NSW GOVERNMENT

Destination NSW

Destination Country and Outback NSW

Destination
Country and Outback NSW
Destination Management Plan
2018 - 2020

Destination Country and Outback NSW

Destination Country and Outback NSW (DNCO) is one of six Destination Networks established by the NSW Government. The networks are responsible for driving the growth of the visitor economy in each respective region to help achieve the NSW Government's overnight visitor expenditure goal for 2020.

The Destination Networks facilitate growth in the visitor economy at a local level by representing and coordinating the region's tourism industry. The operations of DNCO are funded by Destination NSW, the lead government agency for the New South Wales tourism and major events sector.

Destination Country and Outback NSW Board

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FOREWORD

Destination Network Country and Outback NSW is vast, covering 61.2% of the State. It offers an incredible diversity of visitor experiences, precincts and places to attract visitors from across Australia or overseas.

It is a region that has been explored by generations, from Aboriginal communities to those seeking new adventures and horizons. Whether it is the stories or characters, remarkable landscapes, ancient connection to Country, the unfolding history of our economy or evolving sophistication of our produce, there are unlimited possibilities to discover or rediscover. It truly is a region to explore.

The Destination Management Plan (DMP) recognises and acknowledges this diversity while strongly encouraging greater collaboration to underpin and guide strategic destination development and management. Our ambition is to provide an inspiring and effective approach to grow the visitor economy of Country and Outback NSW and create meaningful connections between the place, the communities and businesses with visitors to the region.

In developing the DMP, we undertook extensive research and consultation, including analysing credible trends that are helping to shape the future of travel and tourism. We are indebted to all those who took valuable time to provide input, feedback, advice or assistance to ensure we could deliver a robust plan to grow our visitor economy and encourage more people to visit or return to Country and Outback NSW.

Stephen Bartlett
Chair, Destination Country and Outback NSW
May 2018

EXECUTIVE
SUMMARY

INTRODUCTION

Destination Country and Outback NSW (DNCO) is a new Destination Network, created by the NSW Government through Destination NSW (DNSW) in 2016. It is one of six Destination Networks across NSW. It has been established to assist build the capability of industry and strengthen the visitor economy of Country and Outback NSW.

The DNCO region is vast, covering 61.2% of the State. It offers an incredible diversity of visitor experiences, precincts and places to attract visitors from across Australia or overseas.

As part of establishing the new Destination Network, DNCO has developed a comprehensive Destination Management Plan (DMP), which will guide its program of activities over the period from 2018 to 2020 and beyond.

The DMP recognises and acknowledges the region's diversity while strongly encouraging greater collaboration to underpin and guide strategic destination development and management.

In developing the DMP, a long-term Ambition has been identified, which is:

To provide an inspiring and effective approach to grow the visitor economy of Country and Outback NSW and create meaningful connection between the place, its communities and businesses with visitors to the region.

This Ambition recognises the core role and function of DNCO by focusing on the objective to grow and sustain the visitor economy through developing assets, infrastructure, attractions and world-class experiences, which connect visitors to the place and its characters. It acknowledges that success will be best achieved through strengthening the industry and enabling effective engagement of the communities and businesses who make up the region.

In summary, the key roles and responsibilities of Destination Country and Outback NSW are:

1. Building 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;
2. Engaging and advocating for industry through effective communication as well as representing the DNCO region to Government, including on infrastructure and transport;
3. Facilitating relationships and partnerships for accessing funding, including the Regional Visitor Economy Fund and other grant programs as well as strengthening connectedness with Destination NSW on industry and marketing activities; and
4. Driving more effective destination management and business planning, especially to support experience development and marketing.

Image: Glen Innes , www.visitnsw.com

GUIDING PRINCIPLES AND GOALS

The Guiding Principles are intended to provide a guide to decision-making across both supply and demand initiatives. This includes for governance, product and experience development, marketing and the design and delivery of events, among other things.

The guiding principles, which are all equally important, are:

RESPECTFUL

Acknowledging and respecting the diversity and richness of Aboriginal culture and the enduring connection to Country of the Aboriginal Nations and communities of the region.

SUSTAINABLE

The priorities and actions identified within the DMP need to be financially, socially and environmentally sustainable and achievable to enable the achievement of the DMP's Ambition in the longer-term.

BEST PRACTICE

Creating an outstanding destination involves a number of aspects, from connecting places and experiences within the destination through to implementing guidelines to ensure high-quality signage, interpretation, marketing and visitor information. Over the longer-term, a key benefit of this approach is increasing the appeal and sustainability of the destination.

CUSTOMER-FOCUSED

Whether it's for the community or visitors to the region, it is vital that planning and management adopts a customer focus. For visitors, this specifically involves understanding the visitor or customer journey as well as their motivations, expectations and barriers to travel and the importance of providing meaningful and immersive experiences for them to enjoy.

COLLABORATIVE

The success of the DMP relies on the DNCO, Government (at all levels), private sector and communities working together. Cooperation between these sectors will also contribute to building civic pride and strengthening the culture for tourism.

INCLUSIVE

The DMP aims to facilitate a destination that has broad appeal and enables people of different capacities and interests. Inclusiveness underpins cultural diversity while also meaning there will be interesting and relevant content for all target markets.

The DMP's high-level and long-term goals are to:

- Create a positive and collaborative culture to support the growth of the visitor economy;
- Increase visitation and yield to Country and Outback NSW;
- Strengthen the perception and awareness of Country and Outback NSW;
- Build the capacity and capability of the industry and local government to deliver on the expectations of visitors to the region;
- Facilitate the development or enhancement of products, experiences and events; and
- Enable effective and efficient communication with stakeholders and communities across the network.

INFORMING THE DMP

Analysis of visitor and consumer research as well as tourism and travel trends is critical to ensure that the DMP is well informed, including an understanding of the trends that will influence travel into the future. As a result, extensive analysis has been undertaken of Tourism Research Australia's (TRA) international and domestic visitation data as well as other key sources, including DNSW. A comprehensive research report is included at Appendix B, which provides information relevant at a more local level. Key insights from domestic and global trends in tourism have also been identified and integrated into the DMP. This information is an invaluable resource for Councils and other key stakeholders across the Network.

In addition, extensive consultation was undertaken to inform the DMP. In total, eleven workshops were held in October and November 2017 across the Network as well as a number of meetings with key stakeholders, DNSW and the DNCO Board. A second round of consultation workshops (involving a further fourteen workshops) were conducted during March and April 2018 to discuss the draft DMP and refine it following more detailed discussions.

The consultation insights reflect what we heard from the businesses and communities of Country and Outback NSW, which are critical to an understanding of the broader region's strengths, weaknesses, opportunities and challenges as well as preferences to support the growth of the visitor economy. These insights were enhanced through an analysis of existing local or regional DMPs and tourism strategies from across the Network.

TARGET MARKETS

The strategic approach adopted for the DMP is to maintain existing markets while also targeting new higher-value markets. This reinforces the importance of motivating new people to visit the region as well as encouraging repeat visitation. This is summarised in the diagram below, with identified objectives outlined in the DMP that aim to grow the visitor economy through focusing on both existing and new markets.

DIAGRAM 1: TARGET MARKETS

EXISTING MARKETS
Touring market, esp. 55+; Visiting Friends & Relatives (VFR); Event participants (incl. sports); Nature & cultural tourism; Short-breaks, esp food & wine

NEW MARKETS
Active families; Younger adults; More active 55+; Niche markets inc. meetings and conferences, and international, esp. linked to nature & cultural tourism and food & wine

The region's most important source markets are domestic markets, which will continue to be a significant focus for DNCO into the future. The international market is currently small and generally lower-yield. However, there are opportunities to grow the appeal of Country and Outback NSW for international markets, including higher-yield travellers.

POSITIONING, STRATEGIC THEMES & EXPERIENCE OFFER

POSITIONING FRAMEWORK

Country and Outback NSW is both expansive and diverse. As a result, the positioning framework provides an overarching structure for how local areas can connect and deliver on the strategic themes identified for the Network.

An important feature of the Positioning Framework is that it recognises the diversity and experience offer of the region. In addition, it aims to facilitate a more effective approach to leveraging the personality of the places, precincts and destinations within the Network. The Positioning Framework, which also supports the DMP's Ambition is:

Explore the unlimited possibilities of Country and Outback NSW, as mesmerising as the stars that stretch across the night sky.

It is based on the following core elements:

- The broader region has been explored by generations, from Aboriginal communities to those seeking new adventures and horizons. It truly is a region to explore.
- Whether it is the stories or characters, remarkable landscapes, ancient connection to Country, the unfolding history of the economy or evolving sophistication of produce, this vast region offers unlimited possibilities to discover or rediscover.
- The night sky shines with a million stars, revealing the unlimited possibilities of the universe. It was the strongest connecting theme across all of the DNCO region and reflects the alluring and captivating nature of the landscapes, stories and the characters to meet along the way.

STRATEGIC THEMES

Country and Outback NSW offers an extraordinary diversity of visitor experiences as well as natural, cultural and built assets. A key element of the DMP are its strategic themes, which highlight the points of difference of the region compared with other destinations and provide a high-level experience framework, without trying to describe everything that the region offers its visitors. It is based on a visitor-centric approach to destination planning and management. The strategic themes have been identified through a review of:

- Strengths of the region (or parts thereof), including existing signature experiences and its natural, cultural and built assets;
- Visitor research and data, including an understanding of the destination's perception, awareness levels and demand for the existing offering;
- Analysis of the global and domestic travel trends and an understanding of target markets (demographics and psychographics), which provide insights into the appeal of the destination and the motivations for and barriers to travel of target markets;
- Seasonality and the implications for attracting visitors outside of peak periods or to encourage regional dispersal; and
- Recognition of the important role that products, experiences, events, festivals and conferences play in attracting new markets and encouraging repeat visitation.

DIAGRAM 2: POSITIONING FRAMEWORK AND STRATEGIC THEMES

EXPERIENCE FRAMEWORK

As a result, the DMP's ambition, positioning statement and strategic themes combine to provide a high-level experience framework to guide:

- Enhancing, maintaining or promoting existing experiences and assets;
- Developing or creating new experiences or infrastructure to support the visitor economy, including attracting investment;
- Identifying key game-changing initiatives, which leverage existing strengths of the region while inspiring further development to substantially lift the performance of the region's visitor economy; and
- Recognising supporting experiences, which value-add to the overall visitor experience. While the strategic themes focus on the points of difference for the broader region, there is a rich offering of supporting experiences that enhance visitors' satisfaction and perception. In some destinations within the DNCO, these experiences may be the hero or signature experience for that local area.

The DMP highlights opportunities to enhance the seasonal offer as well as reinforcing the importance of the nature and heritage-based tourism offering and supporting regional conferences and business events. Six potential game-changing initiatives have been identified, which would strengthen the appeal of Country and Outback NSW, including but not limited to:

- Aboriginal cultural tourism experiences;
- Experientially-led touring routes and trails;
- An Unearth the Fossils initiative;
- A Night Skies experience development initiative;
- Export-ready wine packages and experiences; and
- A Flying Tours and Private Charters initiative.

Currently, the Network's Touring Routes have relatively low awareness in the market. A key opportunity is to refocus touring routes through adopting a stronger experientially-led approach, including the development of contemporary, high-quality content and itineraries. This can be delivered in two key ways:

- Connecting individual experiences, tourism products and events within each strategic theme, including at a local or Network scale; and
- Creating cross-regional, cross-boundary and cross-theme experiences that bring the stories, places and characters of Country and Outback NSW to life.

RECOMMENDATIONS AND ACTION PLAN

The DMP is a long-term planning tool for the DNCO. As a result, it provides recommendations on a wide range of initiatives, covering:
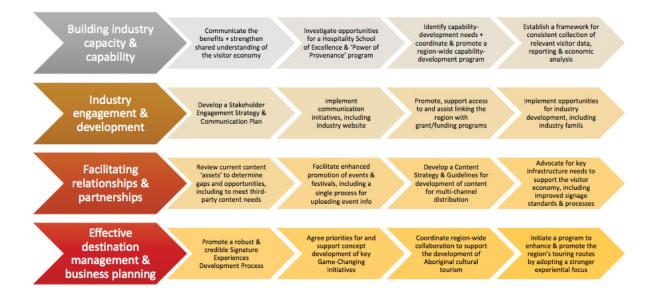
- Enabling activities and governance, including capability development;
- Delivering on supply, including experience, product and event development;
- Strengthening demand, incorporating marketing and visitor services; and
- Strategic communication and stakeholder engagement, which are critical roles for the DNCO.

The DMP incorporates an Action Plan, which is a practical and simple plan that enables the DNCO to get on with the job and monitor and report on implementation. This underpins the sustainability of the plan into the future and ensures it is perceived as an active part of delivering results for the visitor economy. It is designed to facilitate easy reporting on activities undertaken and outcomes achieved by the DNCO. It also highlights indicative resource requirements, which in some cases relate to the involvement of stakeholders or industry as well as where additional resources may be required to achieve the outcome. The DMP includes a table of key stakeholders and partners who will be involved in the successful implementation of many of the actions.

Resources to implement all actions are not necessarily identified or secured at this stage. As a result, the timeframes recognise and prioritise those actions that would deliver the most significant outcomes for the visitor economy of Country and Outback NSW at this time.

In addition, the resourcing or cost of all actions is not necessarily the sole responsibility of the DNCO. Some actions require more detailed investigation and the preparation of business cases to seek funding from either the industry or Government, including the NSW Government and/or the Commonwealth Government. A key role that the DNCO would play in such cases is to advocate for and facilitate access to appropriate funding sources such as grants programs. Likewise, some initiatives, such as capability-development programs may require participants from across the DNCO Network to contribute a small fee to assist enable the delivery of the program. However, the DNCO would play an important role in program coordination, identification of key themes or elements and communication of upcoming opportunities. A diagram of an overview of the key priorities for the DNCO to 2020 is provided below.

DIAGRAM 3: OVERVIEW OF KEY PRIORITIES FOR THE DNCO TO 2020

IMPLEMENTING THE DMP

There are a number of key considerations for implementation of the DMP, which underpin the enabling activities and governance priorities within the DMP. These include:

- DMP is a 'whole-of-DNCO' DMP. It is also essential that the DMP is utilised as a strategic plan for all of the areas within DNCO. This involves aligning strategic plans or allowing the DMP to help guide activities at the local level as well as engaging and involving the stakeholders, businesses and communities of the area. Diagram 4 below outlines the relationships critical for successful implementation of the DMP;
- Resourcing. The DMP identifies opportunities for the DNCO to assist in identifying alternative or additional funding sources to supplement budgets, such as the NSW Government's Regional Tourism Fund or Rebuilding NSW Program, among others;
- Partners are essential to implementation. This includes local government, Destination NSW and other partners and stakeholders, such as the Joint Organisations of Councils, Regional Development Australia committees (RDAs), Local Aboriginal Land Councils, the NSW National Parks & Wildlife Service

and other public and private sector organisations, including the NSW Department of Premier and Cabinet and Transport for NSW;

- Opportunity to build a greater understanding of other areas across the DNCO, including opportunities for collaboration beyond administrative and State boundaries or across sectors and industries. It will be important to share information, successes and best practice;

- Adopt practices that encourage investment, particularly for the game-changing initiatives. A key to success is to develop robust business cases and feasibility studies and consider local government policies and planning to make it easier for businesses and the community to grow the visitor economy;

- Create inspiring and compelling content to bring the stories, places and characters of the region to life and utilise the right channels to reach the target audience, including enhanced use of digital platforms and video content; and

- Dare to be different and memorable. It is important to stand out from the crowd in a highly competitive market place. This can be achieved most effectively by adopting a customer or visitor-centric approach and recognising the value of partnerships and collaboration.

DIAGRAM 4: OUTLINE OF THE RELATIONSHIP BETWEEN STATE-WIDE, DNCO AND LOCAL-LEVEL PRIORITIES AND INITIATIVES

NSW GOVERNMENT PRIORITIES

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

DESTINATION COUNTRY & OUTBACK NSW

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

LOCAL-LEVEL INITIATIVES

| Industry-led initiatives | Local Government-led initiatives, including from the JOC | Local-level and/or collaborative marketing | Identify specific gaps and opportunities for capability development |

DESTINATION
COUNTRY AND OUTBACK NSW
DESTINATION
MANAGEMENT PLAN
2018 - 2020

KEY STAGES IN THE DESTINATION MANAGEMENT PLAN PROCESS

Context for the DMP → Ambition, guiding principles & goals of DMP → 1. INFORM → 1.1 Research & Trends Analysis

1.2 Consultation Insights → 1.3 SWOT Analysis → 2. DEVELOP → 2.1 Target Markets

2.2 Positioning Framework → 2.3 Strategic Themes & Experience Framework → 3. PLAN → 3.1 Enabling Activities & Governance

3.2 Delivering On Supply → 3.3 Strengthening Demand & Visitor Services → 4. COMMUNICATE → 5. MEASURING SUCCESS

Action Plan

DESTINATION COUNTRY & OUTBACK NSW REGION

Destination Country and Outback NSW (DNCO) is a new Destination Network, created by the NSW Government through Destination NSW in 2016.

It is one of six Destination Networks across NSW.
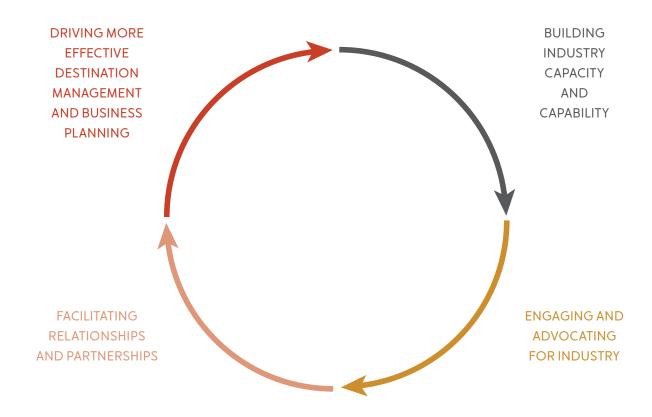
It is the largest Destination Network in NSW, covering 61.2% of the state.

⬤ Destination Country and Outback NSW (DNCO)

KEY

🟩 RIVERINA MURRAY NSW
🟦 SOUTHERN NSW
🟪 NORTH COAST NSW
🟧 COUNTRY AND OUTBACK NSW
🟥 SYDNEY SURROUNDS NORTH
🟦 SYDNEY SURROUNDS SOUTH

ROLES & RESPONSIBILITIES OF DNCO

In a snap-shot, the key roles and responsibilities of Destination Country and Outback NSW are:

- Building industry capacity and capability through training, mentoring and supporting centres of excellence as well as through sharing of best practice and providing access to industry data;
- Engaging and advocating for industry through effective communication as well as representing the DNCO region to Government, including on infrastructure and transport;
- Facilitating relationships and partnerships for accessing funding, including the Regional Visitor Economy Fund and other grant programs as well as strengthening connectedness with Destination NSW on industry and marketing activities; and
- Driving more effective destination management and business planning, especially to support experience development and marketing.

DRIVING MORE
EFFECTIVE
DESTINATION
MANAGEMENT
AND BUSINESS
PLANNING

BUILDING
INDUSTRY
CAPACITY
AND
CAPABILITY

FACILITATING
RELATIONSHIPS
AND PARTNERSHIPS

ENGAGING AND
ADVOCATING
FOR INDUSTRY

CONNECTING STATE-WIDE PRIORITIES TO LOCAL INITIATIVES

The DMP plays a key role in assisting to connect State-wide priorities to local initiatives. It does this primarily by:

- Providing a framework for local areas throughout the Network to strengthen supply and grow demand. This includes opportunities for experience development as well as understanding the motivations and appeal of the region to existing and new markets.
- Identifying Network-wide opportunities to enhance capacity and capability of the industry and local government to build the visitor economy;
- Creating opportunities for sharing best practice and strengthening collaboration within the Network as well as across boundaries (ie with other Destination Networks or across state-boundaries); and
- Providing a model for advocating on behalf of the Network for infrastructure, grant funding or other enabling projects that support the visitor economy, including at the local-level.

It is critical that local government organisations (including JOCs) identify and communicate to the DNCO relevant gaps and opportunities specific to their region. This includes through destination planning and management at the local level.

NSW GOVERNMENT PRIORITIES

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

DESTINATION COUNTRY & OUTBACK NSW

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

LOCAL-LEVEL INITIATIVES

Industry-led initiatives	Local Government-led initiatives, including from the JOC	Local-level and/or collaborative marketing	Identify specific gaps and opportunities for capability development

STAKEHOLDERS AND PARTNERSHIPS

A key role of the DNCO and the DMP is the facilitation of partnerships and engagement with industry for the development and delivery of collaborative, meaningful destination management, including:

- Product and experience development
- Infrastructure programs
- Access to land and assets
- Attracting investment, and
- Marketing and promotion activities.

The implementation of the DMP will not be the responsibility of the DNCO alone, it will require close liaison with Destination NSW, and genuine collaboration and cooperation across the region, as well as with Local Aboriginal Land Councils, other NSW Government agencies including the NSW National Parks and Wildlife Service, and the private sector. These relationships are particularly important for the enhancement and development of cultural and nature-based experiences, as well as agri-tourism.

A critical element in the initial stage of each initiative within the DMP will be the identification of key partners to ensure the right players are in place for the best outcomes.

Key partners for the DNCO and implementation of the DMP will include, among others, the organisations identified in the table of key stakeholders on the following pages.

Key stakeholders	Role and relationships
Destination NSW (DNSW)	DNSW is part of the NSW Government. It develops and implements strategies to grow the NSW visitor economy; collaborates with Destination Networks (DNs) on DMPs and co-ordination of marketing campaigns; provides operational funding to DNs and contestable funding to industry, LTOs and Councils; manages Regional Flagship Events Program funding.
Business communities	Chambers of Commerce and providers of tourism businesses, visitor services, hospitality services, investors, etc; critical partners for identifying, developing and delivering tourism opportunities and visitor services, and investing in infrastructure, experiences, etc.
Industry including peak industry associations	Key point of collaboration for DNCO, partnerships to facilitate strengthening relationships with various sectors within the broader visitor economy.
Joint Organisations of Councils (JOCs)	Facilitate collaborative partnerships between neighbouring councils; will be conduits, stakeholders, partners and facilitators for the development and implementation of the DMP.
Regional Development Australia (RDA)	Regional Development Australia (RDA) is an Australian Government initiative that brings together all levels of government to enhance the development of Australia's regions. A national network of RDA committees has been established.
Local Councils	Local destination management; provision of tourism infrastructure and services; management of planning policies and processes, including those that facilitate economic development; tourism events, festivals and signature experiences; tourism marketing.

Key stakeholders	Role and relationships
Local Tourism Organisations (LTOs) and touring route promotional committees, such as the Newell Highway Promotions Committee (NHPC)	Local tourism growth and development in collaboration with local tourism industry; includes Visitor Information Centres. The touring route promotional committees offer a cross-LGA collaborative model for promoting specific touring routes.
Local Aboriginal Land Councils (LALCs), NSW Aboriginal Tourism Operators Council (NATOC) and organisations such as Murdi Paaki Regional Enterprise Corporation (MPREC)	Key organisations involved in the engagement and support of Aboriginal communities, including in the visitor economy. Manage support services delivered to local Aboriginal communities; facilitate engagement and partnerships with local communities in relation to cultural tourism development, delivery and capacity and capability building.
Australian Tourism Export Council (ATEC)	ATEC is the peak industry body representing Australia's tourism export sector. ATEC is a membership-based organisation. Its services include B2B opportunities, industry advocacy and development, education and business capacity building, local and national networking events and conferences.
NSW Business Chamber	NSW Business Chamber is the state's peak business organisation. It is an independent not-for-profit organisation, which includes a Tourism Industry Division to assist businesses operating in the Visitor Economy (formerly known as the Tourism Industry Council). It coordinates both the NSW Regional and State Tourism Awards and has offices located in regional NSW.
Local communities	Participation in local tourism development for sustainable, supported tourism that meets local needs and aspirations; participation through provision of tourism and visitor services, hosting and share economy services; etc.
Volunteers	Volunteers play an important role in delivering visitor services and assisting the development and management of events throughout Country and Outback NSW. Their contribution to the visitor economy is invaluable. However, a key challenge is to ensure appropriate recognition of and motivation for people to volunteer to avoid volunteer fatigue.
NSW Government agencies	This includes: Department of Premier and Cabinet (DPC) and associated offices such as the Office of the Regional Infrastructure Coordinator and Centre for Economic and Regional Development as well as Industry NSW, Transport for NSW, TAFE NSW and the NSW Departments of Education and Planning and Environment, among many others. These agencies are critical in facilitating or directly providing services and infrastructure to regional NSW that have relevance to the visitor economy. DPC also plays a critical role in coordinating the development and implementation of regional NSW priorities and programs.
NSW National Parks and Wildlife Service (NPWS)	NPWS is part of the Department of Planning & Environment. It manages protected areas; facilitates access to parks and protected areas for nature-based recreation and experiences; develops nature-based products and experiences and works with operators to deliver on park tourism opportunities; supports development and delivery of Aboriginal cultural tourism on park.
Forestry Corporation of NSW	FCNSW is part of the NSW Government. It manages NSW State forests; facilitates access to forests for outdoor recreation and experiences; develops nature-based products and experiences and works with operators to deliver outdoor experiences and tourism opportunities.

Key stakeholders	Role and relationships
Tourism Research Australia (TRA)	TRA is a branch within the Tourism Division of Austrade. TRA is Australia's leading provider of quality tourism intelligence across both international and domestic markets. TRA equips industry with information to strengthen their marketing and business decisions. TRA's data underpins government tourism policy and helps improve the performance of the tourism industry.
Caravan Industry Association of Australia (CIAA)	CIAA is the peak national body for the caravanning and camping industry in Australia. It operates as a not-for-profit organisation with a membership base comprising the individual state caravanning and camping associations. They undertake and provide detailed and credible research reports on the caravanning and camping industry in Australia, including on RUVs.
Roads and Motorists' Associations, such as NRMA, RAA and RACV	There are many roads and motorists' associations across Australia, including the NRMA, RAA and RACV. All of these organisations have a strong membership base and offer a diverse range of motoring, travel and lifestyle benefits, products and services.

BEST PRACTICE DESTINATION MANAGEMENT PLANNING

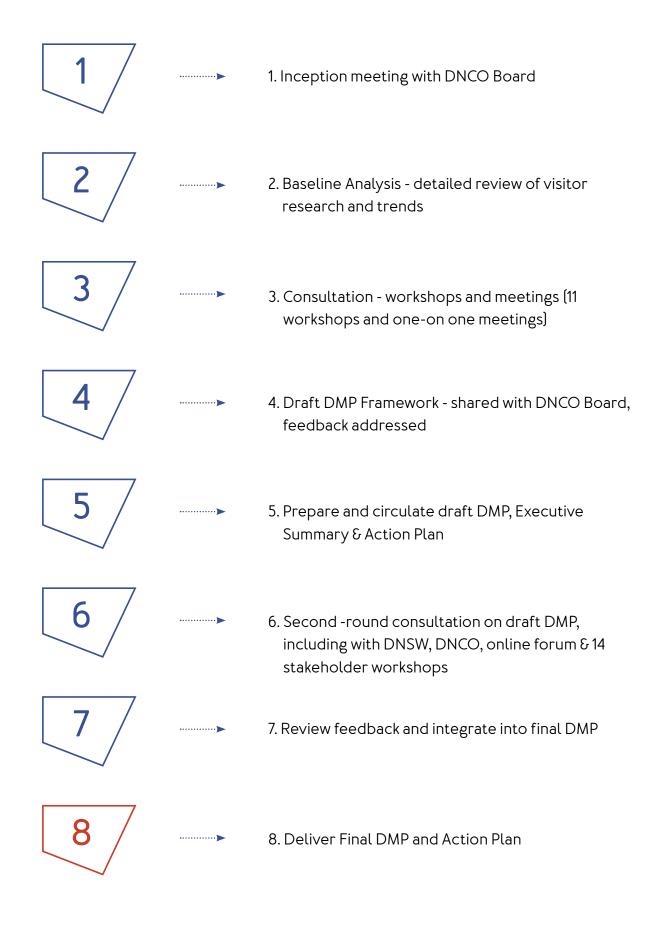Meaningful destination planning involves:

- Adopting a visitor-centric approach to boundary identification, product and experience development and marketing
- Strengthening partnerships with stakeholders and businesses across sectors
- Applying local meaning to global and domestic trends (Think Global, Act Local) and informed by consumer and visitor research and stakeholder consultation
- Identifying the experience framework and signature experiences that can be promoted as the region's lead products, including opportunities for investment in infrastructure, experience and product development
- Determining enablers, including but not limited to opportunities for capacity and capability building, training or education to support and grow the visitor economy
- Allocating resources and accountabilities and evaluating outcomes against Key Performance Indicators (KPIs)

OVERVIEW OF DMP PROCESS AND CORE ELEMENTS

Destination management planning is a requirement of Destination NSW – see: http://www.destinationnsw. com.au/wp-content/uploads/2014/03/Destination-Management-Planning-factsheet.pdf

KEY STEPS IN THE DMP DEVELOPMENT PROCESS

1 ┈┈┈┈▶ 1. Inception meeting with DNCO Board

2 ┈┈┈┈▶ 2. Baseline Analysis - detailed review of visitor research and trends

3 ┈┈┈┈▶ 3. Consultation - workshops and meetings (11 workshops and one-on one meetings)

4 ┈┈┈┈▶ 4. Draft DMP Framework - shared with DNCO Board, feedback addressed

5 ┈┈┈┈▶ 5. Prepare and circulate draft DMP, Executive Summary & Action Plan

6 ┈┈┈┈▶ 6. Second -round consultation on draft DMP, including with DNSW, DNCO, online forum & 14 stakeholder workshops

7 ┈┈┈┈▶ 7. Review feedback and integrate into final DMP

8 ┈┈┈┈▶ 8. Deliver Final DMP and Action Plan

AMBITION FOR THE
DESTINATION MANAGEMENT PLAN

Ambition – a clear vision describes the ambition for the Destination Management Plan (DMP). It is a statement that provides the opportunity for all of the areas that make up the Network's region to acknowledge and reinforce their common ground, while recognising the diversity and size of the Network. The ambition for the DMP is:

To provide an inspiring and effective approach to grow the visitor economy of Country and Outback NSW and create meaningful connection between the place, its communities and businesses with visitors to the region.

This Ambition recognises the core role and function of Destination Country and Outback NSW by focusing in on the objective to grow and sustain the visitor economy through developing assets, infrastructure, attractions and world-class experiences, which connect visitors to the place and its characters.

It acknowledges that success will be best achieved through strengthening the industry and enabling effective engagement of the communities and businesses who make up the region.

GUIDING PRINCIPLES FOR THE DESTINATION MANAGEMENT PLAN

The Guiding Principles are intended to provide a guide to decision-making across both supply and demand initiatives. This includes for governance, product and experience development, marketing and the design and delivery of events.

The guiding principles, which are all equally important, are:

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Acknowledging and respecting the diversity and richness of Aboriginal culture and the enduring connection to Country of the Aboriginal Nations and communities of the region.

SUSTAINABLE

The priorities and actions identified within the DMP need to be financially, socially and environmentally sustainable and achievable to enable the achievement of the DMP's Ambition in the longer-term.

BEST PRACTICE

Creating an outstanding destination involves a number of aspects, from connecting places and experiences within the destination through to implementing guidelines to ensure high-quality signage, interpretation, marketing and visitor information. Over the longer-term, a key benefit of this approach is increasing the appeal and sustainability of the destination.

CUSTOMER-FOCUSED

Whether it's for the community or visitors to the region, it is vital that planning and management adopts a customer focus. For visitors, this specifically involves understanding the visitor or customer journey as well as their motivations, expectations and barriers to travel and the importance of providing meaningful and immersive experiences for them to enjoy.

COLLABORATIVE

The success of the DMP relies on the DNCO, Government (at all levels), private sector and communities working together. Cooperation between these sectors will also contribute to building civic pride and strengthening the culture for tourism .
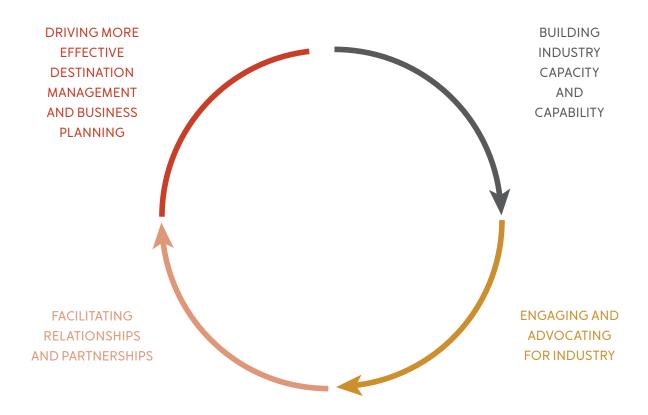
INCLUSIVE

The DMP aims to facilitate a destination that has broad appeal and enables people of different capacities and interests. Inclusiveness underpins cultural diversity while also meaning there will be interesting and relevant content for all target markets.

GOALS OF THE DESTINATION MANAGEMENT PLAN

The DMP's high level goals are to:

- Create a positive and collaborative culture to support the growth of the visitor economy
- Increase visitation and yield to Country and Outback NSW
- Strengthen the perception and awareness of Country and Outback NSW
- Build the capacity and capability of the industry and local government to deliver on the expectations of visitors to the region
- Facilitate the development or enhancement of products, experiences and events
- Enable effective and efficient communication with stakeholders and communities across the Network

The DNCO's key roles and responsibilities are an enabler to achieve these goals.

DRIVING MORE EFFECTIVE DESTINATION MANAGEMENT AND BUSINESS PLANNING

BUILDING INDUSTRY CAPACITY AND CAPABILITY

FACILITATING RELATIONSHIPS AND PARTNERSHIPS

ENGAGING AND ADVOCATING FOR INDUSTRY

DELIVERING ON THE NSW GOVERNMENT'S PRIORITIES

In 2012, the NSW Government released the Visitor Economy Industry Action Plan (VEIAP), which sets the target of doubling overnight visitor expenditure to NSW by 2020. The VEIAP outlines a whole-of-government approach in partnership with industry to achieve this target.

There are a range of actions that relate directly to the DNCO DMP in contributing to the achievement of the national Tourism 2020 target (doubling overnight visitor expenditure by 2020) and attracting investment to regional NSW, including specific actions around industry engagement and capability building to better service visitor needs and preferences; the role and delivery of visitor services; Aboriginal cultural tourism development; enhancing regional events and festivals; developing nature-based tourism opportunities, and growing NSW's profile as a quality food and wine destination, among others.

In October 2017, the NSW Government announced an independent review of the VEIAP. Over November and December, workshops and online consultation were undertaken with key stakeholders across the State to assess progress and determine the next steps for supporting the NSW visitor economy. In addition, the NSW Government has developed Regional Plans while is also in the process of developing Regional Economic Development Strategies (REDS). The Regional Plans and REDS provide linkages between broader economic development and the visitor economy.
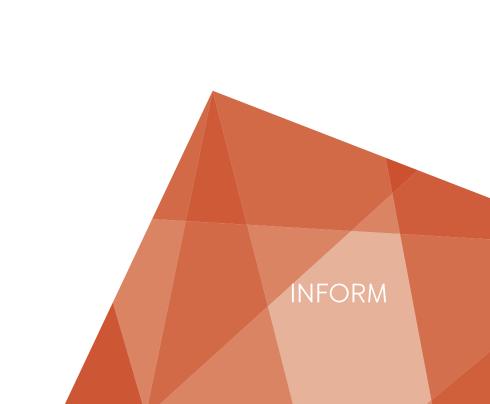
The NSW Government is also working to achieve 12 Premier's priorities and 18 State priorities to grow the NSW economy, deliver infrastructure, increase employment and create liveable communities. There are direct opportunities for the DNCO to contribute to the NSW Government's goals through the delivery of the DMP, in particular:

- Creating jobs, including growing regional companies as well as enabling small and medium-sized businesses to flourish; and
- Building infrastructure, including projects that improve growth and productivity across the state and those that contribute to liveability.

The NSW Government announced a record $193 million investment in tourism and major events in its 2017-18 State Budget. It includes a commitment to regional NSW: "Visitation to rural and regional areas will continue to be driven by a record $43 million funding commitment over four years announced in 2016 to drive innovative industry reforms such as the establishment of six Destination Networks across NSW."

CRITICAL SUCCESS FACTORS

- DMP is a 'whole-of-DNCO' DMP. It is also essential that the DMP is utilised as a strategic plan for all of the areas within DNCO – align strategic plans or allow the DMP to help guide activities at the local level as well as engaging and involving the stakeholders, businesses and communities of the area;

- Resourcing. The DMP identifies opportunities for the DNCO to assist in identifying alternative or additional funding sources to supplement budgets, such as the NSW Government's Regional Tourism Fund or Rebuilding NSW Program, among others;

- Partners are essential to implementation. This includes local government, Destination NSW and other partners and stakeholders, such as the Joint Organisations of Councils, Regional Development Australia committees (RDAs), Local Aboriginal Land Councils, the NSW National Parks & Wildlife Service and other public and private sector organisations, including the NSW Department of Premier and Cabinet and Transport NSW;

- Opportunity to build a greater understanding of other areas across the DNCO – consider opportunities for collaboration beyond administrative boundaries or across sectors/industries – it will be important to share information, successes and best practice;

- Adopt practices that encourage investment, particularly for the game-changing initiatives – develop robust business cases and feasibility studies and consider local government policies and planning to make it easier for businesses and the community to grow the visitor economy;

- Create inspiring and compelling content to bring the stories, places and characters of the region to life and utilise the right channels to reach the target audience, including enhanced use of digital platforms and video content; and

- Dare to be different (and memorable) – it is important to stand out from the crowd in a highly competitive market place – adopt a customer or visitor-centric approach and consider the value of partnerships and collaboration.

1. INFORM

1.1   Research and trends analysis – it is critical that the destination plan is well informed, including an understanding of the trends that will influence travel into the future as well as ensuring stakeholders are involved and felt heard;

1.2   Consultation insights – reflecting what we heard from the businesses and communities of Country and Outback NSW is critical to an understanding of the broader region's strengths, weaknesses, opportunities and challenges as well as preferences to support the growth of the visitor economy; and

1.3   SWOT analysis – it is important to understand the current situation through an assessment of the destination's strengths, weaknesses, opportunities and threats, including identifying what strengths and opportunities can be leveraged and the weaknesses or barriers to address.

1.1 RESEARCH AND TRENDS ANALYSIS

Research and trends analysis is critical to ensure that the DMP is well informed, including an understanding of the trends that will influence travel into the future.
As part of the DMP project, extensive analysis has been undertaken of Tourism Research Australia's (TRA) international and domestic visitation data. In addition, key findings and insights from national and state-level research (for example, from Destination NSW) as well as domestic and global trends in tourism have been identified and presented as part of the DMP.

A comprehensive Research Report is included at Appendix B.

The Research Report provides important data relating to each of the 'research and data hubs', identified on the following page. The insights are more specific at that level and should be utilised by the Local Government Areas (LGAs) and Joint Organisations of Councils (JOCs) to better inform their understanding of their target markets and the motivations, barriers and behaviour of visitors within that hub. Importantly, it identifies the key gaps and opportunities each hub has to strengthen their visitor economy.
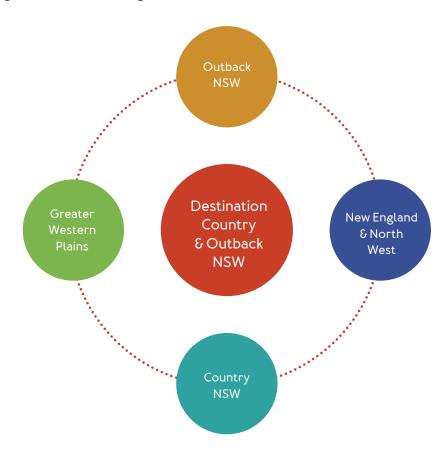
RESEARCH AND DATA HUBS OF DNCO

Destination Country and Outback NSW is vast, covering 61.2% of the State. In order to ensure that the DMP recognises and acknowledges the diversity of the region, four 'research and data hubs' have been identified, as outlined in the diagram below.

However, these 'hubs' have 'soft boundaries', ensuring collaboration and enabling individual places to work with another hub as and when appropriate for specific target markets or strategic destination development or management. This includes cross-border collaboration between Destination Networks (DNs) within NSW and across State boundaries.

It is critical that these hubs are not interpreted as marketing regions nor impose an LGA-cooperative model (which is essentially provided by the Joint Organisation of Councils).
These Hubs are based on:

- Most appropriate economic clustering within the broader DNCO region to enable statistically relevant analysis of visitor research
- The way that visitors identify areas to travel to within the broader region and the most natural (but not exclusive) clustering of the visitor experience offering, and
- Relevance to and distance from the source market for each hub, noting that there are differences relating to their source and target markets.

The table on the following page identifies Local Government Areas (LGAs) within each hub.

RESEARCH AND DATA HUBS OF DNCO

DNCO Research and Data Hubs	No. of LGAs	Local Government Areas (LGAs)
Outback NSW	7	Broken Hill City Council, Bourke Shire Council, Bogan Shire Council, Brewarrina Shire Council, Central Darling Shire Council, Cobar Shire Council, Walgett Shire Council as well as the Unincorporated Far West Region of NSW
New England & North West	12	Armidale Regional Council, Tamworth Regional Council, Inverell Shire Council, Glen Innes Severn Council, Gwydir Shire Council, Moree Plains Council, Liverpool Plains Shire Council, Narrabri Shire Council, Gunnedah Shire Council, Tenterfield Shire Council, Uralla Shire Council, Walcha Council
Greater Western Plains	6	Dubbo Regional Council, Coonamble Shire Council, Narromine Shire Council, Gilgandra Shire Council, Warren Shire Council, Warrumbungle Shire Council
Country NSW	12	**South West NSW**, including Forbes Shire Council, Lachlan Shire Council, Parkes Shire Council and Weddin Shire Council
		Central West NSW, including Bathurst Regional Council, Blayney Shire Council, Cabonne Council, Cowra Council, Lithgow City Council, Mid-Western Regional Council, Oberon Council and Orange City Council

While there are distinct differences between each hub, there are also some underpinning similarities, strengths and opportunities that have informed the DMP.

It is critical that these hubs are not interpreted as marketing regions or impose an LGA-cooperative model (which is provided by the Joint Organisation of Councils).
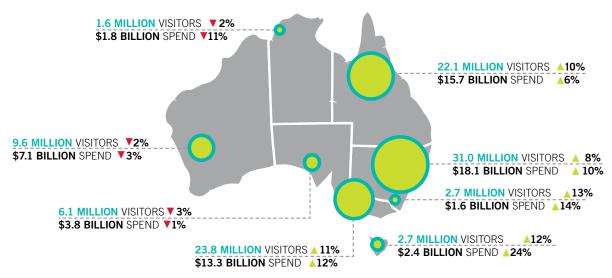
NATIONAL VISITOR SURVEY RESULTS

Australia's domestic visitor economy continues to set new records with figures for 2017 revealing strong growth in overnight trips, nights and expenditure.

In the year ending September 2017, spend grew nationally by 7% to $63.7 billion, overnight trips were up 7% to 96 million and nights were up 6% to 347 million. NSW experienced strong growth although slightly lower than Tasmania, the ACT and Victoria. However, a key trend is for intrastate holiday travel with slightly softer interstate travel. It is also worth noting that the NSW base is significantly higher than Tasmania, ACT and Victoria, meaning that the growth rate while lower has delivered significant visitor numbers.

Since March 2017, growth in both domestic and international tourism and the visitor economy has placed it ahead of the mining industry's economic contribution to Australia.

The domestic tourism results highlight the trend for more Australians to holiday or undertake short-breaks in Australia. A continuing and significant positive change relates to the purpose for travel being to visit friends and relatives.

1.6 MILLION VISITORS ▼ 2%
$1.8 BILLION SPEND ▼ 11%

22.1 MILLION VISITORS ▲ 10%
$15.7 BILLION SPEND ▲ 6%

9.6 MILLION VISITORS ▼ 2%
$7.1 BILLION SPEND ▼ 3%

31.0 MILLION VISITORS ▲ 8%
$18.1 BILLION SPEND ▲ 10%

2.7 MILLION VISITORS ▲ 13%
$1.6 BILLION SPEND ▲ 14%

6.1 MILLION VISITORS ▼ 3%
$3.8 BILLION SPEND ▼ 1%

2.7 MILLION VISITORS ▲ 12%
$2.4 BILLION SPEND ▲ 24%

23.8 MILLION VISITORS ▲ 11%
$13.3 BILLION SPEND ▲ 12%

Sources:
1. National Visitor Survey, YE September 2017.

See: https://www.tra.gov.au/Research/Domestic-tourism-by-Australians/National-Visitor-Survey-results

NATIONAL VISITOR SURVEY RESULTS - ACTIVITIES

An interesting and highly relevant insight from the NVS relates to activities. It finds that Australians have participated in a broad range of nature-based activities as part of their overnight travel over the last year. This includes:

- An increase of 12% to 10.8 million visitors to national parks
- More people undertaking bushwalking, which grew by 9% to 11.3 million
- Growth of 12% in water-based activities and sports, up to 3.4 million visitors

There has also been an increase in the number of domestic overnight travellers who connect with local communities, in particular through attending festivals, events and fairs, which grew by 14% to around 3.4 million.
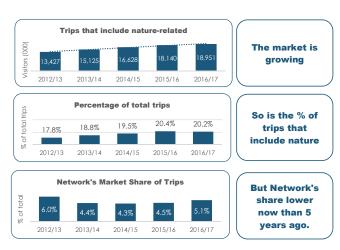
The findings for nature-based activities should be considered in relation to the research results for DNCO (data extracted from the NVS), which are outlined below.

DOMESTIC MARKET FOR NATURE-RELATED ACTIVITIES

Defined as domestic overnight trips that included any of the following activities: bushwalking/rainforest walks, visit to national park, visit to botanical or other public gardens.

ANNUAL AVERAGE - PAST 5 YEARS

Overnight trips that include nature activities	• 16.5million p.a. • Growth 9.0% p.a. ✔
Trip nights that include nature activities	• 84 million p.a. • Growth 7.2% p.a. ✔
Length of Trip	• Average 5.1 nights • slight decline
Total trip spend*	• $14.8 billion* • Growth 8.0% p.a. ✔
Spend per trip*	• $900 • no trend
Spend per night*	• $180 • no trend

Trips that include nature-related

Visitors (000)

2012/13	2013/14	2014/15	2015/16	2016/17
13,427	15,125	16,628	18,140	18,951

The market is growing

Percentage of total trips

% of total trips

2012/13	2013/14	2014/15	2015/16	2016/17
17.8%	18.8%	19.5%	20.4%	20.2%

So is the % of trips that include nature

Network's Market Share of Trips

% of total

2012/13	2013/14	2014/15	2015/16	2016/17
6.0%	4.4%	4.3%	4.5%	5.1%

But Network's share lower now than 5 years ago.

* The expenditure by visitors that included nature activites on their trip is not limited to spending on these activites or due to them. Spend figures cannot therefore be attributed soley to nature-related activities.

See: https://www.tra.gov.au/Research/Domestic-tourism-by-Australians/National-Visitor-Survey-results

TOURING MARKET – KEY FACTS

The Touring Market is a key focus and opportunity for Destination Country and Outback NSW. This market also includes those travelling with RVs, caravans and tents.

As part of this research, it has been identified that, regardless of the purpose for the trip (for example, food and wine; nature; culture and heritage; and/or VFR) that:
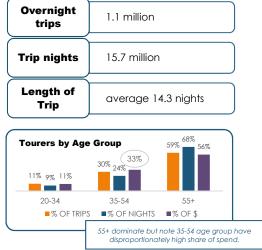
- 89% of the market is travelling to the region by car
- 5% by aircraft
- 2% by railway
- 1% by motorhome or campervan
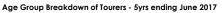- 1% bus/coach
- 1% other.

Outback NSW has about 14% of the overall touring market, while Country NSW (Sub-Hub: Central West NSW) has 23%. However, the number of nights that the touring market spend in Country NSW and Outback NSW is very low.
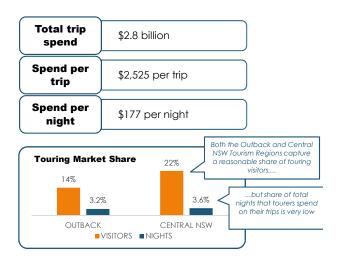
It is noted that Destination NSW only profiles the Darling River Run, Sturt's Steps, Waterfall Way and The Long Paddock Touring Routes within the Country & Outback NSW region on the VisitNSW.com website.

DOMESTIC ROAD TOURING MARKET

SEGMENT AT A GLANCE: ANNUAL AVERAGE OVER PAST 5 YEARS

Overnight trips	1.1 million
Trip nights	15.7 million
Length of Trip	average 14.3 nights

Total trip spend	$2.8 billion
Spend per trip	$2,525 per trip
Spend per night	$177 per night

Tourers by Age Group

Age	20-34	35-54	55+
% OF TRIPS	11%	30%	59%
% OF NIGHTS	9%	24%	68%
% OF $	11%	33%	56%

55+ dominate but note 35-54 age group have disproportionately high share of spend.

Age Group Breakdown of Tourers - 5yrs ending June 2017

Touring Market Share

	OUTBACK	CENTRAL NSW
VISITORS	14%	22%
NIGHTS	3.2%	3.6%

Both the Outback and Central NSW Tourism Regions capture a reasonable share of touring visitors....

...but share of total nights that tourers spend on their trips is very low

Tourism Region Market Share - 5yrs ending June 2017

Definition of the road touring market:

Transport = Any self-drive vehicle including cars, SUV's. 4WD's, Motorhomes, Campervans etc.

Purpose of trip = Holiday/leisure

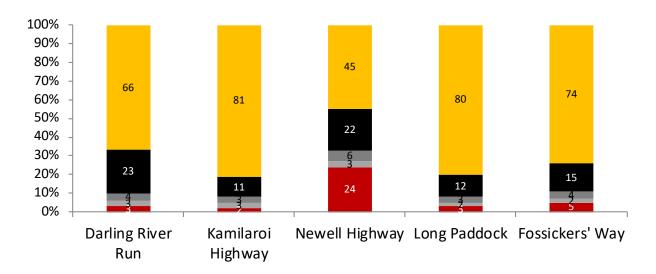**Trip length** = At least seven nights; Number of overnight

TOURING MARKET – AWARENESS AND KEY INSIGHTS

- Awareness is currently limited for key touring routes across the DNCO Network. For example, awareness for the Newell Highway in NSW is modest yet relatively strong among all touring routes. It is likely that awareness for all touring routes is strongest in specific, existing markets;

- To attract a higher-yield touring market (including from the international market), there is an opportunity to create experiences and develop products of higher value that appeal to the younger 35 – 54 year old market, while at the same time maintaining the 55+ market who are also increasing their spend while on a trip. This approach taps into the growing trend for undertaking activities and tours; and

- To enhance the awareness and perception of touring routes, it will be critical to evaluate and update content as well as distribution channels. Currently, the touring route websites are primarily location-based. Adopting an experientially-led approach, including bringing to life the places and people through story-telling would improve engagement with various target markets segments.

AWARENESS OF KEY TOURING ROUTES ACROSS COUNTRY & OUTBACK NSW

- ■ Never heard of this route
- ■ Know the name only
- ■ Know a lot about this route but not currently considering driving it
- ■ Know a lot about this route and currently considering driving it
- ■ Have driven this route

NOTE: Not all touring routes across the DNCO region are included in this research. However, these touring routes have the greatest awareness

Source: MyTravelResearch for Inland NSW Tourism – Positioning Inland NSW for Growth 2015

ATTRACTING MILLENNIALS TO REGIONAL NSW – DNSW & TRA STUDY

In November 2017, DNSW and TRA released a report, Attracting Millennials to Regional NSW. Millennials are aged between 15 – 29 years old although for this study, the age range was extended to 15 – 34 years. While this is highly segmented across age groupings within the wider age band, there are some insights that are highly relevant to Country and Outback NSW. Some of the key outtakes are provided in the accompanying boxes.

Importantly, they define themselves by their experiences rather than by their jobs as older generations have done. This is significant in regard to focusing on the growing domestic market for younger adults, who are increasingly interested in short breaks, festivals and events as well as more immersive nature-based experiences.

To attract their attention, it is important to create experience-rich imagery (photos and video), highlight the uniqueness of destinations and provide options for them to see and do.
Millennials are heavily influenced by digital and social media; WIFI access is important and they are seeking experiences with the 'bragability' factor.

WHAT ARE THEIR PERCEPTIONS OF REGIONAL HOLIDAYS?

- Not enough variety in things to see and do
- Peaceful, relaxing and authentic, but can be dull and boring
- Activities mainly relate to nature - hiking, beach, swimming
- Not accessible if you don't have a car

HOW DO THEIR REQUIREMENTS ALIGN WITH REGIONAL NEW SOUTH WALES' OFFERING?

- The key pull factor for a regional holiday is having basic, yet sophisticated experiences, such as country food and wine, nature-based experiences, and events.
- Millennials consider regional destinations as peaceful and relaxing, while providing authentic experiences.
- As the level of digital overload is only likely to intensify in coming years, growth in people seeking relaxing and peaceful retreats is an opportunity for regional NSW.

WHAT DO THEY WANT FROM A DESTINATION?

CONNECT
Build authentic relationships with other travellers and locals

ESCAPE
Break the monotony and ties of everyday life

DISCOVER
Learn something new about the world, or about themselves

BRAG
Use experience to create social identity

See: https://www.tra.gov.au/research/view-all-publications/all-publications/destination-visitor-survey-results/strategic-regional-research-reports/millennials-regional-nsw

Image: Parkes, www.visitnsw.com

GLOBAL MEGATRENDS DEFINING TRAVEL IN 2017

GROWTH MARKET SEGMENTS GLOBALLY

- There is a continuing rise in the numbers of contemporary female travellers, who are more likely to have a higher disposable income and to travel either on their own or in small groups of friends.
- The fifties are the new demographic for travel brands – more people are choosing to travel earlier than retirement to enjoy the more active or immersive experiences that destinations have to offer.

NEW EXPERIENCES

- Tourism activities, such as tours are finally coming into their own. However, the focus is on small-scale, immersive and locally curated activities. This is particularly important in relation to Indigenous and nature-based tourism;
- New luxury is defined by small brands with big stories. This is driven largely by the opportunity for genuine engagement and interaction with local people, nature, heritage and arts and culture. The story of the place and its people is increasingly critical to the success of the experience.
- 'Festivalisation' of meetings and events – festivals add to the excitement of a destination and increasingly appeal to those organising major conferences and events.

DINING OUT AS THE MAIN EVENT

- This trend is no longer just about the 'super-star' (or multiple-hatted) restaurants but is now about 'local heroes' who create immersive, curated and/or unique experiences rather than standard, expected service.

For a highly credible review of all the megatrends defining travel in 2017 see the SKIFT report at: https://skift.com/2017/01/12/the-megatrends-defining-travel-in-2017/

DOMESTIC TRENDS DEFINING TRAVEL IN 2017

The appeal of holidaying in Australia to Australians continues to grow:

· Escapism and short breaks have become the norm as Australians look to escape the frenetic pace of everyday life
· Domestic holidays provide a perceived 'safety net' to Australians with easy and affordable trips at home that offer fun and relaxed holiday experiences – for younger Australians, this includes carefree and spontaneous experiences
· Domestic holidays are more about the value of the experience, with Visiting Friends and Relatives (VFR), mid-range hotels, motels and serviced apartments the preference - indulgence is on the rise in relation to products and experiences
· Reconnection with family or friends remains central to the Australian holiday experience
· Camping and caravanning continue to increase in popularity - 30 to 54 year-olds make up 47% of the market, visitors aged 55 years and over (30%) and 20 to 29 years (16%)

Regional NSW is the most visited regional destination in Australia (41%) and the most popular regional destination (43%) that people are seriously considering visiting in the next 12 months for a holiday or short break.

Regional NSW fulfils what Australians look for from holidays: 'Peaceful, a moment of quiet' (20%) and 'Reconnecting with family or friends' (23%).

Regional Australia best fulfils Australians' needs
Top 5 experiences Australians want from holidays

52%	**48%**	**40%**	**37%**	**36%**
Peaceful, a moment of quiet	Leaving the cares of the world behind	Re-connecting with family or friends	Enriching and fulfilling	Indulging and rewarding

Australians' domestic holiday needs are best fulfilled through regional Australia - 1 in 4 associate regional Australian destinations with peaceful moments of quiet and reconnecting with family and friends, key experiences Australians want on holidays.

Sources: For a snap-shot of the trends defining domestic travel in 2017, see the Kantar TNS Australia's annual syndicated study into the Australian travel market: http://www.destinationnsw.com.au/wp-content/uploads/2012/04/Domesticate_2017_Factsheet_Australia.pdf; and Caravan Industry Association of Australia (CIAA) – see: http://www.caravanindustry.com.au/research

DOMESTIC TRENDS DEFINING TRAVEL IN 2017

Word of mouth the most influential in holiday decision-making

- Word of mouth from family and friends influences holiday decisions for 1 in 2 Australians, specifically accommodation and destination choices. In 2016, 60% of young Australians said their decisions were influenced by the experiences of friends and family on social media
- Digital is still important and impacts decisions about destination, accommodation, and activities. For many Australians, brand websites and Facebook are the preferred platforms, with 2 in 3 Australians sharing about their holidays on Facebook as they experience them.
- Australians want authentic experiences and many look to locals and local information centres for recommendations on how to do this

What is on young Australians' minds?

Keep up and get ahead: Rising rent and housing costs and challenges in finding full time employment are contributing to the disappearance of the Australian dream for young Australians. There is a rising resignation of the chance of owning your own home.

Focus on the moment: With the increasing resignation to financial pressures comes the attitude of 'I might as well enjoy what I have'. Young Australians value their holidays and the quality is more refined than it once was for travellers of this age. Experience is crucial – young Australians are looking to expand their knowledge and perspective and enrich their lives.

Time pressures: With pressure to get ahead in their careers and financially, young Australians are feeling time pressure and free time is limited given the focus work requires. Holidays are more important than ever as a tonic to these pressures and are a good way to spend time with friends and family.

Occasion-based travel: Young Australians are travelling domestically for special occasions (birthdays, weddings, sporting and music events), and are looking to make the most of these events by extending their holidays around these occasions. The challenge is therefore promoting the destination and encouraging young Australians to extend their trips.

SHARING ECONOMY SET TO GROW

- 1 in 8 Australians already use share economy accommodation when holidaying domestically – this is expected to grow by 33% in the short term, mostly from new users. Share economy users are more likely to be aged 25-44 (54%), be middle-income earners (49%), and be based in NSW (35%)
- The sharing economy also includes access to camping sites on private land, including farms, through new digital enterprises such as Youcamp. This is already proving popular with younger adults and active families.

CONNECTIVITY IS CRITICAL

- Wifi/internet access is a critical issue, especially for the younger market, including lack of access on coaches and trains.

Source: Kantar TNS Australia's annual syndicated study into the Australian travel market 2016 & 2017 – see: http://www.destinationnsw.com.au/tourism/facts-and-figures

HIGH-LEVEL INSIGHTS RELATING TO THE DNCO REGION

The National Visitor Survey (NVS) results for the year-ending December 2017 shows that both overnight visitors and visitor nights for the Country and Outback NSW Network increased by 20%

ANALYSIS OF DATA FOR THE YEAR-ENDING JUNE 2017

- Domestic overnight visitation has grown by 27% over the last ten years with the majority of that growth occurring since 2013/14, which is in line with domestic overnight growth across regional Australia. Regional NSW (RNSW) is the largest source market for DNCO – there were 2.1 million visitors from RNSW and 1.1 million from Sydney
- Average length of stay for the overnight market has stagnated in the region with a slight decline. This has had a negative impact on yield
- Nationally, Brisbane, South East Queensland and Melbourne are the fastest growing domestic source markets (although Melbourne is mostly intrastate)
- Best performing hub for overnight domestic visitors is Country NSW (Central West sub-hub), which has outperformed both regional Australia and regional NSW
- International visitation: International overnight average length of stay for Country and Outback NSW is 19.5 nights (2017), which represents a compound growth of 4.9% since 2012. However, international visitor data for the DNCO region is skewed by the working holiday/youth market, who spend more time in region although relatively less money (eg fruit picking)

NOTE: These are key outtakes that relate to the broader DNCO region or regional NSW more generally. Each Hub will present differences at the local scale. As a result, Appendix B provides further analysis at that level to assist Hubs or local areas better understand how the visitor research data relates to their area.

Source: Data analysed as part of this research has been sourced from TRA.

HIGH-LEVEL INSIGHTS RELATING TO THE DNCO REGION

NATURE

ABORIGINAL CULTURE

FOOD & WINE

EVENTS

TOURING

SHORT BREAKS

VFR

- The touring market is largely passing through the region (ie. stopping briefly or overnight only to break up the journey) on their way to other destinations – it is important to note that while most visitors travel to the region by car, this is not necessarily the touring market and includes those visiting some areas for a short break. However, there is also a low awareness of touring routes in the region, which creates many opportunities including for the 4WD touring market

- Nature-based tourism is a growing market at a national level. However, growth in nature-based tourism for the DNCO region is lower than the national average and represents a decline in market share

- National demand for cultural tourism for both the domestic and international market is growing although off a low base. However, the region can't currently take advantage of this growth given its limited experience offering

- Food and wine includes more than the offering of the wine regions. The broader definition provided by Tourism Australia includes 'drink', such as breweries and distilleries. A key issue is the quality and consistency of the food and drink offering and service standards across the broader DNCO

- International market for the DNCO region is very small although has opportunities to grow in relation to niche product and experience offerings, especially relating to nature and cultural-based experiences and for food and wine

- Visiting Friends & Relatives (VFR) market remains strong and is growing in the family segment

- Short breaks continue to strengthen, especially for the younger adults, more active 55+ and small groups' markets. While strongly focused on the wine regions and/or for events, there is an opportunity to extend the short break offering to other parts of the DNCO region

1.2 CONSULTATION INSIGHTS

Consultation insights reflect what we heard from the businesses and communities of Country and Outback NSW, which are critical to an understanding of the broader region's strengths, weaknesses, opportunities and challenges as well as preferences to support the growth of the visitor economy.

As part of the consultation, eleven workshops were held in October and November 2017 in the following locations: Bathurst, Bourke, Broken Hill, Cowra, Dubbo, Inverell, Lithgow, Moree, Orange (the consultants participated in the Orange City Council's Regional Economic Development or REDS workshop), Parkes and Tamworth. At least one member of the DNCO Board attended each of these workshop.

A second round of consultation workshops (further fourteen workshops) were conducted during March and April 2018. These were held in: Dubbo, Cowra, Bathurst, Lithgow, Moree, Broken Hill, Parkes, Bourke, Tamworth, Armidale, Orange, Cobar, Mudgee and Canowindra.

The key insights from the consultation process, which included a number of recurring themes that were common across the entire network, are summarised on the following pages. The workshops provided an opportunity for the participants to discuss what worked and what didn't work under the previous RTO structure.

A detailed summary of consultation insights is provided in Appendix C – Consultation Insights Report. Other key insights have been incorporated into the SWOT Analysis.

GOVERNANCE

COMMUNICATION

INDUSTRY
ENGAGEMENT

CAPABILITY
& CAPACITY

ADVOCACY

EXPERIENCE
DEVELOPMENT

VALUE OF
SMALL PLACES

PARTNERSHIPS

HIGH-LEVEL CONSULTATION INSIGHTS FROM ACROSS DNCO

- A significant issue raised related to the formation, governance and structure of the new Destination Network. There were concerns expressed by stakeholders about the new structure and the benefit of it to their regions or local government areas
- The need for improved communication and engagement was raised consistently.
- Critical that grant processes are undertaken by the funding organisation effectively and efficiently and that recipients of the grant funding receive the grant in a timely manner to achieve the outcomes of the grant application
- Important to recognise that smaller towns and villages are key assets of the region and provide experiences that are equally or at times, more important than those of the large centres.
- Commitment and resources to deliver the DMP by DNCO, NSW Government and LGAs as well as enable genuine industry engagement
- In developing the DMP there is not a 'one size fits all' approach. Those destinations that are successfully delivering marketing campaigns and working with the industry to develop new experiences and improve capability are supported with funding grants and are empowered to decide who they wish to partner with or contract to deliver their projects. There is a need to address and reduce the bureaucracy for smaller players in the Network.
- DNCO will not be marketing the region as a destination nor attempting to create a visitor-centric brand. The key functions of the DNCO are about building industry capability, facilitating experience and product development and influencing decisions on important infrastructure that will support the visitor economy, among other things
- Opportunity to build industry capability, in particular in relation to customer service and hospitality
- Recognition of a lack of Aboriginal cultural tourism experiences and low levels of engagement with Aboriginal communities in some areas
- Openness to the international market although some concern about capacity to deliver on market demand and expectations

KEY OUTTAKES FROM EXISTING DMPs
ACROSS THE NETWORK

While there are features, advantages, opportunities and issues specific to each of the former regions, an analysis of previous DMPs established a range of challenges and strategic priorities relevant to and consistent across all of them. These include (but are not limited to):

- The need for greater clarity around the regional offer, and the development of compelling stories for destinations and experiences;
- A coordinated approach is required for identifying and creating opportunities for new and enhanced/refreshed products and experiences;
- Improvements to infrastructure and accessibility are necessary, including accommodation, transport, and digital access and distribution;
- Regions must attract new investment for the development of products, experiences, events and accommodation, addressing policies and regulations to facilitate this;
- Cross-regional collaboration across all areas is critical, including product development, funding, events, marketing and insights, to avoid duplication of effort and competition for the same market segments, to share costs, facilitate improved access to funding, and to share learnings and opportunities. This includes cross-border collaboration between Destination Networks within NSW and across state boundaries;
- Collaborative, targeted, cross-regional marketing programs are vital for growing the visitor economy across the Network; regions must move beyond silo marketing approaches to leverage hubs and drive dispersal to smaller destinations and nearby experiences;
- Regions need to develop a collaborative approach to bundling and packaging;
- A core priority is building capability among stakeholders, industry partners and tourism operators around business management, product and experience development, customer service, and digital marketing and social media;
- A strong communications framework is necessary for enabling effective and efficient communication and knowledge sharing; and for engaging communities and local businesses with the visitor economy and the implementation of DMPs;
- There is a need for localised baseline visitation data and insights; and
- There is also a need to establish robust measures, monitoring and reporting processes for destination management programs.
- A VFR program would stimulate community engagement, integrate regional and local activities, and provide opportunities for industry and partner participation;
- There is a fragmented approach to digital across the regions; a digital strategy is necessary for supporting visitor planning, enabling regional operators to have a consistent digital presence (inc. online booking capability), enhancing interactivity with visitors, delivering more innovative technology approaches, and addressing the proliferation of websites and digital content standards;
- WIFI connectivity (linked to the VIC offer) and improved coverage across the regions is critical;
- The quality, variety and availability of accommodation across the regions needs to be improved. Ongoing accommodation audits and occupancy data are needed for identifying gaps, managing

inventory and developing opportunities, as well as capability building to improve standards and enhance digital presence;

· A collaborative approach to regional events is critical; an events audit and calendar should underpin the development of a business and leisure events strategy that also identifies formal measures for assessing impact of events on the visitor economy;

· Supporting the development of Aboriginal cultural tourism products and experiences is priority;

· Regional product and infrastructure audits are necessary to identify gaps and development opportunities;

· There is a need for a strategic review of the Visitor Information Centre network;

· Population declines are a significant concern in some regions; longer term plans such as attracting industry through infrastructure development are necessary to counter this;

· Access to and use of land and water-based conservation areas for development of appropriate agri- and nature-based tourism requires enabling State and local government policies; and

· Transport access will continue to be a critical factor; regions to engage with rail and airlines to provide improved access.

Further detail is included at Appendix C.

1.3 SWOT ANALYSIS - STRENGTHS & OPPORTUNITIES

Strengths	Opportunities
• Expansive sky (especially for viewing of stars and the Milky Way), world-class astronomy facilities and Australia's first 'dark sky park', Warrumbungle National Park • Spectacular natural environment including a world heritage listed sites (places such as Garden of Stone National Park and Jenolan Caves), wetlands of international significance (eg Macquarie Marshes), gorges, rainforests, lakes and river systems • Outback landscapes with unique wildlife, accommodation options, such as offered by Outback Beds, colourful local characters and Australia's first heritage-listed city, Broken Hill • Villages and towns showcasing heritage and rural lifestyle as well as mining history, fossils and geo-heritage – this includes opportunities for opal mining and gold fossicking as well as key centres such as the Australian Opal Centre, Age of Fishes Museum and Australian Fossil and Mineral Museum • High-quality local produce including award-winning wines – this includes the broader agricultural sector • Proximity to the largest and fastest growing source markets • Well-established, highly popular and world-class events and festivals, including music, arts, food and drink and sporting events. This includes popular smaller events as well as those that attract visitors through the region even if the event is held in a neighbouring region or location (such as Birdsville) • Established tourism experiences, including Taronga Western Plains Zoo (most visited attraction in regional NSW), accessible Artesian pools, Mayfield and Cowra gardens, sculpture trails in Broken Hill and Pilliga National Park and Bathurst's Mount Panorama Circuit	• DNCO offers a unique opportunity to identify the common ground, strengthen collaboration and build industry capability and networks to lift the profile of the visitor economy – this includes with the Joint Organisations of Councils (JOCs) • Short breaks and domestic holiday market are growing – tailor the regional offer to capitalise on this growth – this includes the rise of the female traveller, growth in the Millennials' market and more active 55+ market as well as increasing popularity of tours • Strengthen relationships with potential partners to deliver new products and experiences, including but not limited to the Local Aboriginal Land Councils (LALCs), the NPWS and private sector – this is particularly important for heritage, cultural and nature-based tourism experience development as well as agri-tourism • Sharing economy, particularly to add capacity and diversify range of accommodation, leverage existing operators such as Outback Beds and new market entrants such as Youcamp and for bike-share in some larger town centres or for bike hire • Attract greater investment across the region in tourism experiences, facilities and infrastructure, including from Commonwealth and State Governments and private sector • Showcase smaller towns and villages as seasonal or experience-based hubs to strengthen their contribution to the visitor economy • Niche market experience development for international markets • Development of the Hospitality School of Excellence as a joint venture with TAFE Western and enhanced support of the Country Universities Centre (CUC) • Opportunity for business travel and events, including regional conferencing and incorporating the region's offering as part of major business events in Sydney ('festivalisation' trend)

1.3 SWOT ANALYSIS - WEAKNESSES & CHALLENGES

Weaknesses	Threats/Challenges
• Low quality or lack of content for multi-channel distribution, including through third parties, which enhances promotional activities or builds awareness of the diverse and rich offering of the region	• Growing demand during non-peak (low and shoulder) seasons, recognising seasonality has a significant impact on different regions
• Limited range of accommodation types and some capacity issues relating to increasingly popular events or festivals, including capacity, venues and supply needs of the regional conferencing and business events market	• Limited opportunities for packaging and bundling of products and experiences across regions
• Allocation of existing resources not maximising opportunities to build industry capability or encourage the development of new experiences	• Continued decline in visitation and market share if new and enhanced, visitor-centric, cooperative products and experiences are not developed
• Lack of Aboriginal cultural tourism experiences and low levels of engagement with Aboriginal communities in some areas	• Lack of diversity in accommodation options and limited capacity to support increasingly popular events, includes RV and caravan parking
• Lack of or limited access to nature-based and other tourism experiences	• Poor local-level visitor-related data, lack of key performance indicators (KPIs) and limited understanding of the benefits of the visitor economy to the region and other businesses, including the retail sector
• Maintenance or new development required for visitor infrastructure and facilities	• Attracting government funding and ensuring the timing of funding approvals enables delivery of projects on time
• Skills shortages and inconsistent standards of customer service and hospitality	• Lack of tourism expertise or resources within local government and low levels of understanding of the needs of the market
• Limited resources for development and implementation of signature experiences	• Issues around access, equity, participation, provision and delivery in education and training for people in rural and remote NSW
• Inconsistent levels of industry engagement	• Attracting investment for and managing visitor economy infrastructure projects (also at risk if skills shortage not addressed)
• Inconsistent local government planning and policy frameworks, including those that address the sharing economy	• Gaps in infrastructure such as internet and mobile phone coverage, signage, quality of roads and public transport
• Some inappropriate development inconsistent with the appeal of the destination to source markets	• Volunteer fatigue, ageing committees and need for event management training for events
• Limitations in transport access (roads/rail) and distances between destinations and experiences	• Inconsistent promotion and use of local produce in restaurants/cafes
• Limitations in wifi access, mobile coverage and internet connectivity across Network	• DNCO region too big and diverse for marketing purposes – need to encourage promotion of local areas

DEVELOP

Image: Dubbo, www.taronga.org.au

2. DEVELOP

2.1 TARGET MARKETS

To achieve cut-through in a highly competitive market, it is essential that the destination identify its aspirational target markets for whom the positioning and experience offer will resonate and enable more focused marketing activities. However, it is important to recognise that:

- Target markets for specific destinations or experiences within the broader Network region will differ.
- There are similarities and opportunities between the aspirational target markets that can benefit all of the regions within the DNCO.
- Not all destinations or experiences within the DNCO need to adopt these target markets specifically.

2.2 POSITIONING FRAMEWORK

The Positioning framework is about bringing the destination's point of difference to life, including recognition of the 'personalities' of the different places that contribute to the destination.

2.3 STRATEGIC THEMES AND EXPERIENCE OFFER

These represent the destination's points of difference and provides a high-level experience framework, without trying to describe everything that the region offers its visitors.

2.1 TARGET MARKETS

HIGH-LEVEL OBJECTIVES

The strategic approach: maintain existing markets but also target new higher-value markets.

EXISTING MARKETS

Strengthen appeal of the destination to existing markets to:

· Extend length of stay

· Encourage repeat visitation

· Increase participation in tours and activities

NEW MARKETS

Focus on those markets with greatest propensity to grow the visitor economy:

· Increase visitor numbers

· Increase visitation during non-peak periods

· Increase yield (through development of higher-yield experiences and accommodation offers)

EXISTING AND NEW MARKETS

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

EXISTING MARKETS
Touring market, esp. 55+; Visiting Friends & Relatives (VFR); Event participants (incl. sports); Nature & cultural tourism; Short-breaks, esp food & wine

NEW MARKETS
Active families; Younger adults; More active 55+; Niche markets inc. meetings and conferences, and international, esp. linked to nature & cultural tourism and food & wine

More detailed information on source markets, including existing and growth source markets, specific to each Hub is contained in Appendix B.

TARGET MARKETS - DOMESTIC

To achieve cut-through in a highly competitive market, it is essential that the destination identify its target markets for whom the positioning and experience offer will resonate and enable more focused marketing activities. There are three key aspects with regard to target markets:

1. Understanding existing markets to ensure repeat visitation and growth of yield can be achieved;
2. Segmentation of these markets, particularly based on psychographics – that is, the motivations and behaviours that define segments within each broad demographic market, such as nature lovers, adventure-seekers and those to whom heritage and history appeals; and
3. New markets to whom the region (or parts thereof) would appeal.

DOMESTIC MARKETS
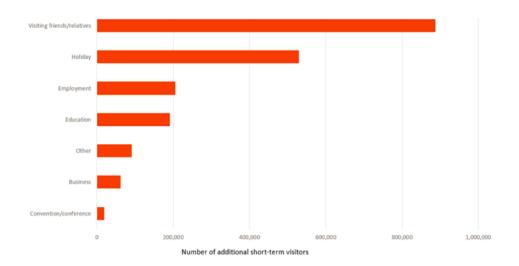
- 55+ drive market continues to be the largest market for Country and Outback NSW. This is a diverse market, with different psychographic profiles, from outback touring through to those more interested in a short break to the wine regions of Mudgee and Orange or to experience unique events such as the Parkes Elvis Festival and the Tamworth Country Music Festival. However, research shows low awareness of Country & Outback NSW touring routes.
- 34 – 55 age touring market is a smaller market. However, it is higher yield and is continuing to show positive growth. This includes the family market, noting that the VFR family market is growing strongly.
- Country and Outback NSW is losing market share in relation to nature tourism. While this is a growing market both domestically and internationally, with more people undertaking nature-based activities, the Network is not achieving relative growth compared to other regions in NSW or Australia.
- Interest in cultural tourism is growing. However, there are limited opportunities for cultural tourism experiences and as a result, it only makes up a small portion of overall visitation.
- The food and wine market represents significant differences across the broader region, with Orange and Mudgee achieving substantial and above-average growth in recent years.
- The region boasts a diverse range of outstanding events, festivals, meetings and conferences. This is delivering sustained growth in visitation to the region. There is an opportunity to further investigate the potential for boutique or small-scale business events and conferencing, in particular to support growth in mid-week and low or should season visitation.

TARGET MARKETS – VISITING FRIENDS AND RELATIVES

VISITING FRIENDS AND RELATIVES (VFR) – DOMESTIC AND INTERNATIONAL

- VFR is a strong market segment for Country and Outback NSW. It is currently the largest growth segment for domestic tourism in NSW. As at the end of 2015, overnight VFR visitors has grown by 19.1% since 2011 (average annual growth rate of around 4.5%). The education sector, particularly in some locations within the broader region, contributes to the strength of the VFR market.
- Hosts are the primary target for marketing to the VFR market as they are the key influencers and decision-makers with regard to visitor experiences and accommodation choices, including commercial accommodation (which is on the increase for VFR)
- VFR remains a key driver of domestic travel as it fulfils a range of different needs, including connecting with family and relaxing holidays (KANTAR TNS Domesticate 2016)
- International VFR was the strongest growth segment in international visitor arrivals between 2005 and 2015 (Australian Trade & Investment Commission, 2015) – refer graph Figure 1: Additional International Visitors
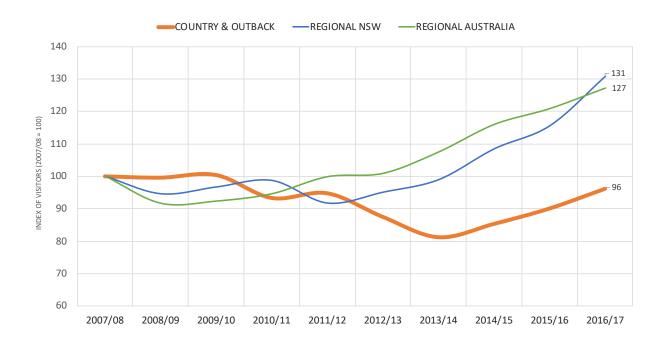
ADDITIONAL INTERNATIONAL VISITORS TO AUSTRALIA BETWEEN 2005 AND 2015,
BY MAIN REASON FOR VISIT

TARGET MARKETS – INTERNATIONAL MARKETS

· Currently, international visitation to Country and Outback NSW is off a low base and is predominantly lower-yield, which results from the youth back-packer and working holiday market

· International tourism and travel trends suggest greater opportunities to attract a higher-yielding international market segments through providing high-quality signature experiences, particularly Aboriginal cultural tourism and nature-based experiences as well as having a higher propensity for food and wine, cooking schools and agri-tourism experiences

· The cost to reach the international market and achieve positive return on investment means there would be a significant lag time. It also requires investigation of the most effective channels to reach an international audience (eg international trade vs direct)

· New international routes into Canberra and Newcastle airports potentially provide an opportunity to attract more international visitors. However, this will be reliant on the experience offering, packaging and bundling of products and accommodation as well as targeted marketing efforts

· Another opportunity is to work with private charter flight operators out of capital cities (esp. Sydney, Melbourne and Brisbane) to deliver outstanding on-ground experiences

INTERNATIONAL PERFORMANCE FROM 2007/08 TO 2016/17

This indexed graph shows there has been a 4% decline (-4% growth) in international visitors to the Network Region, which is significantly lower than Regional NSW and Regional Australia.

2.2 POSITIONING FRAMEWORK

The Positioning Framework is an overarching structure for how local areas across the DNCO region can connect and deliver on the strategic themes. An important feature of the Positioning Framework is that it recognises the diversity and experience offer of the region. In addition, it aims to facilitate a more effective approach to leveraging the personality of the places, precincts and destinations within the Network. The Positioning Framework also supports the DMP's Ambition.

Explore the unlimited possibilities of Country and Outback NSW, as mesmerising as the stars that stretch across the night sky

- The broader region has been explored by generations, from Aboriginal communities to those seeking new adventures and horizons. It truly is a region to explore.
- Whether it is the stories or characters, remarkable landscapes, ancient connection to Country, the unfolding history of our economy or evolving sophistication of our produce, this vast region offers unlimited possibilities to discover or rediscover.
- The night sky shines with a million stars, revealing the unlimited possibilities of our universe, and right across the DNCO. It was the strongest connecting theme across all of the DNCO and reflects the alluring and captivating nature of our landscapes, their stories and the characters to meet along the way.

2.3 STRATEGIC THEMES AND EXPERIENCE FRAMEWORK

Country and Outback NSW offers an extraordinary diversity of visitor experiences as well as natural, cultural and built assets. A key element of the DMP are its strategic themes, which highlight the points of difference of the region compared with other destinations and provide a high-level experience framework, without trying to describe everything that the region offers its visitors. It is based on a visitor-centric approach to destination planning and management. The strategic themes have been identified through a review of:

· Strengths of the region (or parts thereof), including existing signature experiences and its natural, cultural and built assets;
· Visitor research and data, including an understanding of the destination's perception, awareness levels and demand for the existing offering;
· Analysis of the global and domestic travel trends and an understanding of target markets (demographics and psychographics), which provide insights into the appeal of the destination and the motivations for and barriers to travel of target markets;
· Seasonality and the implications for attracting visitors outside of peak periods or to encourage regional dispersal; and
· Recognition of the important role that products, experiences, events, festivals and conferences play in attracting new markets and encouraging repeat visitation.

As a result, the DMP's ambition, positioning statement and strategic themes combine to provide a high-level experience framework to guide:

· Enhancing, maintaining or promoting existing experiences and assets;
· Developing or creating new experiences or infrastructure to support the visitor economy, including attracting investment;
· Identifying key game-changing initiatives, which leverage existing strengths of the region while inspiring further development to substantially lift the performance of the region's visitor economy; and
· Recognising supporting experiences, which value-add to the overall visitor experience. While the strategic themes focus on the points of difference for the broader region, there is a rich offering of supporting experiences that enhance visitors' satisfaction and perception. In some destinations within the DNCO, these experiences may be the hero or signature experience for that local area.

STRATEGIC THEMES AND EXPERIENCE FRAMEWORK

The strategic themes are intended to deliver on the Ambition and positioning framework of the DMP.

- Some of these themes will deliver more content or experiences for some parts of the broader DNCO region than for others. However, the themes have been developed to provide a high-level experience framework for the entire DNCO region. The experience offer includes:
  - Signature experiences and game-changing initiatives;
  - Supporting experiences; and
  - Seasonal appeal.

To provide an inspiring and effective approach to grow the visitor economy of Country and Outback NSW and create meaningful connection between the place, its communities and businesses with visitors to the region.

SIGNATURE EXPERIENCES BY STRATEGIC THEME

Strategic Themes	Signature Experience Offering
Celebrating Culture on Country	This theme is dedicated to greater recognition of the diverse Aboriginal communities and culture across the Network while also celebrating the incredible stories and characters of those communities and profiling the works of Aboriginal artists and artisans, including those in nature such as the Sculptures in the Scrub in Pilliga National Park. Key initiatives include developing new experiences and lifting the profile of existing experiences as well as capability building to strengthen delivery of meaningful and immersive cultural tourism experiences. Requires close collaboration and partnerships with the LALCs, NATOC and Aboriginal communities.
Wine-lovers & Foodie Finds	This theme encompasses the Food & Wine theme of Tourism Australia (which includes 'drink' created by breweries and distilleries) as well as local produce. An important global trend is the appeal of great local produce and locally-curated food experiences, from picking fresh figs through to Farm Gate and Foodie Trails and sharing a meal with friends. This theme includes: • Agri-tourism experiences, farmers markets, food and drink industry conferences, community events and festivals as well as hands-on experiences such as foraging for mushrooms, cheese tasting or picking a basket full of strawberries; and • Capability building to improve the offer, ensure that quality food and local wines are available across the region as well as enhancing hospitality services.
Unlimited Horizons	Whether it is by day or by night, the expansive region offers myriad experiences to explore and feel the sense of freedom offered by unlimited horizons: From star gazing on a cloudless night to heading off-track on an ultimate 4WDing adventure, simply taking a remarkable journey along one of the region's many touring routes or floating across it all in a hot-air balloon. This theme is all about adopting an experientially-led approach in line with global and domestic travel trends. This includes drive journeys and touring routes, opportunities for hot-air ballooning as well as profiling existing and creating new night-time experiences, such as astronomy tours, visiting Australia's first Dark Sky Park and out-of-the-ordinary accommodation like Zoofari at Taronga Western Plains Zoo, dinner under the stars and outdoor concerts at night. An emerging growth market and a potential game-changer for the region is charter flights and flying tours, which can also leverage air shows.
Exploring our Nature	From lacing up the adventure boots or grabbing a pair of binoculars for bird-watching, there are many ways to explore nature in Country and Outback NSW. While the region's landscapes are diverse and offer the opportunity for visitors to immerse themselves in nature, the research shows that this theme needs to be further developed to create more remarkable experiences and strengthen promotion of its natural assets. This includes opportunities such as exploring Outback landscapes and World-Heritage-listed sites, making a splash in waterways, artesian pools and rivers, riding cycling trails, venturing underground into caves, relaxing in spectacular gardens and spotting unique Australian wildlife. Key partnerships will be with organisations such as NPWS.

Strategic Themes	Signature Experience Offering
Revealing our Heritage	Country and Outback NSW delivers a depth of history and heritage, from ancient fossils to agricultural, industrial, mining and war histories and well-preserved towns, including Australia's first heritage-listed city, Broken Hill. Revealing our heritage is about creating contemporary, interactive and immersive experiences that attract new markets and inspire a sense of wonder and pride in Australia's history. Delivering on this ambition will take many forms, from industry-linked events, heritage and fossil trails and precincts, bringing to life our rail heritage, memorial gardens and bundling experiences to provide a truly memorable holiday.
Little Places, Big Stories	In a world seeking more authentic experiences, genuine local characters and off-the-beaten track destinations, little places often deliver the biggest stories. A key to this theme is to profile the experience and events offer of the smaller towns and villages across the region, including showcasing their points of difference and key reasons to visit across the seasons, including identifying when the 'Little Place' can be the hub from a visitor experience perspective.
Events and Conferences	• Events and festivals: The region is already host to a wide range of world-class events and festivals, which provide an ultimate day out or inspire people to visit the region. There are also many smaller, special interest yet very popular events, including community events. There is an opportunity to leverage the success of existing events and develop a small number of new ones to attract people to (or back to) the region. This includes events for lovers of music, art and culture, sport and recreation and food and drink or special-interest events such as air shows and vintage car shows. • Regional conferencing and business events: While some parts of the DNCO region already attract conferences, there is an opportunity to attract more regional conferences and business events to the region to assist grow mid-week and low or shoulder season visitation to the region.

GAME-CHANGING INITIATIVES

ABORIGINAL CULTURAL TOURISM

Destination Country and Outback NSW (DNCO) is located on the Traditional Lands of Aboriginal communities throughout Country and Outback NSW. The Aboriginal communities of the region have a deep and enduring connection to Country - the special places and unique landscapes that make up the DNCO region. This creates an opportunity to further develop Aboriginal cultural tourism by providing meaningful, personalised and interactive experiences that build a shared understanding of Aboriginal culture, contribute to the visitor economy and deliver benefits directly back to those Aboriginal communities.

EXPERIENTIALLY-LED TOURING ROUTES AND TRAILS (BY 2WD, 4WD, MOTORBIKE, BIKE, KAYAK OR PLANE)

The region has been explored by generations, from Aboriginal communities to those seeking new adventures and horizons. It truly is a region to explore. A wonderful way to explore the richness of Country and Outback NSW is through touring. The key challenge is to bring an experiential focus to the journey. Whether it is the stories or characters, remarkable landscapes, ancient connection to Country, inspiring heritage and unfolding history of our economy or evolving sophistication of our produce, this vast region offers unlimited possibilities to discover or rediscover. There is a diversity of opportunity for remarkable journeys, which bring the DMP's strategic themes to life and leverage the existing touring routes that crisscross the region.

UNEARTH THE FOSSILS INITIATIVE

From the earliest signs of life on earth to dinosaurs, mega-fauna and unique gemstones, the DNCO region boasts world-renowned fossil sites and places that offer incredible insights and cultural connections to our ancient land. There is an opportunity to connect these sites and places to bring this story to life in a more contemporary, inspirational and meaningful way. The initiative would require a region-wide master plan that ties together the wealth of precincts, experiences, Museums and centres that can contribute to the overall experience, from places such as Wellington Caves, Bathurst's Australian Fossil and Mineral Museum, Canowindra's Age of Fishes Museum and Lightning Ridge's Australian Opal Centre as well as collaborating outside the DNCO boundary to incorporate places such as Mungo National Park.

EXPORT-READY WINE PACKAGES & EXPERIENCES

Identification and development of export-ready, commissionable wine packages and experiences targeting the international (and growing domestic) wine tourism market. This initiative would assist to bolster NSW's positioning as a premium wine region of Australia and expand the current Ultimate Winery Experiences Australia collective while also strengthening the perception of places such as Orange, Mudgee, Cowra and New England as the producers of great wine.

NIGHT SKIES EXPERIENCE DEVELOPMENT INITIATIVE

Home to Australia's only Dark Skies Park, along with a host of astronomy infrastructure and spectacular, diverse landscapes for night time activities, Country and Outback NSW offers enormous potential to position as Australia's premier destination for Night Skies tourism. Developing new night time experiences is a key factor in attracting new and repeat visitors to the region and keeping visitors - particularly the touring market – in the region for longer.

FLYING TOURS & PRIVATE CHARTERS INITIATIVE

With public and private airstrips available throughout the Network and vast expanses of landscape to explore, there is an exciting opportunity for Country and Outback NSW to advocate for enhanced access to regional NSW through private charters as well as investigating the opportunities for a very special kind of touring experience – by air. Flying tours are a premium product opportunity offering multi-faceted, cross-regional experiences incorporating all of the strategic themes and promoting the characters and personalities that bring Country and Outback NSW to life. They tie together expanded air links, accommodation offerings, food and wine experiences, agri-tourism, nature, Aboriginal cultural experiences and little places with big stories to share.

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SUPPORTING EXPERIENCES

The most important supporting experiences across the expansive DNCO region are outlined below. In some destinations within the DNCO, these experiences may be the hero or signature experience for that local area.

ART & CULTURE

Art and culture, including galleries, performance spaces, artists and artisans. In some cases, the art and culture offering is a lead experience, for example in Hill End, which is home to many artists. Likewise, in some destinations, such as Bathurst, the gallery is a lead offering given the quality and appeal of its exhibitions. In addition, the Living Desert and Sculptures in Broken Hill and the Sculptures in the Scrub walk in the Pilliga National Park offer some of the best 'art in nature' experiences in NSW.

SPORT & RECREATION

Sporting and recreational facilities, including networks of walking or cycling trails, opportunities for kayaking or other water-based recreation, tennis courts and golf courses as well as the sporting clubs and sports fields across the region. In some destinations within the Network, these facilities or infrastructure provide a signature experience. Sporting and recreational facilities contribute to the ability of the region to deliver on the growing trends towards health and well-being. More detail on the opportunities to leverage sports facilities through events is outlined below.

COMMUNITY EVENTS

Community-based events, which deliver on both the desire of many travellers to experience a destination 'like a local' and enable smaller villages and towns to achieve cut-through in a highly-competitive tourism marketplace.

FOOD & DRINK

Food and drink offering outside of key wine regions. While 'Food and Wine' is a strategic theme, not all parts of the broader DNCO region offer this as a signature experience. However, research shows that quality food and drink as well as consistent service value-add to the visitor's experience and help to drive advocacy for the destination, even when that is not the primary motivator for travel to that destination. The Wayward Trails' tours across the New England area, taking in great food and drink experiences in places like Armidale, Uralla and Tamworth, highlight the value of this supporting theme.

'REAL COUNTRY'

Opportunities to experience the 'real country' or the best of Australia's rural landscape with produce and agricultural activities such as regional sale yards, agricultural shows, field days and/or local produce markets.

RETAIL OFFERING

Unique and independent retail offer, including opportunities for visitors to buy locally-produced products or that provide a boutique retail offering. Places such as Little Birdy in Bourke and Raffia & Co in Grenfell are great examples of this offering.

SEASONAL APPEAL

The DNCO region offers exciting and inspiring seasonal highlights. Each season delivers something different for the visitor, enticing them to return to experience the region at a different time of year. From Canola flowering through to grape harvesting, gardens in bloom, foraging for mushrooms, frocking up for the races, cozy moments by the fire, and dappled light falling through autumn leaves, the four seasons offer extraordinary experiences.

There is a significant opportunity for the DNCO to lead a cross-regional approach and develop the seasonality offer of the Network. This includes identifying collaborative opportunities for packaging experiences, developing great stories and creating compelling content to raise the profile of Country and Outback NSW. This approach helps to drive visitation in low and shoulder seasons, encourages repeat visitation at others times of the year, supports Little Places Big Stories.

Examples of this approach include (more examples are captured in the tables on the following pages):

SUMMER	AUTUMN
WINTER	SPRING

↓

EVENTS

TOURING & TRAILS

EXPERIENCES

COMPELLING CONTENT

- Best of road and aviation touring itineraries or products, in particular bringing a focus to the experience offer as opposed to the road route. This can involve integrating the seasonal events or produce offering of the region as well as the best times to view wildlife or the landscape, for example, autumn leaves

- 'Red wine, spirits and fireside' - the Network's more established drink regions could collaborate to create a winter campaign promoting short breaks to discover the food and drink of those regions along with highlighting local art and cultural experiences

- 'Flavour of the month' – Leveraging smaller events to develop a cross-regional program of events and activities based on a theme and delivered in collaboration across the Network's towns and villages, and with the tourism and hospitality industry.

Image: Menindee Lakes, www.visitnsw.com

SUMMER

Summer in Country & Outback NSW is a time for seeking out cooler climates, refreshing water activities, caves and night-time experiences. Hallmark events like the Tamworth Music Festival and the Elvis Festival in Parkes attract visitors from around the country and abroad. The harvest gets underway in the wine regions while farmers markets are serving up fantastic local produce. It might be hot outside, but Summer offers plenty of opportunities across the Network to collaborate on cross-regional experiences, leverage events and festivals, and promote the 'cool' side of Summer in the regions. Here are some examples of potential seasonal appeal opportunities over Summer.

Summer
Harvest of the Vintage – Wine regions to collaborate on the 'harvest' theme with food and wine stories, events and activities; food and drink touring in New England. Note: in some areas the vintage harvest occurs in Autumn
Summer fruit picking – such as cherries and stone fruit as well as figs in February
Head underground and indoors to discover the fossil and mining gems of the region – Fossil Trail.
Cooler nights – Package up cross-regional night time opportunities like astronomy tours, Aboriginal cultural tours, dinners and concerts under the stars, twilight race meetings in Warren and the Perfect Light Film Festival in Broken Hill.
Package the best of the best cross-regional nature-based opportunities eg. Shady nature walks to waterfalls, escapes to rivers and waterways or be amazed by fields of flowering sunflowers . This includes raising the profile of great places to go kayaking, waterskiing, or other water-based activities.

AUTUMN

Autumn in the region spells beautiful colours and cooler days, perfect for short breaks and drive touring in Country NSW, nature-based adventures, and festival fun. The Easter long weekend and school holidays mean longer breaks and an opportunity to offer products and experiences that extend length of stay in the regions. Here are some examples of Autumn appeal in packaging and promoting a cross-regional offer.

Autumn
'Flavour of the Month' - Mushrooms in Oberon. Collaborate with Bathurst and other locations (mushrooms on menus, mushroom market themes, bespoke chef experiences cooking with mushrooms, etc), and develop content to promote; could also involve Mayfield and the Mayfield Café or workshop program. Experience key events such as the Orange F.O.O.D Week, Australia's longest running food festival.
Autumn Colours - Cross-regional collaboration for itineraries and packages including car touring routes, Autumn festivals such as the Australian Celtic festival in Glen Innes, food and wine events, picnic race meetings. A wonderful time to visit destinations across the New England North West.
Heritage Week & Australian Heritage Festival – Leveraging centres of heritage excellence such as Broken Hill and Bathurst collaborating with smaller centres to capture the stories and events to promote heritage across the regions, as diverse as events such as the Scots Highland Gathering and Country Fair in Bathurst, Broken Hill's Heritage Festival through to the Boggabri Drovers Campfire and many more.
Canowindra International Balloon Challenge, Trundle ABBA Festival, The End Festival at Hill End – Leveraging quirky yet high-quality and popular events to promote little places with big stories.
Harvest of the Vintage – Wine regions to collaborate on the 'harvest' theme with food and wine stories, events and activities; food and drink touring in New England. Note: in some areas the vintage harvest occurs in late Summer

WINTER

Winter is ideal for short breaks and journeys around Country and Outback NSW, offering remarkable events, fireside experiences, cool starry nights, therapeutic artesian waters and cooler temperatures for outdoor exploring, fossicking and fossil hunting. In some regions, snow turns gardens into winter wonderlands. Below are some of the Network's collaborative winter opportunities that could be explored.

Winter
Warm waters in winter – Events such as Bre Big Fish Festival in Brewarrina or take time to relax and rejuvenate in the naturally-warmed artesian pools with surrounding experiences perfect for short break getaways or longer stays to soak up the warm winter weather in places like Moree, Lightning Ridge, Bourke and the Pilliga.
Journey from New England to the Outback – Fossicking and fossil hunting, perfect touring time, visit iconic landscapes and wildlife, enjoy remarkable events – fossick for opals in White Cliffs or sapphires in Glen Innes, marvel at unique black opals while enjoying the Lightning Ridge Opal Festival, frock up for the Broken Heel Festival, board the PV Jandra paddle boat in Bourke, discover the enduring connection to Country of Aboriginal communities or feast by the fireside under a star-filled sky on a camping and outdoor adventure. Opportunity to promote Outback Beds, connect the network of or revitalise touring routes (such as the Darling River Run) or encourage people to stop on the way to events such as the Birdsville Big Red Bash
Winter 'wine by the fireside' getaways in wine regions – great opportunity for packaging and bundling products and experiences, including with airlines such as Fly Pelican and Qantaslink
Explore winter wonderlands at gardens like Mayfield and Cowra Japanese Gardens or skate into the winter festival in Bathurst
Winter Villages – Opportunity for many places such as Blayney, Sofala, Millthorpe, Goonoo Goonoo, Bendemeer and Manilla to create experiences for the winter market and encourage more people to meander and stay along their journey through the region via experientially-led touring routes. These should highlight the amazing heritage of these places as well as the incredible range of places to feast &/or stay from Glasshouse at Goonoo Goonoo to camping at Sofala or enjoying lunch at Tonic in Millthorpe and many, many more)

Image: Dubbo Regional Council

SPRING

Spring brings fresh colour and life to the region. It's festival season right across the Network, and the gardens are in full bloom. This is a perfect time of year for short breaks sampling the region's best in food and wine, arts and music, country races and night skies. Below are the best of the Spring-time experiences across the Network. It's school holiday time again, providing another opportunity to target the VFR family market for a longer stay, while providing new experiences and opportunities to appeal to the touring and short break markets. Following are some suggested seasonal opportunities that tap into Spring.

Spring
Fresh season, fresh food – Leverage the many food and wine festivals, eg. Grazing Down the Lachlan, Dubbo River-fest, Mudgee Food & Wine Festival, Orange Wine Festival for a collaborative, cross-regional marketing approach that drives dispersal to nearby destinations for increased length of stay
Dark Skies – Leverage StarFest in Warrumbungle (Australia's first Dark Skies Park) to identify and promote stargazing, astronomy and other night time activities across the Network. Wonderful time to link and/or cross-promote the star gazing opportunities across the region
Spring Festivals and Gardens – Cross-promotion across regions, eg. Wellington, Mayfield, Bathurst, Cowra, etc
Experience the freshness of nature as it springs to life across our national parks, world heritage areas and internationally-recognised wetlands such as the Macquarie Marshes. Take a hike, ride a bike or paddle a river before retiring to unique or heritage-listed accommodation tucked away in spectacular settings
Arts & Music Festivals – Cross-promotion and leverage to extend the experience beyond the events eg. Kalari Lachlan River Arts Festival, Dunedoo Tunes On The Turf, Gilgandra Coo-ee Festival, etc
'Flavour of the month' - Canola season, opportunities through growers markets, farm gate tours and trails, foodie trails, build into menus and activities, etc
Cycle the renowned Taronga Western Plains Zoo and stay in the Zoofari Lodge, awakening to the surrounding sounds of local and exotic wildlife
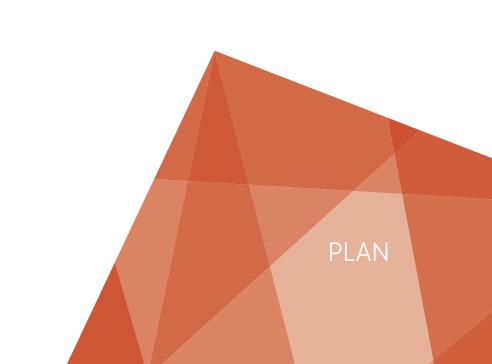
PLAN

3. PLAN

3.1 **Enabling activities and governance** – the actions essential for facilitating Network-wide enhancements to support growth in the visitor economy;

3.2 **Delivering on supply:** Signature and supporting experiences – the experiences and initiatives that will need to deliver on the promise of the place and enable visitors to truly experience the destination, including game-changing intitiatives; and

3.3 **Strengthening demand and visitor services** – effective marketing and delivery of appropriate visitor services are based on the insights and resonate with the target markets to motivate more people to visit the destination.

3.1 ENABLING ACTIVITIES & GOVERNANCE

In achieving the ambition of the DMP to provide an inspiring and effective approach to grow the visitor economy of Country and Outback NSW and create meaningful connection between the place, its communities and businesses with visitors to the region, it is acknowledged that success will be best achieved through the delivery of high-level, Network-wide strategies and actions that enable effective engagement of communities and businesses across the Network.

The DMP aims to identify short, medium and longer-term initiatives, delivered in a phased, prioritised, multi-year approach, that will contribute to the growth of the visitor economy and strengthen economic development across Destination Country and Outback NSW. As part of this process, it is important to identify and consider the critical issues and considerations for successful implementation of the DMP. Some actions within the plan will be straightforward and more easily achieved, others will require extensive investigation or negotiation. All will require a level of collaboration, cooperation and resourcing, and a strong commitment to implementation from the Network, key stakeholders and partners, local businesses and communities.

Enablers	Key Actions
Governance of the DNCO	• Establish a robust Governance Framework for Destination Country and Outback NSW, in collaboration with DNSW, which defines the responsibilities, policies and procedures of DNCO. The framework needs to address stakeholder engagement across the network, communication, resource management, operations, financial management and accountabilities • Identify key measures of success for reporting on the implementation of key initiatives, including the DMP. These measures should reflect performance against the goals identified in the DMP • Provide an annual report for DNSW, stakeholders and industry
Stakeholder engagement and communication	Develop and implement a Stakeholder Engagement Strategy. A critical role for the DNCO is to build relationships and strengthen communication with key stakeholders across the region in order to build credibility. This should be done in collaboration with DNSW wherever possible and requires a strategic, robust communication strategy and action plan for the Network that provides relevant content to stakeholders. Key feedback from many stakeholders across the region is that to date, there has been insufficient communications around the role of the DNCO and how they can work together to achieve a greater outcome for the visitor economy.

Enablers	Key Actions
Capability development	Work with Government, councils, peak industry bodies, industry and other stakeholders to support the foundation of the industry and build the capability of the visitor economy sector, including bridging the skills gap, upskilling the workforce, and lifting customer service and hospitality. The following areas are to be addressed and programs developed: • Building awareness of the value and needs of the visitor economy – this is particularly important to help enhance the capability of local government and communities throughout the region; • Product and experience development education programs and building marketing capability for councils and industry sector to enhance promotion of the region; this includes appropriate training for customer service, hospitality and tour guiding, among other skills; • Building capability to develop major infrastructure projects, for example providing a framework to assist industry and councils to develop robust proposals with feasibility studies for long-term major infrastructure projects; and • Development of a Hospitality School of Excellence in collaboration with NSW TAFE to create a solid foundation of skills and a career path within the hospitality and tourism sector for school leavers in the region.
Governance of the DNCO	• Establish a robust Governance Framework for Destination Country and Outback NSW, in collaboration with DNSW, which defines the responsibilities, policies and procedures of DNCO. The framework needs to address stakeholder engagement across the network, communication, resource management, operations, financial management and accountabilities • Identify key measures of success for reporting on the implementation of key initiatives, including the DMP. These measures should reflect performance against the goals identified in the DMP • Provide an annual report for DNSW, stakeholders and industry
Stakeholder engagement and communication	• Develop and implement a Stakeholder Engagement Strategy. A critical role for the DNCO is to build relationships and strengthen communication with key stakeholders across the region in order to build credibility. This should be done in collaboration with DNSW wherever possible and requires a strategic, robust communication strategy and action plan for the Network that provides relevant content to stakeholders. Key feedback from many stakeholders across the region is that to date, there has been insufficient communications around the role of the DNCO and how they can work together to achieve a greater outcome for the visitor economy.
Capability development	• Work with Government, councils, peak industry bodies, industry and other stakeholders to support the foundation of the industry and build the capability of the visitor economy sector, including bridging the skills gap, upskilling the workforce, and lifting customer service and hospitality. The following areas are to be addressed and programs developed: • Building awareness of the value and needs of the visitor economy – this is particularly important to help enhance the capability of local government and communities throughout the region; • Product and experience development education programs and building marketing capability for councils and industry sector to enhance promotion of the region; this includes appropriate training for customer service, hospitality and tour guiding, among other skills; • Building capability to develop major infrastructure projects, for example providing a framework to assist industry and councils to develop robust proposals with feasibility studies for long-term major infrastructure projects; and • Development of a Hospitality School of Excellence in collaboration with NSW TAFE to create a solid foundation of skills and a career path within the hospitality and tourism sector for school leavers in the region.

Enablers	Key Actions
Inter-agency and inter-government cooperation	• Actively encourage greater collaboration between the DNCO, stakeholders (including JOCs, RDAs and local government) and NSW Government agencies, including on major public infrastructure projects across the region as well as food and wine, nature and cultural-based tourism initiatives. In addition, this involves cross-boundary collaboration between Destination Networks and with neighbouring States, for example on the enhancement of experientially-led touring routes. A key stakeholder will be the NSW Department of Premier & Cabinet with regard to coordination of regional priorities and programs. • Advocate on behalf of the region for State-wide or national infrastructure projects that support the visitor economy. This should include transport access, covering the road and rail network as well as access for commercial and charter flights as well as telecommunications and education. This requires local areas to identify key priorities based on an assessment and business case to support those projects with the highest potential to grow tourism to that part of the region. DNCO can then consider the range of projects and advocate to key departments within the NSW Government or Commonwealth Government, including through the RDA network. This advocacy role should involve the JOCs or RDAs where appropriate, especially for projects that extend across LGA boundaries. • Continue working with NSW Government, JOCs and councils on Signage Infrastructure and Interpretation across the Network. This should include enhanced directional signage, in particular to address ongoing challenges with the TASAC process. In addition, there is an opportunity for DNCO to provide leadership and guidance on: • Innovative and inspiring interpretation signage and information, including utilisation of new technology and delivery through digital channels. • Welcome to Country signage that recognises traditional ownership of the land by Aboriginal communities, in collaboration with the LALCs, NATOC and local government
Economic analysis of the visitor economy	• Develop a framework for the delivery of economic analysis of the value of the visitor economy at the local level – this should be developed in collaboration with Destination NSW, the JOCs, RDAs and Councils and should leverage the work being done or completed by the NSW Government with regard to State-wide economic development and planning, such as the Regional Economic Development Strategies (REDS).

Resources, including grants and partnerships	1. Audit current funding gaps and opportunities across the Network - this should inform advocacy priorities and support for grant submissions
	
	2. Develop a guide to support stakeholders apply for grants and develop partnerships with NSW Government and other organisations (including RDAs) to enhance funding of key initiatives, especially those relating to visitor research, product and experience development, infrastructure, marketing and content. This includes (but is not limited to) opportunities through:
	    • NSW Government's:
	        • Regional Tourism Fund;
	        • Regional Growth – Environment and Tourism Fund;
	        • RVEF Contestable Funding Program;
	        • Regional Flagship Event Program; and
	        • Regional Conferencing Development Grants Pilot Program.
	    • Co-operative marketing campaigns with local tourism and hospitality industry, which provide partnership funding for the development and delivery of campaigns to market; and
	    • Encouraging private sector investment or public-private partnerships.
	
	3. Facilitate relationships with NSW Government to advocate for regions to have a funding structure that supports and empowers the management and delivery of programs at the local level, where the capacity, capability and skills exist. This is in recognition that some destinations within the Network are more advanced in their capacity and ability to deliver and measure successful campaigns, where others require more assistance. This action was a key point made during the consultation process.

Enablers	Key Actions
Visitor Accommodation Strategy	Develop a Visitor Accommodation Strategy. The DMP consultation process has established the lack of diversity and availability of accommodation offer across Country and Outback NSW as a critical challenge in growing visitation and length of stay. It is recommended that the DNCO lead the development of a Visitor Accommodation Strategy, in collaboration with DNSW, JOCs and councils, to guide and facilitate the development of the experiential accommodation offer across the Network. This should include enhancing the supply of accommodation that delivers to the DMP's strategic themes, such as nature-based accommodation in national parks or adaptive reuse of heritage assets to provide unique stays. Other Destination Networks should also be engaged to explore a broader, state-wide approach to accommodation development, in line with the NSW Accommodation Supply Plan identified as an action in the NSW Visitor Economy Industry Action Plan (VEIAP). The first stage involves: • Review of projects that have already been undertaken within the region (for example, Dubbo Regional Council's accommodation white paper); and • An audit and review of the current visitor accommodation situation across the Network.
Sharing Economy Strategy	Develop a Sharing Economy Strategy. Research, the dynamic digital environment, and consultation insights show that there is opportunity to tap into the Sharing Economy, for example AirBnB and Youcamp, and expand on successful initiatives such as Outback Beds, to drive growth in the Visiting Friends and Relatives (VFR) market, and address accommodation supply issues across the Network, particularly during peak season and major events. In larger urban areas, such as Bathurst, Broken Hill, Tamworth, Armidale, Mudgee and Orange, sharing economy opportunities such as bike share and hire are also options to consider in enhancing visitation and attracting funding, and defining opportunities to link other experiences such as heritage and nature and culture experiences through cycling, for example. In collaboration with DNSW, JOCs and local councils, lead the development of a Sharing Economy Strategy, in alignment with the Accommodation Strategy to: • Identify existing sharing economy gaps and opportunities across the Network, challenges to policies and processes and potential reforms to facilitate new opportunities and grow capacity; and • Identify opportunities to attract investment, including public-private partnerships.

Enablers	Key Actions
Keeping pace with new technologies	The pace of change in technology requires the Network to consider the provision of facilities and support for infrastructure to support these developments. This includes improved WIFI connectivity and mobile and internet coverage throughout the Network, capability building for digital delivery and management, and technologies such as up-to-date weather and road access information and recharging stations for cars in accessible locations. These initiatives offer Country and Outback NSW the opportunity to position the Network as a relevant, future-oriented, environmentally responsible destination, an increasingly important factor for nature-based and younger markets and a position that would also support the short break market. Digital technology also provides a key channel for delivering visitor information and interpretation. A key project for the DNCO to consider is to share best-practice contemporary interpretation and visitor information systems through the new DNCO industry hub (part of the DNCO industry website) as well as incorporating it into the annual capability-development and networking program. The implications for the sharing economy are also significant. The market for vacation rentals is rapidly growing and being fuelled by a change in consumer behaviour. Travellers increasingly value experiences over hotel rooms and find that vacation rentals can better deliver unique activities. Additional reasons why guests prefer vacation rentals to hotels include cost, size, and location. Today, technology is essential to running a vacation rental business. It permeates every part of the operation, from distribution and pricing to back-end processes. It not only cuts costs, the traditional purpose of automation, but now also creates new business and has helped overcome trust issues through user reviews and property photos, leaving competitors without leading technology at a disadvantage (see: Decoding the Modern Vacation Rental Technology Landscape, Skift Report, 6 April 2018). A further area for more detailed investigation is the use of new technology for the collection and reporting of visitor research and data. There are many new ways to understand who visits, distribution and length of their stay and spend. For example, through greater utilisation of real time data with 'hot mapping' that assists predict behaviours and trends including utilising models developed by other organisations such as the Caravan Industry Association of Australia (CIAA) or other sectors, such as banking and telecommunications.

3.2 DELIVERING ON SUPPLY

This section outlines the signature and important supporting experiences, projects and development opportunities that align with the Strategic Themes & Experience Offer outlined in Section 2.3. The actions captured here will enable the region to deliver on DNCO's ambition for the DMP, that is: to provide an inspiring and effective approach to grow the visitor economy of Country and Outback NSW and create meaningful connection between the place, its communities and businesses with visitors to the region.

The DMP process has identified a number of signature and supporting experiences, game changing initiatives and development opportunities under the DMP's strategic themes.

Some products and experiences captured already exist and simply require an enhanced or better coordinated approach to promotion, while others are high-level strategic or game changing initiatives that with investment over the longer-term, will significantly assist in developing the products, experiences and opportunities needed to address current visitation challenges, position Country and Outback NSW as a destination of choice throughout the year, grow the Network's visitor economy, and contribute to the achievement of the Tourism 2020 target to double tourism expenditure in NSW.

Signature and supporting experiences and initiatives are summarised in the tables on the following pages and include both existing and proposed initiatives.

Overarching Action for Delivering on Supply:

1. DNCO to lead a network-wide audit of products, experiences and events, mapped against seasonal offer and DMP strategic themes to identify high-level gaps and opportunities for experience and product development to grow visitation (in particular out of peak season) as well as collaborative opportunities to address Network issues and challenges around funding, competition, content production, etc. This activity will need to involve JOCs, local government, private sector operators and other key stakeholders.

Image: Dubbo, www.visitnsw.com

CELEBRATING CULTURE ON COUNTRY

Celebrating Culture on Country, focuses on capability building and mentoring initiatives to develop new meaningful and immersive cultural tourism experiences across the Network and lift the profile or strengthen existing experiences, while creating opportunities for local communities, pathways to employment and opportunities for generations to stay on Country.

Signature experience	Description
Aboriginal Cultural Tourism Initiative (game changing initiative)	Interest in cultural tourism is higher than ever and, while coming off a low base, the number of people undertaking a cultural experience on their trip is growing year on year. While there are a handful of signature experiences across the Network, for example, Mutawintji Eco-Tours, Tri State Safaris, Sculptures in the Scrub in Pilliga National Park and Yaama Ganu Centre-Café Gali in Moree (and successful examples of cross-regional collaboration, eg. Mungo Lodge), overall the opportunities are limited for visitors to access cultural experiences on their trip. Developing the offer within the Network is a high priority, involving collaboration with LALCs, NATOC and organisations such as MPREC.
	The development of Aboriginal cultural tourism experiences, products and businesses is also a goal of the NSW Government, and there is a key role for the DNCO to support the implementation of the Destination NSW Aboriginal Action Plan 2017 – 2020 through the development and delivery of a Network-wide, 3-5-year capability building and mentoring program that supports upskilling and product development, sustainable business development, profile raising, and positioning of the Network as a destination for authentic Aboriginal cultural experiences in NSW. This approach would support fledgling but important Aboriginal cultural tourism experiences such as the Walk With Me tours in Bourke.
	Considerations include:
	· Accessing grant funding for 3-5 years to deliver a capability building and mentoring program; this could be a combination of dollar for dollar funding through the State Government, councils and LALCs.
	· Working closely with Destination NSW and the newly-formed NSW Aboriginal Tourism Operators Council (NATOC), including participating in the annual workshop.
	· Partnering with LALCs, and the NSW National Parks and Wildlife Service to align with and leverage existing programs such as the NPWS Aboriginal Tourism Development Program.
	· Identifying the best approaches, in collaboration with the LALCs and local communities, for developing a program that will have longevity and ongoing support, eg. implementing a combination of in-region, week-long capability building workshops for all participants in one location twice a year, with one-on-one mentoring and support ongoing in between.

CELEBRATING CULTURE ON COUNTRY

KEY ACTIONS

Aboriginal cultural tourism initiative – DNCO to lead a project in partnership with JOCs, RDAs, LALCs, NATOC, Aboriginal communities and organisations, NPWS and other key stakeholders to develop a 3-5 year Aboriginal cultural tourism development and capability building program. The goals and key elements of the program would include:

- Auditing and reviewing existing experiences to ascertain the type of experiences that are meeting market demand, and identify gaps and opportunities across the Network;
- Working with established cultural tourism products and experiences to build awareness and increase visitor number take up and spend;
- Identify and develop new cultural tourism products and experiences for the domestic and international markets, cross-linking with the DMP strategic themes and seasonal opportunities (for example, Night Skies Aboriginal Cultural Tours);
- Enhancing the profile of Aboriginal cultural experiences in Country and Outback NSW through in-region capability building around marketing and content development, noting that in some cases there will be important cultural considerations for delivery; and
- Delivering a program of ongoing capacity/capability building and mentoring to build the skills and capability of individuals developing and delivering cultural tourism businesses.

DNCO should consider the employment of an Aboriginal-identified position within DNCO to strengthen experience development initiatives as well as an Aboriginal-identified internship role to inspire the next generation of Aboriginal adults to become involved in and benefit from the visitor economy.

Image: Orange Region Tourism

WINE LOVERS & FOODIE FINDS

Global trends, along with growth in the short break market, strongly indicate that food experiences and access to local produce is an increasingly important consideration for visitors when planning a trip. This Strategic Theme sets the platform for positioning Country & Outback NSW as a place to find outstanding wines, drink and produce. It leverages existing agri-tourism experiences while identifying new food and wine opportunities to attract growth markets and increase yield. It also addresses capability building within the Network to improve the offer and connect local business with agri-tourism and industry to create opportunities for skills development, industry expansion and sharing of world class best practice.

Signature experience	Description
Food & Wine Experiences Development (game changing initiative)	There are many opportunities to leverage or promote existing and create new food and wine experiences and packages that promote seasonal visitation throughout the Network. For example in winter, a 'red wine and fire' package in the wine regions, experiences with a chef during key produce periods such as truffle season or 'make your own vintage' masterclasses following the grape harvest in late Summer/early Autumn. There are also opportunities to expand on events, conferences and experiences around food and wine, including through attracting food and wine industry events, capability building and event funding, for example leveraging the Canola season, or expanding Oberon's mushroom foraging season to become a 'flavour of the month' throughout the town, with foraging tours, menus incorporating mushrooms, etc. Such experience development also leverages the Little Places, Big Stories theme through the creation of 'new news' and content to promote visitation to the Network's smaller destinations. This approach should involve local leaders in the hospitality sector, such as Mayfield, and cafés and restaurants across the Network. For the Network's more established wine regions such as Mudgee and Orange, there are opportunities to tap into the growing international food and wine market and develop export-ready, commissionable wine experiences, enhancing the profile of NSW as a quality wine destination, and providing packages and experiences to match those offered by the Ultimate Winery Experiences Australia collective, while supporting the NSW Government's in-development action plan for food and wine tourism.

Signature experience	Description
Food & Drink Trails	With trends showing an increasing interest among visitors in local food experiences, and an increasing younger short break and car touring market seeking ease and convenience for quick decision making, food and drink trails provide an opportunity to package up tailored agri-tourism experiences, including foodie stops, farm gate experiences, winery tours, brewing or distillery classes and tastings and fine dining, which support longer stays and higher spend in the region. The DNCO has the opportunity to work with relevant JOCs, local councils and businesses to investigate opportunities for development (and funding) of new collaborative, experience-led (rather than destination specific) foodie trails within and across the region. Examples of existing ones include Taste Tamworth Festival Farm Gate Trail and the New England Foodie Trail.
Farm Gate Experiences	Global trends and recent local campaigns are indicating an increasing interest among visitors in accessing local foods. There are opportunities to leverage and commercialise existing international visitation to parts of the region that tap into agri-events, such as Canola season in places like Cowra, and identify ways to encourage increased length of stay and spend in the region. For example, working with operators to identify food and drink product opportunities that can enhance and expand on existing tours, or creating self-guided farm gate trail experiences as described above. An important aspect of this initiative would be for the DNCO to work with local councils to build commissionable products and with the industry to build awareness of the opportunities and provide specific capability-development in the delivery of tourism products. There will be a need to consider biosecurity issues to ensure that the experience offer doesn't undermine the viability and credibility of the region's significant agricultural sector.
Food Markets, Events & Festivals	Spring is the main food and wine festival season in Country and Outback NSW, although there are a number of existing food markets, events and festivals throughout the year. There are opportunities across the Network for enhanced collaboration on funding, theming and timing, as well as profile raising, cross-promotion, packaging and bundling in relation to food and drink events, as well as opportunities to investigate new agri-tourism event opportunities that raise the profile and contribution of the region's agricultural sector, including industry meetings and conferences. It will be important to reinforce the seasonal offer and position the region to compete with interstate and international destinations.

KEY ACTIONS

1. Collaborate with appropriate JOCs, local councils and local agri-businesses to:

- Foster the development of a regional School of Hospitality and Tourism Excellence as a joint venture with NSW TAFE to develop a workforce skills base to support the vibrant and continuously growing hospitality industry;
- Encourage the development of agri-tourism centres of excellence within the Network, for example with Charles Sturt University and the local hospitality and agricultural sector. This would help to profile key skills and education needs across the Network, while also facilitating the growth in experiences that enable visitors to access and enjoy local produce created and delivered by local people; and
- Initiate a 'Sharing Our Produce' or 'Power of Provenance' capability building and networking program involving producers and the hospitality sector that can be rolled out across the region. It would aim to encourage greater awareness, use and promotion of local produce, including food and drink, identify opportunities for developing new experiences as well as opportunities to leverage existing

markets, festival and events to broaden the seasonal food and drink offer. This initiative should leverage the point above. It is also important that the initiative extends into key source markets to enhance the profile of local produce within those markets, in particular Sydney. A key consideration will be to link with the Accommodation Strategy to ensure opportunities for people to stay on farms or in key agri-tourism districts, including share economy options such as Youcamp.

2. Lead development, in collaboration with JOCs, RDAs, relevant councils, and local agri-business and operators, of a Wine Lovers and Foodie Finds (produce, food and drink) Experience Development Initiative for the Network, involving:

- Audit existing food and drink experiences across the Network to identify at a high level the gaps, opportunities and challenges for enhancing the Network-wide offer seasonally, and developing cross-region collaborations;
- Leveraging existing experiences and developing new food and wine experiences, events, bespoke or 'behind the scenes' experiences as well as packaging and bundling these with experiences and accommodation within other strategic themes;
- Identification of partners for funding and development of new collaborative, experience-led Food Trails within and across the region; for example a Farm Gate Food Trail that brings to life local personalities and food/wine experiences;
- Developing and commercialising farm gate-style tours, eg. working with operators delivering international tours visiting Canola regions to create a bespoke Canola farm gate experience as a value-add to the tour;
- Build awareness of the opportunities for agri-tourism and provide specific capability-development in the delivery of tourism products to those interested within the agricultural sector

3. DNCO to work specifically with places such as Mudgee and Orange on the identification and development of export-ready, commissionable wine packages and experiences targeting the international (and growing domestic) wine tourism market. This action would assist bolster NSW's position as a premier wine region of Australia, and expand on the offer currently presented through organisations such as the Ultimate Winery Experiences Australia collective. It will involve connecting existing operators interested in the export or higher-yield domestic markets to export ready programs, including programs delivered by DNSW, Australian Tourism Export Council (ATEC) and Tourism Australia (this is a game changing initiative).

Image: Cobar, Klae Mcguinness

UNLIMITED HORIZONS

With wide, open landscapes and expansive skies, the Unlimited Horizons strategic theme provides a springboard for developing exciting new experiences and opportunities designed to raise the profile of the region and attract more visitors, particularly the domestic short break and touring markets, and keep them in the regions for longer. Clear, dark night skies offer unlimited scope for night-time experiences. Under-utilised infrastructure such as public and private airstrips provides an opportunity to enhance access and deliver unforgettable cross-region flying tours, while new products and experience-led promotions can shine a light on Country and Outback NSW as a premier touring destination.

Signature experience	Description
Night Skies Experience Development Initiative (game changing initiative)	Home to Australia's only Dark Skies Park (Warrumbungle National Park), along with a host of astronomy infrastructure and spectacular, diverse landscapes for night time activities, Country and Outback NSW offers enormous potential to position as Australia's premier destination for Night Skies tourism. Developing new night time experiences is a key factor in attracting new and repeat visitors to the regions, and keeping visitors - particularly the touring market. The DNCO has a critical role to play in leading the development of a Network-wide Night Skies Experience Development initiative that identifies the best of the best existing and new opportunities across the region, captures cross-regional opportunities, gaps and challenges (such as regularity, competition, promotion, funding, etc), and supports both the enhancement of successful existing products and experiences, and the development of exciting new night time activities, tours, events, conferences and festivals. For example guided astronomy tours and seasonal night sky programs, Aboriginal night-time cultural tours, wildlife spotting, dinners under the stars, outdoor concerts under the stars, etc. There are also two projects currently shortlisted for funding through the NSW Government's Regional Growth – Environment and Tourism Fund that could contribute to this strategic theme. These are: • Astronomy/Science Centre, Planetarium and Café; • Zoofari Lodge Redevelopment and Expansion (this will leverage the existing night time offer of Taronga Western Plains Zoo).

Signature experience	Description
Private Air Charters & Flying Tours Initiative (game changing initiative)	With public and private airstrips available throughout the Network, and vast expanses of landscape to explore, there is an exciting opportunity for Country and Outback NSW to advocate for enhanced access to regional NSW through private charters, as well as investigating the opportunities for a very special kind of touring experience – by air. The two elements – private charters and flying tours - each require extensive investigation and collaboration with a wide range of industry stakeholders, partners and operators. Flying tours are a premium product opportunity offering multi-faceted, cross-regional experiences incorporating all of the themes and promoting the characters and personalities that bring Country and Outback NSW to life. They tie together expanded air links, accommodation offerings (including lodge stays), food and wine experiences, agri-tourism, nature, Aboriginal cultural experiences and small towns and characters. It Is noted that there are already companies providing tours by air; it is recommended to work with these operators to identify opportunities to enhance the flying tour offer across the Network and promote private sector operators who the air tour companies can work with to provide outstanding on-ground experiences once they arrive in region. This initiative could also potentially leverage the extensive public and private airstrips across the region through a sharing economy platform for airstrips. This would require significant investigation (beyond the scope of this DMP).
Country & Outback Touring – experientially-led touring routes (game changing initiative)	The touring market has been a mainstay of Country and Outback NSW for many years, and continues to grow, particularly among the 35-54 and 55+ markets. However, while the younger market is proving higher yield, and while the region commands a fair proportion of the overall touring market in NSW, statistics are showing that touring visitors aren't actually spending many nights in the region. This suggests that more often than not, they're passing through (ie. stopping briefly or overnight to break up the journey). Furthermore, research shows that in relation to key existing touring routes in NSW, awareness is limited. Importantly, many are arriving with their own accommodation (caravans, camper-trailers, RVs or tent). Another opportunity is to apply a new approach across the wide range of ways visitors may undertake touring, for example by motorbike. To enhance the perception and awareness of the region's touring routes, there is a need to refocus efforts by adopting a stronger experientially-led approach, including the development of contemporary, high-quality content and itineraries. This can be delivered in two key ways: • Connecting individual precincts, experiences, tourism products and events within each strategic theme, including at a local or Network scale; and • Creating cross-regional, cross-theme experiences or journeys that bring the stories, places and characters of Country and Outback NSW to life, such as the proposed for the Unearth the Fossils Initiative. In addition, the Network can collectively tackle this challenge by: • Creating new experiences and bookable products across the DMP strategic themes to both attract the touring market and keep them in region for longer; • Raising the profile of touring routes by presenting them as journeys and leading with experiential content rather than destination content; this would involve a review of content and promotion for existing routes; and • Improving the online and digital content for direct and third-party distribution.

KEY ACTIONS

1. Develop, in collaboration with JOCs and tourism managers, a Night Skies Experience Development
   Initiative that:
   - Identifies the 'best of the best' existing opportunities across the regions, including smaller
     observatories as well as nature and cultural-based experiences;
   - Supports both the enhancement and expansion of successful existing products and experiences (such
     as StarFest), and the development of exciting new night time activities, tours, events and festivals, for
     example guided astronomy tours and seasonal night sky programs, Aboriginal night-time cultural tours,
     wildlife spotting, dinners under the stars, outdoor concerts under the stars, etc; and
   - Engage potential partners and identify appropriate funding sources and project leaders to lead
     concept development and create an Experience Development Strategy, which also addresses
     infrastructure requirements, etc.

2. Develop, in collaboration with relevant JOCs and/or RDAs, a Private Charters & Flying Tours Initiative to:
   - Identify potential partners and operators, gaps and opportunities, funding, infrastructure
     requirements, etc, for development of private charter and flying tour experiences and prepare a
     prospectus of opportunities; and
   - Work with existing charter or tour operators to identify access points and connect them with
     providers of high-quality on-ground experiences that meet the needs of their target market.

3. Initiate a program to enhance and promote the region's touring routes. This action involves building
   capabilities to broaden the offer and appeal of existing and new touring routes, including:
   - Experiences and product development, including opportunities for bundling experiences and
     products;
   - Developing experience-led content, digital media and marketing capability – this is particularly
     important in the context of the Destination NSW self-drive marketing campaign and the opportunity to
     enhance the perception of the landscapes, characters and events of the Network; and
   - Identifying and communicating to key stakeholders opportunities for and benefits of
     improved WIFI connectivity and coverage throughout the Network, capability building for digital
     delivery and management, and technologies such as up-to-date weather and road access information,
     and recharging stations for cars in accessible locations.

Image: Canbelego, Klae Mcguinness

EXPLORING OUR NATURE

There are a diverse number and wide range of opportunities for nature-based experiences in this region, from Outback 4WD escapes to bushwalking through gorges and rainforests, making a splash in waterways and rivers, exploring by bike along cycling trails, adventuring into caves and spotting unique Australian wildlife or birdwatching. This strategic theme sets the scene for working with a range of stakeholders and partners, including NPWS and private operators, to develop, deliver, package and promote a diversity of exciting nature-based opportunities.

Signature experience	Description
Nature-Based Experiences Development Initiative	The nature-based market and take-up of nature activities in Australia is on the rise, yet share of market and growth across the Network has declined in recent years. The challenge for the Network going forward is to reinvigorate visitor interest in the regions' nature-based offer - particularly among the growing Sydney market and tapping into the desire for more small group nature-based experiences - through improved bundling, marketing and profiling of the region's nature-based offer, and the development of new signature experiences that increase the accessibility of the nature offer within the region. Nature-based tourism is a key focus for Tourism Australia, providing an important opportunity to leverage a broader, national focus and energy in this sector. This includes targeting niche but high yield markets such as birdwatching out of the USA, UK and Europe. There is a role for DNCO to facilitate the enhancement and repositioning of the nature-based opportunity for visitors through: • Enhanced content development of the offer, leading with the experience; • Taking a Network-wide view to identify opportunities to link cross-regional nature-based experiences, bundle opportunities, create itineraries and packages that build nature-based experiences into the offer; • Working with tourism operators to create tailored, bookable nature-based experiences for the market; • Developing accessible self-guided interpretation opportunities, beyond signage; and • Partnering with NPWS to align and leverage existing programs such as the NPWS Commercial Tour Operator Grant Program, to support development and enhancement of nature and culture-based visitor experiences. There are also five projects currently shortlisted for funding through the NSW Government's Regional Growth – Environment and Tourism Fund that could contribute to this strategic theme. These include: • Zoofari Lodge Redevelopment and Expansion • Infrastructure for Implementing Destination Macquarie Marshes Action Plan • Gunnedah Koala Park and Education Centre • Jenolan Restart • Kokoda Trail Walkway, Liverpool Plains

KEY ACTIONS

1. Facilitate a Nature-Based Experience Development Initiative with local government and organisations such as NPWS to audit their nature-based assets and experiences, including those delivered by tour operators or community groups to identify and develop:

• Best-of-the-best nature experiences and outdoor activities for experience-led content development, including a Network-wide seasonal calendar of nature and wildlife activities – important to assist with the creation of new cross-border and seasonal bundles, packages and itineraries with a nature-based offer;

• Gaps and opportunities for development of new or enhanced signature nature-based experiences in collaboration with tourism operators and/or NPWS that could be bundled, packaged and marketed with other experiences, eg. short break bookable packages and itineraries offering outdoor adventures by day, foodie experiences by night, or foodie by day and nature by night;

• Collaborative, cross-regional opportunities for developing and funding nature-led promotional activities, for example, working with NPWS to leverage campaigns in market (eg the NPWS Young Adults Campaign), encourage tour operator business development and accessible self-guided nature interpretation, beyond signage; and

• Address issues around nature-based access and/or infrastructure that require advocacy or facilitation to progress outcomes.

Image: Armidale Tourism

REVEALING OUR HERITAGE

From ancient fossils to amazing agricultural and mining histories and well-preserved towns, Country and Outback NSW offers so much heritage to be inspired by. This strategic theme aims to leverage existing infrastructure and stories to explore new opportunities to engage visitors with the region's heritage through trails, regional rail offerings, linking or bundling experiences, and providing more contemporary and interactive museum and heritage experiences.

Signature experience	Description
Bringing Heritage To Life	Country and Outback NSW is home to a huge array of heritage assets, some of which are successfully delivering heritage experiences, while others require investment or revitalisation to raise their appeal within the heritage offer. While take-up of heritage experiences is down across the Network, there is a national trend upwards. However, markets are becoming more discerning about the experiences they choose and many destinations are investing in contemporary approaches to bring their heritage to life, eg. MONA in Tasmania. It is critical that the Network evolves the heritage offer beyond traditional forms of interpretation and enhances appeal, particularly with new markets, through immersive, interactive experiences coordinated across the regions (see also Enabling Activities & Governance section). The DNCO has a lead role to play in working with regions to assess the existing heritage offer and: • Identify centres of excellence, such as Bathurst, Lithgow, Broken Hill and Lightning Ridge; • Identify what is required to enhance the regional offer. For example, improvements to infrastructure, partnership opportunities to bring heritage assets to life (eg. working with theatre groups or art groups to create events and experiences that interpret or utilise heritage), skills development, collaboration on funding, bundling and packaging, experience development, content development and cooperative marketing campaigns; • Support enhancement of the regional rail offerings (Lachlan Valley Railway at Cowra and Orange); • Support regions to leverage and plan for new and potential opportunities, for example the $1.1 million reinstatement of the heritage rail link between Kandos and Rylstone, and the proposal under consideration for a New England Rail Trail from Armidale to Wallangarra in Queensland; and • Encourage stronger links to and promotion of the Office of Environment and Heritage (OEH) 'Heritage Near Me' app, which includes video stories, rich imagery, maps and virtual tours. There are also four projects currently shortlisted for funding through the NSW Government's Regional Growth – Environment and Tourism Fund that would contribute to this strategic theme. These are: • Repurposing of the Saumarez Homestead & Heritage Listed Farm for Enhanced Regional Tourism • Eskbank Wagon Maintenance & Carriage Restoration Facility and Living Museum • Restart Jenolan • Kokoda Trail Walkway, Liverpool Plains

Signature experience	Description
Unearth the Fossils Initiative	Leading with experiences is critical to delivering successful touring opportunities that position Country and Outback NSW as a destination, rather than a region to pass through on the way to somewhere else. Theming journeys around key precincts and places of interest offers the Network the opportunity to build cross-regional collaboration and partnerships, leverage the profile of major hubs to promote smaller places and showcase the best of the best visitor experiences within that theme. The Unearth the Fossils Initiative is a game changing project concept that leverages the cross-regional geological and fossil highlights of Country and Outback NSW to offer an exciting and unique curated journey for the touring and other markets. The initiative would tie together key sites or precincts such as Jenolan Caves, Wellington Caves, the Australian Fossil and Mineral Museum in Bathurst, Canowindra's Age of Fishes Museum and Lightning Ridge Opal Centre, with other relevant experiences, food and wine offers and accommodation as well as collaborating outside the DNCO boundary to incorporate places such as Mungo National Park or leverage other experience trails such as Australia's Dinosaur Trail in Queensland. Key partnership in this initiative extend well beyond the DNCO boundaries, including with the Australian Museum, which is already working on early concepts for such projects as well as national institutions and museums.

KEY ACTIONS

1. Lead a program 'Bringing Heritage to Life' in collaboration with the regions. This will include:
- Regions undertaking an audit of key heritage sites to identify signature experience*l*s and opportunities for development;
- Identifying requirements for development of assets and opportunities, such as skills and infrastructure;
- Identifying partnership opportunities to bring heritage assets to life (for example working with theatre groups or art groups to create events and experiences that interpret or utilise heritage);
- Supporting regions to leverage and plan for new and potential opportunities, eg. the $1.1 million reinstatement of the heritage rail link between Kandos and Rylstone, and the proposal under consideration for a New England Rail Trail from Armidale to Wallangarra; and
- Encouraging contemporary interpretation to assist in the appeal of heritage tourism to new market segments.

2. Implement the Unearth the Fossils Initiative in collaboration with relevant JOCs, RDAs, councils, industry partners and stakeholders; including:
- Identifying the best of the best existing opportunities for inclusion in the Initiative (such as Wellington Caves, the Australian Fossil and Mineral Museum in Bathurst, Canowindra's Age of Fishes Museum, and Australian Opal Centre), as well as opportunities for new experiences, including food and drink, accommodation and other experiences across the strategic themes, to enhance the appeal of the experience for young and old;
- Engage potential partners, such as the Australian Museum as well as public and private sector operators;
- Identify appropriate funding sources and partner organisations to lead concept development and create an Experience Development Strategy, which also addresses infrastructure requirements, etc; and
- Developing engaging packages, content and marketing to raise awareness and interest in the Initiative.

Image: Canowindra, www.visitnsw.com

LITTLE PLACES, BIG STORIES

A genuine and engaging strength of Country and Outback NSW is its small places with big stories. This signature theme sets the scene for lifting the profile of the experience and events offer of the smaller towns and villages across the region, showcasing their points of difference and the key reasons to visit across seasons and capturing the opportunities to create the big stories that turn little places into hubs from a visitor experience perspective.

Signature experience	Description
Small Town Events, Festivals & Stories	Research shows that to grow length of stay, a mind shift is required to position Country and Outback NSW, in particular the smaller towns across the region, as destinations worth staying longer. From the Canowindra International Balloon Festival, Trundle ABBA Festival and Gemorama in Glen Innes to the Kalari Lachlan River Arts Festival and The End Festival, there are a plethora of events, festivals and activities throughout the year that have the potential to turn the small towns across the region into hubs for that attract more visitors and extend length of stay. There is an opportunity for the DNCO to facilitate a framework project for regional identification of these hub and spoke development opportunities, that encourages local government and community-based organisations to: • Identify the key stories for each place, existing experiences and experience development opportunities beyond existing key events; and • Build capabilities to enable packaging and bundling of existing experiences with accommodation (etc) as well as the creation of new itineraries and content for multi-channel distribution (images, video and copy). There are also two projects currently shortlisted for funding through the NSW Government's Regional Growth – Environment and Tourism Fund that would contribute to this strategic theme. These are: • Lightning Ridge Visitor Information Centre, Council Agency, Conference/Community Centre and Transit Hub • Central West Equestrian and Livestock Centre, Blayney Shire

KEY ACTIONS

1. Investigate regional opportunities to leverage smaller town experiences and events to drive seasonal, longer-stay visits through working with local government and community-based organisations to identify:

- Stories and characters for their small towns and villages – this should include consideration of local events such as picnic races and local fairs as well as great places to eat or sample local produce, which help to bring the character and richness of little places to life for the visitor;
- Broader experiences and products, along with gaps, challenges, opportunities and partnerships, to create seasonal packages and itineraries, in particular for the touring market that extend length of stay around hub events;
- More unique experiences that assist accessing small towns and villages across the region, such as rail (including steam trains and dedicated services such as the Elvis Express), ballooning and paddle boating, or by horseback or camelback; and
- Compelling and engaging content for multi-channel distribution to promote the 'Little Places, Big Stories.'

Image: Tamworth, www.visitnsw.com

EVENTS AND CONFERENCES

Country and Outback NSW is home to a wide range of big and small events, festivals and conferences that attract people from across the State and in some cases, from around the world. This Strategic Theme aims to leverage the success of existing events across the Network to drive growth in visitation, profile small towns as seasonal hubs and develop a small number of new events to attract people to (or back to) the regions as well as strengthening the profile of Country and Outback NSW as a place to host business events and conferences.

Signature experience	Description
Regional Events, Festivals & Conferences Program	Events, festivals and conferences have a critical role to play in helping to grow the visitor economy for Country and Outback NSW by providing compelling reasons for visitors to come to regional NSW. From major international events such as the Bathurst 1000 and Tamworth Country Music Festival to small town events with stories to tell, like the Coonamble Rodeo and Campdraft, Boggabri Drovers Campfire and Grazing Down The Lachlan, Country and Outback NSW offers myriad and seasonal opportunities to profile unique destinations and the experiences around them through hub events, festivals and conferences, and drive opportunities to grow off-peak and low-season visitation. With the establishment of the Destination Networks, the NSW Government has also expanded the Regional Flagship Events Program and associated funding, creating scope for the Network to progress existing and new signature events, initiate new events through incubator funding and regional conference development grants pilot program. The Network has the opportunity to apply a coordinated, collaborative approach to the regional business and leisure events calendar, leverage existing events and conferences to enhance the experience offer and appeal of towns and villages, identify growth opportunities, and boost the profile of the region's events through content and marketing. There are two projects currently shortlisted for funding through the NSW Government's Regional Growth – Environment and Tourism Fund that could contribute to this strategic theme. These are: • Big River Dreaming - The Water Weaving Way, Gwydir Shire • The Mount Panorama Boardwalk, Bathurst

Signature experience	Description
Sports Tourism (leveraging events)	Sport is a core part of community life in regional NSW and plays a key role in supporting businesses, sporting associations and clubs. Research shows that sport drives healthier communities, lower healthcare costs, more socially connected neighbourhoods and more productive workplaces (see: https://theconversation.com/sport-is-more-than-just-a-fringe-player-in-australias-economy-71212).

From a visitor economy perspective, sporting events bring millions of people to NSW each year and while data is limited in the specific contribution of sporting events to local economies, feedback from the DMP consultation workshops identified sports and sporting events as a significant ingredient in the Network's visitor economy mix, particularly in relation to regional and state sporting competitions and the Visiting Friends and Relatives (VFR) market. For this reason, sport tourism should be acknowledged and broadly considered within the DMP.

Sporting and recreational facilities also contribute to the ability of the region to deliver on the growing trend towards health and well-being as well as value-adding to holidays through access to facilities and clubs, such as provided for golf, tennis, swimming and bowling.

Initiatives around sport tourism are primarily the responsibility of local government, however the DNCO has a role to play in providing support and encouragement for the promotion of sporting and recreational facilities across the region. |

KEY ACTIONS

1. Lead the development of a Business and Leisure Events Strategy for Country and Outback NSW, in collaboration with JOCs, councils, industry and other stakeholders, including:

- Undertaking an audit of all events, festivals and conferences across the network, mapping them against theme and season;
- Identifying seasonal and experiential gaps, challenges and opportunities (including timing of events to address challenges around competition and marketing to the same source markets);
- Identifying existing events with capacity/capability to grow conversion (eg. The Trundle ABBA Festival) and either step up to the next level or for those that may be nearing the end of their product lifecycle;
- Identifying opportunities to attract industry meetings and conferences that complement and align with key events, festivals or signature experiences that bring the industry theme to life For example, delivering a science/environment conference in alignment with the Dark Sky Festival; and
- Identifying opportunities to extend length of stay during hub events with itineraries and packages that incorporate experiences from other themes, for example, packaging events with nearby nature-based and foodie activities. This initiative can assist to strengthen mid-week or low season visitation.

2. Apply the findings of the Strategy to identify and advocate for:

- Growth opportunities for existing leisure events, and development of new events, and prioritise opportunities for submission to the Destination NSW Regional Flagship Events Program and other funding sources.
- Growth opportunities for existing business events and the development of new conferencing opportunities, and prioritise for submission to the Destination NSW Regional Conferencing Development Pilot Grants Program and other funding sources.

3. Deliver a Network-wide events and festivals calendar for Country and Outback NSW and work with DNSW to implement a simple, single process for uploading events for online and digital information distribution and to increase Network-wide awareness of the timing, destination and type of events offered throughout the year.

4. Leverage the positioning of the DNCO by supporting and promoting sporting events that highlight the appeal of the region, or which profile specific experiences, for example cycling or racing events.

5. Support sports that already have strong community engagement to attract and host regional, State or national events; this will be of particular interest to the larger centres across the region, eg. Dubbo and Tamworth, and could include facilitation of funding or in-kind contributions towards 'hosting bids' to sporting associations. Relevant issues also raised through the consultation process were accommodation and visitor services limitations within the Network and the need for strategic coordination between a range of partners across the tourism and hospitality sector. This would also assist to enhance the perception of the region as a leisure destination for immediate or future consideration by target markets (potentially returning with their family or friends for a holiday).

6. Support the development of itineraries and the promotion of experiences and activities across the Network that encourage sporting event participants to bring friends or family with them and/or extend their length of stay.

SIGNATURE EXPERIENCES DEVELOPMENTAL PROCESS

The DMP's signature experience initiatives are high level, strategic, long-term programs designed to boost the Network's visitor economy through capacity/capability building and experience development across the region. These projects are potential game changers for Destination Country and Outback NSW. The actions for the initiatives relate primarily, but are not limited to strategic planning, feasibility assessment and partnership identification and agreements. This process may be utilised at the DNCO-level through to local-level or private sector planning.

Key stages of the Signature Experiences Developmental Process are:

1. For each signature experience project or game changing initiative, determine the project lead and initiate high-level concept development, as well as the identification of key partners and project objectives;
2. Identify potential funding sources and key stages to be funded, commencing with development of an Experience Development Strategy and Feasibility Assessment (initial phase);
3. Prepare and submit funding applications, in collaboration with project partners where appropriate. These applications should provide the broader context for the project, including how it delivers directly on Tourism 2020 and NSW Government priorities such as the NSW Visitor Economy Industry Action Plan and the NSW Aboriginal Tourism Action Plan. As part of this phase, prepare and seek endorsement of agreements with partners, including those from the private and/or public sector;
4. Subject to success in attracting funding for initial stages, prepare a detailed Experience Development Strategy and Feasibility Assessment, which involves detailed consultation with the community and stakeholders. This phase should address feasibility and identify infrastructure requirements and key links to the broader tourism and hospitality offer of the region. The Strategy should also outline a staged approach to implementation that provides a clear roadmap for securing resources for capital works; and
5. Prepare a prospectus to attract public and/or private sector investment to implement the project in line with the endorsed Strategy

EXPERIENCES IN DEVELOPMENT

The DMP recognises that a number of projects that would constitute or contribute to signature experiences have applied for funding through the NSW Government's Regional Growth – Environment and Tourism Fund and have been shortlisted, as below.

Shortlisted Projects	Applicant	Where	DMP Strategic Themes Link
Zoofari Lodge Redevelopment and Expansion	Taronga WP Zoo / TCSA	Central West NSW	Exploring Our Nature/ Unlimited Horizons
Big River Dreaming - The Water Weaving Way	Gwydir Shire Council	New England North West	Events and Conferences
The Mount Panorama Boardwalk	Bathurst Regional Council	Central West NSW	Events and Conferences
Lighting Ridge Visitor Information Centre, Council Agency, Conference/ Community Centre and Transit Hub	Walgett Shire Council	Outback NSW	Little Places Big Stories
Repurposing of the Saumarez Homestead & Heritage Listed Farm for Enhanced Regional Tourism	Armidale Regional Council/ Nat Trust of Aus	New England North West	Revealing Our Heritage
Central West Equestrian and Livestock Centre	Blayney Shire Council	Central West NSW	Little Places Big Stories
Infrastructure for Implementing Destination Macquarie Marshes Action Plan	RiverStart Australia Ltd	Central West NSW	Exploring Our Nature
Astronomy/Science Centre, Planetarium and Café	Tamworth Regional Council	New England North West	Unlimited Horizons
Eskbank Wagon Maintenance & Carriage Restoration Facility and Living Museum	COC Limited	Central West NSW	Revealing Our Heritage
Gunnedah Koala Park and Education Centre	Gunnedah Shire Council	New England North West	Exploring Our Nature
Restart Jenolan	Jenolan Caves Reserve Trust	Central West NSW	Exploring Our Nature/ Revealing Our Heritage
Kokoda Trail Walkway	Liverpool Plains Shire Council	New England North West	Exploring Our Nature/ Revealing Our Heritage

3.3 STRENGTHENING DEMAND & VISITOR SERVICES

Given the significant size and diversity of the Country and Outback NSW network, the role of the DNCO and the DMP is to identify and facilitate strategic, high-level programs that will support the growth of demand and visitor services right across the Network. In practice, this means enabling local areas through capacity and capability building opportunities across marketing and visitor services, facilitating cross-regional and industry collaboration, providing advice and guidance on funding opportunities, and delivering advocacy for changes or improvements that support best practice destination marketing and tourism services.

It is important to note that the DNCO will not be responsible for developing and delivering marketing campaigns and activities. However, it has a role to play in driving a more collaborative and cooperative approach across the Network. This can happen through the provision of in-region training and mentoring programs, strategic advice and guidance on opportunities, funding and best practice as well as advice and review of demand building funding applications.

Based on the research undertaken for the DMP, consultation insights and analysis of the SWOT, the key considerations and challenges for Country and Outback NSW in growing demand and visitor services include:

- Delivering new and enhanced/refreshed collaborative, coordinated, visitor-centric products and experiences is critical for invigorating visitation across the Network, encouraging repeat visitation, reversing declining market share (particularly in areas such as nature-based tourism), and increasing length of stay and yield across the region;
- Building capability within industry to enhance customer service and hospitality, and marketing, recognising that the needs of local areas will vary based on their existing levels of skills and program-focus;
- Improving information on and access to nature and cultural-based experiences;
- Applying a more strategic approach to resourcing and delivery of visitor services;
- Advocating for improvements to processes and practices around grants and other funding programs, in particular acknowledging that some parts of the region have greater skills, capacity or capability with regard to marketing; and
- Enabling local areas to promote their own offer, while leveraging cross-regional opportunities and aligning with strategic themes in the DMP.

KEY ACTIONS

1. Endorse the DMP ambition, positioning and strategic themes as the overarching strategic approach for the DNCO.

2. Establish a framework for the collection of consistent and regular visitor data and reporting across the region. This is critical for planning, measuring progress and impacts and communicating the benefits of the visitor economy. The framework should be guided by Destination NSW and include local visitation data and insights, accommodation occupancy data, etc, as well as measures and reporting

for destination management implementation. Work with regions to identify opportunities for cross-regional collaboration and funding for visitor research. A key issue will be to explore the opportunity for utilising new technology and methods of collecting and reporting visitor data, as outlined in the Enabling Activities & Governance section.

3. Develop a Visitor Services Strategy – DMP consultation feedback has identified that at least $20 million (a conservative estimate) is being spent annually on servicing visitors across the Network, with the greatest investment in operating visitor centres. There is a need for the Network, in collaboration with DNSW, JOCs, local government and local tourism organisations, to undertake a review of visitor services across the Network and develop a Visitor Services Strategy. It should address key considerations such as visitor centre design and offerings, number of visitor centres, and improving partnerships and digital assets for best practice visitor servicing. Priority recommendations should include:

   · allocating resources to highest priority needs;
   · capability building and training for expertise development;
   · enhancing the visitor centre offer through improved relevance, especially in-line with the local experience offer and interpretation; and
   · delivering multi-channel, visitor-centric approaches to maximise the use of resources.

4. Develop a Content Strategy and guidelines to assist local areas and stakeholders identify, test and create content that is experience-led and based on the DMP strategic themes and seasonality, for multi-channel distribution (short videos, images and copy), including through third-party and partner organisations such as Destination NSW and Tourism Australia. High-quality and up-to-date content is critical to enhance destination awareness and appeal, particularly in today's competitive marketplace. Engaging content also encourages user-generated content, while leveraging marketing budgets by providing content that visitors (or potential visitors) can share with their peer groups.

5. Develop an Education and Training Module & Pathway for all levels of staff and personnel engaged in the hospitality industry, including owner operators, managers and customer service frontline staff (eg for Degree, Diploma and Certificate-level qualifications and accreditation).

6. Develop a Network-wide Tourism Marketing Capability Building Program, to be delivered through workshops and training in region over the next 12-18 months. The program will deliver guiding principles to support regions in developing visitor-centric, experientially-led, content-focused marketing strategies that clearly articulate local points of difference in marketplace, while facilitating collaborations and partnerships to maximise opportunities for funding and promotion. Key partners for promotion, particularly relating to packaging and bundling of experiences, include transport providers such as NSW Transport and the major bus companies such as AAT Kings and Murrays, among many others.

7. Develop a guideline or template for 3-year Marketing Plans at a local-level (where required and appropriate based on the capability of each area, organisation or collaborative group such as touring route committees). Marketing plans would be developed with consideration of the recommended marketing models outlined in the DMP (see below), and should integrate measurable objectives, and

set key performance indicators and targets for evaluation of outcomes. There are a range of existing providers who could assist JOCs or councils with this task, including integration of relevant research and consumer insights.

8. Develop a local campaign program in collaboration with JOCs and local government, to build awareness of local tourism potential with residents and businesses across the Network. This might take the approach of a 'Discover Your Own Backyard' (DYOB) styled campaign, a primary purpose of which is to target local communities who are hosts and key decision makers with regard to the Visiting Friends and Relatives (VFR) market. The goals would be to build engagement, promote regions to local hosts or share economy accommodation providers, enhance advocacy of local activities, tours and produce and also establish business and community networks for implementation of the DMP. This initiative will be most effective in utilising local media and other channels to reach the local community, including newsletters and the digital platforms of local organisations.

RECOMMENDED MARKETING MODELS

The following marketing models should inform and guide the development of marketing strategies and activities.

1. CUSTOMER JOURNEY
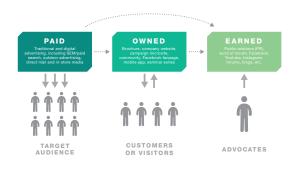
A customer-centric approach has long underpinned the success of products and experiences. Smart destinations also consider the customer journey to prioritise:

- Marketing efforts to shift potential visitors from awareness through conversion, and to create advocates of the place; and
- Partnerships and investment in new experiences or to revitalise existing assets to deliver on the promise of the destination.

A critical step is to investigate the customer journey as it relates to each market segment, across both domestic and international markets, to better understand the tactics required to reach, inspire, engage and create advocates for a destination. By creating advocates, the region can boost their marketing efforts through word of mouth, the most influential marketing tool (particularly as a result of social media).

2. PAID, OWNED, EARNED MODEL

In today's disrupted media environment, it is critical to identify the right channels to reach the target audience for each communication activity. The importance of this model lies in the interaction and opportunities for leveraging each channel within the overall communications or marketing mix. Getting the balance right by identifying the right channels to reach the target market will maximise effectiveness within the available resources.

3. REACH, INSPIRE, ENGAGE & CONNECT MODEL

Word of mouth has never been more important as an influence on consumer decision-making, especially in travel. With the continuing rise of social media and the increasing popularity of user-generated content and reviews, people seek information on where to go and what to experience from their mobile devices. To achieve real engagement, the stories of the Network must resonate with the target audience and the on-ground experiences must deliver on the promise of the destination. Images and video content should also be developed to initially inspire people to visit and then be shareable with their own peer group through social media.

PLAN

COMMUNICATE

4. COMMUNICATE

It is essential to communicate the benefits of the DNCO DMP, including the economic, environmental and social sustainability that will be achieved through its implementation. This involves closing the loop of consultation with key stakeholders and engaging local community and industry to promote greater ownership and a sense of shared responsibility for the DMP's effective implementation.

KEY ACTIONS:

1. Develop and implement a Stakeholder Engagement Strategy and communication plan as a high priority. The plan will enable effective communication on governance and the role of the DNCO as well as identify the key audiences and channels for ongoing communication, including:
   - Attendance at regional meetings and workshops, including opportunities for the DNCO Board and staff to attend Destination NSW, JOC and local council meetings in region as well as hosting networking events;
   - Websites (DNCO, Destination NSW, regional tourism websites, etc);
   - Social media platforms;
   - Targeted email newsletters for stakeholders, business/community; and
   - PR/media relations, in particular traditional and digital local media agencies/outlets.
2. Activate communication tools to promote the ongoing role of the DNCO, implementation of the DMP and reporting on achievements, including:
   - Maintain the online feedback mechanism for the DMP to enable a channel for ongoing feedback and updating of the DMP;
   - Undertake a series of presentations on the DMP across the region, incorporating relevant local-level actions. This will also provide an opportunity to start building the regional network of local residents and businesses for ongoing communication on the implementation of the DMP; and
   - Utilise other communication channels and tools as outlined above.
3. Develop and maintain a business or industry-focused website for DNCO to function as a communication hub portal for the Network to Destination NSW and regional tourism websites. This should include opportunities to share best-practice, including the use of new technology and promote new initiatives or infrastructure projects that support the visitor economy.

Image: Broken Hill, www.visitnsw.com

5. MEASURING SUCCESS

The DMP sets out the strategic direction for the DNCO to 2020. Regular monitoring of progress and performance against the DMP's strategic priorities and actions will be essential for measuring the ongoing success of the DMP, and responding to changes in the tourism and visitor landscape. Most importantly, the metrics should help to measure success against the DMP goals, which are to:

1. Create a positive and collaborative culture to support the growth of the visitor economy
2. Increase visitation and yield to Country and Outback NSW
3. Strengthen the perception and awareness of Country and Outback NSW
4. Build the capacity and capability of the industry and local government, to deliver on the expectations of visitors to the region
5. Facilitate the development or enhancement of products, experiences and events; and
6. Enable effective and efficient communication with stakeholders and communities across the network

Metrics will draw on a range of data sources and assessments, including (but not limited to):

- Implementation of the DNCO governance structure;
- Growth in key markets of overnight visitors, length of stay and yield across the Network;
- Enhancement of tourism, marketing and visitor services skills and capacity/capability across the Network;
- Enhancement of existing signature experiences, development of new products and experiences under the strategic themes of the DMP, particularly in the areas of Aboriginal cultural tourism and nature-based tourism;
- Delivery of greater collaborative outputs across the Network, including access to funding, cooperative experience development and marketing;
- Expanded accommodation offer across the Network;
- Efficiencies, improvements and enhancements across visitor services; and
- Increase in quality, diversity and dissemination of Network content on owned and third-party channels.

A high priority action for the DNCO is to identify the most appropriate measures of success and the data or information that will be required to collate to report on its progress and performance.

ACTION PLAN – OVERVIEW OF KEY PRIORITIES FOR THE DNCO TO 2020

Building industry capacity & capability	Communicate the benefits + strengthen shared understanding of the visitor economy	Investigate opportunities for a Hospitality School of Excellence & 'Power of Provenance' program	Identify capability-development needs + coordinate & promote a region-wide capability-development program	Establish a framework for consistent collection of relevant visitor data, reporting & economic analysis
Industry engagement & development	Develop a Stakeholder Engagement Strategy & Communication Plan	Implement communication initiatives, including industry website	Promote, support access to and assist linking the region with grant/funding programs	Implement opportunities for industry development, including industry famils
Facilitating relationships & partnerships	Review current content 'assets' to determine gaps and opportunities, including to meet third-party content needs	Facilitate enhanced promotion of events & festivals, including a single process for uploading event info	Develop a Content Strategy & Guidelines for development of content for multi-channel distribution	Advocate for key infrastructure needs to support the visitor economy, including improved signage standards & processes
Effective destination management & business planning	Promote a robust & credible Signature Experiences Development Process	Agree priorities for and support concept development of key Game-Changing Initiatives	Coordinate region-wide collaboration to support the development of Aboriginal cultural tourism	Initiate a program to enhance & promote the region's touring routes by adopting a stronger experiential focus

ACTION PLAN - PRIORITIES FOR THE DNCO TO 2020

Priority	Category	Action	Timeframe (Months)		
			0-12	12-24	24+
1. Stakeholder Engagement & Strategic Communication	Enabling activities & governance	• Prepare and implement a Stakeholder Engagement Strategy, including a Communication Plan • Develop and implement key communication initiatives, including development and distribution of a regular e-newsletter, local media PR activities and announcement of key initiatives & opportunities (eg grant funding, capability development program, etc) • Develop and maintain a simple DNCO business-focused website & resource hub	●		
		• Communicate implementation of DMP initiatives, including through regular communication/meetings with key stakeholders, eg DNSW, other NSW Government agencies such as Transport for NSW and NPWS, JOCs, RDAs, Councils & LALCs • Implement a program of networking opportunities for the delivery of the DMP and continuing engagement and involvement of stakeholders and the industry across the Network		●	
		• Review and reporting process for the DMP to involve key stakeholders • Continued implementation of communication and stakeholder engagement initiatives, including advocacy on behalf of the DNCO with DNSW, other Government agencies and key partner organisations			●

Priority	Category	Action	Timeframe (Months)		
			0-12	12-24	24+
2. Governance and Resources	Enabling activities & governance	• Establish a robust Governance Framework for DNCO • Identify key measures of success for reporting on performance against the goals identified in the DMP • Provide an annual report for DNSW, stakeholders and industry • Audit current funding gaps and opportunities across the Network - this should inform advocacy priorities and support for grant submissions • Develop a guide to support stakeholders apply for grants and develop partnerships with NSW Government and other organisations	●		
		• Review and check-in with key stakeholders on the effectiveness and efficiency of the governance model – consider adjustments and improvements on a case-by-case basis • Continue to facilitate relationships with NSW Government to advocate for the regions to have a funding structure that supports and empowers the management and delivery of programs to drive economic growth at the local level • Continue to facilitate relationships with NSW Government to advocate for infrastructure to access and maintain key tourism sites		●	
		• Continue to facilitate relationships with NSW Government to advocate for the regions to have a funding structure that supports and empowers the management and delivery of programs to drive economic growth at the local level • Commence strategic policy initiatives, such as a Visitor Accommodation Strategy and Sharing Economy Strategy in collaboration with the NSW Government, including DNSW and Industry NSW • Continue to facilitate relationships with NSW Government to advocate for infrastructure to access and maintain key tourism sites			●
Building an understanding of the Visitor Economy + Capability development	Enabling activities & governance	• Engagement with key stakeholders, including sharing the DMP and Research Report, which provides detailed insights into the market • Hosting a Visitor Economy Seminar for Councillors and Executives • Hosting a Destination Management Workshop for Tourism and Economic Development Managers and staff *These seminars and workshops should include coverage of the DMP as well as industry insights and case studies. If resources are limited then a small participation fee can be charged to offset the direct costs to DNCO.* • Undertake investigations and commence development of a regional School of Hospitality and Tourism Excellence in collaboration with NSW TAFE • Initiate a 'Sharing Our Produce' or 'Power of Provenance' capability building and networking program involving producers and the hospitality sector to encourage greater awareness, use and promotion of local produce, including food and drink, etc	●		

Priority	Category	Action	Timeframe (Months)		
			0-12	12-24	24+
		• Coordinate a program and the roll-out of capability-development workshops and seminars across the DNCO Network region, including: • Product & experience development workshops • Marketing workshops • Other relevant themes, including those based on feedback from stakeholders (esp Local Government) regarding their interests and needs, eg content development or digital marketing *This initiative includes promotion of DNSW seminars as well as arranging for capability-development workshops provided by external providers.* • Continue development of a regional School of Hospitality and Tourism Excellence Continue implementation of a 'Sharing Our Produce' or 'Power of Provenance' capability building and networking program	●		
		• Continued promotion of DNSW seminars and coordination of workshops to build the capability of the region across key topics relevant to tourism and economic development professionals • Encourage the development of agri-tourism centres of excellence within the Network • Continue implementation of a 'Sharing Our Produce' or 'Power of Provenance' capability building and networking program			●
4. Visitor research + Enhanced understanding of the contribution of tourism to local and regional economies	Enabling activities & governance	• Integrate key messages around the value of tourism and the visitor economy into presentations, seminars and other meetings with stakeholders • Make available and promote the DMP's research component to all stakeholders – see DMP Research Report in Appendix B	●		
		• Establish a framework for the collection of consistent and regular visitor data and reporting across the region and identify opportunities for cross-regional collaboration and funding of visitor research – this will require liaison with and involvement of DNSW and other organisations such as Tourism Research Australia (TRA) • Investigate opportunities for utilising new technology and methods of collecting and reporting visitor data. This involves greater utilisation of real time data with 'hot mapping' that assists predict behaviours and trends		●	
		• Develop a framework for the delivery of economic analysis of the value of the visitor economy at the local level – this should be developed in collaboration with the JOCs and Councils and should leverage the work being done or completed by the NSW Government for the Regional Economic Development Strategies (REDS)			●

Priority	Category	Action	Timeframe (Months)		
			0-12	12-24	24+
5. Strengthening demand & visitor services	Marketing & visitor services	• Identify existing 'best of the best' Country & Outback experiences and products for promotion through 3rd party channels, such as DNSW and Tourism Australia – identify and assist address content gaps & requirements based on target markets and strategic themes (including in alignment with the key themes of the 3rd party distribution channels) • Develop and promote Content Strategy guidelines with advice from DNSW to support JOCs, Councils, touring route committees & private sector – to align with strategic themes from the DMP and content needs for multi-channel distribution • Continue working with NSW Government, JOCs and councils on signage infrastructure across the Network. This should include enhanced interpretation and directional signage, in particular to facilitate an improved TASAC process	●		

		• Lead the development of a Content Strategy for promotion of cross-regional experiences, including but not limited to:
		   • Experientially-led Touring Routes
		   • Aboriginal Cultural Tourism
		   • Night Skies Initiative
		   • Unearth the Fossils Initiative
		   • Nature-based Experiences
		   • Food & Drink
		
		• Promote Marketing Strategy guidelines that would support JOCs, Councils & private sector – opportunity to engage marketing agency to provide a simple template that integrates relevant research and consumer insights – buy-in required from individual organisations interested or requiring support
		
		• In collaboration with DNSW and other organisations eg Tourism Australia, assist in coordination of travel media famils across the region or to specific areas within the DNCO region, especially to improve awareness of signature experiences
		
		• Develop a local campaign framework for use by local Councils to build awareness of local tourism potential with residents and businesses across the Network (eg similar to Destination Melbourne's Discover your own Backyard (DYOB) campaign)
				●	

		• Continue to update and promote the use of content and marketing guidelines and resource hub for access by industry and other stakeholders across the DNCO region • Continue to assist in coordination of travel media famils across the region or to specific areas within the DNCO region • Assist with or advocate for the implementation of the local campaign framework (eg DYOB)			●

Priority	Category	Action	Timeframe (Months)		
			0-12	12-24	24+
6. Leisure & Business Events	Experience Development + Marketing & visitor services	• Develop a Network-wide events and festivals calendar, including but not limited to seasonal, nature or cultural-based events • Work with DNSW to create a single upload system for online and digital distribution of event information • Liaise with DNSW and other partners to enhance promotion of the events calendar through 3rd party channels, including DNSW & Tourism Australia	●		
		• Identify growth opportunities for existing events and development of new events - prioritise opportunities for submission to the DNSW Regional Flagship Events Program and event incubator programs • Identify growth opportunities for existing business events and the development of new conferencing opportunities - prioritise opportunities for submission to the DNSW Regional Conferencing Development Pilot Grants Program		●	
		• Work with key stakeholders to develop and advocate for submissions to: • DNSW Regional Conferencing Development Pilot Grants Program • DNSW Regional Flagship Events Program • Other potential funding sources, including event incubator programs			●
7. Delivering on supply – Export-ready wine packages and experiences	Experience development – game changing initiative	• Engage with the industry to identify specific opportunities for capability-development (export-ready products, experiences and cellar-door) with key organisations such as DNSW, ATEC, Ultimate Winery Experiences Australia Collective and the Winemakers Federation of Australia	●		
		• Assist with the continuing development of export-ready and commissionable packages and experiences, in particular for the international market - involves collaboration and promotion of export-ready programs of DNSW and ATEC		●	
		• Assist with the continuing development of export-ready and commissionable packages and experiences, in particular for the international market – involves collaboration and promotion of export-ready programs of DNSW and ATEC			●

Priority	Category	Action	Timeframe (Months)		
			0-12	12-24	24+
8. Delivering on supply – Aboriginal Cultural Tourism Initiative	Experience development + Enabling activities & governance – game changing initiative	• Identify existing experiences and products for inclusion in a Network-wide Aboriginal Cultural Tourism Initiative • Coordinate collaboration across the Network region with key stakeholders and providers of Aboriginal Cultural Tourism experiences – includes NATOC, LALCs, organisations such as MPREC, Aboriginal communities and private operators, among others • Identify opportunities for capability development, including in partnership with organisations such as DNSW, NATOC and NPWS. This should include initiating mentoring and longer-term (ongoing) capability-development programs linked to employment pathways as a high priority • Identify opportunities for experience development, including through grant funding to develop master plans and undertake feasibility studies – refer Signature Experiences Development Process	●		
		• Assist coordinate content needs to commence promotion of the products and experiences that contribute to the Aboriginal Cultural Tourism Initiative • Lead implementation of opportunities for capability development, including in partnership with organisations such as DNSW, NATOC and NPWS – continuation of the mentoring and capability programs linked to employment pathways • Consider the employment within DNCO of an Aboriginal-identified position to strengthen experience development initiatives as well as an Aboriginal-identified internship role • Assist with and advocate for grant funding to develop master plans and undertake feasibility studies for high-priority or 'ready-to-implement' concepts		●	
		• Assist with the continuing development of export-ready and commissionable packages and experiences, in particular for the international market – involves collaboration and liaison with organisations such as DNSW, NATOC and ATEC • Continuation of the mentoring and capability programs linked to employment pathways as well as the DNCO internship program			●

Priority	Category	Action	Timeframe (Months)		
			0-12	12-24	24+
9. Delivering on supply – Unearth the Fossils Initiative	Experience development – game changing initiative	• Identify existing precincts, experiences and products for inclusion in a Network-wide Unearth the Fossils Initiative • Identify partners and coordinate collaboration across the Network region to develop a clear vision and high-level concept for a region-wide Unearth the Fossils Initiative, which should also consider the strong linkages across boundaries (eg Mungo National Park and into Queensland) – this will need to include other key stakeholders outside of the DNCO region such as the Australian Museum or relevant national institutions • Assist coordinate content needs to build support for the Unearth the Fossils Initiative based on existing experiences and precincts	●		
		• Identify opportunities for grant funding and a lead partner (eg a highly experienced precinct, local government or JOC project manager) to contract and manage an expert to develop a comprehensive Experience Development Strategy, business case and feasibility study (refer Signature Experiences Development Process). *This will identify precinct-level master planning requirements, the market positioning and attributes that would underpin the visitor experience at a whole-of-region scale as well as opportunities for creating new products or experiences.*		●	
		• Continue to advocate for and assist where possible with the development of the Unearth the Fossils Initiative • Ensure linkages between this initiative and other strategic themes, signature and supporting experiences, in particular the touring routes, to enhance visitors' satisfaction and overall experience			●

Priority	Category	Action	Timeframe (Months)		
			0-12	12-24	24+
10. Delivering on supply – Night Skies Initiative	Experience development – game changing initiative	• Identify existing precincts, places, experiences and products for inclusion in a Network-wide Night Skies Initiative • Identify partners and coordinate collaboration across the Network region to develop a clear vision and high-level concept for a region-wide Night Skies Initiative, which should also involve, among other things: 　• Potential linkages across boundaries (Network, State or National) 　• Opportunities with NPWS (eg Dark Sky Park) and private sector operators 　• Cultural activities and experiences – especially related to the Aboriginal Cultural Tourism Initiative 　• Dedicated astronomy institutions or organisations, including observatories and universities across NSW (and beyond) • Assist coordinate content needs to build support for the Night Skies Initiative based on existing experiences and precincts, including through linkages with other strategic themes	●		
		• Identify opportunities for grant funding and a lead partner (including a highly-experienced project manager) to contract and manage an expert to develop a comprehensive Experience Development Strategy, business case and feasibility study (refer Signature Experiences Development Process). *This will identify precinct-level master planning requirements, the market positioning and attributes that would underpin the visitor experience at a whole-of-region scale as well as opportunities for creating new products or experiences.*		●	
		• Continue to advocate for and assist where possible with the development of the Night Skies Initiative • Ensure linkages between this initiative and other strategic themes, signature and supporting experiences, in particular the touring routes, to enhance visitors' satisfaction and overall experience			●

Priority	Category	Action	Timeframe (Months)		
			0-12	12-24	24+
11. Delivering on supply – Experientially-led Touring Routes	Experience development – game changing initiative	• Initiate a program to enhance and promote the region's touring routes, including broadening the offer and appeal of existing touring routes – work directly with touring route coordination groups, such as the Newell Highway Promotions Committee (NHPC) to: • Raise awareness of and process for strengthening promotion of the existing experiential offering of each touring route, including through 3rd party distribution channels (eg DNSW, CIAA and Roads and Motorists' Associations, such as NRMA, RAA and RACV) • Create compelling content to attract new markets and raise awareness and the perception of the offering • Review the online and digital presence of each touring route to improve the customer journey and search engine optimisation (SEO)	●		
		• In collaboration with local government and touring route committees, identify: • Challenges to existing touring routes, such as signage, road linkages or maintenance issues to be addressed, and • Opportunities for product and experience development, in particular in line with the DMP's strategic themes, including better linkages with supporting experiences • Advocate for improvements to or influence NSW Government and local government decisions on initiatives that would support touring routes		●	
		• Continue liaison with the touring route committees to implement best practice, share visitor economy insights and involve them in capability and experience-development programs (relevant to each stakeholder)			●

Priority	Category	Action	Timeframe (Months)		
			0-12	12-24	24+
12. Delivering on supply – Destination Management + Product & Experience Development	Experience development – includes game changing initiatives	• Encourage and promote a Signature Experiences Development Process, which provides a credible pathway from concept to implementation including development of a business case and feasibility analysis to encourage investment • Undertake a Network-wide audit of products, experiences and events, mapped against seasonal offer and DMP strategic themes to identify gaps and opportunities for strengthening existing or creating new experiences – this should inform advocacy priorities and support for grant submissions • Advocate for improvements to or influence NSW Government decisions on transport and infrastructure initiatives that would support the visitor economy	●		

		• Encourage and facilitate development of signature and supporting experiences relating to (stage 1):
		   • Exploring our Nature
		   • Revealing our Heritage
		   • Wine Lovers & Foodie Finds - including food and drink supporting experiences
		   • Art and Culture supporting experiences
		• Continue to advocate for improvements to or influence NSW Government decisions on transport and infrastructure initiatives that would support the visitor economy
				●	

		• Encourage and facilitate development of signature and supporting experiences relating to (stage 1):
		   • Little Places, Big Stories
		   • Wine Lovers & Foodie Finds, focusing on Agri-tourism initiatives
		   • Private Charters & Flying Tours Initiative (game-changing initiative)
		• Continue to advocate for improvements to or influence NSW Government decisions on transport and infrastructure initiatives that would support the visitor economy
					●

DNCO DMP DETAILED ACTION PLAN

The DMP Detailed Action Plan is a practical and simple plan that enables the destination to get on with the job and monitor and report on implementation. This underpins the sustainability of the plan into the future and ensures it is perceived as an active part of delivering results for the visitor economy. It is designed to facilitate easy reporting on activities undertaken and outcomes achieved by the DNCO. It also highlights indicative resource requirements, which in some cases relate to the involvement of stakeholders or industry as well as where additional resources may be required to achieve the outcome.

The actions included in the tables below are only a summary of the recommendations included in the DMP. Further details relating to each action is contained within the DMP.

The Detailed Action Plan is accompanied by a high priority program of activities for the DNCO with an assigned timeframe for commencing or undertaking the action. This is incorporated into the DMP.

The DMP is a long-term planning guide for the DNCO. However, resources to implement actions are not necessarily identified or secured at this stage. As a result, the timeframes recognise and prioritise those actions that would deliver the most significant outcomes for the visitor economy of Country and Outback NSW at this time.

As noted above, the resourcing or cost of all actions is not necessarily the sole responsibility of the DNCO. Some actions require more detailed investigation and the preparation of business cases to seek funding from either the industry or Government, including the NSW Government and/or the Commonwealth Government. A key role that the DNCO would play in such cases is to advocate for and facilitate access to appropriate funding sources such as grants programs. Likewise, some initiatives, such as capability-development programs may require participants from across the DNCO Network to contribute a small fee to assist enable the delivery of the program. However, the DNCO would play an important role in program coordination, identification of key themes or elements and communication of upcoming opportunities.

Key considerations of the Action Plan include:

1. Mix between 'quick wins' and longer-term outcomes that are:
   - Actionable
   - Relevant
   - Leverage existing strengths and key initiatives

2. Actions relate to:
   - Table 1 – Enabling activities and governance, including planning, stakeholder relationships and industry capacity
   - Table 2 – Delivering on supply, covering experience development, management and infrastructure
   - Table 3 – Strengthening demand & strategic communication, including marketing and visitor services

3. Clearly assigns:

- Priority for implementation – timeframe to commence the action:
    - Ongoing (O) – an immediate priority or action already commenced or completed;
    - High (H) – within 0 – 12 months;
    - Medium (M) – within 12 – 24 months; or
    - Low (L) – beyond 24 months
- Category:
    - Governance
    - Advocacy
    - Stakeholder/Community Engagement
    - Capability Development
    - Partnerships
    - Marketing & Visitor Services (M&VS)
    - Experience Development
    - Strategic Planning &/or Policy (SP&P)
- Indicative resource requirements, including highlighting where additional resources would need to be sourced to achieve the outcome
- Responsibility: DNCO, Government, industry or through collaboration and partnerships

ACRONYMS USED WITHIN THE DETAILED ACTION PLAN TABLES

Acronym	Description
ATEC	Australian Tourism Export Council
DNCO	Destination Network Country & Outback NSW
DNSW	Destination NSW
DPC	NSW Department of Premier and Cabinet (in particular, relating to DPC's role in regional program coordination via the Office of the Regional Infrastructure Coordinator and Centre for Economic and Regional Development)
GC	Priority links to an identified potential Game-Changing (GC) initiative or project within the DMP
JOC	Joint Organisation of Councils
LALC	Local Aboriginal Land Councils
LG	Local Government (ie Councils)
LTO	Local Tourism Organisations
NATOC	NSW Aboriginal Tour Operators Council (industry association)
PIO	Peak Industry Organisations (typically membership-based and industry-focused not-for-profit associations)
RDA	Regional Development Australia committees
SGA	NSW State Government Agencies, including but not limited to Transport for NSW, Industry NSW, TAFE NSW and the NSW Departments of Education and Planning & Environment, among many others
TASAC	Tourist Attraction Signposting Assessment Committee (NSW Government committee)
TRA	Tourism Research Australia (Commonwealth Government agency)
WFA	Winemakers Federation of Australia

TABLE 1 – ENABLING ACTIVITIES & GOVERNANCE

REF	PRIORITY	ACTION	CATEGORY (may include more than one)	INDICATIVE RESOURCE REQUIREMENTS	RESPONSIBILITY
1		ENABLING ACTIVITIES & GOVERNANCE			
1.1	O	Establish and communicate a robust governance framework for Destination Country and Outback NSW	Governance	Within existing budget allocation	DNCO
1.2	O	Identify key measures of success for reporting on the implementation and performance of key initiatives	Governance	Within existing budget allocation	DNCO
1.3	H	Provide an annual report for DNSW, stakeholders and industry	Governance	Within existing budget allocation	DNCO
1.4	O	Develop and implement a Stakeholder Engagement Strategy to build relationships and strengthen communication with industry and other key stakeholders across the region. It requires a strategic and practical communication action plan (relates to Action 4.1)	Governance + Stakeholder Engagement	Within existing budget allocation	DNCO
1.5	O – H	Work with local government, industry and other stakeholders to build the capability of the visitor economy sector	Stakeholder Engagement + Capability Development	Develop with buy-in from LG & industry	DNCO with DNSW, other SGA, JOCs, LG + industry
1.6	H – M	Actively encourage greater collaboration between the DNCO, stakeholders (including JOCs, RDAs and local government) and NSW Government agencies. This involves cross-boundary collaboration between Destination Networks and with neighbouring States	Advocacy, Stakeholder Engagement + Partnerships	Within existing budget allocation	DNCO with DNSW, DPC, ROCs & RDAs
1.7	H	Advocate on behalf of the region for State-wide or national infrastructure projects that support the visitor economy. This should include transport as well as access for commercial and charter flights as well as telecommunications and education, among other things	Advocacy, Stakeholder Engagement + Partnerships	Within existing budget allocation	DNCO with DPC, ROCs & RDAs
1.8	O	Continue working with NSW Government, JOCs and councils on signage infrastructure across the Network. This should include enhanced directional signage, in particular to address ongoing challenges with the TASAC process.	Advocacy, SP&P + M&VS	Within existing budget allocation	DNCO with DNSW, TASAC, JOCs + LG
1.9	M	Develop a framework for the delivery of economic analysis of the value of the visitor economy at the local level	Capability Development	Implement with JOCs & LG buy-in	DNCO with DNSW, JOCs, RDAs & LG
1.10	O	Audit current funding gaps and opportunities across the Network to inform advocacy priorities and support for grant submissions	Governance	Within existing budget allocation	DNCO with DNSW + SGA
1.11	O	Develop a guide to support stakeholders apply for grants and develop partnerships with NSW Government and other organisations (including RDAs) to enhance funding of key initiatives, especially those relating to visitor research, experience development, infrastructure, marketing and content	Governance + Advocacy	Within existing budget allocation	DNCO with DNSW + SGA
1.12	O	Facilitate relationships with NSW Government to advocate for the regions to have a funding structure that supports and empowers the management and delivery of programs at the local level	Governance + Advocacy	Within existing budget allocation	DNCO with DNSW + SGA

REF	PRIORITY	ACTION	CATEGORY (may include more than one)	INDICATIVE RESOURCE REQUIREMENTS	RESPONSIBILITY
1.13	M	Lead the development of a Visitor Accommodation Strategy, in collaboration with JOCs and councils and in line with the NSW Accommodation Supply Plan identified as an action in the NSW Visitor Economy Industry Action Plan. Includes undertaking an audit and review the current visitor accommodation situation across the Network to identify gaps, opportunities and barriers (links to Action 1.14)	Advocacy, Stakeholder Engagement + Capability Development + SP&P	Undertake the review within existing budget allocation. Seek support from DNSW, SGA or JOCs to employ independent expertise to develop the Strategy	DNCO with DNSW, SGA, JOCs, LG + industry
1.14	M	Lead the development of a Sharing Economy Strategy in collaboration with DNSW, SGA, JOCs and local councils (links to Action 1.13)	Advocacy, Stakeholder Engagement + Capability Development + SP&P	Seek support from DNSW, SGA or JOCs to employ independent expertise to develop the Strategy	DNCO with DNSW, SGA, JOCs, LG + industry
1.15	H – M	Investigate opportunities, advocate for improved use of and share best practice relating to new technologies, including for visitor data collection, interpretation and to support visitor services (etc)	Advocacy + Capability Development	Within existing budget allocation	DNCO

TABLE 2 – DELIVERING ON SUPPLY

REF	PRIORITY	ACTION	CATEGORY (may include more than one)	INDICATIVE RESOURCE REQUIREMENTS	RESPONSIBILITY
2		DELIVERING ON SUPPLY			
2.1	O	Lead a network-wide audit of products, experiences and events, mapped against seasonal offer and DMP strategic themes to identify high-level gaps and opportunities for experience and product development to grow visitation as well as collaborative opportunities to address issues and challenges around funding, competition, content production, etc	Experience Development + Capability Development	Within existing budget allocation	DNCO
2.2	H (GC)	Aboriginal cultural tourism initiative – DNCO to lead a project in partnership with JOCs, RDAs, LALCs, NATOC, Aboriginal communities, NPWS and other key stakeholders to develop and implement a 3 – 5 year Aboriginal cultural tourism and capability building program	Experience Development + SP&P + Stakeholder/ Community Engagement + Capability Development	Initial review and audit of current offering within existing budget allocation - seek funding for Strategy development ~ $60,000	DNCO with DNSW, LALCs, NATOC, JOCs, RDAs + NPWS

REF	PRIORITY	ACTION	CATEGORY (may include more than one)	INDICATIVE RESOURCE REQUIREMENTS	RESPONSIBILITY
2.3	H – M	Consider the employment of an Aboriginal-identified position within DNCO to strengthen experience development initiatives as well as an Aboriginal-identified internship role to inspire the next generation of Aboriginal adults to become involved in and benefit from the visitor economy	Experience Development + Capacity Development	TBD	DNCO
2.4	O – M	Food and drink capacity development program: • Foster the development of a regional School of Hospitality and Tourism Excellence as a joint venture with NSW TAFE to develop a workforce skills base to support the vibrant and continuously growing hospitality industry • Encourage the development of agri-tourism centres of excellence, for example with Charles Sturt University and the local hospitality and agricultural sector • Initiate a 'Sharing Our Produce' or 'Power of Provenance' capability building and networking program involving producers and the hospitality sector that can be rolled out across the region	Advocacy, Experience Development + Capacity Development	Within existing budget allocation	DNCO with industry, education institutions, JOCs + LG
2.5	H – M	Lead development, in collaboration with JOCs, RDAs, relevant councils, and local agri-business and operators of a Wine Lovers and Foodie Finds (produce, food and drink) Experience Development Initiative	Experience Development	Within existing budget allocation	DNCO, industry, PIO, RDAs, JOCs + LG
2.6	H (GC)	Work specifically with places such as Mudgee and Orange on the identification and development of export-ready, commissionable wine packages and experiences targeting the international (and growing domestic) wine tourism market – key potential partners include DNSW, Australian Tourism Export Council (ATEC), the Ultimate Winery Experiences Australia Collective and the Winemakers Federation of Australia (WFA)	Advocacy + Experience Development	Within existing budget allocation	DNCO with LG, DNSW, industry, PIO, ATEC + WFA
2.7	O – H (GC)	Develop, in collaboration with JOCs and tourism managers, a Night Skies Experience Development Initiative	Advocacy + Experience Development	Within existing budget allocation. Seek funding support to develop strategy	DNCO with DNSW, JOCs, LG + industry
2.8	H (GC)	Develop a Private Charters & Flying Tours Initiative	Advocacy + Experience Development	Within existing budget allocation. Seek funding support to develop strategy	DNCO with DNSW, SGA, RDAs, JOCs, LG + industry
2.9	O – H (GC)	Initiate a program to enhance and promote the region's touring routes. This action involves building capabilities to broaden the offer and appeal of existing and new touring routes. Involve the Region's Touring Route Committees	Advocacy, Experience Development, M&VS + Stakeholder Engagement	Within existing budget allocation	DNCO with DNSW, industry, JOCs, LG + Touring Route Committees
2.10	H – M	Facilitate a Nature-Based Experience Development Initiative with local government and organisations such as NPWS to audit their nature-based assets and experiences and identify, develop and promote nature-based experiences	Advocacy, Experience Development, M&VS + Stakeholder Engagement	Within existing budget allocation	DNCO with DNSW, industry, JOCs, LG + NPWS

REF	PRIORITY	ACTION	CATEGORY (may include more than one)	INDICATIVE RESOURCE REQUIREMENTS	RESPONSIBILITY
2.11	H – M	Lead a program 'Bringing Heritage to Life' in collaboration with the regions, local government and other key stakeholders such as museums and heritage institutions	Advocacy, Experience Development, M&VS + Stakeholder Engagement	Within existing budget allocation	DNCO with DNSW, industry, JOCs, LG + heritage partners
2.12	O – H (GC)	Implement the Unearth the Fossils Initiative in collaboration with relevant JOCs, RDAs, councils, industry partners and stakeholders such as the Australian Museum	Advocacy, Experience Development, M&VS + Stakeholder Engagement	Initial review and audit of current offering within existing budget allocation - seek industry/ Gov't funding for Initiative development by an independent expert ~ $60,000	DNCO with DNSW, industry, JOCs, LG + fossil/ heritage partners
2.13	M	Investigate regional opportunities (Little Places, Big Stories strategic theme) to leverage smaller town experiences and events to drive seasonal, longer-stay visits through working with local government and community-based organisations	Advocacy, Experience Development, M&VS + Stakeholder/ Community Engagement	Initial review and audit of current offering within existing budget allocation	DNCO with JOCs + LG
2.14	O – H	Lead the development of a Business and Leisure Events Strategy for Country and Outback NSW, in collaboration with JOCs, councils and other stakeholders	Experience Development, M&VS + Stakeholder/ Community Engagement	Initial review and audit of current offering within existing budget allocation	DNCO with DNSW, industry, JOCs + LG
2.15	H	Apply the findings of the Strategy (Action 2.14) to identify and advocate for growth opportunities and prioritise funding submissions to: • Destination NSW Regional Flagship Events Program and other funding sources • Destination NSW Regional Conferencing Development Pilot Grants Program and other funding sources	Governance, Advocacy + Experience Development	Within existing resources	DNCO with DNSW, industry, JOCs + LG
2.16	O – H	Deliver a Network-wide events and festivals calendar for Country and Outback NSW and work with DNSW to implement a simple, single process for uploading events for online and digital information distribution	Governance, Advocacy + Experience Development	Within existing resources	DNCO with DNSW, industry, JOCs + LG
2.17	M – L	Leverage the positioning of the DNCO by supporting and promoting sporting events that highlight the appeal of the region	Advocacy, Experience Development + M&VS	Within existing resources	DNCO with DNSW, industry, JOCs + LG
2.18	M – L	Support sports that already have strong community engagement to attract and host regional, State or national sporting events; this will be of particular interest to the larger centres across the region, eg. Dubbo and Tamworth, and could include facilitation of funding or in-kind contributions towards 'hosting bids' to sporting associations	Advocacy, Experience Development + M&VS	Within existing resources	DNCO with DNSW, industry, JOCs + LG

REF	PRIORITY	ACTION	CATEGORY (may include more than one)	INDICATIVE RESOURCE REQUIREMENTS	RESPONSIBILITY
2.19	M – L	Support the development of itineraries and the promotion of experiences and activities across the Network that encourage sporting event participants to bring friends or family with them and/or extend their length of stay	Advocacy, Experience Development + M&VS	Within existing resources	DNCO with industry, JOCs + LG
2.20	H – M	Encourage and promote a Signature Experiences Developmental Process – the DMP's game-changer and signature experience initiatives are high-level, strategic programs designed to boost the Network's visitor economy through capacity building and experience development. As a result, each one requires a robust and credible pathway from concept to implementation, including development of a business case and feasibility analysis to encourage investment	Advocacy, Experience Development, Stakeholder Engagement + Capability Development	Within existing resources	DNCO with industry, SGA + PIO

DMP ACTION PLAN – TABLE 3
STRENGTHENING DEMAND & STRATEGIC COMMUNICATION

REF	PRIORITY	ACTION	CATEGORY (may include more than one)	INDICATIVE RESOURCE REQUIREMENTS	RESPONSIBILITY
3		STRENGTHENING DEMAND			
3.1	O	Endorse the DMP ambition, positioning and strategic themes as the overarching strategic approach for the DNCO	Governance + M&VS	Within existing budget allocation	DNCO
3.2	H – M	Establish a framework for the collection of consistent and regular visitor data and reporting across the region and identify opportunities for cross-regional collaboration and funding of visitor research - this will require liaison with and involvement of DNSW and other organisations such as Tourism Research Australia (TRA)	Advocacy, Capability Development + M&VS	Within existing budget allocation	DNCO, DNSW, LG + LTOs
3.3	O – H	Develop a Visitor Services Strategy. As a first step, in collaboration with JOCs, undertake a review of visitor services (multi-channel) across the Network	Advocacy, Capability Development, SP&P + M&VS	Undertake the review within existing budget allocation. Approx. $60,000 to employ professional expertise to develop the Strategy.	DNCO with industry, JOCs, LG + LTOs
3.4	O – H	Develop a Content Strategy and guidelines to assist local areas and stakeholders identify, test and create content that is experience-led and based on the DMP strategic themes and seasonality, for multi-channel distribution, including through third-party and partner organisations such as DNSW and Tourism Australia	Advocacy, Capability Development + M&VS	Within existing budget allocation	DNCO with DNSW, industry, JOCs, LG + LTOs
3.5	O – H	Develop an Education and Training Module & Pathway for all levels of staff and personnel engaged in the Hospitality industry, including owner operators, managers and customer service frontline staff	Capability Development + M&VS	Within existing budget allocation	DNCO with JOCs, LG + LTOs

REF	PRIORITY	ACTION	CATEGORY (may include more than one)	INDICATIVE RESOURCE REQUIREMENTS	RESPONSIBILITY
3.6	H – M	Develop a Network-wide Tourism Marketing Capacity Building Program to be delivered through workshops and training in region over the next 12-18 months	Capability Development + M&VS	Within existing budget allocation	DNCO with JOCs, LG + LTOs
3.7	M	Develop a guideline or template for 3-year Marketing Plans at a local-level (for use where required and appropriate based on the capability of each area, organisation or collaborative group such as touring route committees)	Capability Development + M&VS	Within existing budget allocation + involvement of & funding from JOCs &/or LG	DNCO with JOCs, LG + LTOs
3.8	H – M	Develop a local campaign program in collaboration with JOCs and local government, to build awareness of local tourism potential with residents and businesses across the Network. For example, a 'Discover Your Own Backyard' (DYOB) styled campaign, which targets local communities who are hosts and key decision makers with regard to the Visiting Friends and Relatives (VFR) market	M&VS + Stakeholder/ Community Engagement	Within existing budget allocation + involvement of & funding from JOCs &/or LG	DNCO with JOCs, LG + LTOs
4.0		STRATEGIC COMMUNICATION			
4.1	O	Develop and implement a Stakeholder Engagement Strategy and communication plan as a high priority (see also Action 1.4). The plan will enable effective communication on governance and the role of the DNCO as well as identify the key audiences and channels for ongoing communication, including: • Attendance at regional meetings and workshops, including opportunities for the DNCO Board and staff to attend DNSW, JOC and local council meetings in region as well as hosting networking events • Websites (DNCO, DNSW, regional tourism websites, etc) • Social media platforms • Targeted email newsletters for stakeholders, business/ community • PR/media relations, in particular traditional and digital local media agencies/outlets	Advocacy, Governance + Stakeholder Engagement	Within existing budget allocation	DNCO
4.2	O	Activate communication tools to promote the ongoing role of the DNCO, implementation of the DMP and reporting on achievements	Advocacy, Governance + Stakeholder Engagement	Within existing budget allocation	DNCO
4.3	O	Develop and maintain a business or industry-focused website for DNCO to function as a communication hub/portal for the Network to DNSW and regional tourism websites. This should include opportunities to share best-practice, such as the use of new technology and promote new initiatives or infrastructure projects that support the visitor economy	Advocacy, Governance + Stakeholder Engagement	Within existing budget allocation	DNCO

APPENDIX B
RESEARCH & INSIGHTS
ANALYSIS REPORT

INTRODUCTION

The Destination Network Country and Outback NSW covers 62.1% of the State and 37 council areas as well as the Unincorporated Far West Region of NSW.

As part of the Destination Management Plan (DMP) development, there has been a high-level review undertaken of the available research and global tourism trends to assist in making evidence-based recommendations to drive the visitor economy for the region for the next 10 years.

The key sources of research utilised for this project are:

- Tourism Research Australia (TRA) – Funded by the Commonwealth and State and Territory Governments. The National and International Visitor Survey is amongst the largest and most comprehensive ongoing visitor research piece undertaken in the world.
- Skift – A global media and travel research platform. Many of Skift's clients are global travel companies or destination marketing organisations who purchase extensive research insights, including global tourism and travel trends. Companies such as Expedia, Booking.com, Tourism Australia, Brand USA, Hilton Hotel Group, Airbnb and many other major organisations utilise the expertise of Skift to inform their business and marketing strategies
- MyTravelResearch – utilising qualitative research developed by MyTravelResearch for Inland Tourism NSW
- ARTN - The Australian Regional Tourism Network commissioned DBM Consultants to undertake research to establish the Local Government spend on tourism across Australia (published in January 2017). The graphs indicate the total spend in NSW by local government outside of the metropolitan area and where local government is spending its money.

RESEARCH AND DATA HUBS OF DNCO

In order to ensure that the DMP recognises and acknowledges the diversity of the region, four 'research and data hubs' have been identified, as outlined in the diagram opposite.
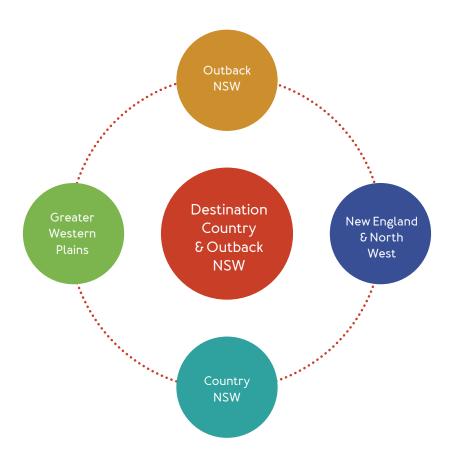However, these 'hubs' have 'soft boundaries', ensuring collaboration and enabling individual places to work with another hub as and when appropriate for specific target markets or strategic destination development or management.

It is critical that these hubs are not interpreted as marketing regions nor impose an LGA-cooperative model (which is essentially provided by the Joint Organisation of Councils).

These clusters are based on:

- Most appropriate economic clustering within the Destination Network to enable statistically relevant analysis of visitor research
- Way that visitors identify areas to travel to within the broader region and the most natural (but not exclusive) clustering of the visitor experience offering, and

- Relevance to and distance from the source market for each hub, noting that there are differences relating to their source and target markets.

RESEARCH AND DATA HUBS OF DNCO

DNCO Research and Data Hubs	No. of LGAs	Local Government Areas (LGAs)
Outback NSW	7	Broken Hill City Council, Bourke Shire Council, Bogan Shire Council, Brewarrina Shire Council, Central Darling Shire Council, Cobar Shire Council, Walgett Shire Council as well as the Unincorporated Far West Region of NSW
New England & North West	12	Armidale Regional Council, Tamworth Regional Council, Inverell Shire Council, Glen Innes Severn Council, Gwydir Shire Council, Moree Plains Council, Liverpool Plains Shire Council, Narrabri Shire Council, Gunnedah Shire Council, Tenterfield Shire Council, Uralla Shire Council, Walcha Council
Greater Western Plains	6	Dubbo Regional Council, Coonamble Shire Council, Narromine Shire Council, Gilgandra Shire Council, Warren Shire Council, Warrumbungle Shire Council
Country NSW	12	**South West NSW**, including Forbes Shire Council, Lachlan Shire Council, Parkes Shire Council and Weddin Shire Council
		Central West NSW, including Bathurst Regional Council, Blayney Shire Council, Cabonne Council, Cowra Council, Lithgow City Council, Mid-Western Regional Council, Oberon Council and Orange City Council

While there are distinct differences between each hub, there are also some underpinning similarities, strengths and opportunities that have informed the DMP.

It is critical that these hubs are not interpreted as marketing regions or impose an LGA-cooperative model (which is provided by the Joint Organisation of Councils).

HOW THE NVS & IVS DATA IS COLLECTED

NATIONAL VISITOR SURVEY

The National Visitor Survey (NVS) is a large-scale telephone survey that has been conducted continuously since January 1998. It is designed to measure domestic and outbound travel by Australian residents. The NVS is funded by the Commonwealth Government, and state and territory governments under the auspices of the Australian Standing Committee on Tourism (ASCOT).

NVS concepts and definitions are based on those developed by the United Nations World Tourism Organisation (UNWTO).

Results from the NVS are published quarterly and are freely available from the Tourism Research Australia website.

- NVS eligibility includes any Australian resident who is 15 years of age or more, and has lived in their current residence for at least three months.
- NVS interviews are distributed evenly across most days of the year (except for 12 public holidays), which means that the current annual quota of 120,000 interviews are completed at a steady rate of around 2,300 per week.
- Sample size and sample type across the time-series:
- 80,000 annual landline sample from 1998 through to 2004
- 120,000 annual landline sample from 2005 through to 2013
- 120,000 annual dual-frame sample continues from 2014 onwards, but with a 50:50 mobile/landline split through to the end of 2017.
- TRA plans to move to 60:40 mobile/landline sample split in 2018. Future increases in mobile sample share are likely, assuming the growth of mobile-only households continues.
- The types of trips collected by the NVS include overnight trips, day trips and outbound (international) trips, though some types of routine trips (such as same-day journeys to work) are excluded. Overnight or outbound trips of more than one calendar year in duration are also excluded.
- To ensure each respondent can accurately recall the details of any trips, information is only collected for recent trips. The respective recall periods are seven days for day trips, 28 days for domestic overnight trips, and three months for outbound trips.

INTERNATIONAL VISITOR SURVEY

The International Visitor Survey samples 40,000 departing, short-term international travellers aged 15 years and over who have been visiting Australia. The survey is conducted by Computer Assisted Personal Interviewing (CAPI) in the departure lounges of the eight major international airports: Sydney, Melbourne, Brisbane, Cairns, Perth, Adelaide, Darwin and the Gold Coast.

The IVS contains around 100 questions supported by 'show-cards' that are used to help the respondent answer sections including:

- Usual place of residence
- Repeat visitation
- Group tours
- Travel party
- Sources for obtaining information about Australia
- Purpose of visit and places visited
- Transportation and accommodation
- Activities
- Expenditure
- Demographics.

The survey design and management is the responsibility of the National Survey Section at Tourism Research Australia (TRA). The section works closely with the consultants, key stakeholders and industry to develop and maintain high data quality and relevant outputs.

Since 2004, the IVS has been surveying international visitors in four languages: English, Japanese, Mandarin and Korean. The total number of interviews conducted with residents of each country or region is distributed among airports by selecting monthly samples of departing flights and visitors on those flights to achieve acceptable sample sizes in various categories.

Survey results are weighted to data on international visitor numbers over the period, provided by the Department of Immigration and Citizenship (DIAC), with the assistance of the Australian Bureau of Statistics (ABS). The variables used in weighting the data are:

- Country of residence
- State of arrival
- Main purpose of journey
- Airport of departure
- Age and sex of visitor.

Overseas (visitor) arrivals and departures (OAD) data are also published monthly by the ABS (ABS catalogue no. 3401.0).

SAMPLE SIZE

- Between 2001 and 2004, interviews were conducted with approximately 20,000 international visitors aged 15 years and over as they were departing Australia.
- Since 1 January 2005, interviews have been conducted with 40,000 international visitors on an annual basis. The sample size was increased to enhance the estimates for smaller states, territories and regions.
- Increasing the sample size of the IVS by 100% has improved the reliability of survey estimates.

THE NETWORK REGION & REGIONAL NSW

As part of the overall analysis of the research there has been a review of the following, but not limited to:
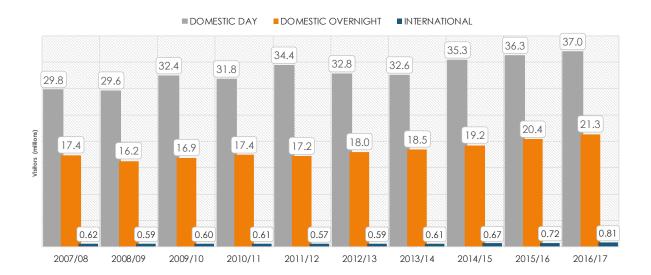
- The number of visitors to Regional NSW
- A summary of the visitor expenditure within the Destination Network Country & Outback region for the last 10 years
- Length of stay of domestic and international visitors within the Network region for last 10 years
- Overall visitor numbers to the region for the last 10 years (domestic day, domestic overnight and international visitors)
- Review of indexed trends for each Hub
- Predicted growth in touring market
- Growth in source markets
- Activity based trends

By including the overall visitor numbers to regional NSW, it provides an opportunity to understand how the DNCO region is tracking against the State given that the DNCO represents 61.2% of NSW land mass.

It is also important to look at the statistics over a longer period of time to gauge visitor trends, i.e visitor numbers, spend and the popularity of different activities.

REGIONAL NSW VISITOR OVERVIEW

This graph highlights the growth of visitor numbers to Regional NSW since 2008. There has been a noticeable growth of domestic day, domestic overnight visitors and international visitors to Regional NSW since 2012/13. However, it is also noted that growth in international is still extremely low and coming off a low base.

EXPENDITURE SUMMARY COUNTRY AND OUTBACK NETWORK

The table below is a summary of visitor expenditure within the network since 2008. The table shows that in total, the international visitor spends more money overall (because they stay longer), but less on a per night basis. The domestic day and overnight market are the biggest markets in visitor numbers for the network. The international market is coming off a much lower base compared to the domestic market.

TOTALS	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	CAGR*
Domestic Overnight Visitors ($ million)	$1,200	$1,200	$1,270	$1,376	$1,438	$1,478	$1,377	$1,492	$1,609	$1,849	5%
Domestic Day Visitors ($ million)	$546	$546	$557	$552	$590	$638	$698	$698	$602	$628	2%
International Overnight Visitors ($ million)	$62	$62	$67	$66	$83	$104	$93	$91	$103	$103	5.80%
TOTAL ($m)	$1,808	$1,808	$1,895	$1,994	$2,110	$2,219	$2,168	$2,280	$2,314	$2,581	4.00%
$ PER VISIT	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	CAGR*
Domestic Overnight	$393	$393	$387	$434	$415	$431	$415	$410	$428	$434	1%
Domestic Day	$116	$116	$116	$123	$122	$146	$142	$127	$122	$115	0%
International Overnight	$692	$692	$743	$788	$964	$1,307	$1,255	$1,147	$1,241	$1,145	5.80%
$ PER NIGHT	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	CAGR*
Domestic Overnight	$124	$124	$122	$143	$136	$133	$143	$135	$138	$143	2%
International Overnight	$55	$55	$55	$51	$47	$59	$47	$50	$47	$59	1%
										* Compounding annual rate of growth	

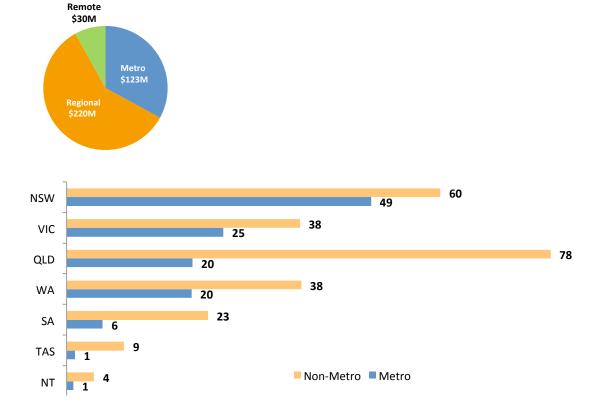## COUNTRY AND OUTBACK NETWORK REGIONAL NSW VISITOR OVERVIEW

The table below demonstrates that the average length of stay for the domestic overnight visitor has not changed over the last 10 years, and the international visitor is staying longer. However, the international visitor also includes those travelling from overseas who are here on a 457 visa. This has skewed the numbers as the international market travelling on a 457 visa have different motivations for visiting and staying in the region for a longer period of time, i.e. work as opposed to holidaying within that destination.

TOTALS	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	CAGR*
Domestic	3.2	3.2	3.2	3	3	3.3	2.9	3	3.1	3	-0.50%
International	12.7	12.7	13.5	15.5	20.7	22.2	26.6	22.9	26.6	19.5	4.90%
											* Compounding annual rate of growth

TWO THIRDS OF LOCAL GOVERNMENT SPENDING ON TOURISM WAS UNDERTAKEN BY COUNCILS LOCATED IN REGIONAL AND REMOTE AREAS.

Councils located in regional Australia indicated that in 2015/16 they spent $220M on operation of visitor information centres, events and festivals and the promotion, marketing and development of tourism, with $30M being spent by Councils located in Remote Areas.

In NSW, 55% ($60M) of tourism spending was undertaken by Councils located outside the Sydney metropolitan area while 60% of spending in the State of Victoria was from Councils located in the regions. The proportion of regional spending was much higher in the smaller States/Territories.
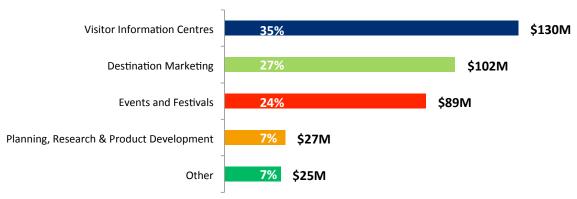

Source: ARTN research 2017

TYPE OF TOURISM SPENDING

35 cents of every dollar spent went to operating visitor information centres

Local Government in Australia spent an estimated $130M on operating visitor information centres in 2015/16. A further $102M was spent on destination marketing, which includes marketing and promotion staff and marketing materials such as maps, brochures, websites, advertising, social media and signage. In 2015/16 $89M was spent on local events and festivals.
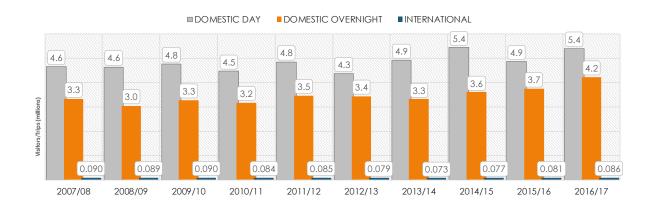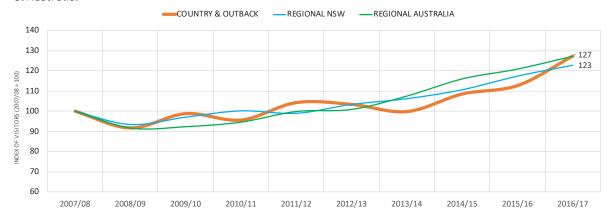
Local Government in Australia spent an estimated $130M on operating visitor information centres in 2015/16. A further $102M was spent on destination marketing, which includes marketing and promotion staff and marketing materials such as maps, brochures, websites, advertising, social media and signage. In 2015/16 $89M was spent on local events and festivals.

Category		Amount
Visitor Information Centres	35%	$130M
Destination Marketing	27%	$102M
Events and Festivals	24%	$89M
Planning, Research & Product Development	7%	$27M
Other	7%	$25M

Source: ARTN research 2017

COUNTRY & OUTBACK VISITOR OVERVIEW

Overall visitors numbers to the Network Region for the last 10 years have grown. Domestic day visitors are the largest market for the Network, however this is very much driven by destinations closer to larger population areas. For example, regions such as Orange, Bathurst and Mudgee have seen an increase in day visitors because of their geographical proximity to each other and Sydney as a key source market, along with other larger population centres such as Dubbo and the Blue Mountains.

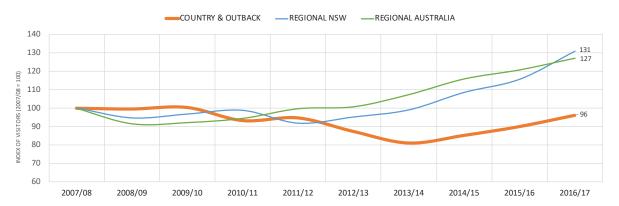|	DOMESTIC DAY	DOMESTIC OVERNIGHT	INTERNATIONAL
2007/08	4.6	3.3	0.090
2008/09	4.6	3.0	0.089
2009/10	4.8	3.3	0.090
2010/11	4.5	3.2	0.084
2011/12	4.8	3.5	0.085
2012/13	4.3	3.4	0.079
2013/14	4.9	3.3	0.073
2014/15	5.4	3.6	0.077
2015/16	4.9	3.7	0.081
2016/17	5.4	4.2	0.086

Visitors/Trips (millions)

DOMESTIC OVERNIGHT VISITOR PERFORMANCE

This indexed graph shows that the Network Region has seen a 27% increase in overnight visitors in the last 10 years. However, the growth has also been trending upwards since 2013/14 across Regional NSW and Regional Australia.
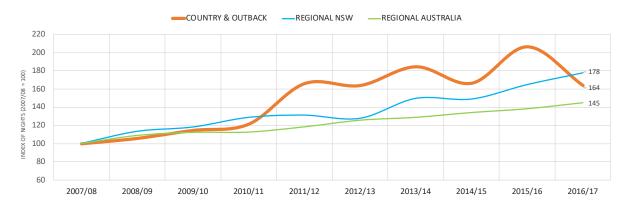

INTERNATIONAL VISITOR PERFORMANCE

This indexed graph shows there has been a 4% decline (-4%) in international visitors to the Network Region. DNCO is performing significantly lower than Regional NSW and Regional Australia.

INTERNATIONAL NIGHTS PERFORMANCE
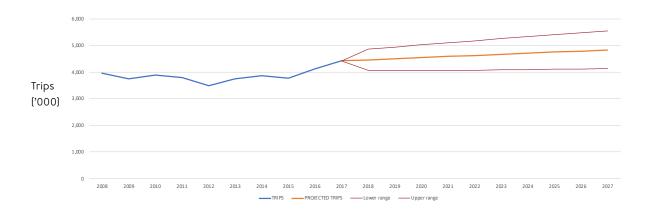
The international nights performance for the Network was outperforming Regional NSW and Regional Australia until 2016/17. Since then, there has been a considerable decrease in international visitor nights in the Network Region. This could be an effect of the 457 visa between 2010 – 2016, with visa changes in 2015 prompting the steep decline.

PROJECTED GROWTH IN DOMESTIC OVERNIGHT INTRASTATE SELF DRIVE TRIPS EX-SYDNEY
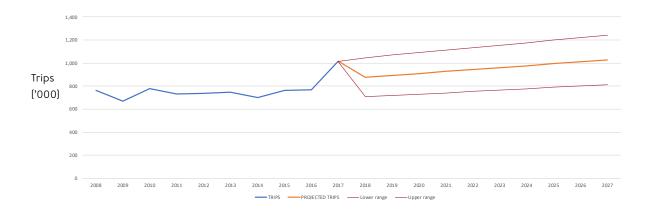
These projections are based on 10 years of data ending June 2017 and have been generated using Microsoft Excel's 'forecast' function. This function uses a method called 'exponential triple smoothing' (ETS). Whilst by no means a substitute for a sophisticated forecasting exercise, it does provide an indication of potential market size in the future, and upper and lower limits of what this may be. As the same method has been applied to a number of markets (using the same data source), it also provides a comparison of possible market size.

The chart above demonstrates that there is a definitely opportunity for growth out of the key source market of Sydney to NSW regions. The worst case scenario would be that the Sydney market does not grow beyond 2016 levels. However, the trend is more likely to continue its growth, particularly given the projected increase of the Sydney population to 2027.
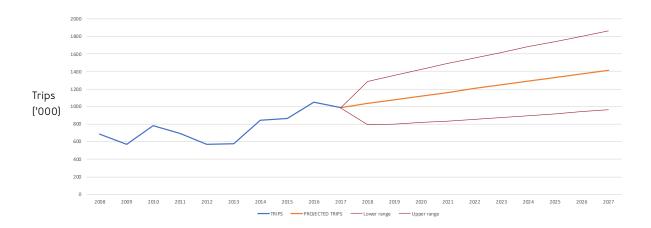

PROJECTED GROWTH IN DOMESTIC OVERNIGHT INTERSTATE SELF DRIVE TRIPS EX-MELBOURNE

As with the Sydney market, there is projected growth coming from the Melbourne market. However, the numbers for interstate travel from the Melbourne market are significantly less than those for Sydney intrastate overnight travel. The worst cast scenario indicates that growth will remain steady at the 2014 levels, which means little if any increase.

PROJECTED GROWTH IN DOMESTIC OVERNIGHT INTERSTATE SELF DRIVE TRIPS EX-BRISBANE

The Brisbane market is set to grow and, for the northern part of the State, provides an opportunity to increase visitors from Brisbane and the broader South East Queensland market. In fact, Brisbane has a greater potential in numbers seeking an interstate self drive holiday than Melbourne.

KEY INSIGHTS FROM THE RESEARCH

- As there is predicted growth coming from the Network's key source markets of Sydney, Brisbane, Regional NSW and South East Queensland, the domestic market provides a greater and more cost efficient way to grow the visitor economy for the Network.

- The number of domestic overnight visitors to the network region has increased in line with growth experienced across the State and Regional Australia, and there has also been an increase of expenditure by this market. This means the Network Region will have a natural growth rate, however there is an opportunity to increase market share by providing more opportunities for the market to experience the Network tourism offering and improving the quality of the experience.

- A major factor in increasing yield for the Network Region is to increase length of stay for the domestic overnight market. There has been little to no growth in the length of stay in the Network Region over the last 10 years. An increase in length of stay requires a 'mind shift' by the market to see Country & Outback NSW and, specifically, the Hubs within the Network, as a destination that requires a longer length of stay.

- International visitors have a longer length of stay and spend more money overall than the domestic overnight visitors. However, the overall number of international visitors to the Network Region is very small.

- There is an opportunity to grow this market, however, coming off such a low base, the cost to reach the international market and to see the benefits of the return on investment means there would be a significant lag time. There are other Australian destinations that have higher destination awareness and demand among the international visitor. To realistically grow this market for the Network Region, the opportunities lie in niche experiences developed specifically for the international market, for example food tours, cooking schools, farm tours and events

DNCO RESEARCH AND DATA HUBS

For the purpose of developing the DNCO DMP, a detailed review has been undertaken of available secondary research, and framed around the following:

- DNCO Network by Hubs; and
- Experience themes.

The following criteria were applied to create the DNCO Hubs:

- Most appropriate economic clustering within the Destination Network to enable statistically relevant analysis of visitor research
- The way that visitors identify areas to travel to within the broader region and the most natural (but not exclusive) clustering of the visitor experience offering, and
- Relevance to and distance from the source market for each hub, noting that there are differences relating to their source and target markets. This is particularly relevant when considering short-break destinations to longer-duration holidays and touring.

In addition, the analysis also involved an understanding of:

- Councils that are already working together on tourism and other projects;
- Similar experience offerings across councils;
- Sample size available through TRA to be meaningful to that Hub.

Please note these clusters of councils are for research purposes only and should not be viewed as marketing clusters even though many Hubs do undertake joint marketing initiatives.

DNCO Research and Data Hubs	No. of LGAs	Local Government Areas (LGAs)
Outback NSW	7	Broken Hill City Council, Bourke Shire Council, Bogan Shire Council, Brewarrina Shire Council, Central Darling Shire Council, Cobar Shire Council, Walgett Shire Council as well as the Unincorporated Far West Region of NSW
New England & North West	12	Armidale Regional Council, Tamworth Regional Council, Inverell Shire Council, Glen Innes Severn Council, Gwydir Shire Council, Moree Plains Council, Liverpool Plains Shire Council, Narrabri Shire Council, Gunnedah Shire Council, Tenterfield Shire Council, Uralla Shire Council, Walcha Council
Greater Western Plains	6	Dubbo Regional Council, Coonamble Shire Council, Narromine Shire Council, Gilgandra Shire Council, Warren Shire Council, Warrumbungle Shire Council
Country NSW	12	**South West NSW**, including Forbes Shire Council, Lachlan Shire Council, Parkes Shire Council and Weddin Shire Council
		Central West NSW, including Bathurst Regional Council, Blayney Shire Council, Cabonne Council, Cowra Council, Lithgow City Council, Mid-Western Regional Council, Oberon Council and Orange City Council

TOP-LINE REVIEW AND INSIGHTS OF THE VISITOR DATA AT HUB LEVEL

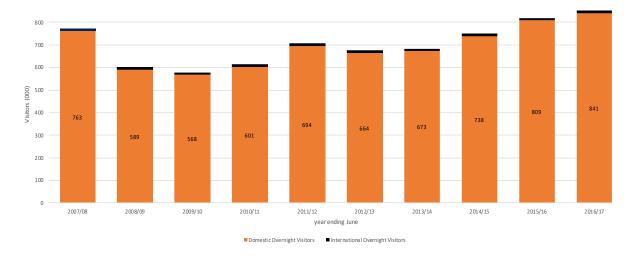Within this section there is an overview for each Hub including:

- The number of day visitors, domestic overnight and international visitor to each Hub over the last 10 years.
- An indexed graph demonstrating the percentage growth of the domestic overnight visitors and total visitor nights trends over the last 10 years. These graphs compare the performance of each Hub to the Network, Regional NSW and Regional Australia.
- A diagnostic chart presenting the size and growth rates of each source market for the Hub (the size and location of the circle on the Y axis shows the average size of the source market, and further to the left, the circle located along the X axis demonstrates its growth rate).
- A summary of the key insights for each of Hub.

DNCO HUB: OUTBACK NSW

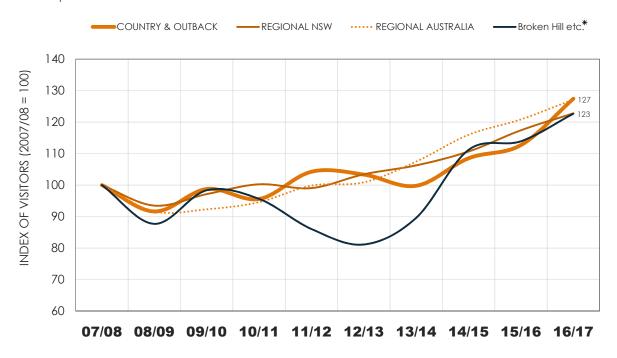| DNCO Research and Data Hubs	No. of LGAs	Local Government Areas (LGAs)
Outback NSW	7	Broken Hill City Council, Bourke Shire Council, Bogan Shire Council, Brewarrina Shire Council, Central Darling Shire Council, Cobar Shire Council, Walgett Shire Council as well as the Unincorporated Far West Region of NSW

VISITOR BREAKDOWN

The data sample for day trip visitors to Outback NSW are too insignificant to include on this graph. This region performs slightly better with the international market than some of the other Hubs within the network, and it has been growing. However, this growth is almost exclusively coming from the domestic overnight visitor market.

NOTE: Sample size for domestic day visitor data too low to present
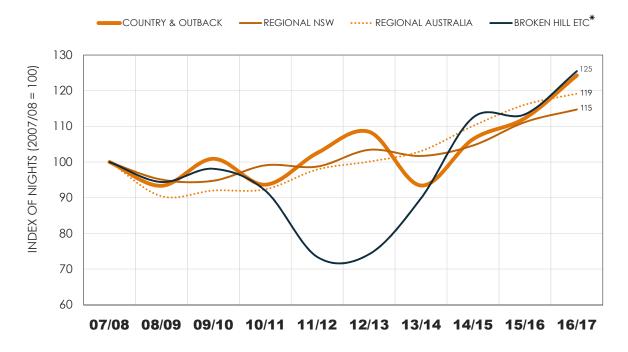
DOMESTIC OVERNIGHT VISITORS – PERFORMANCE

Overnight visitors number have seen a dramatic increase since 2013/14, with an overall increase in visitor nights of 23% in the last 10 years. The big decrease from 2010/2013 would be an effect of flooding; this was also experienced in South East Australia.
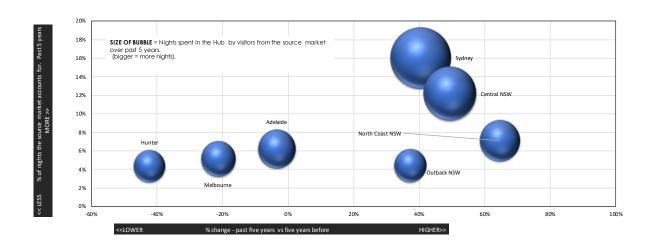

DOMESTIC VISITOR NIGHTS – PERFORMANCE

Overall visitor nights have also seen a dramatic increase since 2012/13 with a growth of 25% in the last 10 years. The region has been outperforming the Network, Regional NSW and Regional Australia since 2015/16.

*Note: 'Broken Hill etc' = Entire Outback NSW Hub as described previously.

OUTBACK HUB DIAGNOSTIC (KEY MARKET SIZE, CONTRIBUTION & GROWTH (DOMESTIC NIGHTS)

Outback NSW's largest market, and one of its fastest growing markets is Sydney, along with Central NSW. This is interesting when compared with other Network Hubs, where Sydney is the largest market but not necessarily the largest growth market. North Coast NSW is the fastest growth market for Outback NSW and is around the same size as the Adelaide market.

KEY INSIGHTS

- Outback NSW has been trending well with visitation from the domestic overnight visitor market, showing marked increases in visitation and length of stay, despite suffering a decrease in numbers following the flooding of 2010-2013.
- The region does attract a very small international visitor market, however the focus is almost exclusively the domestic overnight visitor market.
- Sydney continues to be the region's largest market and is growing quickly, alongside Central NSW, providing an opportunity to capitalise on market share by developing and offering products, experiences and services that both appeal and encourage greater length of stay.
- North Coast NSW is the fastest growing source for the region, and another key market to address.

DNCO HUB: NEW ENGLAND & NORTH WEST

DNCO Research and Data Hubs	No. of LGAs	Local Government Areas (LGAs)
New England & North West	12	Armidale Regional Council, Tamworth Regional Council, Inverell Shire Council, Glen Innes Severn Council, Gwydir Shire Council, Moree Plains Council, Liverpool Plains Shire Council, Narrabri Shire Council, Gunnedah Shire Council, Tenterfield Shire Council, Uralla Shire Council, Walcha Council

VISITOR BREAKDOWN

There has been a noticeable increase in domestic day visitors to New England North West, especially over the period 2016/17. Domestic overnight visitor numbers have also increased. As with the other Hubs that make up the Network, the number of international visitors is very low in comparison to the domestic market. However, for this region the international numbers are slightly higher than other Hubs in the Network.

VISITOR BREAKDOWN

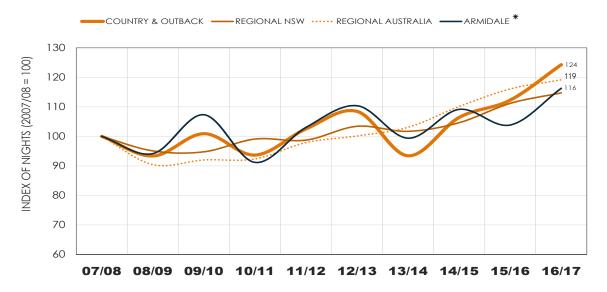## DOMESTIC OVERNIGHT VISITORS – PERFORMANCE

New England North West has been outperforming the Network, Regional NSW and Regional Australia on domestic overnight visitation, with an increase of 32% in overnight visitors in the last 10 years. This increase has been trending differently from the other Hubs, with an uplift in 2014/15 and a dip in 2015/16. However, there has been a sharp increase in visitor nights in 2016/17. Overall domestic overnight visitor numbers are trending upwards.

Note: 'Armidale etc' = Entire New England & North West Hub as described previously.
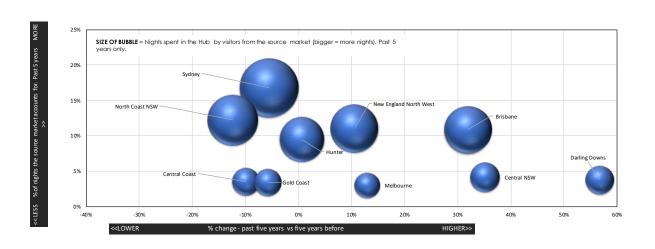
DOMESTIC VISITOR NIGHTS – PERFORMANCE

New England North West has been outperforming the Network, Regional NSW and Regional Australia on domestic overnight visitation, with an increase of 32% in overnight visitors in the last 10 years. This increase has been trending differently from the other Hubs, with an uplift in 2014/15 and a dip in 2015/16. However, there has been a sharp increase in visitor nights in 2016/17. Overall domestic overnight visitor numbers are trending upwards.

*Note: 'Armidale etc' = Entire New England & North West Hub as described previously.

NEW ENGLAND & NORTH WEST HUB DIAGNOSTIC (KEY MARKET SIZE, CONTRIBUTION & GROWTH (DOMESTIC NIGHTS) 5 YEARS ENDING JUNE 2017

Sydney is the largest source market for New England & North West. However, as opposed to the Network's other Hubs, the Brisbane market has grown over time compared to the Sydney market, although the Brisbane market is coming off a lower base. Central NSW is also growing quickly as a source market, but are also coming of a lower base. The local market is also very important to this destination. A key observation is that three of the five largest source markets have decreased in significance or barely grown.
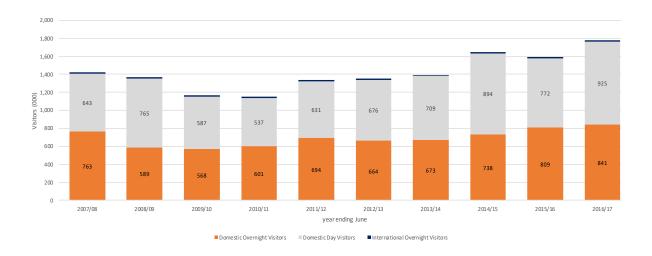
KEY INSIGHTS

- With the exception of a dip in both visitor nights and overnight visitation in 2015/16, New England North West has generally been trending upwards in domestic visitation.
- The largest market for the region continues to be Sydney, however Brisbane and the Central West both provide opportunities to increase visitor numbers and length of stay through addressing supply and demand. The local market is also a key source for the region, albeit coming from a small base.
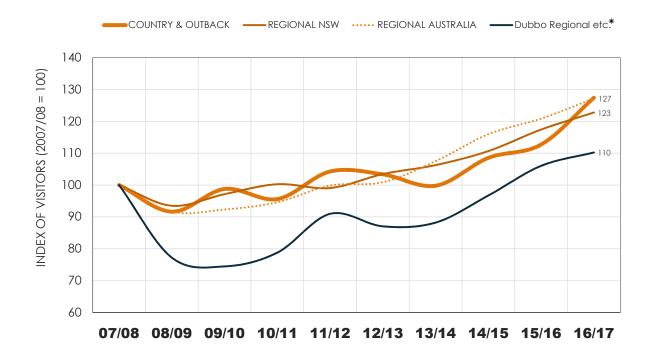- International visitation is slightly higher for this region, compared to other regions in the Network.

DNCO HUB: GREATER WESTERN PLAINS

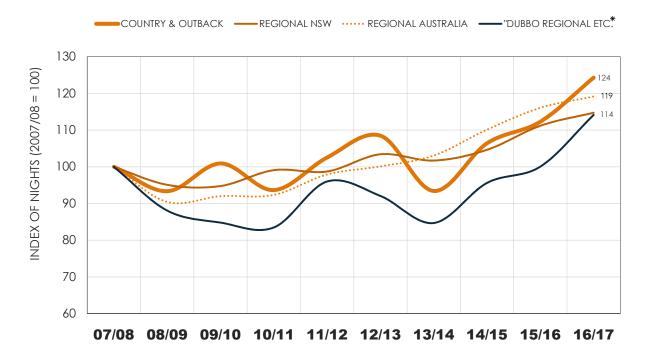| DNCO Research and Data Hubs	No. of LGAs	Local Government Areas (LGAs)
Greater Western Plains	6	Dubbo Regional Council, Coonamble Shire Council, Narromine Shire Council, Gilgandra Shire Council, Warren Shire Council, Warrumbungle Shire Council

VISITOR BREAKDOWN

This graph shows the overall numbers of visitors to the Greater Western Plains. The international market is an extremely small proportion of the overall market, while the domestic overnight market has been trending upwards since 2013.

COUNTRY & OUTBACK — REGIONAL NSW ······ REGIONAL AUSTRALIA — Dubbo Regional etc.*
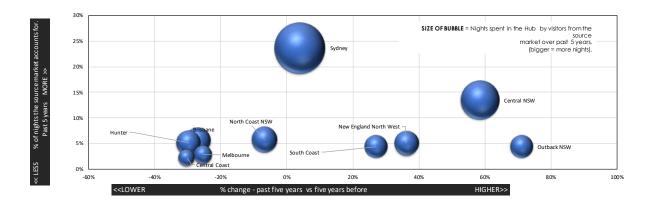

DOMESTIC VISITOR NIGHTS – PERFORMANCE

The visitor nights' performance for Greater Western Plains is similar to that of the Hub's overnight performance i.e. the region has underperformed compared to the Network, Regional NSW and Regional Australia. This region has experienced an increase of visitor nights of 14% over the last 10 years, with erratic results from 2007 – 2013, where the overall visitor nights trended upwards. In 2016/17, the area achieved the same level of overnight visits as Regional NSW, which is also being outperformed by Regional Australia and the Network.

COUNTRY & OUTBACK — REGIONAL NSW ······ REGIONAL AUSTRALIA — "DUBBO REGIONAL ETC."*

* Note: 'Dubbo Regional etc' = Entire Greater Western Plains Hub as described on page 37

GREATER WESTERN PLAINS HUB DIAGNOSTIC (KEY MARKET SIZE, CONTRIBUTION & GROWTH (DOMESTIC NIGHTS) 5 YEARS ENDING JUNE 2017

This chart demonstrates that for the Greater Western Plains Hub, Sydney is the largest source market which has experienced modest growth. However, Central NSW and Outback NSW are the source markets that have grown over time, albeit coming off much smaller bases.

KEY INSIGHTS

- The Greater Western Plains Hub has been underperforming compared to Regional NSW, Regional Australia and the Network. This would suggest that the products and experiences available need evolving to both attract and extend length of stay among the domestic market.
- The domestic overnight market has been trending upwards since 2013. While Central NSW and Outback NSW are the fastest growing source markets for the region, this increase is coming off a small base. Sydney continues to provide the most significant opportunity for the Greater Western Plains to increase visitor numbers and, with continued population growth in Sydney, to capitalise on opportunities to increase market share and yield.

DNCO HUB: COUNTRY NSW

DNCO Research and Data Hubs	No. of LGAs	Local Government Areas (LGAs)
Country NSW	12	**South West NSW**, including Forbes Shire Council, Lachlan Shire Council, Parkes Shire Council and Weddin Shire Council
		Central West NSW, including Bathurst Regional Council, Blayney Shire Council, Cabonne Council, Cowra Council, Lithgow City Council, Mid-Western Regional Council, Oberon Council and Orange City Council

The research and data analysed for Country NSW has been separated into two sub-hubs, providing greater insights across this large area. There are significant differences between the performance of the two sub-hubs at a statistically-relevant level. The two sub-hubs identified for Country NSW are defined as:

- South West NSW, including Forbes Shire Council, Lachlan Shire Council, Parkes Shire Council and Weddin Shire Council; and
- Central West NSW, including Bathurst Regional Council, Blayney Shire Council, Cabonne Council, Cowra Council, Lithgow City Council, Mid-Western Regional Council, Oberon Council and Orange City Council.

DNCO SUB-HUB: SOUTH WEST NSW

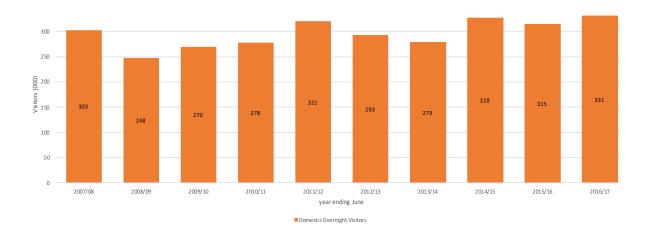| DNCO Research and Data Hubs	No. of LGAs	Local Government Areas (LGAs)
Country NSW	12	**South West NSW**, including Forbes Shire Council, Lachlan Shire Council, Parkes Shire Council and Weddin Shire Council
		Central West NSW, including Bathurst Regional Council, Blayney Shire Council, Cabonne Council, Cowra Council, Lithgow City Council, Mid-Western Regional Council, Oberon Council and Orange City Council

VISITOR BREAKDOWN
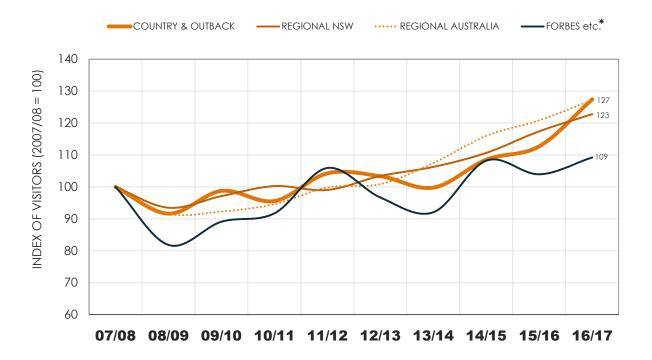
The data sample size available for the international and domestic day trip market for South West NSW is too low to show in a graph. Domestic overnight visitor numbers have been growing slowly for this region. However, with the overall domestic overnight market on the rise, there is an opportunity for South West NSW to benefit from that growth.

NOTE: Sample size for domestic day & international visitors too low to present
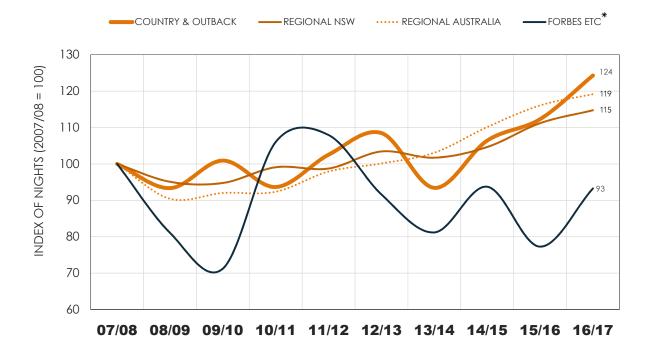
DOMESTIC OVERNIGHT VISITORS – PERFORMANCE

South West NSW Hub has underperformed in the number of overnight visitors compared to the Network, Regional NSW and Regional Australia. The region has not seen the upward trend from 2013/14 that the Network's other Hubs have experienced. Given the general increase in the number of overnight visitors from key source markets, the slow growth is a concern for this region.

DOMESTIC VISITOR NIGHTS – PERFORMANCE
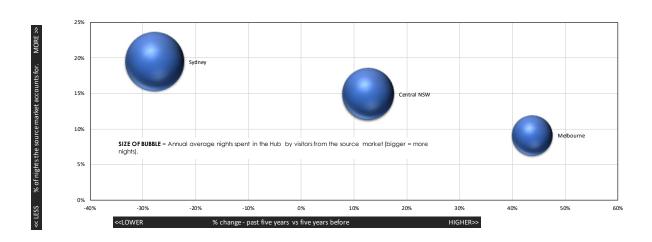
The overall visitor nights for South West NSW has been trending erratically. The 2009/10 decline was probably influenced by the significant flooding experienced in NSW. However, the last five years have seen overall growth in nights significantly underperform compared to the Network, Regional NSW, Regional Australia, and the other Hubs within the Network.

* Note: 'Forbes etc' = Entire South West NSW Sub-Hub as described previously.

SOUTH WEST NSW SUB-HUB DIAGNOSTIC (KEY MARKET SIZE, CONTRIBUTION & GROWTH (DOMESTIC NIGHTS) 5 YEARS ENDING JUNE 2017

The largest source market for South West NSW is Sydney, however Melbourne has grown the most even though it is coming off a lower base. Central West NSW is a very important source market and has grown more quickly than the Sydney market. Sydney will always be important because of the volume of overnight visitors from that source market, however, it is a highly competitive source market. A key concern is that the main market (Sydney) is shrinking at an alarming rate for this region.
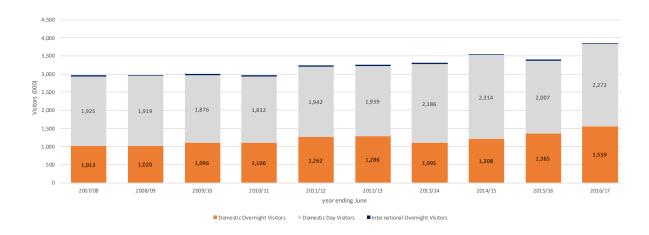

KEY INSIGHTS

- Compared to the Network, Regional NSW and Regional Australia, South West NSW has underperformed on growth in overnight visitors and visitor nights. While circumstances such as flooding have potentially hindered growth in the region, given the upward trend across the other Network Hubs and the State, the slow growth suggests that supply and demand are critical issues requiring attention.
- The international and the domestic day trip markets for South West NSW are too small to be a focus. However, with overall domestic visitor numbers on the rise in NSW, there are opportunities for the region to benefit from this general increase.
- Sydney continues to be a large and important source market for South West NSW. However, with Melbourne and Central NSW showing the fastest growth as source markets for the region, product and experiences should be evolved and enhanced to tap into growth opportunities from these markets, as well as Sydney. Canberra has not shown up as a significant market for this Hub. However, there are potential opportunities to grow this source market, including for international arrivals into Canberra Airport.
- Overall, to grow the market, addressing supply is a major issue and should be a high priority if the Hub is going to grow its visitor economy.

DNCO SUB-HUB: CENTRAL WEST NSW

DNCO Research and Data Hubs	No. of LGAs	Local Government Areas (LGAs)
Country NSW	12	**South West NSW**, including Forbes Shire Council, Lachlan Shire Council, Parkes Shire Council and Weddin Shire Council
		Central West NSW, including Bathurst Regional Council, Blayney Shire Council, Cabonne Council, Cowra Council, Lithgow City Council, Mid-Western Regional Council, Oberon Council and Orange City Council
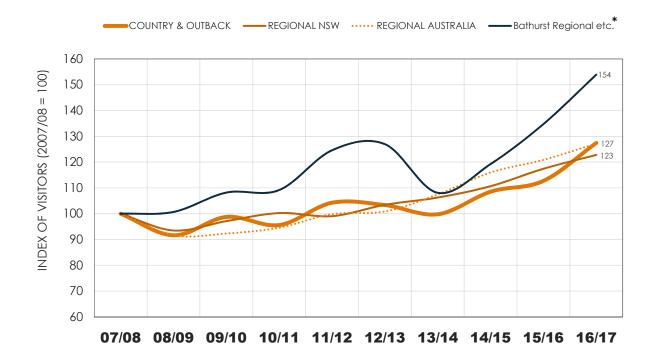
VISITOR BREAKDOWN

The largest market for Central West NSW is the day visitor market, which is not surprising given the population size of the region, and its proximity to larger urban centres, such as Dubbo, the Blue Mountains and Sydney. However, domestic overnight visitor numbers are growing. The international market is insignificant in this region.
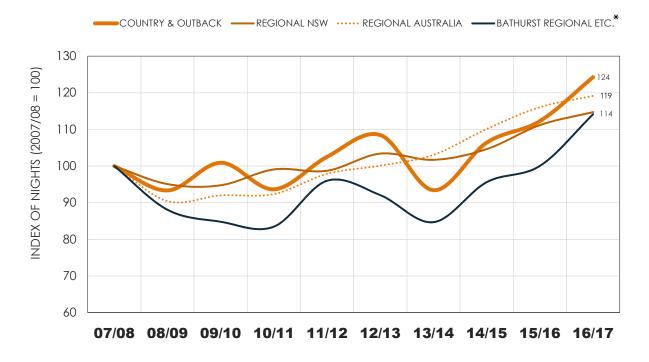
DOMESTIC OVERNIGHT VISITORS – PERFORMANCE

This graph has been indexed to show the percentage growth of domestic overnight visitors to Central West NSW since 2007/08, compared to Regional NSW, Regional Australia and the Network Region. Central West NSW has outperformed all three by nearly double the growth rate, and has achieved a 54% increase in domestic overnight visitors in the last 10 years, with the majority of growth occurring since 2013/14.

COUNTRY & OUTBACK — REGIONAL NSW ····· REGIONAL AUSTRALIA — Bathurst Regional etc.*

DOMESTIC VISITOR NIGHTS – PERFORMANCE
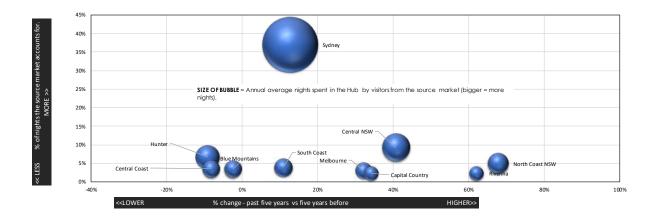
This graph highlights that the Central West NSW has underperformed in total visitor nights by at least 10% in the last 10 years compared to the Network, Regional NSW and Regional Australia, with a significant trend upwards occurring since 2013/14. This means that even though there has been an increase in the number of visitors having an overnight stay in Central West NSW, and an increase in the number of nights they have been staying, growth has not been at the same rate as Regional NSW, Regional Australia or the DNCO Network.

COUNTRY & OUTBACK — REGIONAL NSW ····· REGIONAL AUSTRALIA — BATHURST REGIONAL ETC.*

Note: 'Bathurst Regional etc' = Entire Central West NSW Sub-Hub as described previously.

CENTRAL WEST NSW SUB-HUB DIAGNOSTIC (KEY MARKET SIZE, CONTRIBUTION & GROWTH (DOMESTIC NIGHTS) 5 YEARS ENDING JUNE 2017

This chart shows that for Central West NSW, Sydney is the largest source market for domestic overnight visitors, and this is continuing to grow. However, there has been a 40-70% increase in visitors coming from the North Coast, Riverina and Central NSW to this region, although this increase is coming off a very low base. Sydney is still the largest and most significant source market.

KEY INSIGHTS

- Central West NSW has seen growth in domestic overnight visitors since 2013/14, which also corresponds with the increase in the number of domestic overnight visitors coming from source markets, especially Sydney. Therefore, there will continue to be a natural increase in domestic overnight visitors.

- Sydney has been trending upwards in the number of people visiting the Central West NSW region and this is set to continue. The region has an opportunity to increase market share from the growing market. For the region to increase market share, it must address both supply and demand. There is also an opportunity to drive mid week business especially in the small business events and conferencing market.

- The experiences on offer for the Central West NSW Hub need to evolve and create new and appealing opportunities for the market. There also needs to be an evolution in how the region is marketed into the source markets, including international markets.

- There has been little to no increase in length of stay in the region. This requires a mind-shift for the source market to stay longer, an issue that must be addressed through building demand for the destination. There is also an opportunity to grow yield by increasing length of stay and spend per trip.

TOURING MARKET

The touring market is a key focus for the Destination Network Country & Outback.

As part of this research, it has been identified that:

- 89% of the market travelling to the Network region are travelling by car
- 5% by aircraft
- 2% by Railway
- 1% by Motorhome or campervan
- 1% Bus/Coach
- 1% other, regardless of purpose for the trip (i.e. food and wine, nature or culture and heritage, VFR, etc).
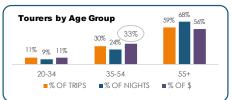
DOMESTIC ROAD TOURING MARKET

The 55+ market is the largest proportion of the road touring market and has been over the past five years. However, the 35-54 market has a disproportionately higher spend than the 55+ market. The Outback has about 14% of the overall touring market, while Central NSW (Country NSW) has 23%. However, the number of nights that the touring market spend in Country and Outback is very low. This indicates that the touring market is spending very little time in the DNCO region.

> *DEFINITION OF THE ROAD TOURING MARKET:* ***TRANSPORT =*** *Any self-drive vehicle including cars, SUVs, RVs, 4WDs, motorhomes, campervans etc.* ***PURPOSE OF TRIP =*** *Holiday/leisure;* ***TRIP LENGTH =*** *At least seven nights;* ***NUMBER OF OVERNIGHT DESTINATIONS ON TRIP =*** *At least four.*

AT A GLANCE: NATIONAL ANNUAL AVERAGE OVER PAST 5 YEARS
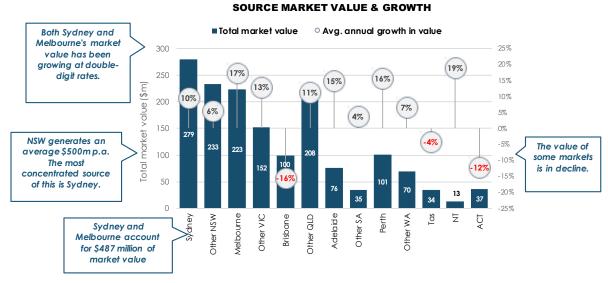
Overnight trips	1.1 million
Trip nights	15.7 million
Length of Trip	average 14.3 nights

Total trip spend	$2.8 billion
Spend per trip	$2,525 per trip
Spend per night	$177 per night

Age Group Breakdown of Tourers - 5yrs ending June 2017

Tourism Region Market Share - 5yrs ending June 2017

SOURCE: Data extracted from Tourism Research Australia; National Visitor Survey

THE 55+ DOMESTIC ROAD TOURING MARKET

Both the Sydney and Melbourne source markets are growing in dollar value, with Sydney growing at 10%, and Melbourne growing at 17% over the previous five years (this does not necessarily mean that there are more people travelling out of these source markets, it can also mean that those who are travelling are spending more money). Brisbane spend has declined, as has the ACT, which represents a very small percentage of the overall spend into the region.

The majority of tourers are aged 55+
The overall market value for this group averages $1.6 billion p.a.

SOURCE MARKET VALUE & GROWTH

Annotations:
- Both Sydney and Melbourne's market value has been growing at double-digit rates.
- NSW generates an average $500m p.a. The most concentrated source of this is Sydney.
- Sydney and Melbourne account for $487 million of market value
- The value of some markets is in decline.
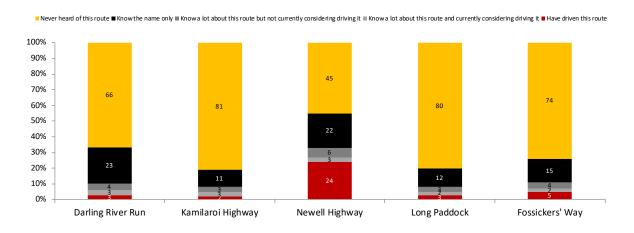
Annual average total trip expenditure in Australia x Source - 5yrs ending June 2017

SOURCE: Data extracted from Tourism Research Australia; National Visitor Survey

AWARENESS OF TOURING ROUTES

Awareness is currently limited for key touring routes. The Newell Highway has the strongest presence. Whilst awareness is stronger in NSW, it is modest even there.

Source: MyTravelResearch for Inland NSW Tourism – Positioning lnland NSW for Growth 2015

KEY INSIGHTS

- To attract a higher yield touring market, there is an opportunity to create experiences and develop products of higher value that could appeal to the younger 35 – 54 year old market, while at the same time maintaining the 55+ market who are also increasing their spend while on a trip.
- Outback NSW has about 14% of the overall touring market of Australia, while Country NSW (Central West NSW Hub) has 23%. However, the number of nights that the touring market spend in Country and Outback NSW is very low.
- The MyTravelResearch report also identifies that within the market place there is little awareness of the touring routes. This would also suggest that the offer or the marketing of the routes is not achieving 'cut through' in the market place. However, there is an opportunity to better link the themed experiences to the touring routes creating 'new news' for the market.
- The touring market is not choosing Country NSW and Outback NSW as destinations but rather they are passing through these areas on their way to another destination. This would indicate that there is an opportunity to create experiences that appeal to the touring market, for example:
  - Providing 'new news' about the Hubs within the Network to raise awareness of these places as destinations for touring. Those experiences could be night-time activities, such as star gazing, night-time wildlife spotting, etc
  - Touring routes can be presented as journeys that tie experiences together, rather than geographical locations, e.g. the fossil journey from Wellington Caves to Canowindra's Age of Fishes Museum, Bathurst's Australian Fossil and Mineral Museum and beyond.
- This would also suggest there needs to be a review of how the touring routes are perceived in market, and how they are being promoted. For example, the content provided on all the touring route websites are town and location-based first, and then provide some high level information about the experiences within a specific location. The offering on the websites and the stories could be experience-led and then identify which towns offer those signature experiences best.

NATURE-BASED MARKET

DOMESTIC MARKET FOR NATURE-RELATED ACTIVITIES

The nature-based market is growing and the number of nature-based activities undertaken by domestic travellers is also growing. However, the Network share of the market that is undertaking a nature-based experience is lower than it was 5 years ago and has grown very little over the period from 2013 – 2017. This means that the Network is losing market share in a growth sector.

Please note: for the purpose of defining nature- related activities we did not include those nature base activities that could not be undertaken within the network region, eg whale watching.

Defined as domestic overnight trips that included any of the following activities: bushwalking/rainforest walks, visit to national park, visit to botanical or other public gardens.

NATIONAL ANNUAL AVERAGE - PAST 5 YEARS

Overnight trips that include nature activities	• 16.5million p.a. • Growth 9.0% p.a.
Trip nights that include nature activities	• 84 million p.a. • Growth 7.2% p.a.
Length of Trip	• Average 5.1 nights • slight decline
Total trip spend*	• $14.8 billion* • Growth 8.0% p.a.
Spend per trip*	• $900 • no trend
Spend per night*	• $180 • no trend

Trips that include nature-related

Visitors (000)

2012/13	2013/14	2014/15	2015/16	2016/17
13,427	15,125	16,628	18,140	18,951

The market is growing

Percentage of total trips

% of total trips

2012/13	2013/14	2014/15	2015/16	2016/17
17.8%	18.8%	19.5%	20.4%	20.2%

So is the % of trips that include nature

Network's Market Share of Trips

% of total

2012/13	2013/14	2014/15	2015/16	2016/17
6.0%	4.4%	4.3%	4.5%	5.1%

Network's share is lower now than 5 years ago.

* The expenditure by visitors that included nature activities on their trip is limited to spending on these activities or due to them. Spend figures cannot therefore be attributed solely to nature-related activities.

SOURCE: Data extracted from Tourism Research Australia; National Visitor Survey

The nature-based segment is still dominated by the 55+ market and that is because this market is still the biggest market travelling to or through the Network region. However, the growth in the nature-based sector is also coming from the younger market of 20–40 year-olds. Even though it is coming off a lower base, it still represents an opportunity to grow this market across the Network. The Sydney and Melbourne markets are the two largest source markets for travellers seeking nature-based activities.

AGE BREAKDOWN & GROWTH

■ Nature-related trips p.a.   ○ Avg. Growth p.a.
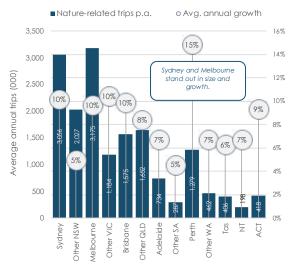
Average annual trips that include a nature-related activity and growth p.a. x Age Group - 5yrs ending June 2017

Dominated by 55+ market. However, some younger age groups nature takeup growing at almost 20% p.a.

SOURCE MARKET SIZE & GROWTH

■ Nature-related trips p.a.   ○ Avg. annual growth

Sydney and Melbourne stand out in size and growth.

Annual average trips with nature-related activity & growth p.a. x Origin of Visitor - 5yrs ending June 2017

SOURCE: Data extracted from Tourism Research Australia; National Visitor Survey

KEY INSIGHTS
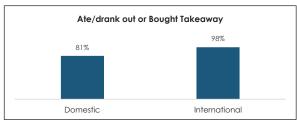
- Overall the network has been missing out on the growth in nature-based tourism, and those visitors who are undertaking nature-based experiences.
- There is an opportunity to develop nature-based experiences that would also attract a younger market and still be relevant for the active 55+ market.
- Melbourne has the biggest growth in the nature-based market followed by Sydney. However, the Melbourne market is more likely to take an intrastate trip than an interstate trip. Given the growth and the potential growth of intrastate trips coming out of Sydney, there is an opportunity to tailor marketing activities to better profile the nature-based offering, and also develop signature experiences that increase the nature offering within the Network region.
- At a Hub level, there is an opportunity for each council to identify what other councils they could work with to develop a nature-led promotional activity, and also a signature nature product under the DMP themes.
- The global trend is showing that there is a market seeking more tailored nature-based experiences, especially smaller, more authentic tours, meaning there is an opportunity to:
  - Bundle nature-based experiences across council boarders; these could be seasonally based for marketing purposes;
  - Identify new nature-based product opportunities for tourism operators.

FOOD & DRINK MARKET
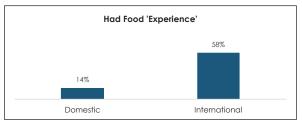
FOOD ESTABLISHMENT & EXPERIENCES

The graph below shows what type of establishment visitors will eat in while visiting a destination. The chart on the following page identifies a number of food-related activities or experiences that are undertaken. These experiences are more likely to be a motivator for visiting a destination, rather than just an activity that is undertaken once the visitor is in a destination.

Ate/drank out or Bought Takeaway

Percentage of domestic overnight and international visitors that eat out or buy takeaway.
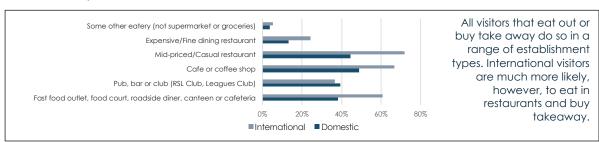Domestic - 2 years ending June 2017; International - 3 years ending 2016

Not surprisingly, the large majority of international visitors and domestic overnight visitors eat out at a food establishment or ordered takeaway food.

Had Food 'Experience'
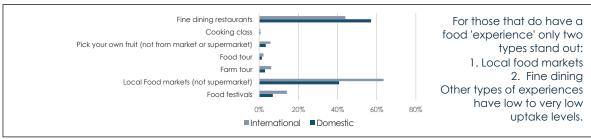
Percentage of domestic overnight and international visitors that had a food 'experience' (see chart below for types)
Domestic - 2 years ending June 2017; International - 3 qtrs ending Sept '17

Only 14% of domestic overnight visitors participated in a food 'experience' compared to 58% of international visitors.

All visitors that eat out or buy take away do so in a range of establishment types. International visitors are much more likely, however, to eat in restaurants and buy takeaway.

Type of eating establishment of domestic overnight and international visitors (percentage of those that eat out or buy takeaway.)
Domestic - 2 years ending June 2017; International - 3 qtrs ending Sept '17
Note: adds to more than 100% as visitors can eat at more than one type of establishment

The research to date shows that international visitors are more likely to undertake a food experience than domestic visitors. This indicates that there is an opportunity to attract an international market (even though off a very small base), through activities such as farm tours, local food markets and food festivals. The research is demonstrating that eating out in a five star restaurant within a region is an important part of the food experience. However, global trends indicate that visitors to destinations are also interested in trying locally grown food and cuisines that the region could be known for, as part of their overall experience without it being necessarily through a five-star restaurant.

For those that do have a food 'experience' only two types stand out:
1. Local food markets
2. Fine dining
Other types of experiences have low to very low uptake levels.

Type of food experience for domestic overnight and international visitors (percentage of those that did a food experience.)
Domestic - 2 years ending June 2017; International - 3 qtrs ending Sept '17
Note: adds to more than 100% as visitors can eat at more than one type of establishment

EATING & DRINKING MARKET SIZE

81% of the domestic market, or about 76 million overnight trips p.a. involve eating/drinking out or buying takeaway.

FOOD EXPERIENCE MARKET SIZE

This means that around 10.5 million domestic overnight trips involve a food experience and that 4.6 million international visitors engage in food experiences.

The specialist food experiences are therefore very small markets. The size of the farm tour market, for example, is around 350,000 p.a. for the domestic overnight market and 280,000 p.a. for the international market. The food tour market is around 143,000 p.a. (domestic) and 168,000 for international.

SOURCE: All data is from TRA, National Visitor Survey and International Visitor Survey.
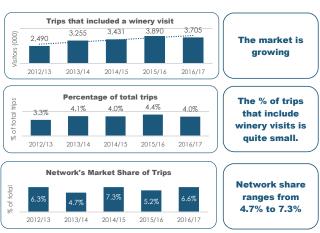CAUTION: All data is subject to sample survey error.

DOMESTIC OVERNIGHT MARKET FOR WINERY VISITS

The number of overnight trips including a winery visit has been growing at 10.4% per annum nationally. Even though the percentage of overall trips including a winery visit is still quite small, the Network's percentage of market generally outperforms the national market as a percentage share. The total trip spend that includes a visit to a winery has also increased by 8% per annum.

Defined as domestic overnight trips that included a visit to a winery as a trip activity.

NATIONAL ANNUAL AVERAGE - PAST 5 YEARS

Overnight trips that included winery visit	• 3.6million p.a. ✓ • Growth 10.4% p.a.
Trip nights on trips with winery visit	• 17 million p.a. ✓ • Growth 6.7% p.a.
Length of Trip	• Average 5.1 nights • slight decline
Total trip spend*	• $3.6 billion* ✓ • Growth 8.0% p.a.
Spend per trip*	• $1,066 • No trend
Spend per night*	• $211 • No trend

Trips that included a winery visit
2,490 — 2012/13; 3,255 — 2013/14; 3,431 — 2014/15; 3,890 — 2015/16; 3,705 — 2016/17

The market is growing

Percentage of total trips
3.3% — 2012/13; 4.1% — 2013/14; 4.0% — 2014/15; 4.4% — 2015/16; 4.0% — 2016/17

The % of trips that include winery visits is quite small.

Network's Market Share of Trips
6.3% — 2012/13; 4.7% — 2013/14; 7.3% — 2014/15; 5.2% — 2015/16; 6.6% — 2016/17

Network share ranges from 4.7% to 7.3%

* Includes all trip expenditure. It is not possible to determine what amount, if any, was spent at a winery.
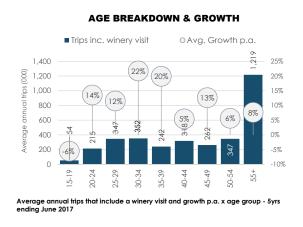
SOURCE: Data extracted from Tourism Research Australia; National Visitor Survey
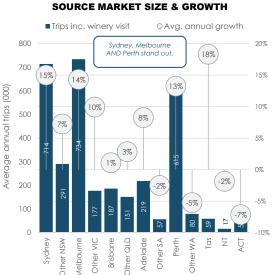PAGE 1

DOMESTIC OVERNIGHT MARKET FOR TRIPS THAT INCLUDE WINERY VISITS

The 55+ demographic still dominates the market when it comes to including a trip to a winery. However, there is double-digit growth coming from the 30 -39 year-old market.

Sydney, Melbourne and Perth are the largest source markets for visitors that include a visit to a winery within their trip.

AGE BREAKDOWN & GROWTH

Average annual trips that include a winery visit and growth p.a. x age group - 5yrs ending June 2017

Dominated by 55+ BUT some younger age groups are growing at double-digit rates.

SOURCE MARKET SIZE & GROWTH

Annual average trips with nature-related activity & growth p.a. x origin of visitor - 5yrs ending June 2017

SOURCE: Data extracted from Touirsm Research Australia; National Visitor Survey

KEY INSIGHTS

- Even though the TRA research is not demonstrating that food is a core driver for a visitor to choose a destination, global trends and the results of campaigns such as Tourism Australia's Restaurant Australia and the growth in the short break market to destinations like Mudgee and Orange, strongly indicate that access and provenance of local produce is an important component and impacts the visitor experience.
- There is a need for ongoing support to increase the capacity of cafes, restaurants, RSL clubs, etc, to have some level of a connection and access to local produce.
- Even though a visit to a winery is coming off a small base, it is showing growth across the Network and, in general, at a national level.
- The source markets are dominated by Sydney, Melbourne and Perth. This would be influenced by the fact that there are significant wine regions within a short break of these key source markets, e.g. Swan Valley and Margaret River WA. However, this presents an opportunity for the the wine regions within the Network to experience organic growth out of the Sydney market.
- It also means there is an opportunity for wineries located in less-recognised wine regions, such as Bathurst and New England who have an opportunity to take advantage of this growth in overnight visitors undertaking a winery experience.

- Even though the 55+ market is still the leading age group to visit a winery on an overnight trip, there is also growth coming from the 30–39 year-old age group.
- The wine regions and individual wineries have an opportunity to bundle experiences that would appeal to the younger age group, e.g. experiences aimed at couples and groups of friends within that younger adult market. Those experiences could include wine festivals and events, personalised experiences such as long lunches, meeting the wine maker, picnics in the vines, etc. The younger market also utilises different channels when sourcing information, or ask their friends for referrals. The younger market needs less lead time when planning a short break than the older market, therefore they will respond better to bundled experiences and packages. They are looking for ease and convenience to make a quick decision and then book. The older market needs to better engage with the story of the destination and its experiences first before they decide to travel.
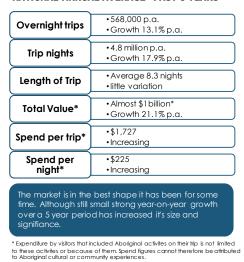
ABORIGINAL CULTURAL EXPERIENCES MARKET

DOMESTIC MARKET FOR ABORIGINAL CULTURE & COMMUNITIES

Aboriginal cultural experiences are still not a core activity undertaken by the domestic market. The market is growing, even though it is coming off a very low base. There has, however, been year-on-year growth over the last five years of visitors undertaking a cultural activity.

DEFINITION: Domestic overnight trips that have included the trip activities of either experiencing Aboriginal art/craft/cultural displays OR visiting an Aboriginal site/community.

NATIONAL ANNUAL AVERAGE - PAST 5 YEARS

Overnight trips	• 568,000 p.a. • Growth 13.1% p.a.
Trip nights	• 4.8 million p.a. • Growth 17.9% p.a.
Length of Trip	• Average 8.3 nights • little variation
Total Value*	• Almost $1 billion* • Growth 21.1% p.a.
Spend per trip*	• $1,727 • Increasing
Spend per night*	• $225 • Increasing

The market is in the best shape it has been for some time. Although still small strong year-on-year growth over a 5 year period has increased it's size and signifiance.

* Expenditure by visitors that included Aboriginal activites on their trip is not limited to these activites or because of them. Spend figures cannot therefore be attributed to Aboriginal cultural or community experiences.

The Market is Growing

2012/13	2013/14	2014/15	2015/16	2016/17
444	539	488	645	726

Visitors (000)

The market is growing but uptake remains low. Less than 1% of all domestic overnight trips include an aboriginal activity as a trip activity.

% of trips including Aboriginal activites

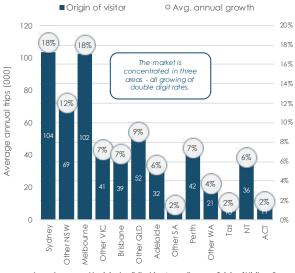| 2012/13	2013/14	2014/15	2015/16	2016/17
0.6%	0.7%	0.6%	0.7%	0.8%

% of total trips

SOURCE: Data extracted from Tourism Research Australia; National Visitor Survey

The key source markets for Aboriginal cultural experiences are Sydney, Melbourne and Regional NSW. Overall, the over 55+ market is most likely to undertake an Aboriginal cultural activity while on a trip. Over the past 5 years, only 1.25% of overall visitors to the Network included an Aboriginal experience in their overall trip.
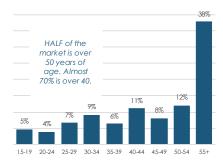
SOURCE MARKET SIZE

■ Origin of visitor   ○ Avg. annual growth

The market is concentrated in three areas - all growing at double digit rates.

Annual average Aboriginal activity trips & growth p.a. x Origin of Visitor - 5yrs ending June 2017

AGE BREAKDOWN

HALF of the market is over 50 years of age. Almost 70% is over 40.

Percentage of National Trips that include an Aboriginal activity x Age Group - 5yrs ending June 2017

1.25%

Over the past five years only 1.25% of visitors to the Network included an Aboriginal activity or experience in their trip itinerary.

SOURCE: Data extracted from Tourism Research Australia; National Visitor Survey

KEY INSIGHTS

- Even though the domestic market is coming off a very low base when choosing an Aboriginal experience as part of their trip, there has been some growth in demand for Aboriginal activities.
- The global trend is showing an increase in demand for cultural experiences. Along with the limited growth in the domestic market, this does present an opportunity to:
- Review the cultural experiences that are on offer within the Network region to ascertain that the type of cultural experiences are meeting market demand, i.e. tailored, authentic experiences delivered by local Aboriginal people.
- Review how cultural experiences are promoted. If there is no promotion and little awareness of the cultural experiences available, it is difficult to increase demand for the experience.
- Identify new cultural experiences opportunities and leverage the cultural experiences that exist.
- Develop an ongoing program to support the future development of cultural experiences over a period of time.
- Identify locations within in the Network where there is an opportunity to leverage established businesses, e.g. Yaama Ganu Centre – Café Gali.

HERITAGE MARKET

DOMESTIC HERITAGE MARKET

There has been a slight decrease in the number of trips and overnight visitors to the Network region since 2012 that includes a heritage experience. However, there has been an increase in the overnight national average of visitors experiencing or visiting a heritage site.

Visitors that visit history/heritage buildings, sites or monuments on their Overnight Trip.

NATIONAL ANNUAL AVERAGE - PAST 5 YEARS

Overnight trips	• 4.5 million p.a. • Growth 8.1% p.a.
Trip nights	• 27.7 million p.a. • Growth 5.8% p.a.
Length of Trip	• Average 6.2 nights • Slight decline
Total Value*	$5.4 billion Growth 7.6% p.a.
Spend per trip	$1,254 Fairly stable
Spend per night	$196 Fairly stable

NETWORK MARKET SHARE

SHARE OF TRIPS

2012/13	2013/14	2014/15	2015/16	2016/17
8.4%	6.9%	7.9%	7.3%	6.8%

SHARE OF NIGHTS

2012/13	2013/14	2014/15	2015/16	2016/17
8.4%	6.9%	7.9%	7.3%	6.8%

To remain competitive in this market the Network needs to defend it's share.

* Total expenditure by visitors that did Heritage/History activites on trip - not expenditure limited to these activites

SOURCE: Data extracted from Tourism Research Australia; National Visitor Survey

The source markets that are most likely to undertake a heritage experience are located in Sydney and Melbourne, with Brisbane growing at the same rate, although off a lower base. The older market is definitely more interested in a visit to a heritage site, however there is also growth from the mid-age market segment.
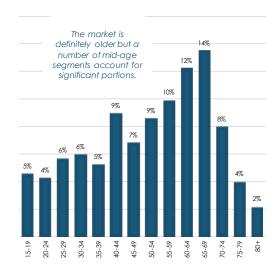
SOURCE MARKET SIZE

Annual average history/heritage trips & growth p.a. by source market
- 5yrs ending June 2017

AGE BREAKDOWN

The market is definitely older but a number of mid-age segments account for significant portions.

Percentage of National History/heritage trips x Age Group - 5yrs ending June 2017

SOURCE: Data extracted from Tourism Research Australia; National Visitor Survey

KEY INSIGHTS

- Visits to heritage sites have continued to grow as the overall domestic market has grown. However, the Network region has seen a decline of overnight visits that have included a visit to a heritage site.

- As other destinations develop their heritage and other cultural experiences, the market will become more discerning about what experiences they choose, e.g. destinations such as Tasmania with MONA, or even Canberra looking to improve accessibility to many cultural heritage sites within the ACT and surrounds by seeking to improve the overall Canberra experience through cycling. It will be critical to ensure that the heritage experiences offered through the Network evolve beyond basic interpretation of an historical site.

- There is an opportunity to develop more immersive experiences and also to better coordinate those experiences across the Network region. This means working with local theatre and art groups for example, to develop events that utilise historic buildings and sites to tell a story and bring a place to life.

APPENDIX C
CONSULTATION
INSIGHTS REPORT

INTRODUCTION

Consultation insights reflect what we heard from the businesses and communities of Country and Outback NSW, which are critical to an understanding of the broader region's strengths, weaknesses, opportunities and challenges as well as preferences to support the growth of the visitor economy.

As part of the consultation, eleven workshops were held in October and November 2017 in the following locations: Bathurst, Bourke, Broken Hill, Cowra, Dubbo, Inverell, Lithgow, Moree, Orange (the consultants participated in the Orange City Council's Regional Economic Development or REDS workshop), Parkes and Tamworth. At least one member of the DNCO Board attended each of these workshops.

A second round of consultation workshops (further fourteen workshops) were conducted during March and April 2018. These were held in: Dubbo, Cowra, Bathurst, Lithgow, Moree, Broken Hill, Parkes, Bourke, Tamworth, Armidale, Orange, Cobar, Mudgee and Canowindra.

The key insights from the consultation process, which included a number of recurring themes that were common across the entire network, are summarised on the following pages. The workshops provided an opportunity for the participants to discuss what worked and what didn't work under the previous RTO structure.

HIGH-LEVEL CONSULTATION INSIGHTS FROM ACROSS DNCO

- A significant issue raised related to the formation, governance and structure of the new Destination Network. There were concerns expressed by stakeholders about the new structure and the benefit of it to their regions or local government areas
- The need for improved communication and engagement was raised consistently.
- Critical that grant processes are undertaken by the funding organisation effectively and efficiently and that recipients of the grant funding receive the grant in a timely manner to achieve the outcomes of the grant application
- Important to recognise that smaller towns and villages are key assets of the region and provide experiences that are equally or at times, more important than those of the large centres.
- Commitment and resources to deliver the DMP by DNCO, NSW Government and LGAs as well as enable genuine industry engagement
- In developing the DMP there is not a 'one size fits all' approach. Those destinations that are successfully delivering marketing campaigns and working with the industry to develop new experiences and improve capability are supported with funding grants and are empowered to decide who they wish to partner with or contract to deliver their projects. There is a need to address and reduce the bureaucracy for smaller players in the Network.
- DNCO will not be marketing the region as a destination nor attempting to create a visitor-centric brand. The key functions of the DNCO are about building industry capability, facilitating experience and product development and influencing decisions on important infrastructure that will support the visitor economy, among other things
- Opportunity to build industry capability, in particular in relation to customer service and hospitality

- Recognition of a lack of Aboriginal cultural tourism experiences and low levels of engagement with Aboriginal communities in some areas
- Openness to the international market although some concern about capacity to deliver on market demand and expectations

GOVERNANCE

COMMUNICATION

INDUSTRY ENGAGEMENT

CAPABILITY & CAPACITY

ADVOCACY

EXPERIENCE DEVELOPMENT

VALUE OF SMALL PLACES

PARTNERSHIPS

CONSULTATION INSIGHTS

What worked and what didn't under the previous RTO structure? What issues need to be considered as part of developing the DMP?

STRENGTHS:

- Councils working together, especially when it came to promotional activities
- The new DMP to provide a working program for the Network and an action plan that enables a framework for the DNCO to report progress on implementation
- Identify common issues and opportunities across the whole network that the DNCO Board or staff can facilitate and advocate for as a collective, as opposed to individual councils or industry sectors having to 'go it alone' e.g. customer service training and capacity building of the industry – this includes the DNCO providing representation at a State level, specifically with Destination NSW (DNSW)
- The ability to be able to access funding opportunities collectively and to undertake projects for example research or analysis of the benefits of the visitor economy

WEAKNESSES AND ISSUES TO ADDRESS:

- Perception around governance issues relating to the previous RTO, Inland NSW Tourism. It is important that the DNCO have a strong governance framework and commitment to transparency
- Over the last 12 months there has been a lack of communication to the regions from the Network and DNSW about what has been happening

- A concern that the DNCO will become a membership-based organisation, in particular making it difficult for small councils to participate or justify their involvement
- A number of DMPs (at both RTO and LGA levels) were recently developed for many areas within the Network's region. There is concern that this DMP is 'reinventing the wheel'. It is important that the DNCO DMP is informed by previous DMPs – key outtakes from the local or a regions DMPs are included in this document
- The Network (as in the DNCO) is too big and diverse for marketing purposes - there are too many differences from the Outback NSW to the Central West NSW Hubs
- Funding approvals and the need to improve the timing of when successful applicants receive the funding. This has caused issues around the timing of going into market for the successful applicants
- Lack of lead time (and often conflicting commitments) given to stakeholders to participate in consultation processes. For example, this DMP had a very short lead time, which meant that many stakeholders were unable to participate due to other commitments. This included the NSW Government's review of the Visitor Economy Industry Action Plan and Regional Economic Development Strategy workshops as well as the annual Australian Regional Tourism Network (ARTN) conference
- Concern that if a hub or local government area receive matched funding from DNSW and DNSW then develop and implement the marketing campaign that the region will lose its personality and become an 'homogenised' destination. A concern is a number of regions are also in market at the same time competing for the same source market
- Review required of the approach to funding marketing campaigns by DNSW. If a region has proven to deliver a successful campaign then there should be an opportunity for that region to still attract matched funding from DNSW to deliver their own campaigns. For those regions who do not have a track record of delivering successful campaigns, then they should have a choice of whether to work with DNSW to deliver the campaign
- Economic analysis of the value of the visitor economy and tourism marketing campaigns (at a local level) to demonstrate the value of tourism to local businesses, communities and local government

As part of the consultation process it was important to understand the stakeholders' vision for the visitor economy of the region and gain an insight into what success would look like.

- Connectivity throughout the region and a sense of community
- Successful and sustainable visitor economy and to create employment opportunities
- A destination that becomes a place that all Australians visit to see the 'real Australia on their doorstep'
- Bringing history to life and leaving a legacy for the next generation
- Connection to people and their place and telling those stories
- An opportunity for tourism to be an industry sector that leverages and adds value to other sectors within the region more broadly

Workshop participants were asked to identify general strengths of the region, what they believed to be the established 'signature' experiences and what were the opportunity for new ones (see additional responses below)

- Region boasts significant and popular events (at a national and international level) e.g. Parkes' Elvis Festival, Tamworth Country Music Festival and Bathurst 1000. There are many other festivals such as the Broken Heel Festival in Broken Hill, The End festival of arts, culture and heritage in Hill End village and the ABBA Festival in Trundle. The region also hosts country race meetings, agricultural field days as well as farmers markets and food & drink festivals

- Opportunity to work with Local Aboriginal Land Councils (LALC) and Aboriginal communities to develop new tourism experiences and showcase their connection to Country. This would create jobs, pathways to employment and opportunities for current and future generations to stay on Country

- Opportunity to work with the agricultural sector and develop and grow agri-tourism experiences

- Further develop fossil tourism experiences across the region (for example, leveraging the Age of Fishes and Australian Fossil and Mineral Museums) as well as mining history from Broken Hill to opal mining at Lightning Ridge or fossicking for gold at Hill End

- Partnerships with NSW National Parks & Wildlife Service (NPWS) and attract investment in facilities to create nature and cultural tourism experiences

- The Flying Doctor Service funding of major infrastructure in Dubbo and Broken Hill

- Astronomy and the night skies across the entire region as well as the opportunity to leverage the Parkes Dish, observatory at Coonabarabran and Australia's first 'dark sky park', Warrumbungle National Park

- The diversity of the region provides a unique opportunity to link different experiences

- Value that the smaller towns and villages across the region bring to the overall visitor experiences and the opportunity to develop experiences within the towns and villages

- Significant heritage across the region and the opportunity to develop contemporary experiences that bring it to life

- Proximity to source markets, e.g. for the southern part of the region access to Canberra, Sydney and Regional NSW. Central and Outback region's access to Sydney and regional NSW and the drive through market from Melbourne and Brisbane and the northern part of the state access to Sydney, Brisbane, Gold Coast and regional NSW

- Quality of the food, wine and drink experience within Central West NSW is outstanding, which creates opportunities to improve the food and drink offer across the region

- Take advantage of the international market that is already coming to the region e.g. the bus loads of Chinese visiting some areas to experience the Canola flowering

- Opportunity to bundle and package up experiences within sub regions as well as across the broader region

- Sharing economy e.g. AirBnB and Youcamp in peak periods addressing accommodation supply during major events etc as well as bike share in larger urban areas

- Opportunity to utilise infrastructure such as private and public airstrips to develop small/charter aircraft touring routes

- Better utilisation of the Visitor Information Centre (VIC) network and to ensure that the VICs are continuing to evolve and deliver services and experiences to meet the needs of the visitor

- Opportunity to build industry capacity through workshops, business mentoring programs and more traditional educational institutions such as TAFE

- Local government to review their policies to create a more enticing environment to encourage appropriate tourism development

- Opportunity to leverage the international market including a better understanding of the China market
- Develop products, experiences and events to fill shoulder and low seasons
- Identify niche market opportunities e.g. birdwatching market

Workshop participants were asked to share other areas that they wanted to see reflected in the DMP - following are the common points of discussion across the whole region

- DNCO governance model to ensure that there is transparency and to build confidence of the stakeholders in the DNCO Board and their capacity to perform
- Development of guiding principles that could assist the local council areas when making decisions relating to visitor economy projects. For example, guiding principles for the development of major projects, identifying appropriate events to grow the visitor economy and for marketing activities
- A framework to assist local governments to work together in a more meaningful and collaborative way
- Identification of projects, opportunities, challenges and barriers that if approached from a broader regional or network perspective would drive better outcomes at a local level
- Creating a prioritised action plan as part of the DMP that was measurable, achievable and provided a framework for the DNCO operational plan and could be reported against by the DNCO
- Consideration given to partnership opportunities, especially in the context of government and private sector partnerships

Identifying the weaknesses, barriers and challenges across the region

- Competing priorities for Commonwealth, State and local government funding in competing sectors e.g. mining and agricultural industry
- Complexities of accessing government funding for projects. There were major concerns expressed about the lack of appropriate timing of receiving funding from these government agencies to achieve the objectives of the project
- A need to greatly improve the standards of customer service across the whole network region and to build industry capacity
- Improve the perception of the hospitality and tourism industry as providing meaningful long-term employment opportunities
- Lack of understanding how to engage and utilise the sharing economy opportunities, i.e. local government having a clear policy around the sharing economy
- Tourism being siloed and not seen as part of the broader economic development of the region. This is very relevant in context of the recent development of the Regional Economic Development Strategies (REDS), which are funded by the NSW State Government
- Gaps in infrastructure such as communication, signage, quality of roads and public transport. Better use of NPWS infrastructure to support nature and cultural-based tourism opportunities
- Limited variety of accommodation styles across the region e.g. there is a large number of traditional motels and hotels, while the market is seeking more experiential accommodation – need to identify appropriate locations to meet market demand
- Appropriate infrastructure to support caravan or RV parking in town centres. A lack of recharge

stations for hybrid cars. A lack of local government policy around providing these services or infrastructure

· Lack of understanding by the business community (such as the retail sector) re the value of tourism to their businesses

· Need to engage at a local level to build better community or civic pride

· Better collaboration between local government on projects beyond just tourism promotion and attending each other's meetings. There is an opportunity to look more broadly at infrastructure and product and experience development

· Building capacity within the tourism and event industry. Improve access to education and training and to have the training offered within the region

· Address the issues around seasonal travel and address low and shoulder seasons

· Lack of funding for projects especially ongoing (multi-year) funding commitments for bigger projects and across local government boundaries

· Lack of Councils' expertise in or resources for tourism, product and experience development, destination branding and marketing. This means that decisions are often made that generally are not conducive to driving the visitor economy in a meaningful way

Workshops participants were asked to identify existing signature experiences that attract visitors to the Country and Outback NSW region. Below is a list of the signature experiences that where raised consistently in the workshops. These experiences were seen by participants as a very important part of the DMP moving forward

· Major events as already mentioned e.g. Tamworth Country Music and Parkes Elvis Festival, Bathurst 1000, Canowindra International Balloon Festival, etc.

· Broken Hill Sculptures and more generally Broken Hill as an iconic town

· Big Skies across the whole region, including Warrumbungle National Park, Australia's first Dark Skies Park

· Lightning Ridge and the potential of the new Australian Opal Centre. The characters of Lightning Ridge are also part of the signature experience

· Food and wine experiences that are on offer in destinations such as Orange and Mudgee are outstanding – includes bespoke opportunities such as mushroom foraging around Oberon

· Western Plains Zoo in Dubbo is internationally recognised and offers unique experiential accommodation

· Cowra Japanese Gardens at Cowra and Mayfield Garden near Oberon

· Number of quality visitor experiences offered within the national parks located across the region

· Back of Bourke Centre and the show at Bourke

· Artesian spas and waters of Moree and Lightning Ridge attract a wide range of markets from diverse cultural backgrounds

Workshop participants were asked to identify opportunities to create new signature experiences and to identify opportunities to leverage the existing signature experiences

· Further development of agri-tourism and understanding the barriers to participation by the rural

sector. This could include anything from farm-stays to more technical agricultural tours. It was identified that there is already a Chinese market visiting some parts of the region to take advantage of the seasons e.g. Canola in flower in the spring. The opportunity to embrace this market to improve management of their visit and increase yield

· Improve and grow the Aboriginal cultural tourism experiences offer. This requires resources, commitment to working with the local Aboriginal communities and the LALCs located within the network. This issue was seen by Aboriginal and non-Aboriginal participants as being a major issue and a gap that needs to addressed as a high priority

· Opportunity to build on the significant fossil and archaeological history of Australia that this region offers. There are several different locations that offer an experience and tell the stories of the region through the fossil collection. For example, the Australian Fossil and Mineral Museum in Bathurst, Age of Fishes Museum in Canowindra, Wellington Caves as well as Lightning Ridge and opals.

· Opportunity to package and bundle up experiences to take advantage of the amazing night skies and leverage the Dark Skies Park (Warrumbungle National Park)

· Need to identify a 'hub and spoke' model that creates an opportunity to profile the smaller towns and villages across the network and to also identify some opportunities for the smaller towns to improve their visitor experience offer

· An opportunity to work more closely with NPWS to better leverage national park's assets and visitor facilities to improve the nature and cultural-based experiences

· Investigate opportunities to enhance access for charter flights and bespoke, higher yield tours

KEY TAKE-OUTS FROM PREVIOUS DMPs

Key outtakes from the analysis of previous or existing Destination Management Plans across the DNCO:

While there are features, advantages, opportunities and issues specific to each of the former regions, an analysis of existing DMPs established a range of challenges and strategic priorities relevant to and consistent across all of them. These include (but are not limited to):

· The need for greater clarity around the regional offer, and the development of compelling stories for destinations and experiences;

· A coordinated approach is required for identifying and creating opportunities for new and enhanced/ refreshed products and experiences;

· Improvements to infrastructure and accessibility are necessary, including accommodation, transport, and digital access and distribution;

· Regions must attract new investment for the development of products, experiences, events and accommodation, addressing policies and regulations to facilitate this;

· Cross-regional collaboration across all areas is critical, including product development, funding, events, marketing and insights, to avoid duplication of effort and competition for the same market segments, to share costs, facilitate improved access to funding, and to share learnings and opportunities;

· Collaborative, targeted, cross-regional marketing programs are vital for growing the visitor economy across the Network; regions must move beyond silo marketing approaches to leverage hubs and drive

dispersal to smaller destinations and nearby experiences;

- Regions need to develop a collaborative approach to bundling and packaging;
- A core priority is building capacity and capability among stakeholders, industry partners and tourism operators around business management, product and experience development, customer service, and digital marketing and social media;
- A strong communications framework is necessary for enabling effective and efficient communication and knowledge sharing; and for engaging communities and local businesses with the visitor economy and the implementation of DMPs;
- There is a need for localised baseline visitation data and insights; and
- There is also a need to establish robust measures, monitoring and reporting processes for destination management programs.
- A VFR program would stimulate community engagement, integrate regional and local activities, and provide opportunities for industry and partner participation;
- There is a fragmented approach to digital across the regions; a digital strategy is necessary for supporting visitor planning, enabling regional operators to have a consistent digital presence (inc. online booking capability), enhancing interactivity with visitors, delivering more innovative technology approaches, and addressing the proliferation of websites and digital content standards;
- Wifi connectivity (linked to the VIC offer) and improved mobile and internet coverage across the region is critical;
- The quality, variety and availability of accommodation across the regions needs to be improved. Ongoing accommodation audits and occupancy data are needed for identifying gaps, managing inventory and developing opportunities, as well as capacity building to improve standards and enhance digital presence;
- A collaborative approach to regional events is critical; an events audit and calendar should underpin the development of a business and leisure events strategy that also identifies formal measures for assessing impact of events on the visitor economy;
- Supporting the development of Aboriginal cultural tourism products and experiences is priority;
- Regional product and infrastructure audits are necessary to identify gaps and development opportunities;
- There is a need for a strategic review of the Visitor Information Centre network;
- Population declines are a significant concern in some regions; longer term plans such as attracting industry through infrastructure development are necessary to counter this;
- Access to and use of land and water-based conservation areas for development of appropriate agri- and nature-based tourism requires enabling State and local government policies; and
- Transport access will continue to be a critical factor; regions to engage with rail and airlines to provide improved access.

Key projects and product/experience development areas identified in previous DMPs that align with the DNCO DMP Experience Themes:

CELEBRATING CULTURE ON COUNTRY

- Development of the regional cultural heritage offering, with a strong emphasis on Aboriginal culture:
  - eg. Kamilaroi Highway Plan
  - eg. Establishing an Aboriginal Cultural Festival
- Development of regional and place-based 'art-scapes'.

WINE LOVERS AND FOODIE FINDS

- Development of a product development strategy for food and wine/beverage for Country NSW
- Development of Agri-tourism, Food and Wine/Beverage products and experiences, for example:
  - Creation of edible streetscapes that showcase regional produce
  - Investigation of opportunities to host regular farmer's markets across the region
  - Investigation of farm gate experiences and farm gate trails
  - Development of a Country Cooking School in collaboration with Country Womens' Association
  - Establishment of a regional harvest event, showcasing region's agri-tourism product
  - Identifying and developing a regional food and wine market schedule to ensure weekly access to fresh seasonal and regional produce for locals and visitors
  - Improving direct trade between regional food and beverage producers and the region's food service and retail sectors.

UNLIMITED HORIZONS

- Delivery of product audits for better understanding of experience linkages, gaps and opportunities.
- Development of touring routes, loops and trails, such as:
  - Reinvigoration of stories and interpretation around the Darling River Run
  - Development of an FIT Outback Station Tour
  - Investigation of a 'Pioneer Trail' around Gunnedah
  - Development of a Country Heritage Trail System
  - Development of the Far Northern Inland Iconic Journey narrative and implementation
  - Further development of the Artesian Way, including linking Coonamble's new Eco-Spa development.
- Development of Rail Trails and Cycleways
  - Investigation of opportunities for development of a regular weekend event train from Tamworth to Willow Tree and return
  - In addition, an infrastructure funding bid for the 'Kokoda Trail Walkway & Cycleway' in Liverpool Plains is currently shortlisted through the NSW Government's Regional Growth – Environment and Tourism Fund).

- Investigation of product and experience development, including Aboriginal experiences, around Night Skies, for example:
  - Creation of the Big Sky Soiree (concerts under the stars)
  - In addition, there are two projects currently shortlisted for funding through the NSW Government's Regional Growth – Environment and Tourism Fund:
    - Tamworth Astronomy/Science Centre, Planetarium and Café;
    - Zoofari Lodge Redevelopment and Expansion (this will leverage the existing night time offer of Taronga Western Plains Zoo).
- Development of a system that sources RMS and Police data to collate and provide current road access and weather condition information for travellers, shared across social media and linking to official websites.

EXPLORING OUR NATURE

- Development of an overarching Plan of Management for Macquarie Marshes for the development of nature and cultural tourism products and experiences (an infrastructure funding bid for 'Implementation of the Destination Macquarie Marshes Action Plan' is currently shortlisted through the NSW Government's Regional Growth – Environment and Tourism Fund);
- Enhancing Gunnedah's profile as the Koala Capital of NSW (an infrastructure funding bid for the 'Gunnedah Koala Park and Education Centre' is currently shortlisted through the NSW Government's Regional Growth – Environment and Tourism Fund);
- Working with key stakeholders such as NPWS to develop infrastructure and experiences in Warrumbungle National Park.
- In addition, an infrastructure funding bid for the 'Jenolan Restart' is currently shortlisted through the NSW Government's Regional Growth – Environment and Tourism Fund.

REVEALING OUR HERITAGE

- Continue to support the development of the Australian Opal Centre in Lightning Ridge, providing a world-class facility for education, research and tourism.
- In addition, the following regional projects are currently shortlisted for funding through the NSW Government's Regional Growth – Environment and Tourism Fund:
  - Repurposing of the Saumarez Homestead & Heritage Listed Farm
  - Eskbank Wagon Maintenance & Carriage Restoration Facility and Living Museum

LITTLE PLACES, BIG STORIES

- There are two projects currently shortlisted for funding through the NSW Government's Regional Growth – Environment and Tourism Fund :
  - Lightning Ridge Visitor Information Centre, Council Agency, Conference/Community Centre and Transit Hub
  - Central West Equestrian and Livestock Centre, Blayney Shire

EVENTS AND CONFERENCES

- Development of a regional events audit and calendar, along with formal measurement tools to help evaluate event impact on visitor economy.
- Development of a business and leisure events strategy that links to and leverages other sectors, for example sports, mining, agri-tourism, etc
- Exploration of the potential across the region to grow the MICE sector and build capacity of stakeholders to deliver quality services and experiences for this sector
- Investigation of opportunities for a major event in the Outback, targeting the younger market as a 'rite of passage/journey event', eg. Burning Man in Nevada.
- In addition, there are two projects currently shortlisted for funding through the NSW Government's Regional Growth – Environment and Tourism Fund:
  - Big River Dreaming - The Water Weaving Way, Gwydir Shire
  - The Mount Panorama Boardwalk, Bathurst