2020 Refresh of Central NSW Tourism Strategy

CNSWJO Visitor Economy Strategy 2021-2026

Prepared for the Central NSW Joint Organisation

11 March 2021

Front cover photos

Amazing Forbes Cattle. Image credit: Denise Yates at Five Hours West.

Sauce Towney's public artwork in Peak Hill Parkes. Image credit: Image owned by Parkes Shire Council. Photo taken by Denise Yates at Five Hours West.

MTB Kanangra-Boyd National Park. Image credit: Oberon Business and Tourism Association.

Canberra Camping Expo in 2019. Image credit: Central NSW Joint Organisation.

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OVERVIEW

The Central NSW region is unique in NSW. It is an area of high agricultural value and also has potential to develop its visitor economy by creating new opportunities and attractors for additional regional jobs outside the agricultural sector. This helps to diversify the industry base and create more sustainable communities. The region has a pattern of settlement including the larger regional centres of Bathurst and Orange, larger towns such as Parkes, Forbes and Cowra, smaller towns such as Blayney, Molong, Condobolin, Grenfell, Canowindra and Oberon and a significant number of villages. Where proximity to Sydney has enabled more significant opportunity for shorter visitor journeys in the east of the region, careful planning can minimise disparities and achieve regional economic growth from the visitor economy.

The current federal and state government policy environments strongly support regional growth and funding for infrastructure and economic development. In this climate, short to medium term investment in the regions could be instrumental in meeting the clearly articulated needs of regional communities. In addition, the Covid-19 pandemic has severely restricted overseas travel for Australians and this creates opportunities if the Central NSW can quickly respond to demand for a quality product and deliver a strong, tactical visitor experience within the next 12-18 months. The Covid-19 pandemic has also increased interest for nature-based tourism in safe and open spaces and again, there is an opportunity for the region to take advantage of this change in visitor preferences.

Building a new market is a challenge but investing in product now will pay dividends in the future with repeat business from domestic and the visiting friends and relatives (VFR) market. Destination Country and Outback NSW (DNCO) lacks the funding to effectively support this vast region of NSW so the Central NSW Joint Organisation (CNSWJO), in conjunction with its ten member councils can provide a strong starting point for a CNSWJO visitor economy strategy. In addition, many of the towns have the opportunity to attract business investment and this should be encouraged, particularly investment in the visitor economy, whilst at the same time ensuring sufficient housing and other service provision as people re-locate to the region in response to lifestyle choices, work or business potential.

There are several key opportunities which are important considerations in the development of the strategy. Critically, they involve thinking regionally around communities of interest as well as locally and ensuring that there is alignment with federal, state, regional and local strategies. It is also important to recognise the relative local and regional strengths for the visitor economy and explore the potential for cross-council collaboration to develop linked experiences, itineraries and hold visitors in the region post a major anchor attraction or event. Finally, re-positioning 'tourism' as 'visitor economy' will bring different thinking into the strategy. It will create more nuanced understanding about the visitor economy as a viable regional value proposition and will hopefully sharpen the focus by all levels of government (and the community) on the key direct and indirect impact visitors have in both small and larger places within the region. Recognising the economic, social and environmental value of the visitor economy to the region is critical, especially at elected member and business levels. This consistent support about its value is a key enabler for intergovernmental collaboration for policy and funding and elevates 'tourism' to something of added value which is a broader driver of community sustainability.

Overall, there is a significant opportunity for the regional visitor economy to play a key role in delivering outcomes for communities in the region, in line with the CNSWJO Strategic Plan. The starting delivery point is to design a refreshed regional visitor economy strategy with agreement of the purpose, objective and priority actions. The strategy is dependent on key success factors, most notably funding, capacity and an enduring collaborative network model, not only between the members of the CNSWJO but also its key collaborators and stakeholders.

KEY MESSAGES

Key messages for CNSWJO advocacy should include the following:

Key messages
1. Central NSW has a proud history of Local Tourism Organisations working collaboratively to grow the visitor economy. This collaboration respects every destination is at a different place on the journey.
2. People visit a region before they relocate so impressions they experience on a visit or receive by word of mouth or in online forums are important.
3. With international travel unlikely until the end of 2021, the short to medium term following the Covid-19 pandemic is a critical time to invest in tourism in Central NSW.
4. It will be important to align with *Tourism 2030* once it is launched. With its expected focus on regions, the Australian Government may fund regional initiatives and promote the regions for livability.
5. Given the visitor demographic, the rapid growth in the visitor economy as a result of the Covid-19 pandemic and transport constraints between Sydney and Central NSW, an urgent investment is required to encourage weekend visitors to stay longer in region, especially past Sunday afternoon.

6. The Australian and NSW governments funding to improve road connectivity including:
  a. Into Western Sydney where the journey east is subject significant delays on a regular basis
  b. Continued improvements to the Newell Highway
  c. Connections from Canberra and the South Coast.

7. A growth in the visitor economy will be enabled by the Australian and NSW governments delivering reliable NBN and mobile phone coverage across the whole region.
8. NSW Government departments responsible for Planning, Infrastructure, Heritage and Parks and Wildlife and Crown Lands should collaborate with the key decision makers in Central NSW to enable product development to grow the visitor economy. This includes investment in static infrastructure such as directional and interpretive signage, heritage structures, silos and sculptures as well as dynamic infrastructure, for example, rail trails for walking/cycling and on- and off-road cycle tracks.
9. Federal, State and Local Government owned existing and emerging infrastructure that generates visitor experiences is vital for the economy and require ongoing investment.

10. The NSW Government, Destination NSW and the CNSWJO should collaborate for better funding and governance arrangements to support the visitor economy. This includes:
  a. Equity of service because DNCO services 61% of the State and is currently under resourced for its task
  b. Equity of funding across the state due to the sometimes limited budget for regional councils to allocate funding to new products and capacity building
  c. Leveraging the JO structure to maximise efficiencies and effectiveness
  d. Supporting all destinations to build the contribution of tourism to their local economy to at least the NSW State average by 2025.

11. Support councils to implement infrastructure, training and planning initiatives to support the visitor economy. Examples include public amenities, unused buildings/rail tracks, CBD upgrades or infrastructure assets, as well as capacity building of existing operators and the development of quality accommodation, food and retail offerings.

STRATEGY ON A PAGE

The following graphic shows the high level strategy.
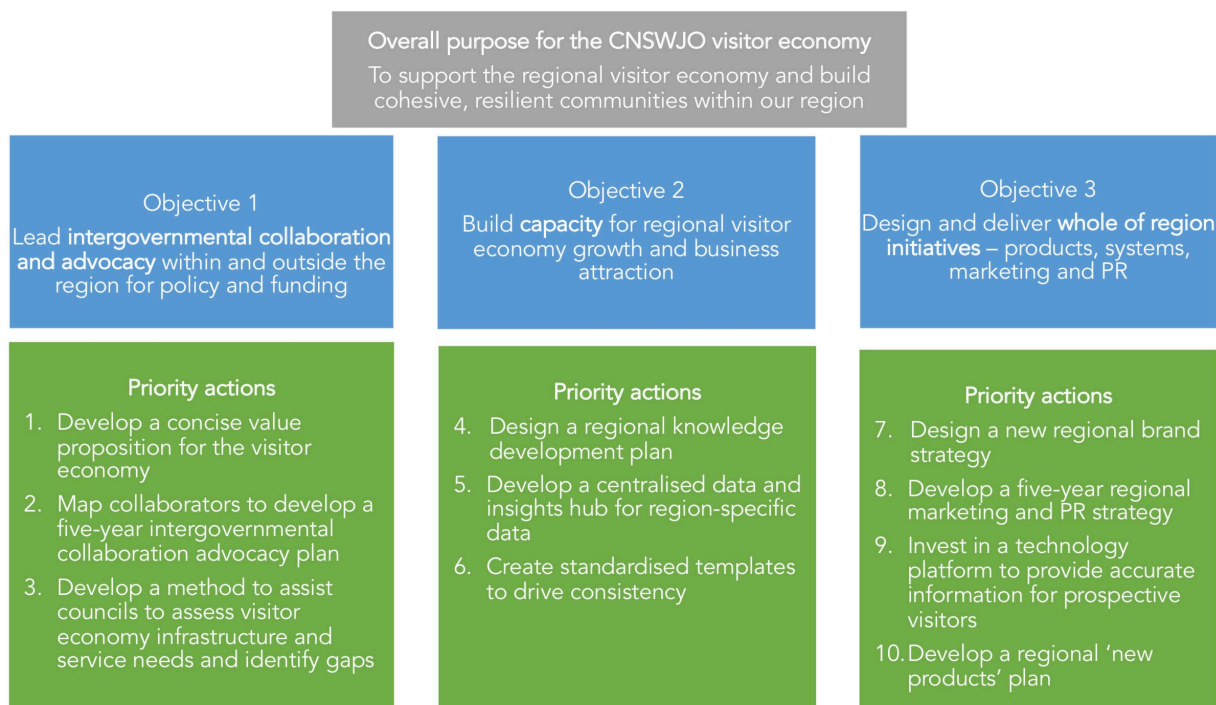
DETAILS OF THE PRIORITY ACTIONS

Additional information about the ten priority actions are in the following table.

Objective	Priority actions
Objective 1 Lead intergovernmental collaboration and advocacy within and outside the region – policy and funding	1. Develop a <u>concise value proposition</u> for the visitor economy which includes targets for new jobs and economic growth. Use this for intergovernmental collaboration and advocacy within the region (councils, businesses and communities) as well as external to the region (Destination NSW and Australian and NSW governments). The value proposition should demonstrate the planned economic, social and environmental impacts of the visitor economy to the region and how investment can create additional, long term jobs and drive regional prosperity.
	2. Map collaborators to <u>develop a five-year intergovernmental collaboration and advocacy plan</u> with levels of funding sought to: • Ensure the Australian and NSW governments deliver reliable NBN (broadband at a minimum) across the whole region • Ensure Australian and NSW governments improve road connectivity into Western Sydney to avoid the traffic issues which are an inhibitor to weekend/long weekend visits. Also drive continued improvements to the Newell Highway and connection from Canberra and the South Coast • Work with the Australian Government's *Tourism 2030* to gain from its expected focus on regions, funding regional initiatives and promoting the regions for liveability • Ensure the NSW Government improves funding levels for DNCO to support the delivery of the CNSWJO strategy and/or combine funding levels to provide more 'bang for buck' across the whole region. Aim to address the funding inequity for DNCO with the NSW Government using the value proposition • Collaborate across councils (and also mayors) to consider infrastructure and planning initiatives to support the visitor economy, for example, public amenities, unused building or infrastructure assets and trading hours

Objective	Priority actions
	• Collaborate with government departments such as Planning and Infrastructure or NSW Parks and Wildlife to support the visitor economy via product investment. This includes static infrastructure such as heritage structures, silos and sculptures as well as dynamic investment, for example, into the development of rail trails for walking/cycling and mountain biking/cycle track on- and off-road • Understand the pipeline of funding opportunities councils/the region a whole can access.
	3. Develop a method to assist councils to <u>assess visitor economy infrastructure and service needs</u> and identify gaps to be filled at a local level to achieve consistently high grade visitor experience across the region.
Objective 2 Build capacity for regional visitor economy growth and business attraction	4. Design a <u>regional knowledge development plan</u> to: • Provide mayors and councillors with the consistent tools and messaging to support them to advocate for local and regional tourism, as part of regional economic development, to support community building and resilience. Include quarterly dashboard measures on economic value creation and a small set of other measures for councils as well as the CNSWJO Board • Upskill staff involved in tourism/economic development, potentially including mentoring between councils, including business case development for new initiatives • Build the capability of tourism operators (food, accommodation and experiences) to understand the delivery standards needed to attract new and returning visitors and increase their business resilience. This is critical and could be undertaken in conjunction in partnership with chambers of commerce who could also promote liveability of the region and its towns • Understand how best to work with local chambers of commerce and other business groups to support product development.
	5. Develop a <u>centralised data and insights hub</u> for region-specific data on trends, forecasts, using TRA data and spend/travel pattern data from third party sources. Focus on deriving predictive data. Use case studies/success stories from within and outside the region to build on the story-telling about the region which has shown to be effective in the *We want you back* campaign. Stories and learnings should be shared regularly across the region via a regional forum (in person or digital).
	6. Create <u>standardised templates</u> to drive consistency for: • An annual calendar of events and festivals to avoid or reduce competition, build content and bundle other visitor experiences and accommodation • Evaluation frameworks for events, attractions and other tourism related initiatives • Council DMPs to allow for ease of completion and better view across all the DMPs to align shared priorities and support potential economies of scale. Develop an annual summary document to facilitate effective and efficient delivery of regional scale experiences and investment. Ensure a focus on increased visitation, longer trips and higher spend
Objective 3 Design and deliver whole of regional initiatives – products, systems, marketing and PR	7. Design <u>a new regional brand strategy</u> which sits as an umbrella and ties existing individual council brands to the regional brand. Gradually retire the Unearth and Central NSW brands
	8. Develop a <u>five-year regional marketing and PR strategy</u> which: • Identifies the region's comparative advantages and matches these to segmented markets underpinned by data on drivers of destination choice • Coordinates all council tourism offerings to ensure avoid duplication, identify gaps and leverage strengths • Drives consistent best practice approaches to marketing/using social media for all councils, for example, maintaining the connection with visitors who have previously travelled to the region and build on the successful *We want you back* campaign • Promotes 'anchor attractions' across the region and provides avenues for each council to leverage this effort by scaffolding with a broader list of things to see and do before or after the anchor attraction experience

Objective	Priority actions
	• Leverages the strong role of word of mouth and VFR in the decision journey i.e. where to go, what to do, what not to miss • Ensures sufficient resources are allocated from within and external to the CNSWJO to deliver it.
	9. Invest in a <u>technology platform</u> or collaborate with existing providers to develop a new website and mobile interfaces and social media focused on experiences/itineraries rather than destinations and individual activities. This also requires maintaining to produce accurate information for prospective visitors to help them plan their trip before they travel and during their trip which: • Packages multi-day itineraries by travel time but includes a breadth of experiences • Packages regional itineraries of interest to particular cohorts, for example, arts, heritage, indigenous experiences, nature-based, food, wine • Readily provides information about the distance from their home base to the region (this is to address the misconception that the region is too far away for most people to visit within a short time frame) • Ensures that tourism related and other businesses are readily discoverable online.
	10. Develop a <u>regional 'new products' plan</u> for experiences such as biking, ecotourism, agritourism, indigenous tourism and CBD/main streets revitalisation.

ROLE OF THE CNSWJO IN THE DELIVERY OF THE STRATEGY

The CNSWJO already plays a key role in driving intergovernmental collaboration across Central NSW and this is vital, given the variety of stakeholders who can influence the success of the visitor economy. The CNSWJO can support these stakeholders to prioritise, within their own strategic plans, activities which will support Central NSW regional outcomes. It is important for the CNSWJO to continue to provide leadership for this potential key industry sector and:

- Plan and implement intergovernmental collaboration and advocacy activities with Australian and state governments to source policy support and funding for the region

- Drive council and business collaboration for the regional visitor economy to increase the proportion of the visitor economy contribution for the economy in smaller towns and/or where the visitor economy is less mature and support shared learnings across councils

- Continue to deliver regional PR and marketing, especially for new products and experiences

- Capacity build tourism managers and support mayors to communicate the value proposition for the visitor economy within their own councils and to key stakeholders outside the region in the context of building a diverse economy and strong community outcomes.

NEXT STEPS FOR THE CNSWJO

The next steps are to:

- Review the strategy, in particular, the overall purpose and priority actions and develop an appropriately resourced action plan

- Consider and resolve the key success factors, especially timeline (tactical and more strategic actions) funding and resourcing for specific priority actions

- Prioritise the priority actions, especially an intergovernmental collaboration and advocacy plan, a 'new products' as part of the tactical response (in the short and medium term) and a regional knowledge development plan

- Establish the governance framework for the delivery of the strategy

- Plan to review the progress on the priority actions on an annual basis.

1. Introduction

1.1 OVERVIEW

Tourism has been an increasingly important part of the Central NSW Region's economy over the past decade. The regional strategy was initially delivered by Central NSW Tourism (CNSWT) which was merged into Central NSW Councils (Centroc). Since early 2018, regional tourism has been incorporated into the scope of the Central NSW Joint Organisation (CNSWJO). Although CNSWT and Centroc delivered good outcomes, there is an opportunity to better leverage the role of the CNSWJO to support its ten member councils to grow their visitor economies.

The ten member councils are: Bathurst, Blayney, Cabonne, Cowra, Forbes, Lachlan, Oberon, Orange, Parkes and Weddin.

1.2 PURPOSE OF THE CNSWJO

Collaborations of Councils were formalised under the NSW Local Government Act as Joint Organisations (JOs). In accordance with the Act, the principal functions of a JO are:

1. To establish strategic regional priorities for the JO area and to establish strategies and plans for delivering those priorities

2. To provide regional leadership for the JO area and to be an advocate for strategic regional priorities

3. To identify and take up opportunities for intergovernmental cooperation on matters relating to the JO area.

In addition, the CNSWJO has a fourth function which is:

4. Inter-council cooperation, including on tourism.

1.3 BACKGROUND TO THIS REFRESH

The *CNSWJO Strategic Business Plan* included a review of the tourism service provided to members. Following the completion of the review by a subcommittee of the Central NSW Regional Tourism Managers Group, the CNSWJO Board requested a strategic refresh.

There are many existing documents which were developed and used over the years but the CNSWJO is not formally recognised in these documents for the role it plays in regional tourism. This project seeks to undertake a refresh of the already developed plans and strategies, including advice on the regional value JOs can bring to members and the NSW Government.

1.4 THE AIM OF THE REFRESH

The aim of the strategic refresh is review existing local and regional tourism plans and strategies, the opportunities for the region and develop a regional tourism strategy and shared tourism service which will aim to maximise the region's tourism assets and set agreed priorities. Specifically it aims to provide:

- Advice on the current framework for tourism in regional NSW, including funding, strategic and structural arrangements

- Advice on opportunities and challenges for tourism in Central NSW at a regional level

- Advice on the value of tourism to member Councils and their communities

- Advocacy advice including key messaging on policy relevant to current tourism issues

- Advice on key tourism infrastructure priorities across the region

- Advice on opportunities for intergovernmental collaboration including with other JOs

- Development of *CNSWJO Tourism Strategy 2021-2026* with a value proposition to both members and then to NSW

- Advice on structural options and resources to deliver the *CNSWJO Tourism Strategy 2021-2026*

- A summary of other key learnings for the CNSWJO Board.

Bathurst Rail Museum. Image credit: Image owned by Bathurst Regional Council. Photo taken by Trent Cash of GroCreative.

1.5 THE APPPROACH

The approach is shown in Table 1.

Table 1: Approach to project

Element	Details	Output
Project Steering Group	Fortnightly meetings with the Project Steering Group to track progress, provide relevant input and discuss project findings. This group also reviewed the draft strategy	Input into project process and feedback on key deliverables
Background documentation review	Review of: • Background documentation including council DMPs and a variety of regional and state plans • Policy context review at federal, state and regional levels	Document review summary report
Stakeholder interviews	23 Semi-structured interviews (see Appendix A) with: • Staff at the ten councils in the CNSWJO who manage tourism/visitor experience and/or destination management and/or economic development • Other CNSWJO stakeholders with an interest in regional tourism	Thematic summary of stakeholder interviews
Workshops with Regional Tourism Group	Two workshops to: • Introduce the project scope and purpose and obtain early feedback on contextual issues for the group • Present findings and discuss and agree key objectives and action items to achieve the objectives over the next five years	Input into project planning and draft strategy

1.6 THIS DOCUMENT

This document is divided into the following sections:

- Executive summary

- Introduction (Section 1)

- Situational analysis: Tourism profile (Section 2)

- Situation analysis: Policy context and priorities (Section 3)

- Key opportunities (Section 4)

- A five-year strategy (Section 5)

- Conclusion (Section 6)

- Appendices.

2.   Situational analysis: Tourism profile

2.1   OVERVIEW

One of the key issues for the Central NSW region (and some other parts of regional Australia) is the access to reliable, up to date data and information about visitation, tourism spend and contribution to the regional economy. In addition, not all places in the Central NSW region are equal especially in terms of transport access, time to reach the location and the variety and breadth of tourism product. Product includes accommodation options and experiences including events, natural landscape features and manmade attractions.

In addition, the Covid-19 pandemic has influenced the reliability of data, although some sources, such as Tourism Research Australia (TRA), have averaged out tourism industry and visitation data over a four-year rolling period. However, with the international Australian borders closed (and unlikely to be opened until at least mid-2021), plus continued social distancing, there is the potential for a more immediate, tactical response for overnight, domestic travellers on multi-day trips to the region.

2.2   KEY STATISTICS FOR THE CENTRAL NSW REGION

Tourism continues to contribute to the regional economy and has grown over the past ten years. The region is in the top ten regional destinations nationally and fourth in NSW. In summary, the headline statistics for the region[1][2][3] show:

- Gross value add and gross regional product have doubled over the past ten years

- Tourism consumption has increased by 50% over the past ten years

- The domestic day and overnight visitor continue to be the biggest markets

- Average length of stay has been stable for domestic visitors (average of three days) but falling for international visitors (<20 days) over the past ten years (only some part of their stay would be in a region)

- The two top reasons to visit are holidaying and visiting friends and relatives (VFR)

- The majority of the domestic market is intra-state visitation

- A significant proportion of visitors are unaccompanied visitors, especially business travellers.

However, regional dispersal is a key issue for the region, with most tourism focused on two LGAs in the east – Bathurst and Orange. So whilst it is useful to consider the region as a whole, consideration needs to be given to regional differences and how to maximise different types of opportunities in different parts of the region.

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[1] Destination Country and Outback NSW. *Destination Management Plan 2018-2020*. Available at: www.dnconsw.com.au/app/uploads/2018/05/dnco-dmp-v3.pdf
[2] Tourism Research Australia. National and International Visitor Surveys. Available at: www.tra.gov.au
[3] Austrade 2019. *Understanding visitor regional dispersal in Australia*. Available at: https://www2.deloitte.com/content/dam/Deloitte/au/Documents/Economics/deloitte-au-economics-regional-dispersal-october-2019-151119.pdf

Key drivers of regional dispersal[4] are shown in Table 2.

Table 2: Key drivers of regional dispersal

Driver	International	Domestic
Age	Older visitors have a higher propensity to travel to regional destinations and have a longer stay in regional Australia than younger visitors.	
Purpose of visit	Visitors who travel for employment (3% international visitor share) have a higher propensity to travel to regional destinations and stay longer in regional Australia. This is linked to regional working requirements that are often part of visa conditions. However, holiday visitors (48% of international market) are more likely to travel to regional destinations than visitors who travel to visit friends and relatives (27% of international market) and business travellers (9% of international market).	Holiday visitors (33% of domestic market), business visitors (18% of domestic market) and visitors who travel to participate in a sporting event (2% of domestic market) are important drivers of regional dispersal. Holiday visitors are not only the largest group of visitors in the domestic market but are also more likely to travel to regional destinations and stay for a relatively longer period.
Travel party	Adult couples (21% of international market) and friends and relative groups (11% of international market) have the highest propensity to travel to regional destinations. However, unaccompanied visitors (52% of international market) are found to have the longest stay in regional Australia, over 30% longer than adult couples and friends and relatives groups.	Business groups (6% of domestic market) and family groups (20% of domestic market) have a relatively high propensity to travel to regional destinations and have a longer length of stay in regional Australia.
Household income	-	Regional Australia provides an affordable holiday option for people on a lower income. Visitors with a household income less than $100,000 per year (31% of domestic market) are more likely to visit regional destinations and they tend to have a longer stay in regional Australia.

People most likely to visit regional Australia include[5]:

- Family road trippers (20% of domestic) are the most likely to visit regional Australia – 62% of them did on their most recent trip. When making decisions about where to travel, family road trippers are repeat customers – 33% chose the destination based on where they have travelled previously. They also value the recommendations of others – 28% reported word of mouth as a key source of information in deciding on the destination

- Traditional market Gen Y and Z (4% of international) on their first trip to Australia, are the next most likely to visit regional Australia – 59% travelled to regional Australia on their most recent trip. These young travellers are more likely to use the internet to decide on where to travel to and what to do when they get there. Whilst regional Australia was part of their 'bucket list' itinerary and offered them a chance to learn something new, they are more price-sensitive than other travellers

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[4] Adapted from: Austrade 2019. *Understanding visitor regional dispersal in Australia*. Available at: https://www2.deloitte.com/content/dam/Deloitte/au/Documents/Economics/deloitte-au-economics-regional-dispersal-october-2019-151119.pdf
[5] Ibid.

- Affluent 55+ Australians (10% of leisure visitors) are third most likely visit regional Australia (with 56% visiting a regional destination on their most recent trip). They enjoy eating out at restaurants and shopping when they travel and tend to stay longer when visiting regional destinations than when visiting capital cities. For this group, travel offers the chance to escape day-to-day life and gain knowledge. They are also repeat customers with 44% choosing the most recent destination because they had travelled there previously.

People least likely to visit regional Australia include[6]:

- Asian market visiting friends and relatives (VFR)

- Asian market Gen Y and Z.

Interestingly, the barriers for both those who are more and those who are less likely to visit are the same:

- Regional Australia is perceived as expensive

- The regions are seen as hard to get to

- Regional visits need more time to visit rather than a day trip, overnight or weekend option.

Millthorpe Night Market. Image credit: Blayney Shire Council.

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[6] Adapted from: Austrade 2019. *Understanding visitor regional dispersal in Australia*. Available at: https://www2.deloitte.com/content/dam/Deloitte/au/Documents/Economics/deloitte-au-economics-regional-dispersal-october-2019-151119.pdf

The visitor economy needs to be central to regional economic growth and should be valued not only for its current and potential contribution but also its impact on liveability both for locals and those considering relocation.

The visitor economy is recognised at local and regional levels as an integral part of the regional economy. It is a key element in all of the Regional Economic Development Strategies for Central NSW councils and the *Central West and Orana Regional Plan 2036*.

Maximising the potential of the region's natural, historical, cultural and lifestyle assets will grow the contribution of the visitor economy to the regional economy. This will be critical for next decade, with the expected decline in workforce required for traditional industries such as agriculture, processing and mining.   An investment now in quality products and experiences can transform some of the smaller towns and locations into significant attractors for visitors.

Investment in the visitor economy also provides increased amenity and liveability for locals. Better food offerings, more retail options on the high street and better amenities such as walking tracks, cycleways and art trails helps locals to feel connected to their place and to each other and keeps people in the region.

Liveability provides important locational preference factors. It is also a powerful attractor for people to move to the region where they previously only came as visitors. First impressions, 'try before you move' and the existence of amenities are significant enablers to boost migration of individuals and families to the region and increase community sustainability.

2.3   KEY STATISTICS FOR THE INDIVIDUAL COUNCILS

Tourism businesses, jobs and economics

The number of tourism businesses in each council generally drives employment in tourism and whilst the average number of businesses, jobs and output from tourism is people is close to the NSW average, there is significant variation. There is a higher spend on accommodation and food for every dollar spent and perhaps is the reason for the perception that regions are more expensive. This is shown in Table 3:

Table 3: Summary of economic impact of tourism

Council	# of tourism businesses*	# and % of tourism jobs*	$ output and % from tourism*	# cents spent on accommodation and food for every dollar spent*
Bathurst	419	1,242 (28.1%)	$235m (27.7%)	41c
Blayney	74	95 (2.2%)	$19M (2.3%)	50c
Cabonne	140	163 (3.7%)	$37m (4.4%)	44c
Cowra	165	296 (6.7%)	$58m (6.9%)	45c
Forbes	111	169 (3.8%)	$33m (3.9%)	37c
Lachlan	84	112 (2.5%)	$22m (2.6%)	43c
Oberon	49	162 (3.7%)	$34m (4%)	57c
Orange	456	1,122 (25.4%)	$209m (24.7%)	40c
Parkes	179	370 (8.4%)	$70m (8.2%)	58c
Weddin	43	39 (0.9%)	$7m (0.9%)	55c
Total/average for the region	-	3,770 (6%)	$724m (3.2%)	46c
NSW average	-	6.1%	3.65%	33c

*Sourced from Remplan: ABS 2016 Census Place of Work Employment (Scaled), ABS 2016 / 2017 National Input Output Tables, ABS June 2019 Gross State Product, and ABS 2018 / 2019 Tourism Satellite Account. Available at: https://app.remplan.com.au/rdacentralwest/economy/tourism/employment?state=DrwbF6!B5xBfAwpkF7GWaYI9BJaWteTWh xnMHafOhZvh4SmjGI8Sm2P4FyN9

Tourism numbers, spend and accommodation type

Tourist numbers are higher in Bathurst and Orange, reflecting their proximity to Sydney and the average spend for overnight and per night visitors is lower than the state average. The main reason for travel is holiday and VFR and this is also reflected in the accommodation type. This is shown in Table 4.

Table 4: Summary of tourism numbers, spend and reasons for visits

Council	# of visitors*	Average spend domestic overnight*	Average spend per night*	Accommodation type*	Reason
Bathurst	1,028,000	$381	$135	Hotel, VFR	Holiday, VFR, business
Blayney	109,000	$413	$157	np	Not publishable
Cabonne	176,000	$413	$57	np	Holiday
Cowra	313,000	$296	$118	np	Holiday, VFR
Forbes	152,000	$413	$157	np	Holiday, VFR
Lachlan	127,000	$413	$157	np	Not publishable
Oberon	209,000	$380	$159	np	Holiday
Orange	1,162,000	$467	$167	np	Holiday, VFR, business
Parkes	314,000	$334	$149	Hotel, VFR	Holiday, VFR
Weddin	np	$413	$157	np	Not publishable
Total/average for the region		$403	$158	VFR 36%, Hotel/motel 22%, Caravan/camping 11%	
NSW average	-	$611	$193	-	-

*Sourced from: TRA local government profiles 2019. Available at: www.tra.gov.au/Regional/local-government-area-profiles.

In addition, most visitors spent three nights on average in the region and most visit in private vehicles or company cars.

Before the Covid-19 pandemic, Sydney residents were taking few overnight stays in regional NSW. The main growth area for the region was intra-state regional visitors and the ACT.   However, ACT visitors are comparatively low. The ACT is a potentially valuable market because residents here have a median weekly household income 25% higher than Sydney and 36% above the NSW state median[7].

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[7] Central NSW Tourism. *2016-17 Destination Management Annual Update and Action Plan*. Australian Bureau of Statistics data from 2011.

Travel to the region is more popular in the spring and winter but is generally well spread out across the year as shown below.

Figure 1: Visits by season[8]

Travel season*

Summer 20%

Spring 28%

Autumn 25%

Winter 28%

by month returned from the trip

Hot Air Balloons. Image credit: Cabonne Council.

2.4   WHAT THIS MEANS FOR THE CNSWJO STRATEGY

Implications of the current and predicted tourism profile include:

- Consider a more tactical response for the next 18-24 months to boost domestic tourism to the region as the restrictions linked to the Covid-19 pandemic continue. Disruption to the international market represents a significant opportunity for the region to expand and retain its share of the domestic market during this period

- Increase contribution of tourism in each LGA to at least the NSW average in jobs and output

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[8] Destination NSW 2020. Central NSW Visitor Profile. Available at: www.destinationnsw.com.au/wp-content/uploads/2020/08/central-nsw-fact-sheet-ye-mar-20.pdf

- Increase the amount and quality of the food and accommodation offer to increase the average spend to the NSW average

- Capitalise on the global trend for unique experience-led travel, for example, food and wine, nature and wildlife, culture and heritage

- Tailor thematic trips for day trippers, family road trippers and unaccompanied visitors as these are major segments of the market

- Ensure there is a balance of tourism jobs across all seasons

- With a high proportion of tourism as VFR and a key driver of visits to the region there is the opportunity to increase this share of the market with more tailored offerings

- Strengthen the appeal of the region to existing markets to:
    o Extend length of stay
    o Encourage repeat visitation
    o Increase participation in tours and activities

- Focus on those identified markets with greatest propensity to grow the visitor economy, for example, 55+ but also segments of VFR via:
    o Increased visitor numbers
    o Increased visitation during non-peak periods
    o Increase yield (through development of higher-yield experiences and accommodation offers).

Bathurst 12-hour race. Image credit: Bathurst Regional Council.

3.   Situational analysis: Policy context and priorities

3.1   OVERVIEW

The federal government and all state governments recognise the potential value of tourism to Australia, especially from international visitors. There is strong alignment between federal and all state policies for tourism and increasingly alignment between state, regional and council policies.

In some states, tourism is seen as a strong driver for economic development, particularly where there are industries in decline or where there is less diversity of economic activity than there could be to maintain sustainable economies. There is also an increasingly strong link between arts and culture and tourism, particularly for festivals, arts and placed-based events. Again, this is reflected in federal and state policies and, indeed, has been a strong driver in the past for the Central NSW region.

3.2   NATIONAL LEVEL

Tourism 2020 was a five year plan to respond to ongoing challenges and emerging opportunities for the Australian tourism industry and providing a framework for growth. The next strategy to 2030 is currently in development and has been through rounds of public comment and key stakeholder consultation. The key relevant themes for the region from *Tourism 2020* were:

- Develop a skilled tourism workforce to better service the visitor economy
- Integrate national and state tourism plans into regional development and local government planning to generate effective infrastructure to service regional communities, services to the visitors and encourage private investment in tourism infrastructure.

These objectives will most likely remain relevant for the next five years but specific themes emerging from the consultation for *Tourism 2030*[9] specifically recommend:

- Changing the focus away from Sydney and Melbourne (recognising these as gateways) and focus on regions
- Establishing regional gateways
- Funding campaigns in regional areas.

Two of the top five 'Game Changers' voted on in the Industry Roundtable workshop were regionally focused:

1. Focus on the regions – Create regional gateways and encourage dispersal beyond cities (39% of the vote)
2. Change paradigm – Tourism is supported by government to create more liveable communities across Australia, so we need this outcome to be foremost – jobs is only one tool; economic/ social/ environmental; quality of life for the community is improved; not tourism growth at all costs and not volume everywhere (28% of the vote).

In addition, six pillars were identified by participants as drivers for success. These are shown in Table 5.

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[9] Adapted from: Austrade Beyond Tourism 2020 Workshop 2019. *Beyond Tourism 2020 Industry Roundtable workshop*. Available at: www.austrade.gov.au/ArticleDocuments/10371/2019%20March%20-%20Austrade%20Beyond%20Tourism%202020%20Workshop%20Report%20Updated%20PM%206.03.19.pdf.aspx

Table 5: Drivers of tourism success

Pillar		Pillar	
1. Capacity	Each destination needs to maintain its own personality so it is not a one solution for all. Refocus on not just Sydney and Melbourne but on regional disposal. Drive the demand for a quality unique product, producing higher yield, to drive volume.	2. Data	Need better quality data at regional/local level. Turn data into predictive tools v hindsight. Get more data from people who do not come. Develop more data platforms specific for collating industry product data to be unified across industry.
3. Drive demand	Sell the uniqueness of a product. Skills development in regional areas and reduction of red tape particularly for small businesses. Support from government i.e. funding, grants, programs. Community focused approach to generate good ideas. Use a coordinated events strategy to drive visitation for sport, business, festivals, cultural.	4. Sustainable Industry	Package products to reduce individual marketing costs. Regionally, in particular, find niches for many small businesses (local) to contribute. Cross agency collaboration – need to support national parks, transport, infrastructure, planning etc. as these are assets our tourism industry uses. Encourage sustainable practices within organisations for staff and visitors. Legislate and align tourism certification with environmental impact assessment/development.
5. Harness Technology	Develop centralised booking portals – one stop shop. Use technology to 'theme' and connect product. Use virtual tourism experiences as promotion and marketing. Use augmented reality in attractions. Reduce internet black spots – (Wi-Fi hotspots should be matched to tourist destinations). Enable storytelling – linked to phone.	6. Suitably Skilled And Available Work Force	Training access. Recognise volunteers to manage appropriately. Seasonality – keeping good staff, set up process to trade staff. Partnerships between different climatic areas i.e. Tasmania and NT to smooth the labour market in tourism. Year round employment allows career progression. Flexible work arrangement (support for senior staff balancing family life).

Whilst the *China 2020* and *India 2020 Strategic Plans* will be need be reviewed in the light of the Covid-19 pandemic, they are less likely to be relevant for regional tourism. Although there is significant potential in terms of high quality spend, the length of time spent in the regions is much less for these groups of higher end international travellers and the cost-benefit of marketing and targeting these groups (unless there is a VFR element which is also less likely in the region) may not yield the value anticipated.

Regional Development Australia – Central West is the arm of Regional Development Australia which supports the development of their regions. One of its strategic objectives is to support regional competitiveness by building on existing and emerging strengths and *industry development across diverse sectors and communities*.

Cowra Japanese Gardens. Image credit: Cowra Council.

3.3   STATE LEVEL

The NSW *Visitor Economy Industry Action Plan 2030* (VEIAP) committed $43 billion to a new regional tourism framework and spend of $17 billion to create regional jobs. The status of the actions was reviewed by an independent taskforce who made recommendations for six key focus areas to 2030. One of these is to *Support regional decisions. Back regional NSW*[10].

The plan to deliver the VEIAP is the NSW *Statewide Destination Management Plan* developed by Destination NSW (DNSW) and each of six Destination Networks are tasked with developing a regional Destination Management Plan. Ideally, they facilitate visitor economy growth at the local level, through representing and coordinating the region's tourism industry. The plan highlights future trends and insights relevant for the region including[11]:

- Experiential travel – more and more travellers will search for immersive, authentic, educational, local experiences

- Sustainable travel – sustainable and conscious travel will gain momentum, and the concept of excessive visitor arrivals known as 'over tourism' will be topical

- Caravanning and Camping – the desire for authentic experiences will drive demand for exploring destinations on caravanning and camping holidays

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[10] NSW Department of Industry. NSW *Visitor Economy Industry Action Plan 2030*. p. 10. Available at: www.business.nsw.gov.au/__data/assets/pdf_file/0008/261827/Visitor-Economy-Industry-Action-Plan-2030.pdf

[11] Destination NSW. *Statewide Destination Management Plan*. p. 16. Available at: www.destinationnsw.com.au/wp-content/uploads/2019/02/nsw-statewide-destination-management-plan.pdf

- Wellness travel – travel for the purpose of wellness, both spiritual and physical, will continue to gain momentum

- Food and drink – local produce and food and drink experiences will continue to play a role in destination choice, as a central part of the travel experience, and this space will become crowded

- Business events – conventions, corporate meetings, AGMs, corporate retreats, workshops, seminars and sales incentive rewards trips all hold promise for growth in regional NSW

- Personalisation – digital and mobile technology have empowered visitors to take more control of their travel experiences and increased their expectations. As a result, the expectation of personalised and tailor-made experiences is likely to grow

- Multigenerational travel – the trend in multigenerational travel will continue, as families use their holiday time to bond and create memories together and this will influence the type of customer experience they are looking for

- Sharing economy – the sharing economy, for example, Airbnb, will continue to transform travel experiences, giving the customer more choice and greater flexibility

- Digital – digital technology will continue to advance, facilitating all stages of the customer journey and experience, for example, search, booking, payments, augmented reality, real time translations etc.

- Mobile – mobile will be the preference of travellers throughout their customer journey, so mobile optimisation of the customer experience will be key

- Social Media – social media and user generated content will continue to be key and can present opportunities for destinations that optimise them well.

Destination Country and Outback NSW (DNCO) covers 61% of the state's area and is the Destination Network for the Central NSW region and aims to:

- Build industry capacity and capability through training, mentoring and supporting centres of excellence as well as through sharing of best practice and providing access to research and industry data

- Engage and advocate for industry through effective communication as well as representing the DNCO region to government, including on infrastructure and transport

- Facilitate relationships and partnerships for accessing funding, including the Regional Visitor Economy Fund and other grant programs as well as strengthening connectedness with DNSW on industry and marketing activities

- Drive more effective destination management and business planning, especially to support experience development and marketing.

The main target markets reflect the region's tourism profile from Section 2 are shown in Figure 2.

Figure 2: Target markets for Central NSW[12]

Other state based plans relevant for the region are:

- NSW South Wales Food & Wine Tourism Strategy & Action Plan 2018-2022

- NSW Regional Conference Strategy & Action Plan 2017-2021

- Destination NSW Aboriginal Tourism Action Plan 2017-2020

- NSW Aboriginal Tourism Toolkit

- NSW Tourism and Transport Plan: Future transport strategy 2056.

Grazing down the Lachlan. Image credit: Forbes Shire Council.

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[12] Destination Country and Outback NSW. *Destination Management Plan 2018-2020*. Available at: www.dnconsw.com.au/app/uploads/2018/05/dnco-dmp-v3.pdf

3.4 REGIONAL LEVEL

The NSW Department of Planning's *Central West and Orana Regional Plan 2036* views tourism as an important part of a diversified economy for the region and a growth sector with both natural and manmade attractions. Four key areas of opportunity identified are:

- Develop the region's capacity to grow food and wine tourism
- Enable opportunities appropriate for tourism development and associated land uses in local environmental plans
- Target experiential tourism opportunities and develop tourism management frameworks to promote a variety of accommodation options
- Encourage tourism development in natural areas that support conservation outcomes.

In addition to aligning with the *Destination Management Plan* for Destination Country and Outback NSW, it identifies tourism as the one of the top three economic opportunities in seven of the ten CNSWJO councils as shown in Figure 3.

Figure 3: Tourism in the top three economic opportunities

Source: NSW Department of Planning *Central West and Orana Regional Plan 2036*. Available at: www.planning.nsw.gov.au/-/media/Files/DPE/Plans-and-policies/central-west-and-orana-regional-plan-2017-06.pdf?la=en

All five Regional Economic Development Strategies (REDS) which cover the ten councils in the CNSWJO also have tourism in their top five 'elements' which are derived from an analysis of the endowments which underpin the region's strengths, followed by an analysis of current industry specialisations and emerging specialisations, identified in consultation with the community and councils.

Table 6 shows the definition of the tourism/visitor economy elements and a high level analysis of the types of priorities proposed for the REDS which will be relevant for the CNSWJO tourism strategy.

Table 6: REDS and their tourism/visitor economy elements and priorities

REDS	Elements of the REDS	Summary of infrastructure priorities relevant to the CNSWJO	Summary of priority actions relevant to the CNSWJO
Bathurst Regional Council, Oberon Council (Abercrombie REDS)[13]	Develop the Region's Brand and Diversify Local Tourism Offerings	Transport links in and out of the region Improved access to natural assets Tourism accommodation	Coordinated branding, including signage on highways Coordination of roster of events Involvement of locals in events Push visitors to offerings other than racing and caves
Blayney Shire Council, Cabonne Council, Orange City Council (Orange, Blayney and Cabonne REDS)[14]	Drive tourism growth and enhance the liveability of the region	Transport links in and out of the region Local road network and rail services to Sydney Digital connectivity, NBN and mobile reception Bike trails, cycle pathways Water supply consistency	Long term vision and marketing strategy Regional cultural heritage offer Training and jobs in hospitality Cycle networks and centre
Cowra Council (Cowra Shire REDS)[15]	Grow the visitor economy	Transport links in and out of the region	Link different attractions in the region Develop the Peace Precinct Refurbish the CBD Business cases for art gallery upgrade and civic square precinct development
Weddin Shire Council (South West Slopes)[16]	Continue to develop and grow the Visitor Economy	Development of infrastructure to develop tourism products Improved access to natural assets Improved aviation facilities	Development of a NSW Silo Art Trail Development of Caravan and Camping Visitor Smart Tracker Eco-tourism accommodation and environmental education facility on Lake Cowal

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[13] Abercrombie Regional Economic Development Strategy 2018-2022. Adapted from p.18. Available at: https://www.nsw.gov.au/regional-nsw/regional-economic-development-strategies#download-the-strategies

[14] Orange, Blayney and Cabonne Regional Economic Development Strategy 2018-2022. Adapted from p.13. Available at: https://www.nsw.gov.au/regional-nsw/regional-economic-development-strategies#download-the-strategies

[15] Cowra Shire Regional Economic Development Strategy 2018-2022. Adapted from p.11. Available at: https://www.nsw.gov.au/regional-nsw/regional-economic-development-strategies#download-the-strategies

[16] South West Slopes Regional Economic Development Strategy 2018-2022. Adapted from p.16. Available at: https://www.nsw.gov.au/regional-nsw/regional-economic-development-strategies#download-the-strategies

Parkes, Forbes and Lachlan (Mid Lachlan REDs)[17]	Grow Tourism in the Mid-Lachlan to diversity the economy.	Upgrade to VICs Improved access to natural assets Improved aviation facilities CBDs and town centres developments including parks from a tourism perspective Major transport links Sporting facilities Sculpture trails Heritage assets	Addressing service gaps Development of key tourism infrastructure assets Collaborative branding and marketing

Currently, the CNSWJO has identified four strategic regional priority areas and tourism is specifically addressed in Priority Two: Regional prosperity as shown in Table 7.

Table 7: Current CNSWJO tourism priorities

Initiatives to grow population and increase the visitor economy	
No.	Activity
a)	Review CNSW Tourism service provided by JO with consideration of future services in light of the offerings from Destination NSW Country and Outback
b)	Visitor economy statistics at LGA level in place and longitudinal reporting provides key data for regional tourism development
c)	Outputs from the MoU with RDA Central West (RDACW) are delivered including policy development on NBN, business retention and new entrants monitoring and regional data collation

The links between state, regional and local priorities are best expressed in the Central NSW Tourism *2016-17 Destination Management Annual Update and Action Plan*, as shown in Figure 4.

Figure 4: Links between state, regional and local priorities

NSW GOVERNMENT PRIORITIES

Visitor Economy Industry Action Plan & Tourism 2020 targets	Economic Development and Infrastructure priorities	State-wide Marketing (DNSW)

REGIONAL PRIORITIES Destination
Country & Outback NSW (DNCO)

DMP provides a framework for experience development & marketing	DNCO as an advocate for local initiatives and conduit for grant funding	Communication, capacity & capability development

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[17] Mid Lachlan Regional Economic Development Strategy 2018-2022. Adapted from p.16. Available at: https://www.nsw.gov.au/regional-nsw/regional-economic-development-strategies#download-the-strategies

SUB-REGIONAL & LOCAL INITIATIVES
JO, Central West & Orana Regional
Plan, local DMPs

Industry-led initiatives	Local Government led initiatives including those from the JO	Identify specific gaps and opportunities for capability development
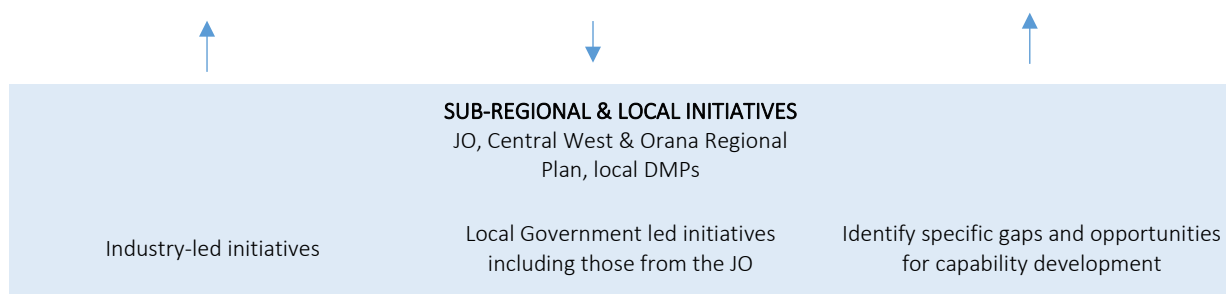
Although a precursor to the refreshed CNSWJO strategy it includes a helpful hierarchy of connections (albeit with issues over the size of the DNCO) which could be used as a starting point for the future.

This existing strategy[18] aims to double the visitor economy from 2011 to 2020 by focusing on incremental growth across domestic visitation by:

1. Providing a regional platform for collaboration, leadership and good governance in all aspects of destination management subject to available resources

2. Expanding our visitor economy

3. Facilitating LGAs to grow and evolve our product and experience offering

4. Building demand by developing the destination's brand and appeal.

These objectives are now under consideration during the development of the strategy refresh.

The value of the CNSWJO

The CNSWJO is a high functioning collaboration of councils with a unified voice and a clear vision.

The CNSWJO is recognised by the NSW Government and other JOs are 'working well' and is an exemplar to other councils/regions in Australia as a model of effective and efficient regional strategic planning and collaboration.

Value to the state

A regional approach has inherent cost savings and other efficiencies for State investment. Collaboration with the NSW Government is also easier with central point of contact (rather than ten local governments) and presents efficiencies and cost savings for the state.

JOs coordinate local and regional voices to the table to develop more informed regional strategy and better tailored delivery.

Codesign between the CNSWJO and the NSW Government is then possible to drive devolution of decisions/funding/investment from the centre which is aligned to visitor economy priorities as part of state, regional and local economic development strategies.

Respecting and leveraging the deep knowledge and experience of elected member ensures the right focus is maintained at a strategic, governance and advocacy level for the regional visitor economy.

This model of regional visitor economy delivery could be used in other JOs in other areas of the state.

Value to members

Regional tourism services have been successfully delivered through collaboration administered centrally for over a decade. Building on the legacy of previous iterations of Regional Tourism Organisations, CNSWO continues to deliver significant ROI on tourism in grant funding, social media reach and public relations per year.

The legislated roles of CNSWJO provide an addition to this ongoing value. They are:

1. Through advocacy and leadership, key messages, informed by the priorities of members, form the basis of briefings to Ministers, engagement with federal and state agencies, submissions and media

2. Through intergovernmental collaboration the CNSWJO engages with federal and state agencies in the interest of members. This includes strategy, prioritisation and program delivery. Examples relevant to the visitor economy include:

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[18] Central NSW Tourism. *2016-17 Destination Management Annual Update and Action Plan*.

3.5   CURRENT LOCAL AND REGIONAL TOURISM PRIORITIES

Regional tourism priorities identified in existing *2016-17 Destination Management Annual Update and Action Plan*[19] are:

- Culinary and Agritourism – authentic farm to plate experiences

- Cultural and Heritage – ancient aboriginal cultures, gold miners and bush rangers, sporting events, pop culture, artists and architecture

- Natural Heritage – seasonal appeal of natural landscape, national parks and waterways, parks and gardens, sculptured agricultural landscapes.

These align with the Destination Country and Outback NSW *Destination Management Plan* tourism priorities of:

- Celebrating Culture on Country

- Wine Lovers & Foodie Finds

- Unlimited Horizons

- Exploring our Nature

- Revealing our Heritage

- Little Places, Big Stories

- Events and Conferences

- Signature Experiences

- Strengthening Demand & Visitor Services.

Both strategies are aligned around strategic development priorities:

- Increasing the number of visitors, length of stay and spend

- Expanding the visitor economy

- Developing the physical capacity of the region

- Improving the visitor experience.

The priorities outlined above also align with the *Central West and Orana Regional Plan 2036*:

- Develop the region's capacity to grow food and wine tourism

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[19] Central NSW Tourism. *2016-17 Destination Management Annual Update and Action Plan*

- Enable opportunities appropriate for tourism development and associated land uses in local environmental plans

- Target experiential tourism opportunities and develop tourism management frameworks to promote a variety of accommodation options

- Encourage tourism development in natural areas that support conservation outcomes

- Promoting eco-tourism, conference and sports tourism, agritourism, events and festivals, recreation (including recreational fishing) and Aboriginal cultural and historic heritage.

Although, to be updated during this project, the *Centroc Regional Tourism Group Management Plan 2017-20* is also strongly aligned to the state and regional plan objectives which:

- Provide a regional platform for collaboration, leadership and good governance in all aspects of destination management subject to available resources

- Expand our visitor economy through a targeted approach to
    - Boosting Visitor Nights
    - Increasing Visitor Expenditure
    - Increasing Length of Stay
    - Increase consumer insights of region through the development of original content, for example, agri-tourism

- Facilitate LGAs to grow and evolve the region's product and experience offering.

Finally, a review of the available current and draft council DMPs concludes they are generally aligned with state tourism and economic development priorities and council tourism priorities as defined in the relevant Community Strategic Plans.

Ute-opia. Image Credit: Stephen Coburn.

3.6 WHAT THIS MEANS FOR THE CNSWJO STRATEGY

Implications of the policy context and priorities include:

- Continued alignment to federal and state policies is important to support intergovernmental collaboration, advocacy and funding applications

- Consider potentially stronger alignment with economic development and regional planning policies which view tourism through an economic lens, especially with the expected focus of the new Australian Government *Tourism 2030* strategy

- Ditto but for environmental and conservation policies at state and federal government level

- Ensure the regional voice is engaged in state and regional policy making via the CNSWJO and that a network of advocates exist, including mayors, chambers of commerce and the community

- Identify specific support available from various funding sources within regional and state plans which align with whole of region opportunities

- Consider re-orientating 'tourism' to 'visitor economy' in the CNSWJO, in line with how this sector of industry is increasingly viewed by policy and decision makers and the recognised contribution it has on diversification of regional economies which builds community resilience in the regions.

4.   Key opportunities

4.1   OVERVIEW

This section details the key opportunities for tourism in the Central NSW region and includes:

- Overview (Section 4.1)
- Opportunities for the region (Section 4.2)
- Opportunities for the CNSWJO (Section 4.3)
- Other learnings (Section 4.4).

4.2   OPPORTUNITIES FOR THE REGION

The key opportunities for the region can be divided into three themes as shown in Table 8.

Table 8: Opportunities for the region

Theme	Opportunity
Intergovernmental collaboration and advocacy	• Better articulate the value of regional tourism to drive a shared understanding and messaging (especially from mayors) within and outside the region • Increase the understanding of the CNSWJO role in the visitor economy and how it adds value for councils and some communities • Make intergovernmental collaboration and advocacy effective and efficient by planning activities and measure outcomes achieved, again to demonstrate value i.e. collaboration/advocacy with whom, about what and when and what was achieved • Build on the existing strong relationships with DNCO, although it is recognised it has resource and funding challenges of its own • Work with state government to reduce the size of funding offered (sounds counterintuitive) so that councils can match the funding level often required by grants • Increase the economic contribution of tourism across councils as this is currently uneven and not at the NSW average in all councils due to the historical focus on certain industries and/or the maturity of the visitor economy offer at local level
Capacity and capability	• Improve the granularity and availability of visitor data to aid decisions • Increase the understanding and knowledge of all elected members to articulate the value of the visitor economy • Increase the capability of operators to create more consistent product and visitor experience • Identify what can be achieved with limited resources and deliver as efficiently as possible with economies of scale and shared learnings • Ensure councils also resource whole-of-region outcomes as part of local DMPs (especially where there are resource constraints) • Improve digital infrastructure (in particular, NBN and mobile phone coverage) as it can be uneven and does not support visitors to the region in the way they are used to i.e. having immediate access to data and information
Projects and priorities	• Package multi day itineraries and experiences since the region is geographically large and extremely diverse to reduce the perception that distance is a barrier to visiting • Align all council DMPs to regional outcomes so there is a line of sight from the local to regional to state level • Continue to value regional collaborations which successfully deliver at the local level with other organisations, for example, Orange 360, local business chambers, partnerships with other councils such as Dubbo, Mudgee, Lithgow and Blue Mountains

Jenolan Caves. Image credit: Oberon Council.

4.3   OPPORTUNITIES FOR THE CNSWJO

As noted in the *Centroc Regional Tourism Group Management Plan 2017-20* there are resource constraints at the CNSWJO and local levels to support tourism. However, there are certain roles which the CNSWJO may be able to play relating to specific local and regional initiatives. It will be important to maximise resource efficiency and ensure the right actions are being undertaken by the right local, regional and state stakeholders (within and outside local government).

The following opportunities exist for the CNSWJO based on the desktop review, the interviews and input from the Steering Group. Not all of them will be progressed. They were workshopped with the Regional Tourism Group to develop a priority action list for the strategy (see Section 5.3).

Intergovernmental collaboration and advocacy

Develop a whole of region intergovernmental collaboration and advocacy plan, prioritised by member councils which:

- Maps out key relationships and engages potential collaborators, partners and funders in state and federal government, government agencies and the private sector

- Establishes forums for regular engagement with tourism service providers, in particular accommodation providers, to raise awareness about the importance and value of tourism and their role in the sector within the region

- Establishes systems to maintain a comprehensive understanding and schedule of funding opportunities which the CNSWJO and councils could tap into to support the development of the regional tourism sector and/or individual council tourism offerings

- Investigates and builds the case for new tourism initiatives such as biking tourism, ecotourism, wellness and nature based tourism and additional indigenous tourism

- Investigates and builds the case for enhancing existing natural, cultural, heritage and experiential tourism assets

- Actively promotes the benefits of collaboration to develop joint inter-regional marketing strategies to neighbouring regions.

The role of the CNSWJO in intergovernmental collaboration

Visitor economy supported through the CNSWJO achieves stronger results because of collaboration.

The CNSWJO is legislated to work in collaboration with other levels of government to achieve sustainable regional development which leads to jobs and population growth. With a well-deserved reputation as a highly collegiate region with decades of successful collaboration, regional collaboration continues to deliver on investment, capacity building and marketing.

The power of the CNSWJO is the ability to act singularly as a collective voice, to achieve effective results for the region with the Australian and NSW government. This cohesion is a core strength for iintergovernmental collaboration and should be leveraged for the visitor economy, especially to drive devolution of decisions/investment from the centre to the region.

CNSWJO has delivered and continues to deliver value for members through collaborating with other peak regional organisations. These include:

- Regional Development Australia, Central West

- Arts Out West

- Business NSW and Western NSW Chamber of Commerce

- Biz HQ

- DNCO.

Content development, capacity building and marketing initiatives are optimised and enjoy co-investment through these collaborations. For example, see the Culture Maps project at centralnsw.com.

Intergovernmental collaboration is a key enabler for success for the region and is underpinned by aligned purpose, policy and practice across different levels of government.

The challenge is to have formal conversations with the right stakeholders and to ensure those people have the right delegations to make decisions to unlock investment and funding.

This *CNSWJO Visitor Economy Strategy 2021-2026* recognises the CNSWJO strength in intergovernmental collaboration and seeks to build on its success through further collaborative activity and enabling structures.

Coordination

Establish a systematic approach to coordination which harnesses the skills of the Tourism Managers and other staff in the councils and supports their work which:

- Agrees a program of actions and activities to support strategic development and knowledge sharing, for example, an annual planning and strategy meeting for tourism managers

- Establishes a mechanism (such as a working group or other) to develop and coordinate cross-region initiatives, for example, the currently on-hold Astro-tourism Trail or a Heritage Trail

- Maps tourism activities (annually and quarterly) across the region by council, for example, developing a regional calendar of events and a seasonal calendar of experiences

- Coordinates scheduling of signature experiences, annual events and festivals to avoid or reduce competition, build content and bundle other visitor experiences and accommodation

- Develops standardised evaluation frameworks for events, attractions and other tourism related initiatives to ensure continuous improvement and shared learnings.

Marketing and communications

Continue to implement a region-wide marketing strategy which plays to regional strengths and:

- Identifies the region's comparative advantages and matches these to segmented markets underpinned by data on drivers of destination choice

- Establishes a whole of region brand which sits as an umbrella and ties existing individual council brands to the regional brand

- Coordinates all council tourism offerings to ensure duplication is avoided, gaps are identified and strengths are leveraged

- Puts in place consistent best practice approaches to marketing/using social media for all council, for example, maintaining the connection with visitors who have previously travelled to the region and build on the successful *We want you back* campaign

- Promote anchor attractions across the region and provides avenues for each council to leverage this effort by scaffolding with a broader list of things to see and do before or after the anchor attraction experience

- Leverages the strong role of word of mouth and VFR in the decision journey i.e. where to go, what to do and what not to miss.

Capacity building

Continue to support the maintenance and development of the region's portfolio of tourism assets. Of equal importance is supporting the development of a pipeline of new offerings to ensure the sector remains vibrant and competitive. Within this context, the focus on capacity building could include:

- Providing mayors and councillors with the necessary tools to:
  - Leverage their understanding of the current and future potential for tourism in their LGA and the region
  - Support their key role in developing local and regional visitor economy strategies and promoting the region

- Ensuring access to an up to date evidence base to assist in planning and delivery of tourism offering through the creation of a region-specific data hub which provides data on trends, forecasts, TRA data and includes case studies and/or success stories with shared learnings

- Ensuring access to accurate information for prospective visitors to help them plan their trip by investing in technology platforms which:
  - Package multi-day itineraries according to time limitations
  - Package regional itineraries of interest to particular cohorts
  - Readily provide information about the distance from their home base to the region (this is to address the misconception that the region is too far away for most people to visit within a short time frame)
  - Ensure that tourism related and other businesses are discoverable online.

Phillip Shaw Winery. Image credit: Orange City Council.

4.4   OTHER LEARNINGS

This project provided a range of other learnings which are relevant for the strategy. They include:

- As noted in Section 3.6, the strategies, action plans and conversations about 'tourism' may be stronger if viewed from an economic development perspective with the focus on 'visitor economy' rather than just 'tourism'

- A strong, consistently articulated regional voice about the visitor economy is important for regional outcomes. This means that all individuals and organisations involved in intergovernmental collaboration and advocacy need to have a narrative which includes:

  o   The recognition of the contribution of a diverse economy to strong regional and local community outcomes

  o   The commitment of the region to diversification into the visitor economy

  o   The visitor economy as an attractor, not only of visitor but also of businesses and people who want to relocate to the region

- Regional marketing and PR campaigns have contributed significantly to raising the profile of the region. They are viewed as considerable value for money when compared to market rates for advertising or PR and there is a need to ensure the CNSWJO Board understands this value

- The current NSW Government focus on the regions is a critical and valuable opportunity to raise the focus of the Central NSW region and to advocate for resource support for the visitor economy

- Regional collaboration, led by the CNSWJO, is highly valued and seen as an enabler for regional strategies. However, the outcomes the CNSWJO achieves are less understood and there is an opportunity to present this value to the ten councils in a more consolidated manner

- Commitment to expansion of the visitor economy for regional growth needs a long term vision and dedicated resources. Although capability is high at the CNSWJO, the capacity for the necessary time and effort may require a rethink of staffing, in particular, the consideration of a new role for a Regional Tourism Manager at the CNSWJO.

MTB Kanangra-Boyd National Park. Image credit: Oberon Business and Tourism Association.

5.   A five-year strategy

5.1   OVERVIEW

It is important to consider the overall contribution of tourism as part of the regional economy. This will help to position the current, and potential future, impact of tourism as a key driver of growth and prosperity. Creating additional jobs outside the traditional sectors such as agriculture will attract more people into the region, into new jobs and create a more diverse economic base which can support community resilience, especially in times of drought. As such, the 'tourism' strategy might be more appropriately named a 'visitor economy' strategy to highlight that the strategy is not just about bringing tourists to the region but providing a range of quality experiences for tourists, the VFR market and also for the local community. Together these will create a valuable industry sector and sustainable, viable communities in the long term. This naming also complements the need to look beyond investment to drive the direct impact of visitors but understand the indirect effect of the region as an attractor for tourism operators, small businesses and entrepreneurs who want a great lifestyle but need a solid income level to relocate and/or to remain in the region.

This section details the *CNSWJO Visitor Economy Strategy 2021-2026* and includes:

- Overview (Section 5.1)
- Overall purpose and objectives (Section 5.2)
- Priority actions (Section 5.3)
- Key stakeholders (Section 5.4)
- Governance and resourcing (Section 5.5).

5.2   OVERALL PURPOSE AND OBJECTIVES

The overall purpose and objectives need to align with the CNSWJO purpose and vision. This is shown in Figure 5.

Figure 5: Visitor economy strategy purpose and objectives

CNSWJO

Purpose
To provide strong cohesive leadership that aligns all tiers of government to deliver our region's community derived strategic priorities

Vision
Central NSW is a vibrant, prosperous and welcoming place of seasonal landscapes that is recognised by the nation for its agricultural heart

Overall purpose for the visitor economy
To support the regional visitor economy and build cohesive, resilient communities within our region

Objective 1
Lead **intergovernmental collaboration and advocacy** within and outside the region for policy and funding

Objective 2
Build **capacity** for regional visitor economy growth and business attraction

Objective 3
Design and deliver **whole of region initiatives** – products, systems, marketing and PR

5.3   PRIORITY ACTIONS

The priority areas and actions for the CNSWJO defines 'the things we need to address in the next five years' to meet our purpose i.e. to support the regional visitor economy and build cohesive, resilient communities within the region. However, some of these are more tactical priorities (short-medium term) which could be implemented sooner to build capacity in the visitor economy (people and product) in order to take advantage of the impact of continuing restrictions on international travel well into 2021.

The proposed priority areas and actions are linked to each of the three objectives (see Figure 5) and were developed in consultation with the Regional Tourism Group. They aim to meet the needs of the regional community, rather than just local interests but due to the different context for each local government area, there may be uneven outcomes across the region. Over time the actions will hopefully enable successful visitor economy outcomes for the whole region.

The proposed priority areas and actions are detailed in Table 9 and, once agreed, can be further developed to confirm timings and responsibilities.

Table 9: Proposed priority actions for the region

Objective	Priority actions
Objective 1 Lead intergovernmental collaboration and advocacy within and outside the region – policy and funding	1. Develop a <u>concise value proposition</u> for the visitor economy which includes targets for new jobs and economic growth. Use this for intergovernmental collaboration and advocacy within the region (councils, businesses and communities) as well as external to the region (Destination NSW and Australian and NSW governments). The value proposition should demonstrate the planned economic, social and environmental impacts of the visitor economy to the region and how investment can create additional, long term jobs and drive regional prosperity.
	2. Map collaborators to <u>develop a five-year intergovernmental collaboration and advocacy plan</u> with levels of funding sought to: • Ensure the Australian and NSW governments deliver reliable NBN (broadband at a minimum) across the whole region • Ensure Australian and NSW governments improve road connectivity into Western Sydney to avoid the traffic issues which are an inhibitor to weekend/long weekend visits. Also drive continued improvements to the Newell Highway and connection from Canberra and the South Coast • Work with the Australian Government's *Tourism 2030* to gain from its expected focus on regions, funding regional initiatives and promoting the regions for liveability • Ensure the NSW Government improves funding levels for DNCO to support the delivery of the CNSWJO strategy and/or combine funding levels to provide more 'bang for buck' across the whole region. Aim to address the funding inequity for DNCO with the NSW Government using the value proposition • Collaborate across councils (and also mayors) to consider infrastructure and planning initiatives to support the visitor economy, for example, public amenities, unused building or infrastructure assets and trading hours • Collaborate with government departments such as Planning and Infrastructure or NSW Parks and Wildlife to support the visitor economy via product investment. This includes static infrastructure such as heritage structures, silos and sculptures as well as dynamic investment, for example, into the development of rail trails for walking/cycling and mountain biking/cycle track on- and off-road • Understand the pipeline of funding opportunities which councils and the region a whole can access.
	3. Develop a method to assist councils to <u>assess visitor economy infrastructure and service needs</u> and identify gaps to be filled at a local level to achieve consistently high grade visitor experience across the region.

Objective	Priority actions
Objective 2 Build capacity for regional visitor economy growth and business attraction	4. Design a regional knowledge development plan to: • Provide mayors and councillors with the consistent tools and messaging to support them to advocate for local and regional tourism, as part of regional economic development, to support community building and resilience. Include quarterly dashboard measures on economic value creation and a small set of other measures for councils as well as the CNSWJO Board • Upskill staff involved in tourism/economic development, potentially including mentoring between councils, including business case development for new initiatives • Build the capability of tourism operators (food, accommodation and experiences) to understand the delivery standards needed to attract new and returning visitors and increase their business resilience. This is critical and could be undertaken in conjunction in partnership with chambers of commerce who could also promote liveability of the region and its towns • Understand how best to work with local chambers of commerce and other business groups to support product development.
	5. Develop a centralised data and insights hub for region-specific data on trends, forecasts, using TRA data and spend/travel pattern data from third party sources. Focus on deriving predictive data. Use case studies/success stories from within and outside the region to build on the story-telling about the region which has shown to be effective in the *We want you back* campaign. Stories and learnings should be shared regularly across the region via a regional forum (in person or digital).
	6. Create standardised templates to drive consistency for: • An annual calendar of events and festivals to avoid or reduce competition, build content and bundle other visitor experiences and accommodation • Evaluation frameworks for events, attractions and other tourism related initiatives • Council DMPs to allow for ease of completion and better view across all the DMPs to align shared priorities and support potential economies of scale. Develop an annual summary document to facilitate effective and efficient delivery of regional scale experiences and investment. Ensure a focus on increased visitation, longer trips and higher spend
Objective 3 Design and deliver whole of regional initiatives – products, systems, marketing and PR	7. Design a new regional brand strategy which sits as an umbrella and ties existing individual council brands to the regional brand. Gradually retire the Unearth and Central NSW brands
	8. Develop a five-year regional marketing and PR strategy which: • Identifies the region's comparative advantages and matches these to segmented markets underpinned by data on drivers of destination choice • Coordinates all council tourism offerings to ensure avoid duplication, identify gaps and leverage strengths • Drives consistent best practice approaches to marketing/using social media for all councils, for example, maintaining the connection with visitors who have previously travelled to the region and build on the successful *We want you back* campaign • Promotes 'anchor attractions' across the region and provides avenues for each council to leverage this effort by scaffolding with a broader list of things to see and do before or after the anchor attraction experience • Leverages the strong role of word of mouth and VFR in the decision journey i.e. where to go, what to do, what not to miss • Ensures sufficient resources are allocated from within and external to the CNSWJO to deliver it.
	9. Invest in a technology platform or collaborate with existing providers to develop a new website and mobile interfaces and social media focused on experiences/itineraries rather than destinations and individual activities. This also requires maintaining to produce accurate information for prospective visitors to help them plan their trip before they travel and during their trip which: • Packages multi-day itineraries by travel time but includes a breadth of experiences

| Objective	Priority actions
	• Packages regional itineraries of interest to particular cohorts, for example, arts, heritage, indigenous experiences, nature-based, food, wine • Readily provides information about the distance from their home base to the region (this is to address the misconception that the region is too far away for most people to visit within a short time frame) • Ensures that tourism related and other businesses are readily discoverable online.
	10. Develop a regional 'new products' plan for experiences such as biking, ecotourism, agritourism, indigenous tourism and CBD/main streets revitalisation.

CSIRO Parkes Telescope. Image credit: Wayne England.

5.4   KEY STAKEHOLDERS

Government and non-government stakeholders will need to be engaged and activated to deliver the priority actions, especially for intergovernmental collaboration, advocacy, funding and regional initiatives. This will require the development of a stakeholder engagement plan which includes initial and ongoing engagement with a wide range of stakeholders from within and outside the region. Building on the CNSWJO's existing relationships, this plan will be vital to ensure the right outcomes are achieved in the agreed timeframes.

This plan should be drafted as an immediate priority to better understand existing relationships with and between stakeholders, their interest in regional issues and their ability to influence the outcomes the CNSWJO is seeking. The plan can be based on a matrix similar to that in Figure 6 which helps to identify the relative interest and influence of various stakeholders.

Figure 6: Stakeholder analysis matrix
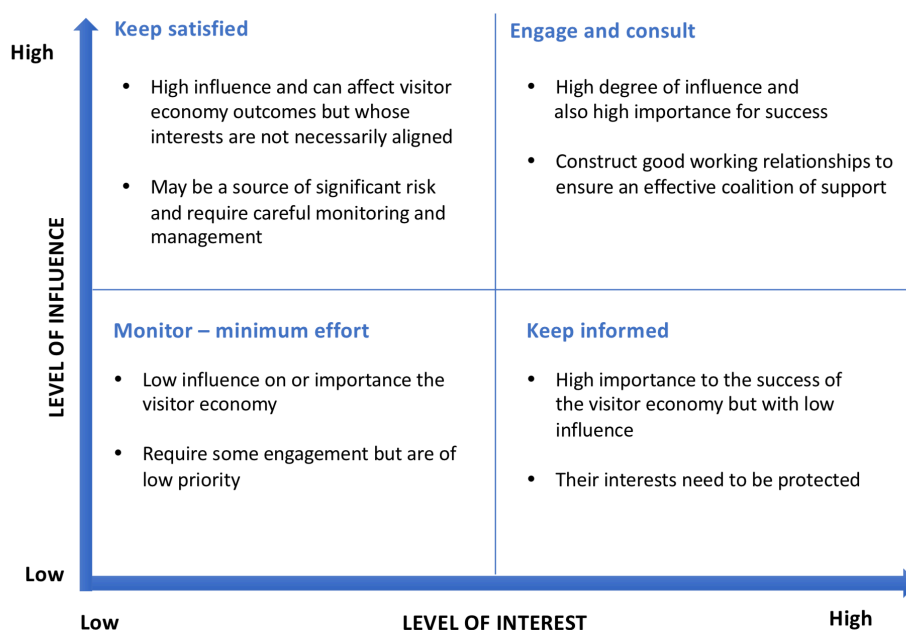
This plan also needs to align to some extent with the proposed intergovernmental collaboration and advocacy plan as many of the stakeholders in the 'engage and consult' category are key influencers in the region. Engaging a wide range of stakeholders initially and then using them as regional supporters and advocates is another effective way of attraction investment and businesses. If new businesses into the region within the visitor economy are used to promote the region (either via formal marketing or word of mouth) then this can be a very powerful attractor to enable economic growth which creates community resilience.

Examples of potential stakeholders are detailed in Table 10.

Table 10: Potential stakeholders

Type of stakeholder	Potential stakeholder
Local government	CNSWJO member councils
	Other local governments in NSW for example, Dubbo, Mudgee, Lithgow and Blue Mountains
	Other local governments in other states
Elected members	CNSWJO Board (mayors)
	Elected federal and state government members
Local government staff	Directors at councils responsible for visitor economy and/or economic development
	Tourism managers/officers responsible for visitor economy and/or economic development
Regional organisations	Destination NSW and DNCO
	RDA and RDA Central West
	Arts out West
	Orange 360
	Biz HQ
	WRI
	Education and training providers
Australian and NSW government departments	For regions, transport, tourism, planning and infrastructure, aboriginal affairs, environment
NSW government agencies	NSW National Parks and Wildlife Services, Arts, water, power
Businesses	Food and accommodation providers
	Festivals and major events operators
	Experience providers
	Hotel/motel/camping chains
	Shop owners and retailers
	Real estate agents and landlords for tourism accommodation and retail/food outlets
	Chambers of commerce and other business groups, including Western NSW Chamber of Commerce
Media	Traditional print media
	Social media influencers
The community	Local residents/ratepayers/in towns and out of towns
	Interest groups (biking, bird watching, heritage, indigenous groups etc.)
	Volunteers
Visitors (new and existing markets)	VFR
	Domestic intra-state
	Domestic inter-state
	International

Grenfell Commodities Silo. Photo credit: Five Hours West.

5.5   GOVERNANCE AND RESOURCING

Currently, the Regional Tourism Group meets regularly to oversee the delivery of the tourism strategy and provide networking support for their own DMPs. It includes participants from the ten member councils and also DNCO and Orange 360. The Executive Officer provides progress reports from the group to the CNSWJO Board.

Many Regional Tourism Group participants have a wide range of abilities, some of which might be suited to a more operational rather than a governance committee.

Consideration should be given as to whether the delivery of the new strategy may be better achieved by:

1. The creation of a visitor economy sub-committee of the CNSWJO with a clear role to provide oversight of delivery of the strategy. Participants would include a selection of Director-level staff from councils (community development, planning, economic development), one or two mayors from the CNSWJO Board, RDA Central West, DNCO, Arts out West and the Executive Officer. This sub-committee would have eight to ten members. This group would meet two or three times per year. One of the key roles for the group would be to set the regional product focus for the year, for example, CBD upgrades, agritourism, indigenous tourism, which would then be passed to the operational group to activate

2. The creation of an <u>operational group</u> consisting of a mix of all member councils and other organisations involved in visitor economy delivery, such as Orange 360. This group would be a self-selected larger group than the CNSWJO Board sub-committee and its role would be to share operational information, knowledge about successes, scheduling, as well as develop whole of region product delivery. It could possibly be broadened with the addition, at times, of community members, businesses and other regional providers.

3. The appointment of a Regional Tourism Manager as a senior position within the CNSWJO, reporting to the Executive Officer. Dedicated executive level staff are required to operationalise and manage the priority actions and currently, this is achieved through the significant efforts of the CNSWJO Executive Officer. The strategy might have improved effectiveness and impact if a Regional Tourism Manager is recruited on a full or part time basis.

Weddin Mountains National Park. Photo credit: Geagle Productions.

6. Conclusion

6.1 OVERALL SUMMARY

There is a significant opportunity for the Central NSW region visitor economy to increase value to the region and to NSW. There is an immediate decision around tactical actions to take to maximise visitation and spend per visit whilst Australia's international borders are closed. These should focus on product development for new or existing accommodation, food and experiences. Such investment must be balanced with a longer term, more strategic view which builds longer term capacity and capability across the region, both in terms of intergovernmental collaboration and advocacy to gain a longer term funding commitment from governments at various levels and more knowledge and insight about visitors (spend, profile and need), especially those who are not currently visitors. This will provide a solid platform for the next iteration of the strategy for 2026-2031.

6.2 KEY SUCCESS FACTORS

The delivery of *CNSWJO Regional Visitor Economy Strategy 2021-2026* depends on various success factors which include:

Appropriate capacity:

- Elected members and general managers able to dedicate sufficient time to build ongoing relationships across the CNSWJO and with other stakeholders to drive regional collaboration

- Member councils and other stakeholders with the capacity (and capability) to deliver the priority actions

Sufficient funding:

- Many of the priority actions may require funding which cannot be provided by solely member councils (either in-kind or dollar value). It will be important to secure federal/state/other funding for these actions as early as possible

- If the CNSWJO is able to appoint a specialist Regional Tourism Manager (senior staff position) in addition to other staff (marketing, project manager, communications, administrative) these roles will need to be appropriately remunerated on a full-time, part-time or contract basis to attract and retain staff

Good collaboration:

- The CNSWJO operates in a highly collaborative network model. For many of the priority actions, the CNSWJO may be in the role of enabler or advocate and will need to work with a range of government and non-government organisations to deliver the outcome. This will require initial and ongoing communication between the CNSWJO mayors, the Executive Officer and staff at member councils in a structured and aligned manner

- The CNSWJO may have to form working groups to enable some of the priority actions. This requires collaboration between the working group members and also with the Executive Officer and the CNSWJO Board

Long term commitment:

- None of the priority actions will be easy to deliver and commitment over time is needed to ensure the CNSWJO continues to achieve its goals for the region

- All decision-making and priority setting needs to be non-political and endure even when there is change in political representation at local and/or state government levels

Evaluation and reporting:

- In addition to setting timeframes for actions and responsibilities, the outputs and outcomes need to be monitored on a regular basis to monitor progress and adjust the approach if necessary. This will require an initial evaluation framework to be drafted with key stakeholders to agree on how outputs and outcomes will be measured and how the data to assess success will be collected.

6.3   SUGGESTED NEXT STEPS FOR THE CNSWJO

The next steps are to:

- Review the strategy, in particular, the overall purpose and priority actions and develop an appropriately resourced action plan

- Consider and resolve the key success factors, especially timeline (tactical and more strategic actions) funding and resourcing for specific priority actions

- Prioritise the priority actions, especially an intergovernmental collaboration and advocacy plan, a 'new products' as part of the tactical response (in the short and medium term) and a regional knowledge development plan

- Establish the governance framework for the delivery of the strategy

- Plan to review the progress on the priority actions on an annual basis.

Orange night market for F.O.O.D. week. Photo credit: Orange 360.

Appendix A: Stakeholder interviews

1. Council interviews

Name	Position	Organisation
Auburn Carr	Economic Development Officer	Weddin Shire Council
Belinda Virgo	Tourism Manager	Cowra Tourism Corporation
Daniel Cove	Manager Tourism and Visitor Services	Bathurst Regional Council
Debbie Keane	Tourism and Economic Development Officer	Lachlan Shire Council
Glenn Mickle	Tourism Manager	Orange City Council
Kelly Hendry Katrina Dwyer	Destination Development Manager Brand and Marketing Manager	Parkes Shire Council
Laura Lewis-Minogue	Tourism Co-ordinator	Cabonne Council
Mathew Webb	Tourism Manager	Oberon Council
Megan Rodd	Manager Tourism and Communications	Blayney Shire Council
Nadia Parkinson	Tourism and Destination Officer	Forbes Shire Council

2. Other stakeholder interviews

Name	Position	Organisation
Amy van de Ven	Franchisee	Quest Orange City Council
Caddie Marshall	General Manager	Orange 360
Fee Jennings	Social Media	For CNSWJO
Gabrielle Brewer	PR and Marketing	For CNSWJO
Jenny Bennett	Executive Officer	CNSWJO
Jodie Anderson	Director	Jenolan Caves Reserve Trust
Jordan Core	President	Cowra Business Chamber
Kathy Woolley	CEO	Western Research Institute
Lexie Hopkins	Information Officer	Cowra Visitor Information Centre
Lucy White	General Manager	Destination Country and Outback NSW
Sam Harma	CEO, Director of Regional Development	RDA Central West
Tracey Callinan	Executive Director	Arts out west
Wendy Muffet	Chairperson	Grazing Down the Lachlan