS), was engaged from January to July 2022 to prepare the Central West NSW DMP 2022 to 2030.

It is acknowledged that considerable work has been achieved for the Central West NSW region by Destination Network Country and Outback NSW (DNCO). The newly appointed Destination Central West NSW Board includes a number of Board members who were previously on the DNCO Board, providing continuity as the new Destination Network is established.

The aim of the NSW Visitor Economy Strategy 2030 and the Destination Network DMPs is to stimulate economic prosperity, create new jobs and enhance the lifestyles of the people of NSW.

² NSW 2020 Economic Blueprint

Central West NSW DMP 2022 to 2030

Central West NSW comprises twelve local government areas: Bathurst Regional Council, Blayney Shire Council, Cabonne Council, Cowra Council, Forbes Shire Council, Lachlan Shire Council, Lithgow City Council, Mid-Western Regional Council, Oberon Council, Orange City Council, Parkes Shire Council, and Weddin Shire Council.

The Central West NSW visitor economy supported around 2,254 tourism businesses and attracted just over 5.2 million visitors and 6.3 million visitor nights for the Year Ending December 2019³.

The Central West NSW destination management planning process involved:

1. Analysis of visitor research and data
2. Review of existing strategies and plans, including at the Commonwealth, State, regional and local level
3. Consultation with over 100 participants from across the region, representing industry, local government, Central NSW Joint Organisation, NSW Government agencies and local communities
4. Analysis of relevant global and domestic trends influencing tourism and travel.

The purpose of the Destination Management Plan is to identify the priorities for Central West NSW to achieve within the context and scope of its role, as outlined above. It focuses on:

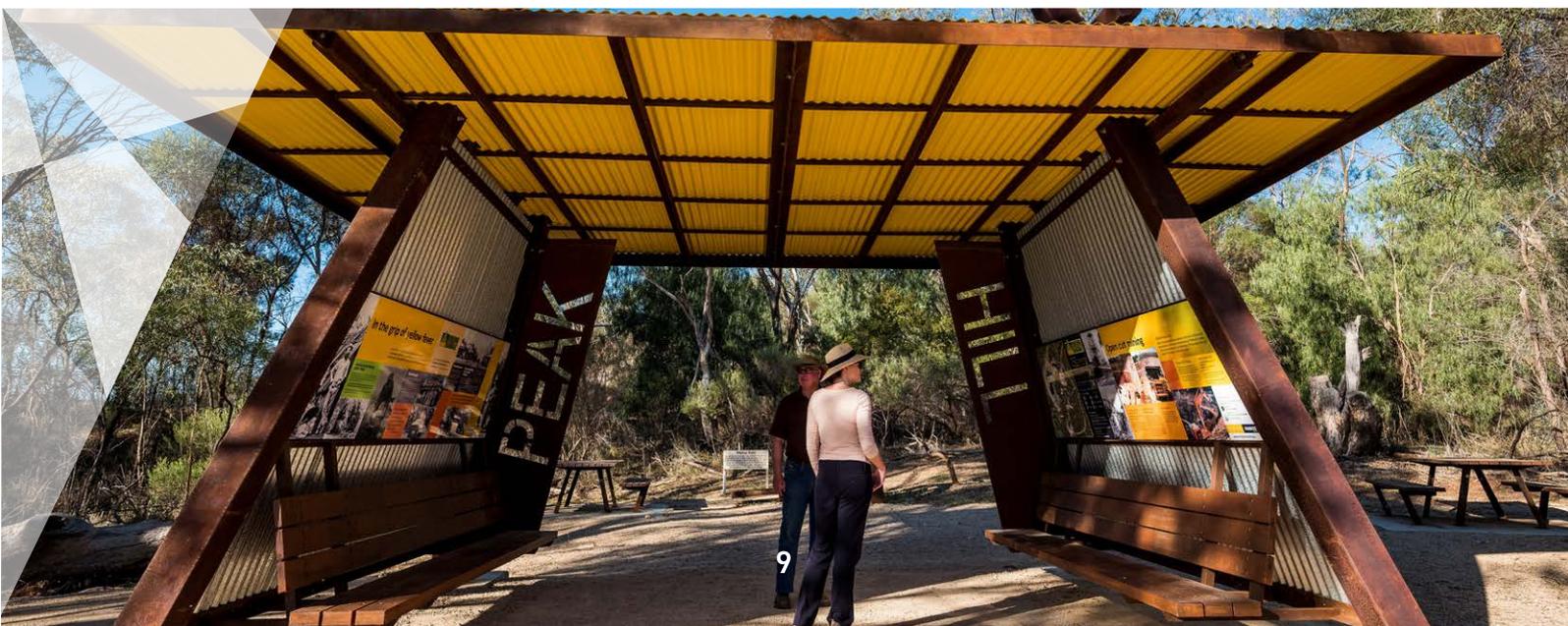
- Industry engagement and development
- Enhancing the experience offering of the region, including events
- Leveraging and value-add to the wide range of existing stakeholder priorities, strategies and successes for the region to date.

It is not intended to replicate or duplicate the work already done or planned at the local government level. Destination Central West NSW will, however, act as a conduit to Destination NSW and facilitate relationships between local government and other NSW Government agencies as part of its role.

The Central West NSW DMP adopts the following guiding principles:

- Inclusive of the whole region, its communities and businesses
- Informed (evidence-based)
- Showcase the region's existing and emerging strengths
- Customer-centric (putting the visitor first)
- Future-focused and sustainable (understanding a dynamic industry and the importance of protecting the region's values and attributes)
- Contribute to the prosperity, cultural identity and well-being of the region's Aboriginal communities
- Foster collaboration across sectors and between industries, local government areas and stakeholders
- Demonstrate leadership through effective implementation, partnerships and communication (including through alignment with NSW Visitor Economy Strategy 2030)
- Measurable in terms of both deliverables and outcomes.

³ YE December 2019 (pre-COVID-19 health pandemic) Tourism Research Australia visitation data is used as a base measure to recover and grow the visitor economy



Central West NSW DMP 2022 to 2030 (continued)



Figure 1. Map of the Destination Central West NSW region



Strategic Context



Strategic Context

The Central West NSW DMP 2022 has been developed to align with the *NSW Visitor Economy Strategy 2030* (VES). The strategy comprises three phases:



Figure 2. NSW Visitor Economy Strategy 2030 phases

Ambitions, Outcomes and Targets

The ambitions, outcomes and targets of the *NSW Visitor Economy Strategy 2030* are important indicators to this DMP.

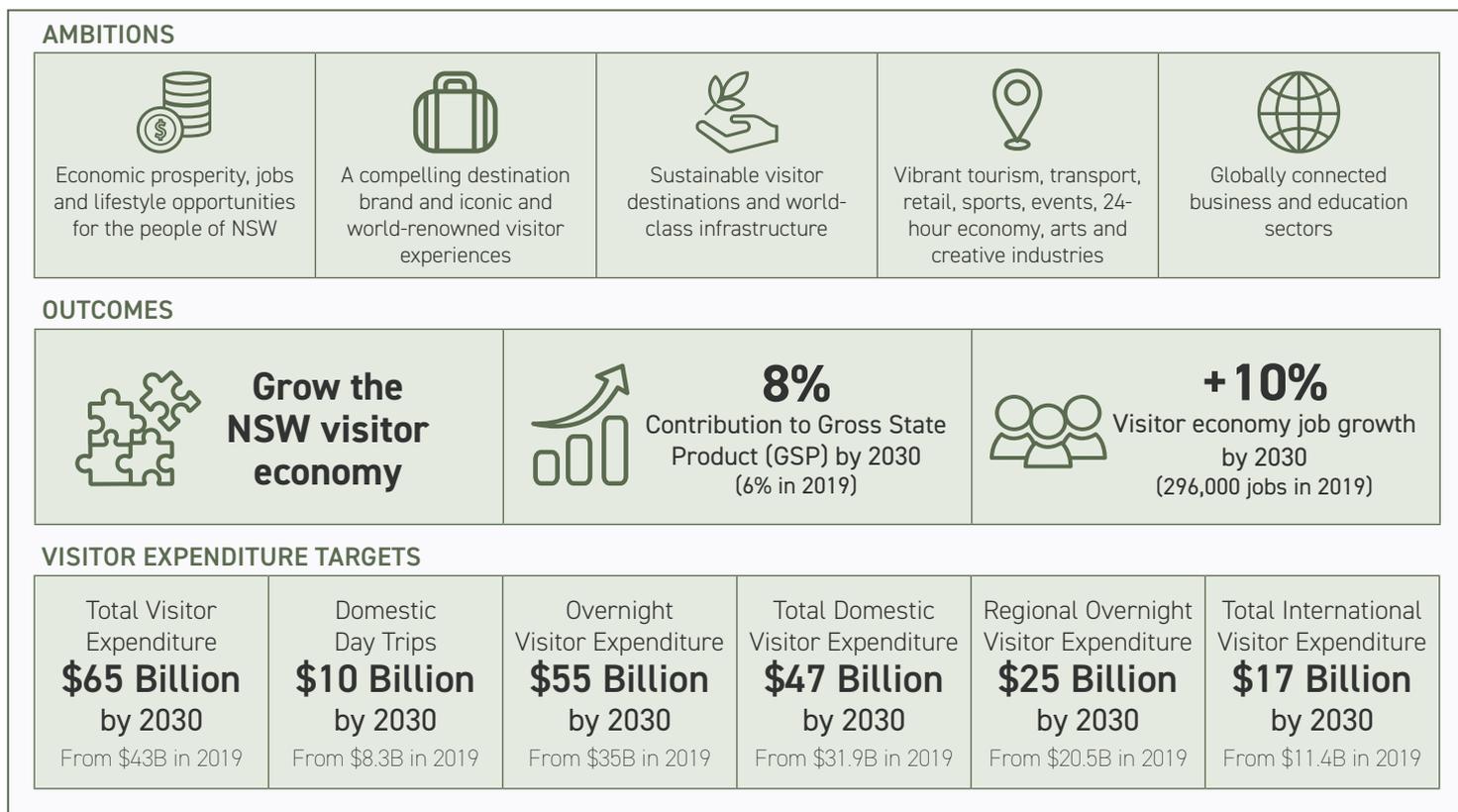


Figure 3. NSW Visitor Economy Strategy 2030 – ambitions, outcomes, and visitor expenditure targets

Guiding Principles

Five Guiding Principles inform the NSW Government's policy and investment in the visitor economy.

PUT THE VISITOR FIRST	ACCELERATE DIGITAL INNOVATION	LEAD WITH OUR STRENGTHS	MOVE FAST, BE RESPONSIVE AND AGILE	COLLABORATE WITH INDUSTRY AND GOVERNMENT
We have put the visitor front and centre of this strategy. A greater understanding of potential visitors by segment will deliver high performance marketing solutions and improve the visitor experience.	We will use technology to deliver personalised marketing to potential visitors, streamlined interactions between government and industry, and to enhance the visitor experience.	We will focus on the distinctive character and features of NSW and our people to help us stand out in a crowded market.	We will build agility into the way we operate so we can take advantage of opportunities as they emerge and adapt to changing conditions.	We will foster greater engagement and cooperation with the industry to deliver the vision and take a whole-of-government approach to growing the NSW visitor economy.

Table 1. NSW Government Five Guiding Principles for visitor economy policy and investment

Strategic Pillars

Five Strategic Pillars have been established to guide visitor economy growth to 2030.

1. Road to Recovery
2. Build the Brand
3. Showcase our Strengths
4. Focus on World Class Events
5. Facilitate Growth

These pillars and associated key result areas are explained further on page 34.



Other Considerations relevant to Central West NSW

The Central West NSW DMP 2022 to 2030 has also been developed to align with the broader NSW Government strategic context and to recognise how different NSW Government priorities and strategies may influence the growth and development of the regional visitor economies (see Appendix 1 for a list of strategies reviewed).

A comprehensive review of the following strategies and plans was also undertaken including:

- Local government strategies and plans for all 12 LGAs
- Key initiatives and strategies of the Central Joint Organisation (JO)
- Relevant NSW and Commonwealth Government strategies, initiatives and reforms, including but not limited to Thrive 2030, Reflections Holiday Parks and the NSW Department of Planning and Environment (incorporating Planning NSW and NSW National Parks and Wildlife Service (NPWS))
- Review of five Regional Economic Development Strategies (REDS).

Most existing or proposed plans, strategies and projects relating to the visitor economy highlight the importance of tourism and identify high level strategic priority areas: driving demand, capability and capacity building, collaboration, improving the visitor experience, visitor servicing support and aligning with the State Government's NSW Visitor Economy Strategy 2030 objectives.

Many of these plans take this wish list one step further and outline more specific projects, including, among other things:

- Improve digital connectivity, upgrading road infrastructure and addressing the skills shortage
- Given the region's strong wine and food culture, agritourism and making the region's produce more accessible
- Ecotourism and nature-based tourism, including cycle trails and accommodating the growing interest in cycle tourism.

A critical next step is for each destination to prioritise their objectives that adopts a visitor-centric approach, filtered by available resources or required resources to assist attract investment.

Regional Economic Development Strategies (REDS)

All the REDS for the Central West NSW area identified improving connectivity as a foundation for growth. This primarily focused on improving digital connectivity and upgrading transport infrastructure, particularly road, but in many cases extended connectivity to establishing robust tourism business networks that would help build industry capability, improve cross-promotion between tourism operators, accommodation providers, and other sectors servicing tourists. In short, to enhance and create strong tourism partnerships within the region.

Many of the REDS also highlighted staff retention and training as significant issues and to a lesser extent, the need to provide a more positive planning and regulatory environment. Perhaps not surprisingly, given the region's reputation for high quality agricultural and its strong wine and food culture, agritourism and making the region's produce more accessible (for example, farm stay accommodation, farm experiences, an increased focus on local food and wine events that enhance demand and shorten supply chains between producers and visitors) emerged as a priority for many areas.

Another common theme was diversification. Building a diverse offering including sports and heritage tourism, ecotourism, nature trails and culture and heritage tourism (including Aboriginal and European history and culture).

Priorities ranged from creating local events and festivals and developing natural and built assets to attract visitors. Assets like the type of adventure tourism proposed by the Mt Canobolas mountain bike track and the development of the Mt Canobolas Mountain Bike Centre. Indeed, many of the REDS flagged how best to accommodate the growing interest in cycling across the region.

Trends Influencing Visitor Demand

The COVID-19 health pandemic has resulted in a range of new consumer trends related to travel decision planning.

The following provides an overview of the main trends influencing recovery from the pandemic as sourced from travel research commissioned in 2022 that is also relevant to regional NSW visitor economy growth and development. It is recommended that continual monitoring of consumer trends be undertaken to 2030⁴.

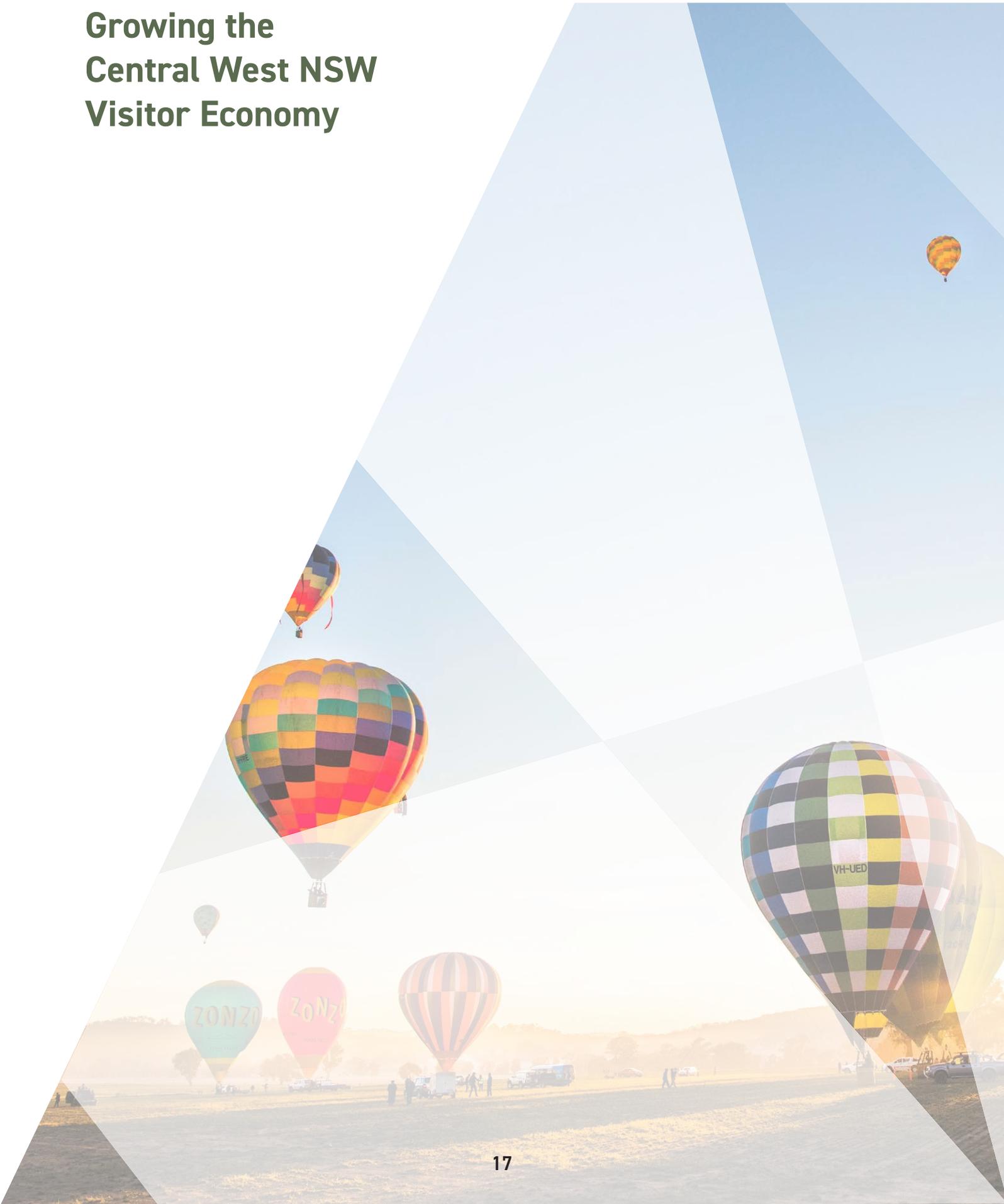
TREND	DESCRIPTION
Edventures / Mixing Work & Play	Is about combining education and holidays for the youngest members of the family. While adults may need to telework or attend meetings, their children can be doing workshops and learning in a playful way – workcations.
Transformative Travel Experiences	These are experiences that are less about just looking at things and more about experiencing something new that engages and connects visitors, in a meaningful way, to the place, its history and heritage and its people.
Conscious Travel	Travel to more distant destinations, but with prolonged durations of stay, as consumers look to enjoy as much of each place they visit as possible.
Green Travel	Climate change is a problem that is present and growing. Consumers now are much more responsible and aware of the reality they live in on a daily basis.
Rural Experiences	Rural and regional destinations in Australia will continue to benefit from the desire of source markets for city escapes that continue to boost domestic tourism.
New faces and places	2022 will finally be the time to branch out and make new connections with 55% wanting to meet new people while away. A resurgence of vacation romances is also likely, with 41% hoping for one on their next trip.
Travel as Self Care	Travel will become an essential form of self-care. Travellers agree that travel helps their mental and emotional wellbeing more than other forms of self-care.
Community First	Authentic connection with the local community will be a priority. Travellers agree it's important that their trip is beneficial to the local community at their destination.
Just Say Yes	People will be saying YES to travel, making up for lost vacation time with travellers now more open to different types of vacations.
Embracing the Unpredictable	People will use technology to embrace travels continued unpredictability with travellers agreeing that technology will be more important than ever while on vacation.

Table 2. Trends influencing visitor demand

⁴ See more at <https://www.unwto-tourismacademy.ie.edu/2021/08/tourism-trends-2022>, <https://skift.com/megatrends-2022/>, <https://skift.com/megatrends-2022/>



Growing the Central West NSW Visitor Economy



Growing the Central West NSW Visitor Economy

Growing the Central West NSW Visitor Economy will initially require strategies to continue to recover from impacts of bushfires and the COVID-19 health pandemic to 2024, followed by growth strategies to stimulate the visitor economy to 2030.

COVID-19 Impacts

In March 2020 the Commonwealth Government closed its international borders due to the rapid spread of COVID-19 virus. Domestic travel to NSW was constrained by Public Health Orders resulting in numerous lockdowns and restrictions on intrastate and interstate movement.

The disruption to the tourism sector in 2020 was unprecedented. The immediate halt to people movement to prevent the spread of COVID-19 was significant to the industry in Australia and worldwide that experienced: a sudden halt in international visitation; restrictions on domestic mobility; and increased health and safety concerns. Australia's proactive management approach to the pandemic played a key role in protecting domestic demand for tourism despite ongoing disruptions to the tourism industry⁵.

The Murray region, due to the nature of the cross-border communities and the reliance on Victorian visitors was more heavily affected by COVID than most of NSW.

At Y/End Dec 2021 the number of total visitors to the Central West NSW region was 3.6 million or 31 per cent below the pre-COVID period (year 2019).

⁵ Tourism Research Australia, Tourism Investment Monitor 2019-20. Australian tourism investment and COVID-19 impacts



Recovery Goals

The focus of the goal Recovery Phase to 2024 is to assist businesses and the industry to rebuild and return total visitor expenditure to pre-COVID levels.

The following table highlights the 2019 (pre-COVID) visitor economy achievements versus the Y/End 2021 impacts⁶.

Y/END DEC 2019 (pre-COVID)		Y/END DEC 2021
5.2 million visitors		3.6 million visitors
6.3 million visitor nights		4.7 million visitor nights
\$1.35 billion visitor expenditure		\$1.29 billion visitor expenditure
2.3 million domestic overnight visitors		1.7 million domestic overnight visitors
2.9 million domestic daytrip visitors		1.9 million domestic daytrip visitors
33,800 international visitors		n/a international visitors
2,254 tourism businesses		n/a tourism businesses

Figure 5. 2019 (pre-COVID) visitor economy indicators versus 2021 outcomes⁷

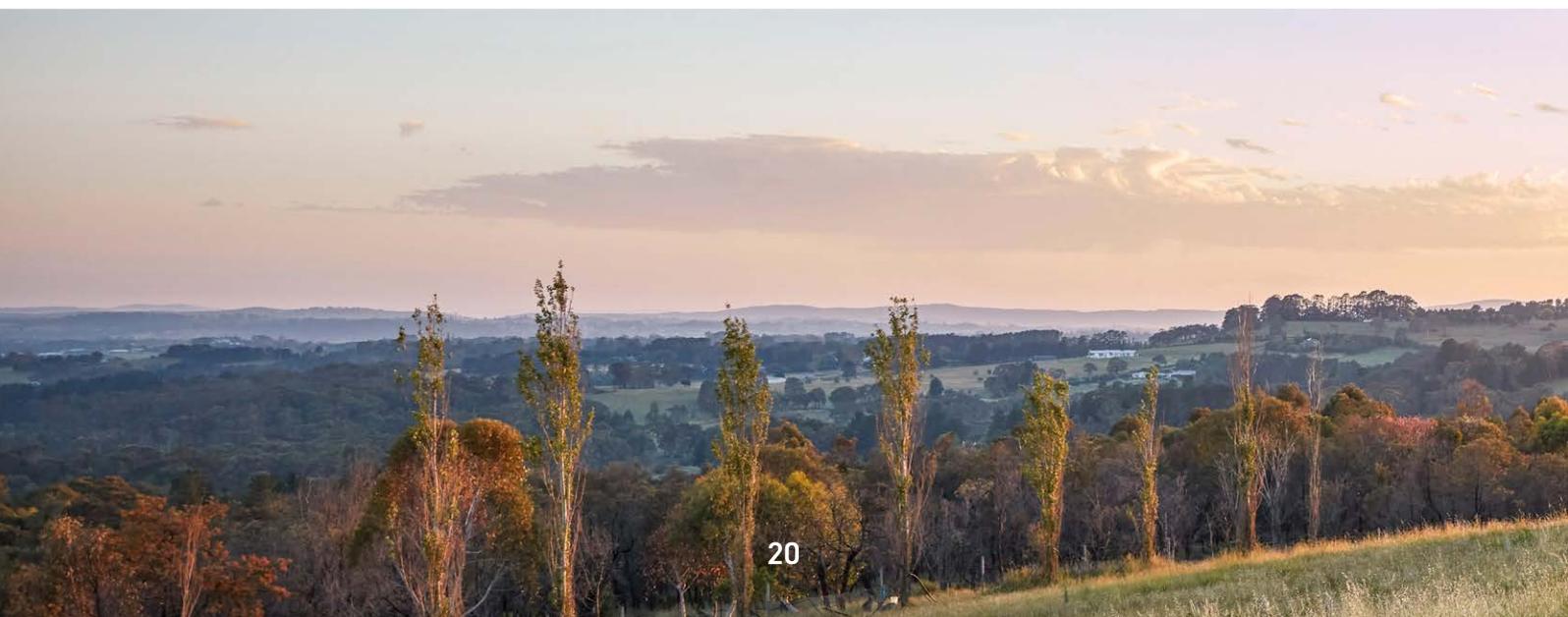
⁶ Tourism Research Australia – data set for Central West

⁷ International visitation data is not statistically reliable for YE December 2021

Main Opportunities & Challenges

The following strengths, weaknesses, opportunities, and threats were identified during the destination management planning process to inform the development of the Central West NSW DMP.

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Relatively close proximity to Sydney and Canberra and their surrounds that is appealing for daytrips and short breaks including multiple transport options (rail, air and road) • Outstanding history, heritage, arts and cultural offering • High quality food, drink and produce, including a number of wine regions and an established and growing agritourism sector that provides opportunities for visitors to directly engage with producers • The area has a strong 'emotional' pull' whereby people are attracted to the place for its beautiful landscapes, heritages towns, nature and to be connected to people (family and friends, producers, businesses and cultural experiences) • Significant geological assets, including fossil records dating back to Gondwana • Range of quality sporting facilities and assets • An active and effective Joint Organisation that supports collaboration between local government 	<ul style="list-style-type: none"> • Average night stay (2.6 nights) is lower than NSW regional average (3.2 nights) • At the time of preparing this Plan, Destination Central West NSW was newly established • Limited collaboration between stakeholders in the visitor economy, in particular to support multiday itineraries across LGA boundaries • Road access and quality of the road network as well as intra-region transport options • Limitations of the existing active transport network • Quality of interpretation and way-finding signage varies greatly • Lack of EVC charging in some Central West LGAs



OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Visiting Friends and Relatives (VFR) is a strong a motivator for travel • Road trips with multiday, experientially-led itineraries, including greater connectivity with outdoor recreation options such as cycling, hiking and kayaking (over 95% of visitors drive to the region) • Growing demand for private air charters • Increased interest in short breaks (the 'longer' long weekend) resulting from a number of reasons, including groups of friends reconnecting and greater flexibility in the workplace (digital nomads) • Events, including bespoke or small-scale leisure and business events • Aboriginal cultural tourism, including more personalised, immersive and transformative experiences • Ruralisation of tourism, which is resulting in increased demand within domestic markets for travel to regional Australia – links to increasing interest in agritourism • Sustainability and eco-tourism, including active transport and to support e-vehicles • Adopting new technology and integrating it into all relevant areas of the visitor economy from visitor services through to workforce support and interpretation • Leverage the Modern Mining Trail to drive regional dispersal across the Central West region • Development and promotion of the Gardens of Stone National Park by NPWS. • Opportunities for Central West arising from proximity to Western Sydney Airport 	<ul style="list-style-type: none"> • The shift from transactional to transformative travel • Digital transformation required to future-proof the visitor economy and meet the expectations of contemporary markets/travellers • Major infrastructure projects competing with leisure markets for occupancy and access • Domestic market demand likely to soften with the opening of international borders • Increasing cost of fuel and cost of living pressures (including inflation) impact domestic demand for discretionary holiday expenditure, especially for road trips • Regulatory barriers to agritourism and eco-tourism both at the state-wide and LGA levels • Connectivity relating to digital and communication technology • Attracting and retaining talent in a highly competitive workforce environment

Table 4. High-level SWOT analysis



Main Opportunities & Challenges (continued)

Further insights, issues and enablers relevant to the Central West NSW regional visitor economy include:

- **Improving standards of visitor servicing should be a high priority.** This includes greater activation of online and digital channels and enhanced in-destination visitor servicing with more remarkable destination content and information to attract new markets and encourage return visitation.
- **Accelerating digital innovation and connecting local content with DNSW** for distribution through their channels will be important to success, as highlighted in the comprehensive product and experience audit undertaken across the former Country and Outback NSW region (incorporating the new Central West NSW area) in 2018/19 and is reinforced by the ATDW listings for the region.
- **Engagement of other businesses and sectors and increased promotion of regional events** will assist in growing the value of the visitor economy and enhance linkages with Regional Economic Development Strategies. Importantly, the REDS are in the process of being reviewed and updated to reflect the current economic situation and influences, including interest rate and inflationary pressures.

In addition, a number of enablers were identified, including:

- **Engagement with stakeholders is a key to success.** As a new Destination Network, establishing and maintaining effective stakeholder engagement will be a high priority for DNCW. This should involve engagement of the region's economic development officers, which supports the VES action to link DMPs with REDS.
- **While the wide range of initiatives is acknowledged, greater support is required for businesses** (especially small to medium-sized enterprises), new market entrants and industry development, including a more wholistic, whole-of-government approach to building capability and capacity.
- **Investment in infrastructure to support the visitor economy is critical**, including air transport and an active transport network. The planning and the design of this infrastructure should be customer-centric and involve in-region stakeholders and those with specialist expertise in the visitor economy, including for the design of open space that suits outdoor events.
- **Given limited resources, new or emerging opportunities could result from additional funding received through State or Commonwealth Governments' grant programs.** However, a challenge is identifying the resources to apply to this task, especially to ensure that robust feasibility and return on investment analysis and appropriate master planning can be undertaken to attract investment.
- **A challenge for the region remains mobile connectivity.** While this needs to be addressed, it is still critical for tourism businesses to be online and to provide opportunities for visitors to connect in key locations.
- **A significant gap remains with regard to Aboriginal cultural tourism**, specifically but not exclusively relating to connecting potential experience providers to DNCW and DNSW and greater promotion of the experience offer. This should involve an ongoing and close relationship with NATOC as well as encouraging and supporting new market entrants.
- **Australia, like many places around the world, is currently facing significant challenges with attracting and retaining a viable and high-quality workforce.** In its 2022 Megatrends Report, SKIFT Research highlighted the ongoing challenge with labour supply, providing two insights (among many others) into the future: Firstly, shift focus on to the quality of the employee and invest in their ability to grow and learn in the industry; Secondly, consider the workforce issue within the broader context of technology, automation and innovation. These strategies will have the dual effect of increasing employee satisfaction and sense of value while also lifting the quality of the overall visitor experience. In adopting this approach, the region's reputation as an employer of choice will be enhanced, which will assist attract new talent.

See Appendix 3 for a summary of key insights gained from the consultation process.

Vision & Positioning



Vision & Positioning

The following vision and values were created from findings of the destination management planning process:

Vision

The following vision was created from findings of the destination management planning process:

Inspire and facilitate collaboration to grow a sustainable visitor economy for Central West NSW and contribute to the NSW regional overnight visitor expenditure target of \$25 billion by 2030.

Mission

To achieve this vision, the mission of DNCW and the region's stakeholders is:

Facilitate the development, enhancement and promotion of signature visitor experiences and events that create meaningful connections between the region, its cultural experiences, communities, characters, producers and businesses with visitors.

Positioning

The Central West NSW positioning statement frames the region's competitive advantage or point of difference and experience offering that visitors seek.

Indulge in the richness of a region immersed in nature and rural landscapes, enlivened with arts and culture and brimming with exceptional drink, food and produce to revitalise your senses.



Experience Strengths

The Wiradjuri, Gundungurra and Darug Nations are the Traditional Owners of the DNCW region, from the lands to the waters and the sky. We acknowledge their enduring connection to Country and pay our respects to their Elders past, present and emerging.

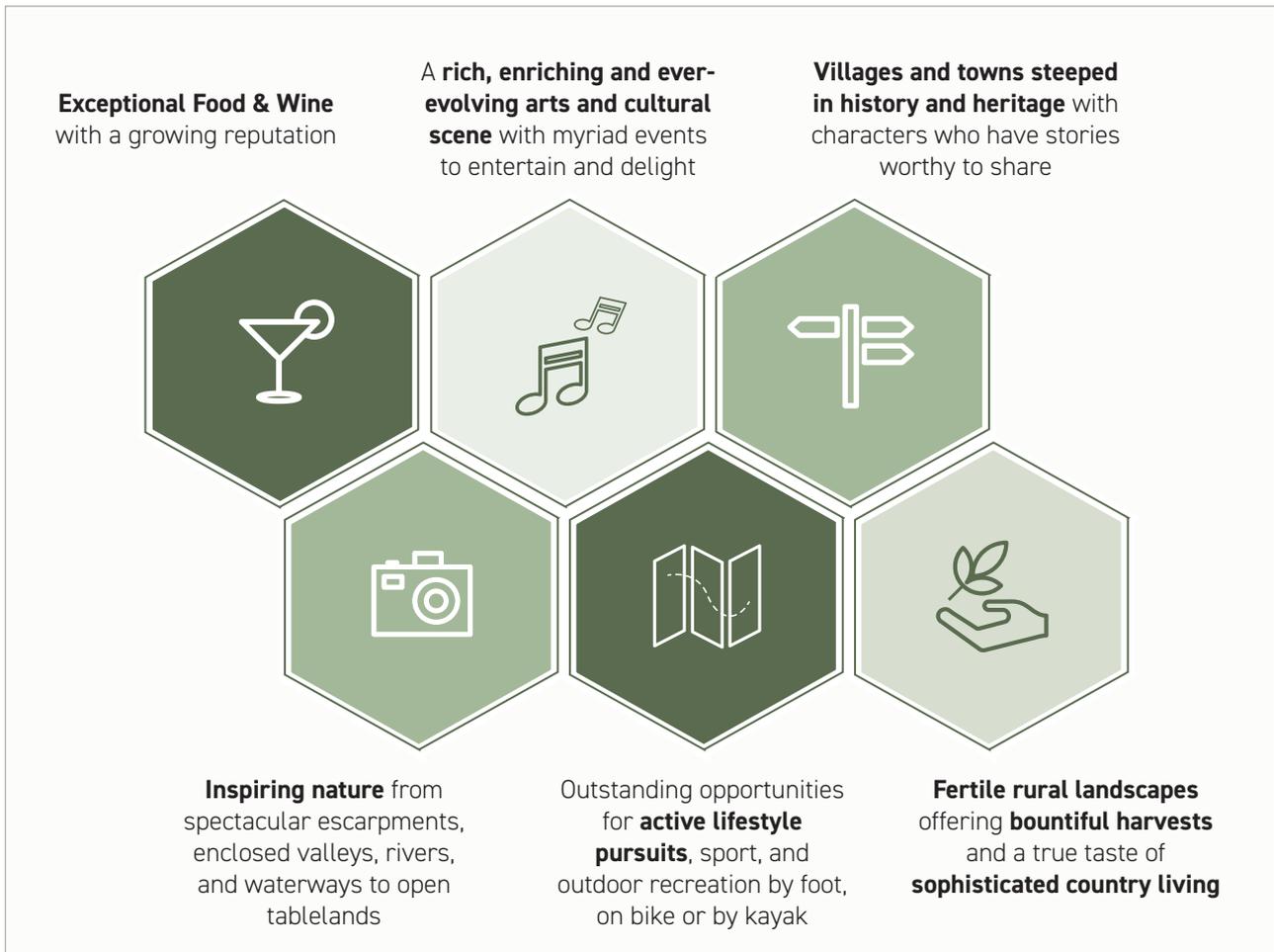


Figure 6. Key experience strengths for the Central West NSW region



Experience Strengths (continued)

The following summary of the Experience Strengths for each of the three sub-regions are drawn from the insights provided by stakeholders as well as the existing plans and strategies of the region. For further insights, please refer to Appendix 4.

SUB-REGION	EXPERIENCE STRENGTHS	
Lachlan, Parkes, Forbes, Weddin and Cowra	<i>A true taste of rural Australia</i>	<ul style="list-style-type: none"> • Stretching from the Central Tablelands through to the Central West, the region is full of fertile farmlands, fields of canola, vineyards, and open plains of grazing sheep and cattle. • From the charming town of Cowra in the beautiful Lachlan Valley surrounded by vineyards and waterways and famous for its Peace Precinct and Japanese Gardens, to the ultimate bush experience of camping under a star-filled night sky in Condobolin or Forbes and visiting Parke's famous landmark 'The Dish'. • Dress up for something a little more upbeat and be entertained at the popular Parkes Elvis Festival and Trundle's ABBA Festival. • Pick up the pace on a gravel or mountain bike along the myriad trails across the region. Plan your multiday itinerary with time for a hearty country meal or a refreshing craft beer at one of the region's many local pubs. • The area's villages and towns are steeped in history with compelling stories of Australia's earliest country heritage. Today, this is further brought to life through a nature-inspired sculpture trail, which captures the essence of the '<i>unmanicured beauty of the rural landscape</i>' as it winds its way along the Kalari Lachlan River between Forbes and Condobolin. • Experience the Somewhere Down the Lachlan Sculpture Trail or authentic local events such as Frost and Fire and Grazing Down Under. • Take in the amazing views and trails of the Weddin Mountains Region and experience surrounding rural villages of Caragabal, Quandialla, Bimbi and Greenethorpe and gaze at silo art around Grenfell.
Cabonne, Orange and Blaney	<i>Ignite and nourish your sense of well-being</i>	<ul style="list-style-type: none"> • Offering a range of experiences to nourish both body and soul; head and heart. From the creative to living history and heritage, all served with culinary delights and quality wines. • There is plenty to satisfy both the curious and the active. From masterclasses with local artists and artisans, discovering the provenance of produce or immersing yourself in the many events – big and small – that are scattered across the region and throughout the year: Orange F.O.O.D Week - Australia's longest running regional food festival; the Black Tie and Gumboot Truffle Hunt; Dinner by Lake Canobolas; Millthorpe's <i>Progressive Lunch</i>; or Mulaa Giilang: Wiradjuri stories of the night sky. • A visit to one of the region's many high-quality wineries and restaurants should be on the bucket-list of many, not just the foodies among us. • While for something a little more active, hop on a bike to experience the gravel road cycling loops connecting the region. • Discover Carcoar, a charming National Trust-listed town with outstanding heritage buildings, a true historic gem. • Gently take to the skies over Canowindra in a hot air balloon to survey the stunning landscapes of Cabonne, home to the Age of Fishes Museum, which proudly displays a 360-million-year-old fish fossil from the days of Gondwana. • Whether it's planning something special or finding those moments of serendipity, you'll leave feeling refreshed and revived.

SUB-REGION	EXPERIENCE STRENGTHS	
Mid-Western Region (Mudgee Region)	<i>Reset your senses</i>	<ul style="list-style-type: none"> • Whether you're a sporting enthusiast, wine lover or budding artist, the Mudgee Region is the place to reset your senses and restore your feeling of wellbeing. • Its charming villages and towns preserve some of the best examples of heritage from the gold-rush era, Victorian times or more recent industrial periods. Explore times past by wandering through the many museums of Gulgong. Or prepare to be amazed by the edgy arts and music scene inspired by Kandos' cement history. • Share special moments with family and friends visiting the region's wonderful wineries set amongst picturesque working vineyards; at one of the region's many captivating events; or by unwinding in its beautiful accommodation offerings, from farm stays to country cottages and glamping under the stars. • After a delicious meal, head off from the beautiful Victorian village of Rylstone for an adventure in nature. The region offers natural wonders such as Ganguddy Dunns Swamp, perfect for a kayak or take a wander through enchanted places such as Fern Tree Gully. • Cycle the quieter roads from Mudgee to Gulgong along the Central West Cycle Trail or power up on many of the region's mountain biking trails. Meanwhile, watersports and fishing await you at Windemere Dam. • Beyond its vibrant boutique retail, wine bars and cafes, Mudgee township boasts the recently opened Mudgee Arts Precinct, which hosts exhibitions from near and far in a spectacular gallery that connects to the peaceful Cudgegong River and Lawson Park Sculpture Trail. • View or participate in elite, professional, or local sporting activities at the nationally recognised Glen Willow Regional Sports Complex.
Bathurst, Oberon and Lithgow	<i>Travel across the ages</i>	<ul style="list-style-type: none"> • From the Jurassic Period when Jenolan Caves were forming through to the Industrial age, the region's towns radiate with history and heritage and remarkable stories. • Oberon, surrounded by pine forests that give the town its European ambience, offers a network of trails providing opportunities for walkers, mountain bikers, horse riders and 4W-drivers or those who like to forage for nature's treats of the forest. A visit to Mayfield Gardens is a treat in any season. • Only half an hour away by car is Australia's oldest and most spectacular cave system – Jenolan Caves. A place for connecting or reconnecting with family and friends or satisfying your sense of adventure deep underground. • Immerse yourself in Lithgow's fascinating industrial heritage at the Railway and Blast Furnace Park, the internationally recognised Small Arms Museum, by taking a ride on the Zig Zag railway or celebrating all things metal at Ironfest, 'An Arts Festival with a Metal Edge'. See a different side of Lithgow, with its emerging art scene or by exploring its many natural wonders, from Australia's largest enclosed valley to the recently expanded Gardens of Stone reserves. • A little further west is Bathurst, Australia's oldest European inland settlement. The first place that gold was discovered in Australia and the centre of its first gold rush. Head out to the eclectic arts community of Hill End to try your luck at gold panning for yourself. Today, the vibrant heritage city of Bathurst is popular for the arts, intriguing museum collections and sports, including Mount Panorama's internationally-renown Bathurst 1000. • The Bathurst region possesses a multitude of family friendly educational and cultural experiences; and is host large scale sporting events including the Bathurst 1000 and other major events.

Table 5. Experience strengths of Central West NSW by sub-region



Target Markets & Visitor Profiles



Target Markets & Visitor Profiles

The Central West NSW destination management planning process identified the following main visitor markets and growth development opportunities based on analysis of relevant Tourism Research Australia visitation data.

Overnight Visitor Market

The 'centrality' of the Central West NSW area, combined with its main centres of Orange, Mudgee and Bathurst, facilitates frequent day trips within the network area, and therefore day visitors outnumber overnight visitors. TRA data (2012-2021) highlights the multiple aspects to this region:

- Orange (20%), Bathurst (18%) and Mudgee (15%) are the main destinations attracting half of overnight visitors
- Sydney (48%) is a key segment for overnight visitors and the day market (23%)
- Overnight markets seeking dining (60%), VFR (44%) and interest in nature experiences (28%)
- Visitors in both day and overnight markets comprise Gen X families and 45+ workers along with Baby Boomer retirees
- International visitors comprise less than 1% of visitors across the network area. While the number of international visitors is low, the international market may still offer opportunities to target the Free & Independent Travellers (FIT) market; a segment that pre-COVID represented 83% of all international visitor arrivals to NSW.

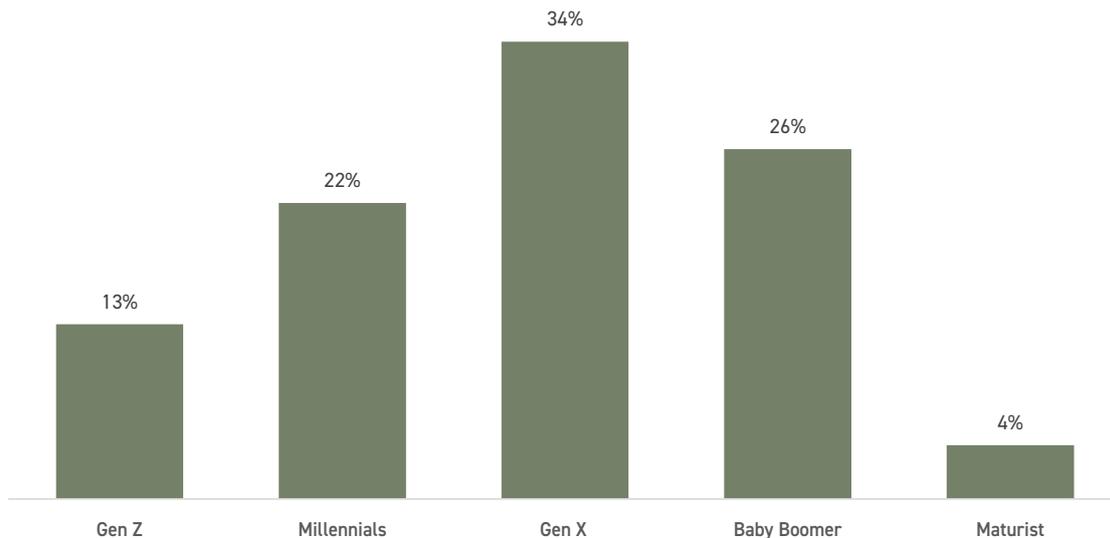
The following table provides the main **source markets for the Central West NSW region as averaged over eight years from 2012 to 2019**. This data is more consistent than 2020 and 2021, when interstate travel was restricted. Current data (2021) may show different results due to changes in border and travel restrictions.

TRA 2012 - 2019	CENTRAL WEST NSW	
SOURCE MARKETS	OVERNIGHT %	DAY %
NSW	83	99
Sydney	40	24
Intra-region	17	56
Hunter	7	2
North Coast	3	
Riverina	2	1
Other NSW	16	16
QLD	6	
VIC	7	1
ACT	2	
SA	1	
WA	0	

Table 6. Source markets for Central West NSW region averaged 2012-2019

Age and Lifestyle Segments

TRA data also shows an increase in **45+working couples/singles**. This most closely aligns to **Gen X Couples**. Gen X seek travel experiences that include elements of culture, are eager to experience new places and are especially drawn to cultural experiences. Expedia Group Media Solutions found that **71% like to explore off-the-beaten-path activities and seek local recommendations**.



Graph 1. Visitors by generational segment for Central West NSW

Future market growth opportunities

There are several market segments where significant growth is expected to continue both within Australia and around the world that could be considered for the Central West NSW region, including:

- Continuing rise in the numbers of **contemporary female travellers**, who are more likely to have a higher disposable income and to travel either on their own or in small groups of friends. They are also key influencers in family travel. This market is seeking new experiences that immerse them into the destination and the local culture.
- The continuing evolution of the **fifty-five plus (55+) market**. More people are choosing to travel earlier than retirement to enjoy the more active or immersive experiences that destinations have to offer. Globally, the 55 + market has the highest disposable income and are seeking new destinations to add to their bucket-list. They are as equally excited about an Australian holiday as they are about an overseas trip. This market is largely misunderstood; they want to engage and be part of the 'local scene'. They are also much more active and want to be perceived as being 'young at heart.' Domestically, they are also looking for short-break escapes and often choose to travel outside of peak periods to avoid the crowds.
- **Digital Nomads** and the **flexible working** revolution. This market is growing rapidly. While connectivity (for ease of remote working) is important, they are also seeking experiences and activities to enjoy while they are in the region. They want to feel like a local for the time they are in the destination. Accommodation options that cater to their needs are an important consideration. Importantly, digital nomads are not all about long-term travel and not confined to a single demographic or generation. Short breaks (more than just a long weekend) and school holidays are also an opportunity to attract digital nomads and their families.



Strategic Objectives



Strategic Objectives

Strategic objectives are designed to coordinate the region's tourism industry to grow the Central West NSW visitor economy to be fit for the future and align to the VES 2030 strategic pillars.

VES Strategic Pillars	Road to Recovery A comprehensive program of marketing and industry development will ensure NSW recovers quickly from the impacts of COVID-19, bushfires, drought and floods and elevates its status as the premier visitor economy in the Asia Pacific.	Build the Brand Compelling new brands will be developed for Sydney and NSW to provide a strong foundation for differentiation, consumer messaging, local pride and competitiveness to turbocharge recovery and accelerate future growth.	Showcase our Strengths NSW is a state of breathtaking diversity and bucket list visitor attractions and experiences. We will focus on existing strengths and develop new opportunities to ensure place making, destination marketing, events and visitor experiences drive visitation.	Invest in World Class Events An accelerated investment in signature sporting and cultural events as well as business events will help position Sydney and NSW as the events capital of the Asia Pacific, drive visitation and enhance the social wellbeing of NSW residents.	Facilitate Growth Investing in infrastructure, job creation, industry resilience and sustainability, future planning, and better ways to do business will ensure the continued growth and future prosperity of the NSW visitor economy.
Central West NSW DMP Strategic Objectives	Support the Central West NSW visitor economy to recover and be sustainable, capable and resilient.	Position and promote Central West NSW and its destinations to align to the Feel New brand.	Facilitate and enable the development or enhancement of world-class visitor experiences and accommodation.	Facilitate and enable the development or enhancement of world-class events.	Provide an enabling environment to attract investment in the Central West NSW visitor economy.
VES Key Result Areas	<ul style="list-style-type: none"> Return visitation and expenditure to pre-COVID levels by 2024 Sustainable and resilient visitor economy businesses 	<ul style="list-style-type: none"> Increased demand to visit Sydney and NSW Greater brand awareness in target markets Improved response to campaign activity Increased community satisfaction 	<ul style="list-style-type: none"> Increased average length of stay and yield Growth in visitation and expenditure for regional destinations Higher levels of repeat visitation 	<ul style="list-style-type: none"> Increased economic impact and visitor attendance at events Greater promotion of Sydney and NSW as an events destination Increased community and visitor satisfaction 	<ul style="list-style-type: none"> Increased private and public sector investment in visitor infrastructure Improved access to visitor destinations and visitor attractions Increased visitor satisfaction with accommodation and experiences

Table 7. Strategic objectives for Central West NSW visitor economy

Relevant actions from the VES have been identified in Table 1 below, noting that these actions only relate to DNCW as a supporting partner with the exception of Action 5.07, for which it has direct responsibility.

STRATEGIC PILLAR	VES ACTION REFERENCE	KEY AREAS OR STRENGTHS
Road to recovery	Actions 1.01, 1.02, 1.08, 1.11, 1.12, 1.17, 1.18, 1.20	<ul style="list-style-type: none"> • Support business • Drive demand • Develop and grow the visitor economy workforce • Infrastructure
Build the brand	Action 2.05	
Showcasing our strengths	Actions 3.01, 3.02, 3.03, 3.04, 3.09	<ul style="list-style-type: none"> • Small town charm • Vibrant contemporary culture • Reconnect in nature • World-class food and drink • Eco-wellbeing • Everyone's invited
Invest in world-class events	Actions 4.02, 4.03, 4.06, 4.08, 4.09	<ul style="list-style-type: none"> • Regional and local events • Business events
Facilitate growth	Actions 5.02, 5.03, 5.06, 5.07	<ul style="list-style-type: none"> • Regulation and planning reform • Transport and access • Visitor infrastructure

Table 8. Relevant strategies or actions of the VES⁸

⁸ See: <https://www.destinationnsw.com.au/wp-content/uploads/2020/12/nsw-ves-2030.pdf>





Action Plan



Action Plan

The following sections identify actions related to the five Central West NSW DMP strategic objectives.

Actions align with the three phases of the VES 2030:

- Recovery Phase to 2024
- Growth Momentum to 2026
- Growth Accelerate to 2030

1.0 Road to Recovery

Strategic Objective: Strategic Objective: Support the Central West NSW visitor economy to recover and be sustainable, capable and resilient.

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
1.1	Work with DNSW to deliver NSW First initiatives to strengthen industry sustainability, capability, and resilience	DNSW	DNCW LGAs, LTOs	2022 to 2024
1.2	Work with the DNPMG to create an 'Understanding the Regional Visitor Economy Program' to improve understanding of local government, industry and community about the Central West NSW visitor economy	DNPMG	DRNSW LGAs	2022 to 2024
1.3	Work with the DNPMG to advocate and maximise the opportunities and resources available from external grant funding opportunities to support regional visitor economy resilience and growth	DNPMG	DRNSW	2022 to 2024
1.4	Work with the DNPMG and regional stakeholders to advocate for work force solutions around visitor economy staff and skills and housing shortages	DRNSW	DNPMG	2022 to 2024
1.5	Work with the JO, LTOs and LGAs to coordinate a regular visitor research program to provide meaningful insights into the region's visitor economy and the dynamic and evolving nature of consumer behaviour in tourism and travel, including for events	DNCW	DNSW LGAs, LTOs JO	2022 to 2024
1.6	Strengthen industry engagement and networking, including through hosting forums and seminars as well as creating and distributing stakeholder newsletters that enhance awareness of the latest trends and best practice in the visitor economy	DNCW	DNSW LGAs, LTOs	2022 to 2030

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2.0 Build the Brand

Strategic Objective: Position and promote Central West NSW and its destinations to align to the Feel New brand.

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
2.1	Work with DNSW, LGAs and LTOs to create a Central West NSW Marketing Toolkit that maps the destination brand identities, product and experience strengths and ways to align with Feel New brand	DNSW	DNCW LGAs, LTOs	2022 to 2024
2.2	Encourage the creation of experience-led remarkable content for multichannel distribution and support a shared program to capture and curate content (images, videos and copy), including a focus on culinary, nature, arts and culture as well as well-being tourism	DNCW	DNSW LGAs, LTOs	2022 to 2024
2.3	Act as a conduit between DNSW, LGAs and LTOs to facilitate media famils, photo-shoots and other opportunities for content development – strengthen collaboration to avoid duplication and maximise budgets for content development	DNCW	DNSW LGAs, LTOs	2022 to 2030
2.4	Facilitate awareness of information travellers should know and plan for before they arrive in-region, including for events and sports tourism. The program could provide helpful 'local tips' as well as safety and sustainability messages, including a guide or map to mobile connectivity, highlighting centres, facilities and services	DNCW	DNSW LGAs, LTOs	2022 to 2030

3.0 Showcase our Strengths

Strategic Objective: Facilitate and enable the development or enhancement of world-class visitor experiences and accommodation.

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
3.1	Work with DNSW to coordinate famils and deliver NSW First programs that encourage and support development and packaging of new and improved existing products and services	DNSW	DNCW	2022 to 2030
3.2	Work with NATOC, First Nations' communities, representative organisations and businesses across Central West NSW to support the development of new or enhance existing Aboriginal cultural experiences and events, including opportunities for accommodation	DNSW	DNCW NATOC, NIAA DNPMG LGAs, LTOs	2022 to 2024

3.0 Showcase our Strengths (continued)

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
3.3	Work with the DNPMG to advocate and support the development of First Nations and new heritage products and experiences including tailored industry development and support to help bring forward new cultural tourism product development opportunities	DNPMG	DNSW NATOC, LALCs Museums & Galleries NSW LGAs, LTOs	2022 to 2030
3.4	Work with LGAs, food and drink sector and land managers to promote and enable experience development focused on enhancing existing and creating new experiences, packages and accommodation. Consider opportunities to activate small-scale and personalised experiences. <ul style="list-style-type: none"> • Agritourism, farm stays, tours and produce, including wineries • Behind the scenes tours • Special-interest and sport tourism markets • Nature-based and well-being experiences 	DNCW	DNSW NPWS Crown Lands LGAs, LTOs	2022 to 2030
3.5	Support the development of a cycle tourism strategy for Central West NSW and reinforce the importance of growing the active transport network across the region. Ensure consideration for a diverse cycling offering, from road cycling to gravel bikes and mountain biking	DNCW	DNSW DRNSW TNSW LGAs, LTOs	2022 to 2030
3.6	Work with DNCO, DRM and market-ready operators to bring to life the Wonder of Gondwana concept and experience themes, incorporating geotourism	DNCW	DNSW DNCO, DRM LGAs, LTOs	2022 to 2030
3.7	Work with the DNPMG, NPWS and FCNSW and private landowners to identify opportunities for nature-based product and experience development. Consider opportunities to activate small-scale and personalised experiences. For example: <ul style="list-style-type: none"> • Behind the scenes tours • Special-interest, sports and nature tourism markets 	DNPMG	DNSW DRNSW LGAs, LTOs	2022 to 2030
3.8	Work with the DNPMG to support operators to further develop agritourism product and experiences, to capitalise on agritourism planning reforms, including audit to identify existing hero agritourism products and experience offerings	DNPMG	DNSW DRNSW LGAs LTOs	2022 to 2026

4.0 Invest in World Class Events

Strategic Objective: Facilitate and enable the development or enhancement of world-class events.

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
4.1	Support LGAs and LTOs to proactively pursue, attract and support new event initiatives, including business events and conferences as well as leisure and cultural events	DNCW	DNSW LGAs, LTOs	2022 to 2024
4.2	Work with LGAs and LTOs to activate the diverse sporting facilities and outdoor recreation opportunities to capitalise on the sports tourism opportunities of Central West NSW, including enhanced visitor services pre, during and post visit and attract new sporting events and participants to the region	DNCW	DNSW LGAs, LTOs	2022 to 2024
4.3	Identify and support applications for grants to enable event development for First Nations' cultural events and infrastructure	DNCW	DNSW NATOC, LALCs LGAs, LTOs	2022 to 2030
4.4	Advocate and support investment in event infrastructure and facilities for and programming of events that reinforce the point of difference of the region or destinations of DNCW, including smaller-scale leisure and business events	DNCW	DNSW LGAs, LTOs	2022 to 2030
4.5	Encourage event organisers, LGAs and LTOs to implement commercial opportunities to minimise the use of volunteers to manage and run events	DNCW	DNSW LGAs, LTOs	2022 to 2030
4.6	Encourage LGAs and LTOs to provide pre-event, in-destination and post-event information and inspiration to extend the length of stay as well as encouraging regional dispersal and repeat visitation	DNCW	DNSW LGAs, LTOs	2022 to 2030

5.0 Facilitate Growth

Strategic Objective: Provide an enabling environment to attract investment in the Central West NSW visitor economy.

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
5.1	Support the strengthening of visitor servicing standards and content across the Central West NSW region	DNCW	DNSW JO LGAs, LTOs	2022 to 2024
5.2	Encourage and facilitate digital transformation to future-proof the region's visitor economy, involving: <ul style="list-style-type: none"> Industry awareness of consumer behavior and expectations about online and digital services, including e-commerce, online booking and flexibility Adoption of technology to promote the region and provide contemporary visitor services at all touch points along the customer journey as well as revitalise interpretation Encourage more tourism and hospitality businesses to participate in DNSW's Digital Skills Accelerator for Tourism program, which is part of the NSW First program 	DNCW	DNSW JO LGAs, LTOs	2022 to 2030
5.3	Identify opportunities to attract investment in facilities and accommodation to support and cater to the needs of the growing sports tourism market	DNCW	DNSW JO LGAs, LTOs	2022 to 2030
5.4	Identify opportunities in collaboration with hospitality businesses to facilitate on-the-job training and meaningful career pathways in hospitality	DNCW	DNSW JO LGAs, LTOs	2022 to 2030
5.5	Identify opportunities for and encourage the region's top performing wineries to participate in programs such as the Ultimate Winery Experiences Australia	DNCW	DNSW JO LGAs, LTOs	2022 to 2030
5.6	Advocate for increased supply of accessible tourism experiences	DNCW	DNSW JO LGAs, LTOs	2022 to 2030
5.7	Identify opportunities to expand facilities and services for digital nomads (flexible working), including longer short-breaks and school holiday travel and increase awareness of local accommodation providers about the current and emerging expectations and needs of digital nomads	DNCW	DNSW LGAs, LTOs	2022 to 2030

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5.0 Facilitate Growth (continued)

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
5.8	<p>Encourage the continued revitalisation of heritage tourism through:</p> <ul style="list-style-type: none"> • Adaptive reuse and repurposing of heritage assets for the visitor economy • Enhanced interpretation, including through use of new technologies 	DNCW	DNSW LGAs, LTOs	2022 to 2030
5.9	<p>Collaborate with LGAs and JO to inform priorities and attract investment for major infrastructure projects and improvements that enhance connectivity and accessibility, deliver shared benefits and enable greater linkages between the LGAs.</p> <ul style="list-style-type: none"> • Incorporate active transport options, such as regional cycleways (options for mountain, gravel and road bikes) and rail trails • Advocate for accelerating growth in the network of high-speed charging stations for electric vehicles (EV) • Activate the region's airstrips (public and private) to support private air charters for both the leisure and business markets 	DNCW	DNSW DRNSW JO LGAs, LTOs	2022 to 2030
5.10	<p>Continue to provide advice and support to local businesses, organisations and community or volunteer groups to apply for visitor economy or other grants that can assist them grow, revitalise or enhance their experience or offering, including for events.</p> <ul style="list-style-type: none"> • Support cross-region infrastructure projects that enhance access to and within the region as well as provide high quality visitor experiences • Ensure customer-centric design and the costs associated with attracting investment are built into all proposals for new major projects. This includes robust master planning, feasibility analysis and demonstrating return on investment • Adopt and apply the VES' Visitor Infrastructure Framework and its assessment criteria 	DNCW	DNSW DRNSW JO LGAs, LTOs	2022 to 2030
5.11	<p>Advocate in partnership with organisations such as Ecotourism Australia to encourage and strengthen the supply of sustainable and ecotourism-accredited experiences and accommodation</p>	DNCW	DNSW NPWS Crown Lands LGAs, LTOs	2022 to 2030

5.0 Facilitate Growth (continued)

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
5.12	Work with Destination NSW and the Destination Network Project Management to disseminate and communicate relevant visitor economy research to regional stakeholders	DNPMG	LGAs LTOs	2022 to 2030
5.13	Work with the DNPMG to advocate to the NSW Government and LGAs to streamline planning requirements to better support the growth of the visitor economy	DNPMG	NSW Govt. DNSW DRNSW LGAs, LTOs	2022 to 2030
5.14	Work with the DNPMG to advocate to the Australian and NSW Government to collectively advocate for improved digital and transport connectivity	DNPMG	NSW Govt DNSW	2022 to 2030
5.15	Work with the DNPMG to leverage opportunities for international and domestic airway route development	DNPMG	DNSW	2024 to 2030



Regional Priorities



Regional Priorities

As a result, the regional priorities have been informed by the situation analysis and structured to reflect the role of the DN and contribute to the ambitions and regional visitor expenditure target across the three phases of the VES 2030.

As a result, **six priority focus areas have been identified for Central West NSW**, which reflect the strategic objectives and align to its role and responsibilities, specifically:

- Digital transformation and visitor services to future-proof the visitor economy
- Industry engagement and capability development
- Regular visitor research program to understand the visitor
- Strategic approach to attracting investment
- Attracting, retaining and developing talent (visitor economy workforce)
- Enhancing connectivity and accessibility

In addition, **two major initiatives or opportunities for regional collaboration** have been identified that would significantly contribute to enhancing the perception and appeal of the broader region. They focus on:

1. World-class food, drink and agritourism, leveraging the region's significant reputation for its culinary and local produce offering
1. Regional NSW's premier health and well-being destination. A significant opportunity for the region is to position itself as the leading health and well-being destination in regional NSW, including eco-well-being. This would elevate the existing and outstanding health and well-being experiences or accommodation on offer through Central West NSW

Delivery of these projects would further strengthen the reputation of DNCW across the region, including in stakeholder engagement and supporting the region's visitor economy.

A tailored set of actions relating to the opportunities for regional collaboration as well as the six priority focus areas are provided in Appendix 4.

DNCW is the new 'shopfront' of DNSW for Central West NSW, supporting the sustainable growth of the region's visitor economy and delivering on the VES' visitation and expenditure targets for regional NSW.

This will be most effectively achieved through:

- Ongoing and enhanced stakeholder engagement, communication and collaboration within government and across sectors, including strategic planning to align with the visitor economy priorities of the REDS;
- Strengthen the supply of world-class visitor experiences, products and accommodation; and
- Supporting and promoting industry capability development, including for new market entrants.

Stakeholder Roles in Growing the Regional NSW Visitor Economy



Stakeholder Roles in Growing the Regional NSW Visitor Economy

The Central West NSW Destination Management Plan will guide the region's priorities to 2030 and will require cooperative support from other tourism stakeholders across local, regional and state/territory levels to successfully implement the Plans' initiatives.

Stakeholder engagement confirmed a commitment from local governments, tourism businesses, Destination Central West NSW and Destination NSW to develop a solid working relationship to achieve the outcomes prioritised in this Plan.

The following outlines the roles of these stakeholders in implementing this plan to 2030.

Destination Central West NSW

Destination Central West NSW is one of seven Destination Networks in regional NSW and is an important conduit between the NSW Government, the local governments and tourism businesses across the Central West NSW region. It continues to play an important role in delivering regional funding and industry development programs, and in identifying infrastructure needs and investment opportunities to grow the regional visitor economy.

The NSW Destination Networks are considered the champions of the visitor economy in their regions, proactively engaging with stakeholders to identify, prioritise and facilitate opportunities for regional visitor economy growth. They also play a key support role for Destination NSW in the delivery of its industry development and visitor experience and regional event funding programs⁹.

The Destination Networks will support Destination NSW in implementing the NSW Visitor Economy Strategy 2030 to achieve the visitation and expenditure targets for regional NSW. The Destination Management Plan for each Destination Network is aligned with the NSW Visitor Economy Strategy 2030.

The Destination Networks are predominantly destination managers and are considered the 'shopfront' for Destination NSW in regional NSW and work closely with local government, tourism organisations and operators.

Their objective is to facilitate visitor economy growth at the local level, through representing and coordinating the region's tourism industry.

Their core responsibilities include:

- Industry Engagement and Industry Development
- Product Development
- Training and Education
- Preliminary Review of Local DNSW Grant Applications to ensure quality/compliance with guidelines
- Collaboration with DNSW on cooperative marketing and industry activities that are aligned to Brand NSW

Specifically, Destination Networks:

- **Develop and implement the region's Destination Management Plan and Business Plan**, in alignment with the NSW Visitor Economy Strategy 2030, and ensure alignment with local tourism and related plans
- **Work with Local Government and industry** on product development, including investment attraction
- **Work in collaboration with DNSW** led marketing and communications activity for their 'hero' destinations, experiences, events and festivals and regional campaigns
- **Explore Industry Development initiatives** (i.e., identify opportunities for growth) eg., Conferencing, Field Study Tours, local industry education and training needs especially for small to medium sized tourism operators
- **Assist local industry to prepare DNSW grant applications**¹⁰.

The Destination Networks are funded by Destination NSW with an independent skills-based board providing strategic leadership and direction.

⁹ NSW Visitor Economy Strategy 2030

¹⁰ Destination Networks: Driving Growth of the Visitor Economy in Regional NSW <https://www.destinationnsw.com.au/wp-content/uploads/2016/07/Destination-Networks-29-June-2017.pdf>

Destination NSW

As the lead NSW Government agency for the visitor economy, Destination NSW will coordinate and amplify delivery of the programs and initiatives of the NSW Visitor Economy Strategy 2030 across all levels of Government.

A whole-of-government approach has been embedded in visitor economy planning with the establishment of a new Visitor Economy Senior Officers Group, to ensure visitor economy strategies are coordinated across government, to monitor performance against targets, and respond to emerging issues.

New approaches to industry engagement and consultation are also proposed to inform the development of new NSW Government initiatives and programs for the visitor economy. The NSW Government will continue to develop the Visitor Economy Index to explore new ways of measuring the impact of the visitor economy and guide future decision-making.

DNSW support the Destination Networks to deliver the strategic directions of the DMPs and grow the visitor economy.

Department of Regional NSW

The Department of Regional NSW is the NSW Government's central agency for regional issues, building resilient regional economies and communities, strengthening primary industries, managing the use of our valuable regional land, overseeing the state's mineral and mining resources and ensuring that government investment into regional NSW is fair and delivers positive outcomes for local communities and businesses¹¹.

The NSW Government's 'Regional Development Framework' and '20-Year Economic Vision for Regional NSW – Refresh' set out the Government's priorities and plans to achieve long-term social and economic success for regional communities across the state. In addition, Regional Economic Development Strategies provide a clear economic development strategy for the regions and guide government investment in economic development initiatives in regional NSW.

¹¹ www.regional.nsw.gov.au



Local Government

Local Government plays a pivotal role in tourism activity, with councils actively involved in promoting tourism, providing infrastructure and services to support tourism, and managing the impacts of tourism. The Australian Regional Tourism and Economic Development Australia benchmarking survey of local governments (2020) shows that each council spends on average \$761,000 on tourism annually. Whether it's through the provision of infrastructure, cultural facilities, events, visitor services or public spaces, councils support the economic development of their local communities via either direct financial or in-kind support to tourism. The role of local government in tourism is also recognised in the State Government's NSW Visitor Economy Strategy 2030, which contains a commitment for Destination NSW to work closely with councils and a principle of collaboration between the industry and government, including councils¹².

Other Key Support Partners

Other important local, regional and NSW government and industry stakeholders that have an important role in supporting the DNS to implement strategies and actions of their associated with this Plan to 2030 include:

- Local tourism organisations and Chambers of Commerce
- Tourism industry operators
- Region Joint Organisations
- NSW Government Departments and Agencies (represented by the DNSW Visitor Economy Seniors Officers Group)
- NSW Tourism Industry Associations

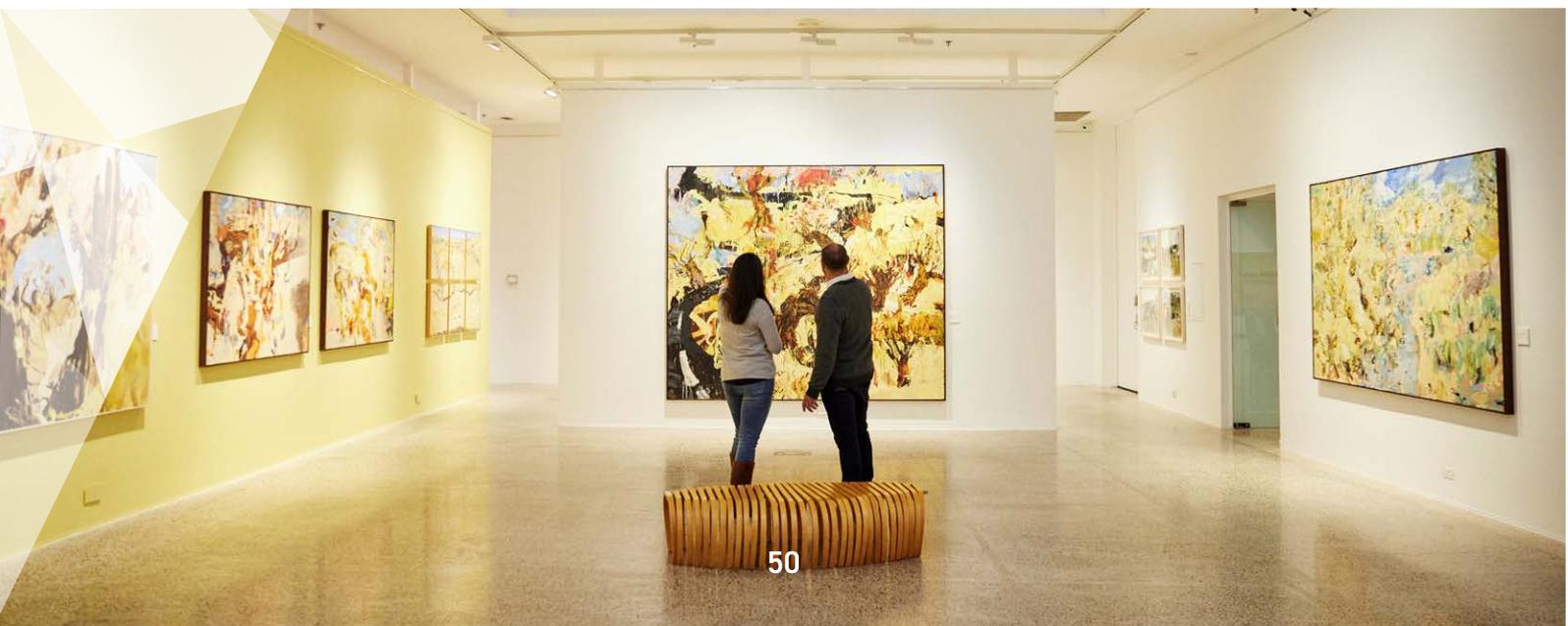
¹² <https://lgnsw.org.au/Public/Public/Policy/Tourism.aspx>

Review

Monitoring of the implementation of this Plan's strategies and actions is important to ensure its vision and objectives are achieved and to provide new information that can be used to inform planning and decision-making for the Central West NSW visitor economy to 2030. A review of this plan will be undertaken in 2024 and 2026.

Visitor Infrastructure Framework Assessment Criteria

The NSW Government uses Cost Benefit Analysis to assess the social, economic and environmental impacts of infrastructure proposals including visitor economy infrastructure. Where feasible, Cost Benefit Analysis will be used to prioritise proposals for regional NSW visitor economies and have been designed to help guide prioritisation and decision-making. See Appendix 6 for the criteria used by the NSW Government to analyse the cost benefit of infrastructure development proposals.



Appendices



Appendix 1: NSW Government strategies relevant to the regional visitor economy

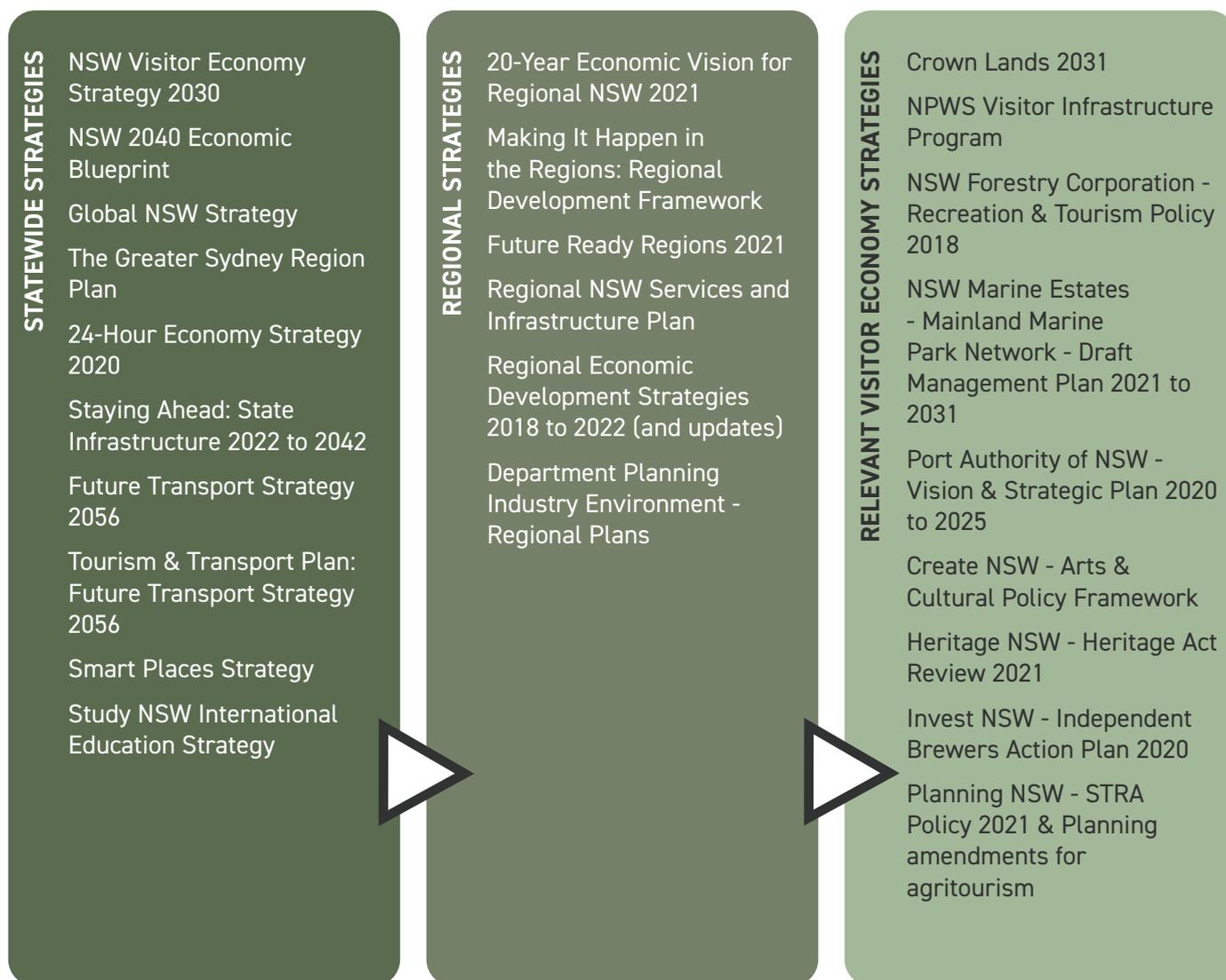


Figure 8. Strategies relevant to the regional visitor economy

Appendix 2: Research Insights

DESTINATION NETWORK CENTRAL WEST NSW
Bathurst Regional Council, Blayney Shire Council, Cabonne Council, Cowra Council, Forbes Shire Council, Lachlan Shire Council, Lithgow City Council, Mid-Western Regional Council, Oberon Council, Orange City Council, Parkes Shire Council, Weddin Shire Council
12 Local Government Areas (LGA), five Regional Economic Development Strategies (REDS) and one Joint Organisation
FAST FACTS
The total network area averages just under 4.5 million visitors per year (2017-2021)
<ol style="list-style-type: none"> Overnight visitors comprise 44% of visitors, and contribute approximately \$891 million per year Day visitors comprise 55% of visitors and contribute approximately \$376 million per year International visitors comprise 1% of visitors and contribute approximately \$15 million per year
Average visitor expenditure is estimated at over \$1.2 billion per year
Domestic average overnight spend is on par with the Regional NSW average of \$171
Average overnight stay (2.6) nights is lower than the Regional NSW average of 3.2 nights

Table 8. Visitation and spend for Central West NSW (2017-2021)¹³

Reason for Travel

Visiting Friends and Relatives (VFR) travel is equal to holidaying as a travel motivator.

PURPOSE	OVERNIGHT	DAY
Holiday	37%	44%
VFR	37%	24%
Business	16%	11%
Other	7%	21%
Transit	3%	

Table 9. Reason for travel for visitors to Central West NSW¹⁴

¹³ Analysis of visitor research or data for each hub was downloaded using ArcGIS to examine LGA, Tourism and SA2 boundaries as defined within the DNSW Destination Network Boundaries

¹⁴ Source: TRA NVS data: data for 2017 calendar year

Visitor Flows

Over 95% of visitors drive to the network area, which signifies the importance of understanding the drive tourism market and their needs and aspirations.

Visitor Summary

5-YEAR AVERAGE (2017-2021)		# visitors ('000)	% of total	\$ contribution	Domestic \$ per night	Average night stay
DNCW Network Area	Domestic overnight	1,960	44%	\$891 m	\$170	2.6
	Domestic day*	2,491	56%	\$376 m	\$151	
	International	22	1%	\$15 m		
	Total	4,473	100%	\$1,283 m		

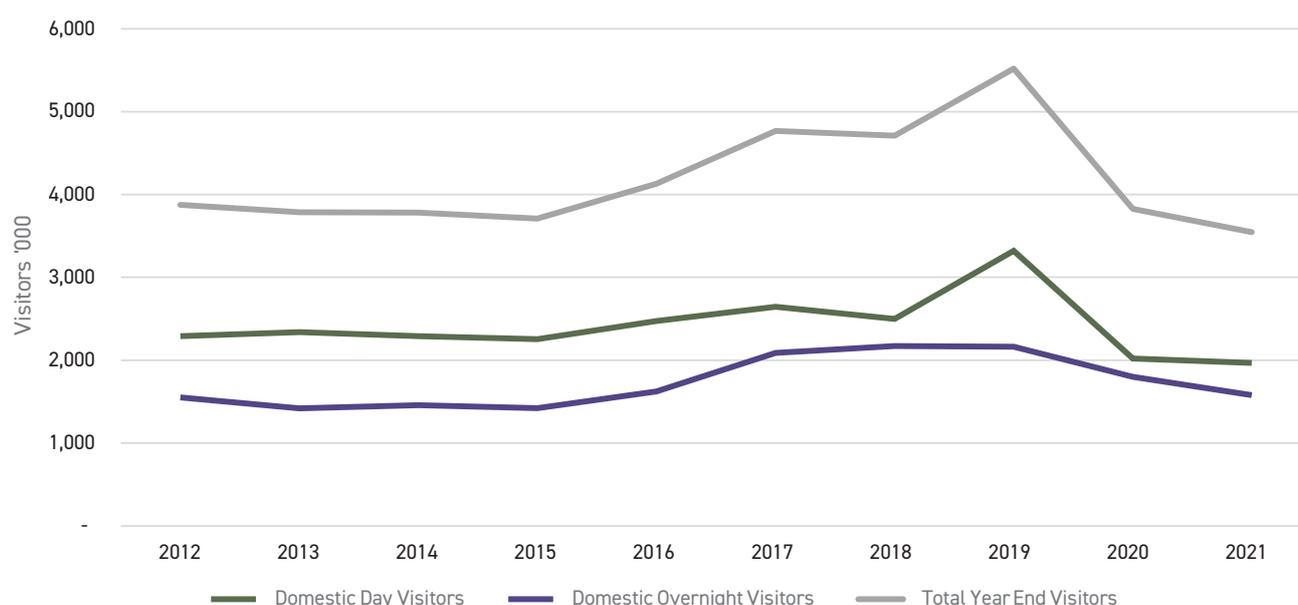
Source: TRA (2019) LGA profiles. 5-year average 2017-2021

* Small sample size for day visitors

^ For the same period, in Regional NSW the domestic overnight average spend is \$171

Table 10. 5-year average (2017-2021) visitation and spend for Central West NSW¹⁵

Visitation to the DNCW region had been steadily increasing to reach **5.6 million visitors** in 2019 before the impact from COVID-19 resulted in visitation decreasing 35% in 2020 and 5% in 2021. DNCW region represented 44% of visitation to the former DNCO network area in 2019.



Graph 2. 5-year visitor statistics (2017-2021) for the Central West NSW

¹⁵ Analysis of data for the former DNCO region found that Country NSW (the new DNCW region) provided 42% of the \$3 billion total network contribution

Appendix 3: Consultation Insights

Over 100 representatives from across the Destination Network were consulted to inform the development of the DMP.

WHO WE CONSULTED

- Over 100 participants
- Councillors and Council staff
- Local industry
- Representatives of regional organisations, State and Commonwealth Government agencies
- Australian Geoscience Council

HOW WE CONSULTED

- Workshops and meetings in Bathurst, Orange and Parkes
- Sessions via video-conferencing
- One-on-one and small group meetings with key stakeholders

High-level summary of insights:

- Entire region has experienced an increased **diversity in visitor markets**, in particular families and younger travellers
- Building a more **capable and cohesive tourism community**. This could be achieved through providing access to better information, research and insights into the visitor economy
- **Experience and event development**, including leveraging active transport networks (cycling) as well as supporting greater diversity in accommodation and attracting higher-yield markets. Opportunities for packaging and bundling of experiences was also highlighted as part of strengthening partnerships within the region
- Desire of **addressing key challenges** such as barriers to agritourism and eco-tourism, improved connectivity (digital and communication technology) and accessibility (esp. road access and intra-region transport options) and a more sustainable workforce
- Major **infrastructure projects** across the region is impacting on the availability of the workforce and accommodation for leisure markets. There are many projects planned that will continue to impact accommodation supply
- Growing **culinary and agritourism** as well as the **arts and culture** offering
- Importance of encouraging greater regional dispersal while supporting **greater collaboration** (industry, government and other sectors) will be a key to success



Appendix 4: Opportunities for Regional Collaboration

Major Initiatives: Existing & Emerging Strengths

1. World-class food, drink and agritourism

The Central West NSW region includes three of NSW's wine regions and has a reputation for its high-quality culinary and drink offering. However, there are many opportunities to continue to elevate its reputation and experience offering as well as to enhance access to local produce.

This includes the opportunity to strengthen development of the sector through a dedicated, industry-led approach to strengthening hospitality and customer service. A core focus would be to create meaningful employment pathways to attract and retain talent.

An integrated approach across experiences, events and accommodation would enable the region to compete even more effectively with Australia's most renowned and popular food and wine destinations. The diversity of the region's food and drink offering is a strength to be harnessed in this regard. However, a significant opportunity is to take ownership of agritourism as part of this approach.

Growing interest in where food comes from and how it is produced, including broadacre agriculture is creating increased demand for agritourism, including farm stays.

Produce is becoming the travel souvenir of choice. In part fuelled by food media that amplify the provenance story and illustrate the connection between ingredients, producers and places; and in part, fuelled by the growing shift in consumer spending towards more immersive and transformative experiences. This includes behind the scenes tours with farmers to masterclasses with local chefs using freshly harvested ingredients. The Central West NSW region provides a wide range of agritourism opportunities, from vineyards to broadacre farming and more.

There are many barriers faced by Australian producers wanting to innovate on farm and beyond the farm gate. Similarly, there are many barriers that prevent regions from maximising their opportunities to develop high-yielding agri and food tourism. The two issues are linked.

The ultimate goal is to help facilitate a regulatory and commercial environment to assist regional businesses to innovate, use their creativity and spare capacity to create new products and experiences that tap into consumers' growing desire to know where their food and fibre comes from and to experience a real connection with the producer and regional NSW. It needs to balance all this with important considerations such as biosecurity and farm safety to minimize risks and optimise the visitor experience.



World-class food, drink and agritourism	
<p>Work with the food and drink sector of the region, including wine regions, wineries and agri-businesses of Central West NSW to further strengthen and promote the region's culinary and produce offering</p>	<p>i. In collaboration with LTOs, RTOs and Councils, develop a series of Taste Trails and Tales, including through a 'Power of Provenance' network involving produce suppliers, hospitality sector and wineries</p> <ul style="list-style-type: none"> • Utilise the Taste Trails to guide the creation of remarkable content for multi-channel distribution, including through third-party channels such as Destination NSW and Tourism Australia • Remarkable content should bring the 'Taste Tales' to life, including highlighting the provenance stories of local produce or engaging stories of local characters, among other things • Integrate the region's event program (that relate to its food, drink and produce offering) with the Trails, including signature events and festivals through to farmers markets <p>ii. Support the development of experiences packages that link commercial airlines, private air charters and rail services with on-ground food, drink and agritourism experiences</p> <p>iii. Support the development of new or enhance existing experiences and events through the experience and development program (see Strategy 2, Action (ii) below)</p>
<p>Strengthen the supply of agritourism experiences across the Central West NSW region</p>	<p>i. Promote best practice agritourism that considers:</p> <ul style="list-style-type: none"> • Analysis of the most relevant consumer trends and demand for agritourism, including best practice case studies • Existing capability building tools for farmers looking to diversify into agritourism and identify any gaps and opportunities • Insights from consultation with local farmers, produce suppliers as well as peak bodies such as the NSW Farmers Federation, among others – this should integrate key findings from the NSW Government's agritourism research and pilot project undertaken in 2018-2019 about farmers' experiences and needs in starting and running an agritourism business • Opportunities or gaps in the current agritourism experience offer across the Central West NSW region <p>ii. Support the development of new or enhancement of existing agritourism experiences</p> <ul style="list-style-type: none"> • Implement a specialised, experience development program for farmers (new market entrants) seeking to diversify their business through agritourism
<p>Foster the development of an industry-led approach to strengthening hospitality and customer service in-region</p>	<p>i. Support an industry-led approach to strengthening hospitality and customer service, which is linked directly to on-the-job training and career pathways</p> <ul style="list-style-type: none"> • Involve TAFE NSW to support this industry-led initiative through attainment of relevant qualifications required for employment in the sector

Major Initiatives: Existing & Emerging Strengths (continued)

2. Regional NSW's premier well-being destination

For several years, there has been increasing interest in and demand for well-being experiences. This has been amplified by the COVID-19 pandemic as well as significant natural events, which has further strengthened interest in the emerging area of eco well-being, as highlighted in the VES. It includes eco-tourism, sustainability, volun-tourism and wellness tourism.

To date, no other destinations in NSW have focused on this theme for their region. Further, Central West NSW is uniquely positioned to capitalise on this trend, especially given its relatively close proximity to both Sydney and Canberra source markets.

The region provides an outstanding blend between nature-based tourism and outdoor recreation, world-class food and drink, events and accommodation that together can deliver on the positioning of the region as a stand-out destination for well-being. Importantly, it should aim to:

- Extend the average length of stay
- Increase spend and yield, and
- Encourage regional dispersal

It would also provide remarkable content for distribution through organisations such as DNSW and Tourism Australia.

Success will rely on continued development of the experience offering, events and accommodation that focus on positioning the region as NSW's premier well-being destination. There is a clear opportunity to further amplify the region's reputation for well-being through reimagining the cycle tourism experience.

Regional NSW's premier well-being destination	
Lead the development of a cycle tourism strategy and reinforce the importance of growing the active transport network across the region	i. Collaborate with local councils, JO and other key stakeholders to develop a Central West NSW Cycle Tourism Strategy , which: <ul style="list-style-type: none"> • Focuses on and integrates a more diverse cycling offering, from road cycling to gravel bikes and mountain biking • Enhances the active transport network of the region, leverages existing or planned initiatives, such as Parkes-Forbes-Eugowra, Cowra-Grenfell-Eugowra, the Goolagong to Eugowra Road/Rail Trail as well as the 400 km Central West cycle trail between Dubbo and Mudgee and optimises the 2,000 kms of cyclable road across the region • Reinforces the vital link between the broader experience offering of the destination and integrates it with trail enhancement and development • Capitalises on the region's cycling events such as the Newcrest Orange challenge and identifies new opportunities to expand the cycling events offering • Involves key peak bodies and NSW Government agencies including DNSW, Department of Regional NSW and Transport NSW, among others • Identifies opportunities for further collaboration and investment attraction
Strengthen the supply of sustainable and eco-tourism experiences	i. Partner with Ecotourism Australia to increase awareness of sustainability as well as to assist strengthen the eco-tourism offering of the region ii. Encourage an increased supply of eco-accredited experiences and accommodation iii. Support diversification and growth in the accommodation offering (in line with global and domestic trends) relating to bespoke, sustainable and small-scale accommodation that is located within a nature-based setting, such as 'tiny houses' and glamping

Regional NSW's premier well-being destination	
<p>Support the development and distribution of remarkable content to promote the region as a leading sports and well-being destination</p>	<p>i. Encourage the creation of remarkable content for multichannel distribution and support a shared program to capture and curate content (images, videos and copy)</p> <ul style="list-style-type: none"> • Strengthen content relating to trails that connect well-being experiences, including but not limited to: <ul style="list-style-type: none"> » Nature and outdoor recreation trails, including for cycling (mountain biking, gravel bikes and road cycling), hiking and kayaking as well as multi-day, multi-activity trails that connect different outdoor recreation pursuits » Healthy living and mindfulness trails, including those that take advantage of open green space » Taste trails, highlighting the culinary, drink and produce experiences of the region » Arts, music and culture trails, including linking Aboriginal art sites with art galleries and local artists and artisans as well as profiling the range of related events » Sustainable tourism and eco-tourism experiences
<p>Lead the development of experiences packages that link commercial airlines, private air charters and rail services with on-ground experiences and services, including transport providers</p>	<p>i. Work with the local tourism industry, transport providers and the hospitality sector to develop well-being experience packages, including bespoke, small group tours</p> <ul style="list-style-type: none"> • Incorporate services offered by holistic health practitioners and healthy living and mindfulness program providers, such as massage and yoga • Packages can be promoted by participating accommodation providers

Table 16. Central NSW opportunity to be **Regional NSW's premier well-being destination**



Appendix 5: Priority Focus Areas

Priority Focus Area 1: Digital transformation and visitor services

- | | |
|---|---|
| <p>A. Facilitate digital transformation and visitor services to future-proof the region's visitor economy</p> | <ul style="list-style-type: none"> i. Collaborate with DNC0 to undertake a visitor-centric review of visitor servicing and share insights with the JO, Councils, LTOs and RTOs of the Central West NSW region <ul style="list-style-type: none"> • Identify gaps and opportunities for enhancing visitor servicing, including through accelerating digital innovation ii. Increase industry awareness of consumer behavior and expectations about online and digital services, including e-commerce, online booking and flexibility <ul style="list-style-type: none"> • Encourage adoption of technology to promote the region and provide contemporary visitor services at all touch points along the customer journey iii. Identify opportunities to expand facilities and services for digital nomads or remote working as part of an odyssey journey as well as to support and enhance visitor experiences <ul style="list-style-type: none"> • Increase awareness of local accommodation providers about the current and emerging expectations and needs of digital nomads iv. Promote more rapid adoption of new technology into traditional tourism and hospitality business practices as well as to enhance or create more interactive and immersive interpretation, especially of the region's history and heritage |
|---|---|



Priority Focus Area 1: Digital transformation and visitor services (continued)

- | | |
|--|---|
| <p>B. Lead the development of signature, cross-regional content, including multiday itineraries that link the experience offering and lift awareness and appeal of the Central West NSW region</p> | <ul style="list-style-type: none"> i. Encourage the creation of remarkable content for multichannel distribution and support a shared program to capture and curate content (images, videos and copy) ii. Focus on signature, cross-regional content for initiatives such as the <i>Wonder of Gondwana</i> and the cycle tourism strategy iii. Strengthen content relating to trails that profile the existing and emerging strengths of the region (across the five pillars from the VES) and drive tourism, including but not limited to: <ul style="list-style-type: none"> a. Taste trails, highlighting the culinary, drink and produce experiences of the region (see game-changer project 1 above) b. History and heritage trails, including linking in with the myriad museums and heritage attractions of the region c. Nature and outdoor recreation trails, including active transport trails d. Special-interest trails, such as those leveraging the increased demand for activities such as birdwatching and geo-tourism e. Arts, music and culture trails, including linking Aboriginal art sites with art galleries and local artists and artisans as well as profiling the range of related events f. Sustainable and accessible tourism experiences iv. Act as a conduit between DNSW and local councils, LTOs and RTOs to facilitate media famils, photo-shoots and other opportunities for content development – a critical issue will be to strengthen coordination to avoid duplication and maximise budgets for content development v. Improve pre-event, in-destination and post-event content for event participants, including those involved in sporting events – this should aim to encourage increased length of stay as well as repeat visitation vi. Create a shared program that builds awareness of information travellers should know and plan for before they arrive. This could be modelled on the Iceland Academy, which is presented in a fun and engaging way albeit with serious messages for travellers. The program could provide helpful 'local tips' as well as safety and sustainability messages. It should, among other things (refer also Strategy 6, Action (iii) below): <ul style="list-style-type: none"> • Promote links to DNSW's road trip guides and other information on weather/seasonality, safety and road access • Provide a guide or map to mobile connectivity, highlighting centres, facilities and services • Provide information for younger families about the region's playground or family-friendly attractions as well as sporting facilities • Include blogs or short videos made with local operators or characters of the region |
|--|---|

Appendix 5: Priority Focus Areas (continued)

Priority Focus Area 2: Industry engagement and capability development	
<p>Strengthen industry engagement and capability</p> <p><i>A shared program would mitigate duplication and provide cost savings for local councils and other organisations while creating greater opportunities for access and participation by the local industry</i></p>	<p>Develop and implement a shared engagement and capacity development program</p> <ol style="list-style-type: none"> i. Strengthen industry engagement and networking, including through hosting forums and creating and distributing newsletter articles that enhance awareness of the latest trends and best practices in the visitor economy ii. Implement a product and experience development program focused on enhancing existing and developing new experiences, products, accommodation and events - incorporate a business mentoring program tailored to suit the needs of each business. As part of this program, consider opportunities to: <ul style="list-style-type: none"> • Improve the supply of accessible tourism experiences • Support heritage tourism through adaptive reuse, repurposing and revitalising heritage assets and interpretation iii. Lead a pilot study to identify and activate bespoke or small-scale, personalised and transformational experiences – delivering benefits to local businesses that want to diversify through offering a visitor experience. It should provide a pathway to market for those who are not solely aiming to be a tourism business but who would enrich the experience offer of the region. For example: <ul style="list-style-type: none"> • Agritourism • <i>Wonder of Gondwana</i> and geotourism experiences • Enriching the experience offering - elevating it to transformational experiences through: <ul style="list-style-type: none"> » Farm stays and tours » Behind the scenes tours » Special-interest markets – from outdoor recreation (kayaking or fishing with a local) to tag-along tours or opportunities to meet/spend time with the local expert, farmer, artist, artisan, historian or Aboriginal Elder » Well-being experiences iv. Implement a program to connect major industry tourism operators with local tourism and hospitality providers in the region and extend distribution to market <ul style="list-style-type: none"> • Include private air charter, rail and event packages or product bundling • Profile sustainability

Priority Focus Area 3: Regular visitor research program

Work with the JO, LTOs and RTOs to coordinate a **regular visitor research program** to provide meaningful insights into the region's visitor economy and the dynamic and evolving nature of consumer behaviour in tourism and travel, including for events

A cooperative research program would mitigate duplication and provide cost savings for the Councils while providing invaluable insights to inform destination planning, management and strengthen local industry capability

- i. Confirm **key visitor segments** – utilise existing research and data from Tourism Research Australia (TRA), Destination NSW and Tourism Australia, to confirm key visitor segments such as: active Boomers, families (Millennials and Gen X), nature lovers, foodies, special-interest markets and digital nomads, among others
 - As part of this process, consider developing **audience personas** to assist stakeholders identify and activate the most **effective media activity and communication channels** to reach target markets
- ii. Undertake **visitor experience and sentiment analysis as well as qualitative research**. This could be done **biennially**
 - Incorporate:
 - » Online forum with participants to explore the perceptions, motivations and barriers of segments identified above
 - » Analysis of global and domestic trends influencing travel and tourism
 - Benchmark the findings against similar competitor destinations

Priority Focus Area 4: Strategic approach to attracting investment

Foster and facilitate a strategic approach to **attracting investment**, including contestable funding opportunities (grant funding)

- i. Continue to provide advice and support to local businesses, organisations and community or volunteer groups to apply for **visitor economy or other grants** that can assist them grow, revitalise or enhance their experience or offering, including for events. This involves ongoing liaison with grant providers, including but not limited to DNSW, Department of Regional NSW, other NSW Government agencies and Commonwealth Government agencies
 - Consider profiling opportunities for the development of **social enterprises and/or utilising crowd funding** for new or revitalising existing experiences. This could include adaptive reuse of heritage assets across the region
- ii. Support **cross-boundary and other infrastructure projects** that enhance access to and within the region as well as provide high quality visitor experiences
 - Identify opportunities for facilities and accommodation to support the region's growing sports tourism market
- iii. Ensure **customer-centric design and the costs associated with attracting investment** are built into all proposals for new major projects. This includes robust master planning, feasibility analysis and demonstrating return on investment

Appendix 5: Priority Focus Areas (continued)

Priority Focus Area 5: Attract, retain and develop talent

Foster and facilitate a strategic approach to **attract, retain and develop talent** and create meaningful career pathways within the visitor economy

- i. As part of the industry engagement program, share insights into best practice workforce strategies with industry to **shift focus on to the quality of the employee and invest in their ability to grow** and learn to create meaningful career pathways
- ii. Collaborate with **peak industry bodies and local operators to attract, retain and develop talent and strengthen the visitor economy workforce** – for example, working with the accommodation providers and peak bodies such as the Accommodation Association of Australia (AAA) to identify needs and develop relevant and targeted workforce programs
- iii. Collaborate with **TAFE NSW** to enhance the integration of relevant vocational training with industry programs (in line with (ii) above), in particular to support entry level programs, skills retraining and attainment of qualifications



Priority Focus Area 6: Connectivity and accessibility	
<p>Continue to improve connectivity and accessibility of the region</p> <p><i>Stakeholders consistently raised challenges relating to connectivity and accessibility. This includes communication technology, road access and safety. These challenges are steadily being addressed with a range of major infrastructure projects. However, it remains a key enabler for the region to address</i></p>	<ul style="list-style-type: none"> i. Collaborate with local Councils to shape priorities and attract investment for major infrastructure projects and improvements that enhance connectivity and accessibility, deliver shared benefits to communities and the visitor economy and enable greater linkages between the LGAs <ul style="list-style-type: none"> • Incorporate active transport options in line with the Central West NSW cycle tourism strategy (refer game changer project 2 above), such as regional cycleways (options for mountain, gravel and road bikes) and rail trails. This is critical to support the increased interest in and demand for outdoor recreation, well-being and more sustainable visitor experiences • Advocate for accelerating growth in the network of high-speed charging stations for electric vehicles (EV) – this is critical to meet the significantly increased demand for EVs, assist in the transition being made by motor vehicle manufacturers to EVs and to address competition (and balance or improve market share) from coastal destinations created by EV touring routes. A proactive approach would also enhance the region’s perception with regard to sustainability • Activate the region’s airstrips (public and private) to support private air charters for both the leisure and business markets - the activation of private and small public airstrips would enhance access by air (Game-changer project identified in the 2018 DNCO DMP) ii. Prioritise high-value touring routes to strengthen and promote a visitor-centric, experience-led approach to drive tourism, including: <ul style="list-style-type: none"> • Develop a Wonder of Gondwana touring route across LGA and Destination Network boundaries • Support ongoing improvements to the region’s existing touring routes and cycleways • Expand the number of touring routes targeting motorcycles and bikes iii. Most visitors travel to the region by private vehicle, including 4WD or SUV. Persistent issues relate to visitor/road safety, unplanned road closures and alternative routes for wet weather. This is exacerbated by an increasing number of inexperienced ‘country-road’ drivers. A priority is to enhance visitor information pre and during trip via online and digital channels, which are the most common source of information for source markets (refer also Strategy 1 (B), Action (v) above) <ul style="list-style-type: none"> a. Promote links to DNSW’s road trip guides a. Online mapping service, such as links to pre-prepared, downloadable Google map routes (checked by those with local knowledge) ii. Touring routes and drive tourism initiatives provide an opportunity to consider social enterprise models that enable and enhance community participation in the visitor economy

Table 19. Priority focus areas for Central NSW

Appendix 6: NSW Government Cost Benefit Analysis

ASSESSMENT CRITERIA

The NSW Government uses Cost Benefit Analysis to assess the social, economic and environmental impacts of infrastructure proposals including visitor economy infrastructure. Where feasible, Cost Benefit Analysis will be used to prioritise proposals. The following considerations are designed to help guide prioritisation and decision-making.

ASSESSMENT CRITERIA	KEY CONSIDERATIONS
Creates growth opportunities from domestic and international markets	<p>Facilitate growth in demand and address capacity constraints to develop a nationally and globally competitive visitor economy.</p> <ul style="list-style-type: none"> » The investment addresses identifiable capacity constraints or supports growth in demand as informed by national and international benchmarking, Regional Economic Development Plans and Destination Management Plans. » The investment supports the 2030 Visitor Expenditure Targets and aligns with the Sydney and NSW brand.
Supports a prosperous NSW	<p>Create economic benefits that outweigh the economic costs.</p> <ul style="list-style-type: none"> » The investment generates economic benefits either in the form of increased tourism expenditure, which benefits NSW economy through higher employment and value added. » The investment generates economic benefits for local residents through access to additional infrastructure and amenities. » The investment generates increased opportunities for direct and indirect employment. » The economic benefits outweigh the costs to the government of supporting the infrastructure.
Aligns and supports other infrastructure strategies and plans	<p>Recognise alignment and support for other government strategies.</p> <ul style="list-style-type: none"> » Promotes urban and regional development. » Creates sustainable commercial opportunities for indigenous cultural businesses and support Indigenous tourism. » Supports accessible, inclusive, and special interest tourism and encouraging skill development in the sector. » Develops and renew regional government assets. » Aligns with the objectives in REDS, DMPs and local government policies and plans.

ASSESSMENT CRITERIA	KEY CONSIDERATIONS
<p>Supports equity and access for all</p>	<p>Distribute benefits to disadvantaged and local communities.</p> <ul style="list-style-type: none"> » The infrastructure utilises universal design principles and promotes accessibility. » Promotes increased participation of disadvantaged young people. » Promotes increased participation of Aboriginal people. » Sustains jobs and generates additional jobs in the visitor economy and associated supply chains. » Supports and benefits local groups.
<p>Fosters a sustainable visitor economy</p>	<p>Ongoing financial viability and contribution to a sustainable and resilient visitor economy.</p> <ul style="list-style-type: none"> » The investment generates revenue to support operation and management that is likely to minimise unexpected government outlays. » Promotes year-round visitation and grows capacity to reduce reliance on visitation in peak seasons. » Incorporates environmentally sustainable features (such as renewable energy, waste reduction, water, and energy efficiency). » Improves the public realm and adds to the sense of place and community. » Is built in an appropriate location with appropriate materials and responds to the changing climate including more extreme and frequent natural disasters such as bushfires, flood, coastal erosion and inundation.

Table 18. Assessment criteria for NSW Government Cost Benefit Analysis



Central West NSW Destination Management Plan

W: www.dncw.com.au



Destination
Central West NSW