

Country and Outback NSW Destination Management Plan

2022-2030



This Destination Management Plan was prepared by Destination Marketing Store.

ACKNOWLEDGEMENTS

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

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LIST OF ACRONYMS

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

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Acknowledgement of Country

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

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

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

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

Message from the Country and Outback NSW Board

The Destination Country & Outback (DNCO) Destination Management Plan 2022 – 2030 (DMP) is designed to align with the NSW Visitor Economy Strategy 2030 (VES) and guide the work of DNCO and its stakeholders to sustainably grow the region's visitor economy which is worth over \$1.7 billion annually. DNCO is a geographically vast and diverse region and welcomes nearly six million visitors each year.

The plan has been developed following extensive consultation with stake holders and has identified many opportunities to lift the region's performance and sustainably grow the visitor economy, delivering benefits to the local industry and communities across the region.

The plan further prescribes how DNCO by proactively engaging with stakeholders can identify, prioritise and facilitate opportunities for regional visitor economy growth while performing its key role in supporting Destination NSW (DNSW) in the delivery of its industry development, visitor experience and regional event funding programs.

It also demonstrates how DNCO supports DNSW in implementing its NSW Visitor Economy Strategy 2030 to achieve the visitation and expenditure targets for regional NSW through focusing on industry engagement and development as well as enhancing the experience offering of the region, including events. It is not intended to replicate or duplicate the work already done or planned at the local government level. However, acting as a conduit to DNSW and facilitating relationships between local government and other NSW Government agencies is a core part of DNCO's role.

Key opportunities in the plan have identified an ability to reimagine the way that Aboriginal cultural experiences can be developed and shared, in particular to deliver meaningful benefits to Aboriginal communities, tourism operators and businesses within the framework of the NSW Aboriginal Tourism Action Plan 2017 – 2020, which seeks to further develop the sector in a manner that is endorsed by Aboriginal people, respects their cultural identity and creates a greater understanding of, and engagement with Aboriginal culture in NSW.

The plan also highlights The Wonder of Gondwana - A Journey into Ancient Australia which will connect Australians and our visitors from abroad to the extraordinary history and heritage of our timeless land. It would deliver on the major trend identified by Tourism Australia relating to Odyssey Journeys and increased demand for drive tourism, including with younger markets such as Millennials and Gen Z markets. This is even more important given that 95% of visitors to the DNCO region arrive by private vehicle. Time not only evolves our landscape and nature but it transforms our culture. This project pays respect to and recognises the inherent connection to Country of the Aboriginal communities throughout the region while also highlighting the amazing opportunities to step back into Gondwana or marvel at Earth's riches formed by forces of nature beyond our imagination.

I wish to acknowledge the valuable work of our General Manager, Lucy White and Administration Co-ordinator / Acting Business Development Manager, Lauren Bingham in developing the plan together with the support of the DNCO Board, and we look forward to implementing the plan and growing the visitor economy in the DNCO region.

Clyde Thomson AM GM

Chair

Destination Country and Outback NSW

Overview

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

The Country and Outback NSW region comprises 25 local government areas organised into three main sub-regions: Outback NSW, New England North West and Greater Central Plains.

The Country Outback NSW visitor economy delivered 6.9% of the region's jobs, supports 5,487 businesses and directly delivers 3.6% (over \$1 billion) of the region's Gross Value Add (GVA) which has grown every year since 2010-11 at an average 5.3% pa. The region attracted 12.2 million visitors and 16.5 million visitor nights in 2019 (Year End December)¹.

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

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

1. Road to Recovery: Support the Country and Outback NSW visitor economy to recover and be sustainable, capable and resilient
2. Build Our Brand: Position and promote Country and Outback NSW and its destinations to align to the Feel NSW brand

¹ YE December 2019 (pre-COVID-19 health pandemic) Tourism Research Australia visitation data is used as a base measure to recover and grow the visitor economy. Note this data does not account for DNCO boundaries from July 2022.

3. Showcase Our Strengths: Facilitate and enable the development or enhancement of world-class visitor experiences and accommodation
4. Invest in World Class Events: Facilitate and enable the development or enhancement of world-class events
5. Facilitate Growth: Provide an enabling environment to attract investment in the Country and Outback NSW visitor economy.

Vision

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

Mission

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

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

Positioning

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



Introduction

Destination Country and Outback NSW commissioned the preparation of the Country and Outback NSW Destination Management Plan to create a collaborative framework to guide the work of local, regional and state visitor economy stakeholders to grow, develop and promote the region's visitor economy to 2030.

The Country and Outback NSW DMP 2022 to 2030 has been developed to align with the directions of NSW Visitor Economy Strategy 2030.

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

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

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

The seven DNs are:

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

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

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

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

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

Specialist agency Destination Marketing Store was engaged from January to July 2022 to prepare the Country and Outback NSW DMP 2022 to 2030.

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



Country and Outback NSW DMP 2022 to 2030

Given the large size and diversity of the Country and Outback NSW region, its geographical footprint is organised into three main sub-regions:

NEW ENGLAND NORTH WEST	GREATER WESTERN PLAINS	OUTBACK NSW
<ul style="list-style-type: none"> • Armidale Regional Council • Glen Innes Severn Council • Gunnedah Shire Council • Gwydir Shire Council • Inverell Shire Council • Liverpool Plains Shire Council • Moree Plains Council • Narrabri Shire Council • Tamworth Regional Council • Tenterfield Shire Council • Uralla Shire Council • Walcha Council 	<ul style="list-style-type: none"> • Coonamble Shire Council • Dubbo Regional Council • Gilgandra Shire Council • Narromine Shire Council • Warren Shire Council • Warrumbungle Shire Council (Coonabarabran) 	<ul style="list-style-type: none"> • Bogan Shire Council (Nyngan) • Bourke Shire Council • Brewarrina Shire Council • Broken Hill City Council • Central Darling Shire Council • Cobar Shire Council • Walgett Shire Council • Unincorporated Far West Region of NSW

Table 1. Country and Outback NSW sub-regions

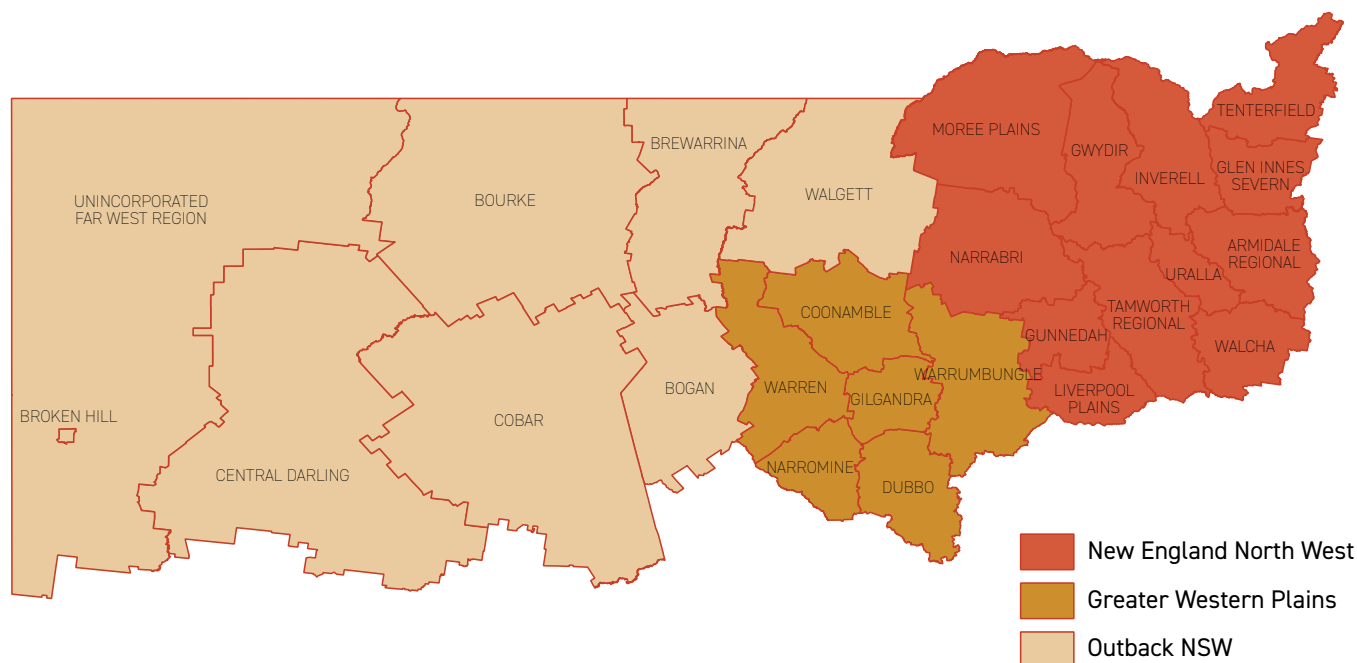


Figure 1. Map of the DNCO region indicating LGAs and the broader three sub-regions

Country and Outback NSW Destination Management Plan

The Country Outback NSW visitor economy delivers 6.9% of the region's jobs, supports 5,487 businesses and directly delivers 3.6% (over \$1 billion) of the region's Gross Value Add (GVA) which has grown every year since 2010-11 at an average 5.3% pa. The region attracted 12.2 million visitors and 16.5 million visitor nights in 2019 (Year End December)².

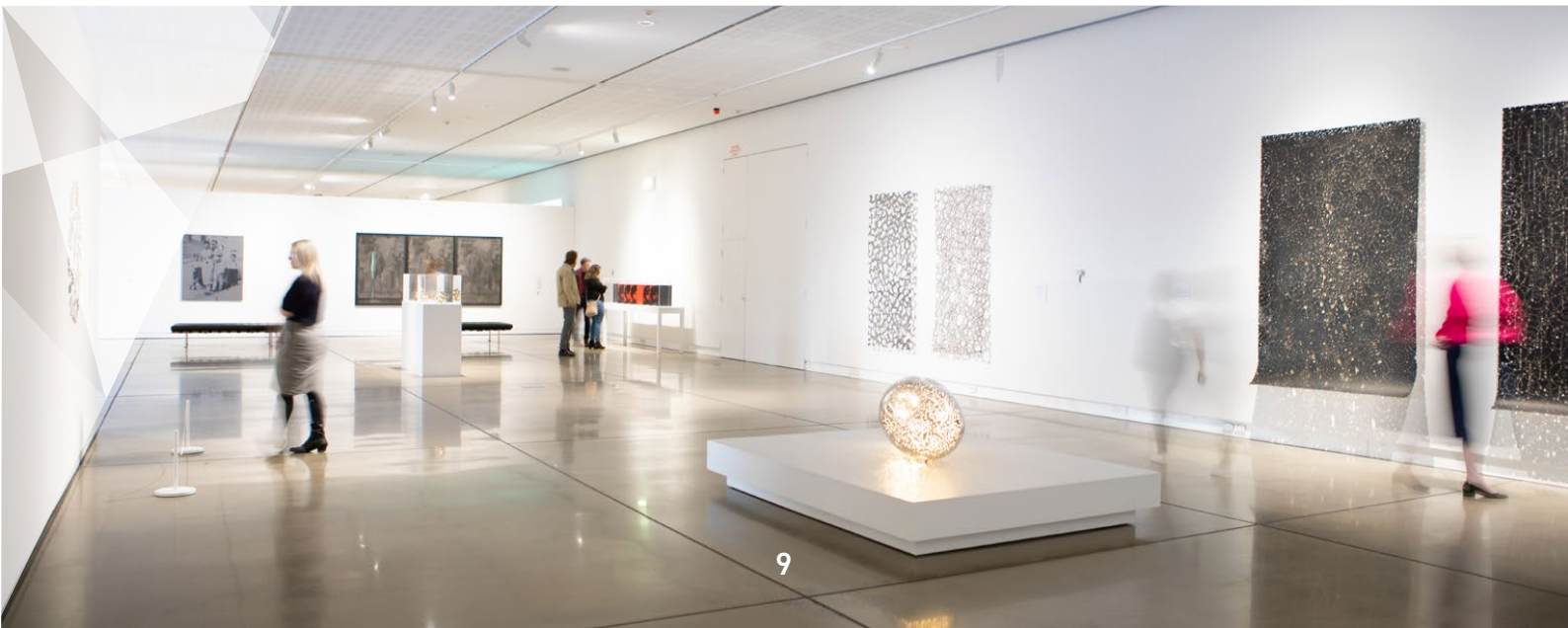
The Country and Outback NSW destination management planning process involved:

1. Analysis of visitor research and data
2. Review of existing strategies and plans, including at the Commonwealth, State, regional and local level
3. Consultation with over 120 participants from across the region, representing industry, local government, Joint Organisations, NSW Government agencies and local communities
4. Analysis of relevant global and domestic trends influencing tourism and travel

The Country and Outback NSW DMP adopts the following guiding principles:

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

² YE December 2019 (pre-COVID-19 health pandemic) Tourism Research Australia visitation data is used as a base measure to recover and grow the visitor economy. Note this data does not account for DNCO boundaries from July 2022





Strategic Context



Strategic Context

The Country and Outback NSW DMP 2022 to 2030 has been developed to align with the *NSW Visitor Economy Strategy 2030*. The strategy comprises three phases:



Figure 2. NSW Visitor Economy Strategy 2030 phases

Ambitions, Outcomes and Targets

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

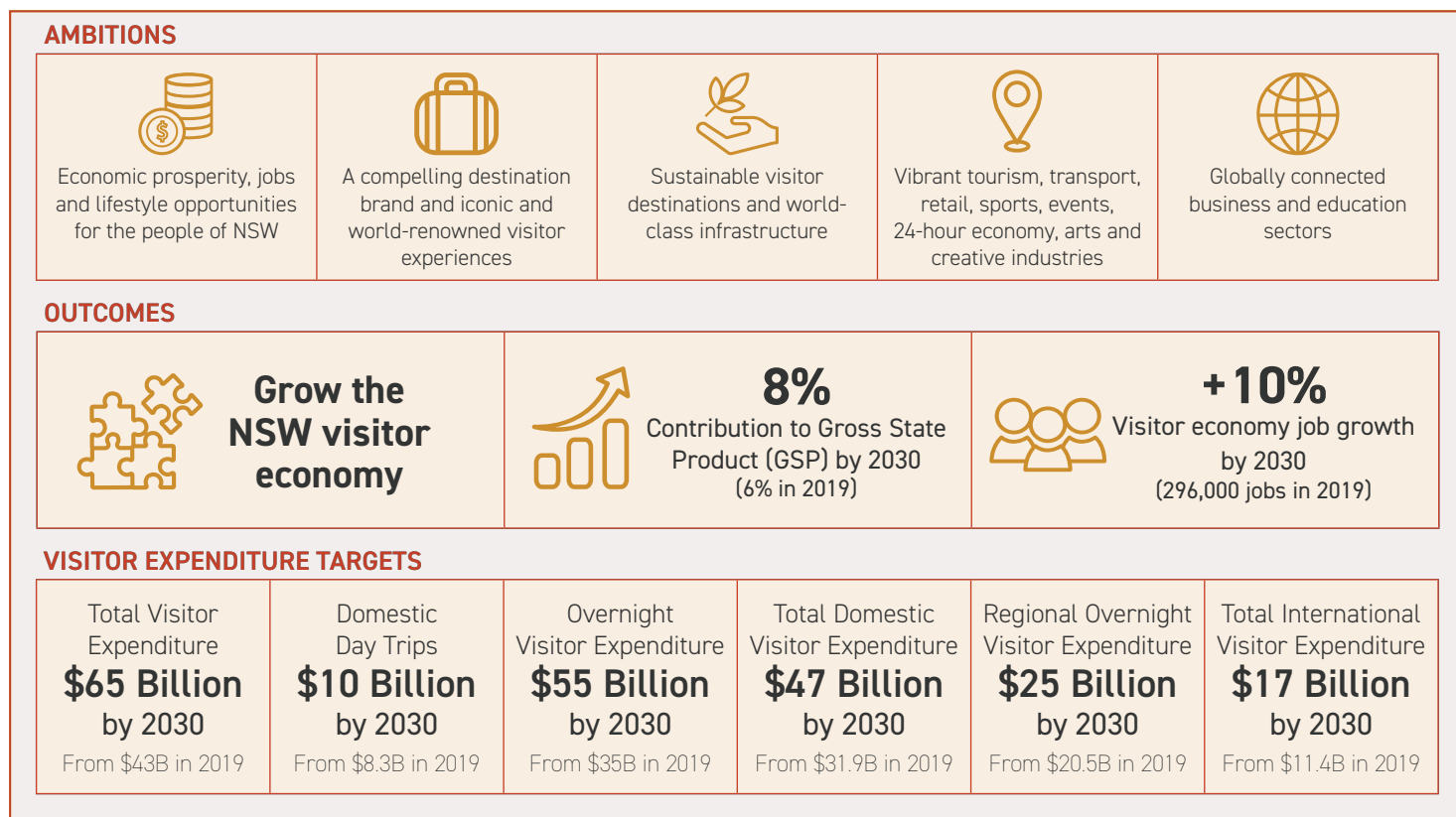


Figure 3. NSW Visitor Economy Strategy 2030 – ambitions, outcomes, and visitor expenditure targets

Country and Outback NSW Destination Management Plan

Guiding Principles

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

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

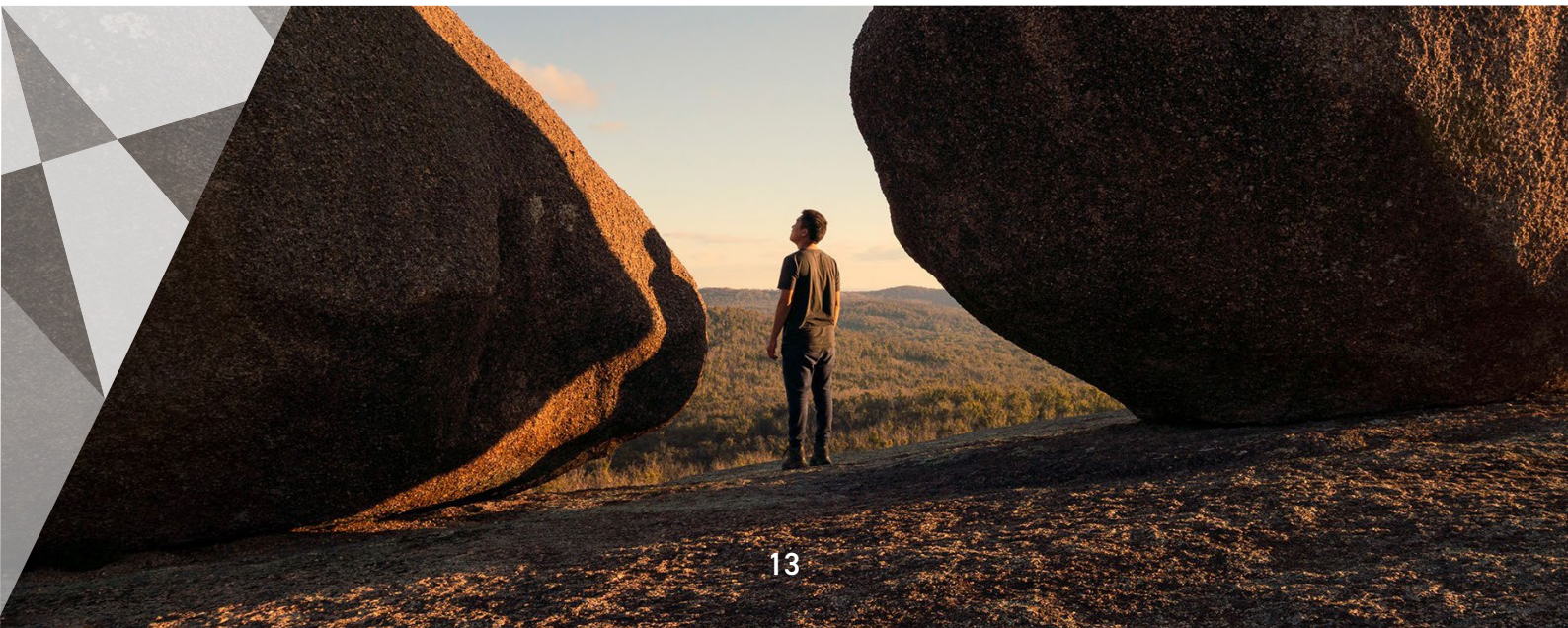
Table 2. NSW Government Five Guiding Principles for visitor economy policy and investment

Strategic Pillars

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

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

These pillars and associated key result areas are explained further on page 32.



Other Considerations

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

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

- Local government strategies and plans for all 25 LGAs and the Unincorporated Far West Region
- Key initiatives and strategies for the five Joint Organisations (JO)
- Relevant NSW and Commonwealth Government strategies, initiatives and reforms, including but not limited to Thrive 2030, Reflections Holiday Parks and the NSW Department of Planning and Environment (incorporating Planning NSW and NSW National Parks and Wildlife Service (NPWS))

Most plans and strategies relating to the visitor economy highlight the importance of tourism and identify high level strategic priority areas: driving demand, capability and capacity building, collaboration, improving the visitor experience, visitor servicing support and aligning with DNSW's objectives.

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

- Enhancing the visitor services model
- Developing regional trails
- Implementing a Visiting Friends and Relatives (VFR) program
- Building a strong tourism events and festivals brand
- Leveraging nature-based tourism

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

Regional Economic Development Strategies (REDS)

A review of seven Regional Economic Development Strategies (REDS) was also undertaken as part of the review process. Across all the REDS for the Country and Outback NSW area identified improving connectivity as a foundation for growth. This primarily focused on improving digital connectivity and upgrading road infrastructure but in some cases extended to establishing an energised business network amongst visitor economy operators to build industry capabilities and assist businesses in networking and co-promotion.

Many of the REDS also highlighted retaining long-term staff as a significant issue along with the need to provide a more positive planning and regulatory environment.

Given the unique landscape and rich cultural heritage the regions have to offer, particularly Aboriginal cultural heritage, tourism was consistently recognised as a significant growth opportunity for the region and a key sector that requires support.

Priorities range from developing natural and built assets to attract visitors through to creating local events and festivals and funding for cultural tourism offerings, as supported through DNCO.

Many of the REDS are in the process of being updated.

Trends Influencing Visitor Demand

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

The following provides an overview of the main trends influencing recovery from the pandemic as sourced from travel research commissioned in 2022 that is also relevant to regional NSW visitor economy growth and development. It is recommended that continual monitoring of consumer trends be undertaken to 2030³.

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

Table 3. Trends influencing visitor demand

³ See more at <https://www.unwto-tourismacademy.ie.edu/2021/08/tourism-trends-2022>, <https://skift.com/megatrends-2022/>, <https://skift.com/megatrends-2022/>



Growing the Country and Outback NSW Visitor Economy

Growing the Country and Outback NSW Visitor Economy

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

Covid-19 Impacts

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

The disruption to the visitor economy sector in 2020 was unprecedented. The immediate halt to people movement to prevent the spread of COVID-19 was significant to the industry in Australia and worldwide that experienced: a sudden halt in international visitation; restrictions on domestic mobility; and increased health and safety concerns. Australia's proactive management approach to the pandemic played a key role in protecting domestic demand for tourism despite ongoing disruptions to the tourism industry⁴.

At Y/End Dec 2021 the number of total visitors to the Country and Outback NSW Destination Network was 8.1 million or 32 per cent below the pre-Covid period (year 2019).

⁴ Tourism Research Australia, Tourism Investment Monitor 2019-20. Australian tourism investment and COVID-19 impacts



Recovery Goals

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

The following figure highlights the 2019 (pre-Covid) visitor economy achievements versus the Y/End 2021 impacts⁵.



Figure 4. 2019 (pre-Covid) visitor economy indicators versus 2021 outcomes⁶

Further visitation research analysis for the Country and Outback NSW region is provided in Appendix 2.

⁵ It should be noted that these visitation statistics use the previous Destination Network boundaries prior to changes in 2022

⁶ International visitation data is not statistically reliable for YE December 2021

Main Opportunities & Challenges

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

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> Outstanding natural assets, spectacular night sky and expansive horizon reinforce the sense of freedom and open space Rich history and heritage Fascinating combination or laying of geological and cultural influences on a timeless landscape Broken Hill (30% of visitors to the NSW Outback visit Broken Hill) Taronga Western Plains Zoo (attracts 250,000 people p.a. to the Great Western Plains region) Tamworth Country Music Festival (50,000 people over 10 days) 	<ul style="list-style-type: none"> Domestic overnight average spend in both the New England North West and Outback NSW sub-regions is lower than the NSW regional average (\$171) Average night stay in Greater Western Plains (2.4 nights) and New England North West (2.9 nights) is lower than NSW regional average (3.2 nights) Limited collaboration between stakeholders in the visitor economy Fragmented tourism community Road access and quality of the road network as well as intra-region transport options Use of digital technology by industry (especially online, e-commerce and to support visitor servicing) below market and visitor expectations Quality of interpretation and way-finding signage varies greatly
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> For the Greater Western Plains and New England North West hubs, VFR is a strong a motivator for travel – on par with holidays Tapping into the Odyssey travel trend and the renewed interest in road trips - landscape-scale, experiential itineraries that link destinations through trails and touring routes (over 95% of visitors drive to the network area) Growing demand for private air charters Events, particularly (but not exclusively) outdoor events or those that take advantage of the landscape setting, including the night skies Adopting new technology and integrating it into all relevant areas of the visitor economy from visitor services through to workforce support and interpretation Aboriginal Cultural tourism, including: <ul style="list-style-type: none"> » More personalised, immersive and transformative experiences » New model for encouraging Aboriginal cultural tourism Ruralisation of tourism, which is resulting in increased demand within domestic markets for travel to regional Australia – links to increasing interest in agri-tourism Sustainability and eco-tourism, including active transport and to support e-vehicles 	<ul style="list-style-type: none"> The shift from transactional to transformative travel Digital transformation required to future-proof the visitor economy and meet the expectations of contemporary markets/travellers Major infrastructure projects competing with leisure markets for occupancy and access Domestic market demand likely to soften with the opening of international borders Increasing cost of fuel and cost of living pressures (including inflation) impact domestic demand for discretionary holiday expenditure, especially for road trips and odyssey travel Regulatory barriers to agri-tourism and eco-tourism both at the state-wide and LGA levels Improved connectivity relating to digital and communication technology Attracting and retaining talent in a highly competitive workforce environment

Table 4. High-level SWOT analysis

Main Opportunities & Challenges (continued)

Further insights, issues and enablers identified during the destination management planning process relevant to growing the Country and Outback NSW visitor economy include:

- **A significant gap remains with regard to Aboriginal cultural tourism**, specifically but not exclusively relating to connecting potential experience providers to the Country and Outback NSW and DNSW and greater promotion of the experience offer. This should involve an ongoing and close relationship with NATOC as well as encouraging and supporting new market entrants.
- **There is a need to further grow and develop high-quality products and experiences around unique Australian locations and themes** as identified in the Australian Government's recently released *THRIVE 2030*⁷. This includes approaches which integrate sustainable nature tourism with economic opportunities for Traditional Owners, and capitalising on emerging tourism trends such as geotourism.⁸
- **Improving standards of visitor servicing should be a high priority.** This includes greater activation of online and digital channels and enhanced in-destination visitor servicing with more remarkable destination content and information to attract new markets and encourage return visitation. Accelerating digital innovation and connecting local content with DNSW for distribution through their channels will be important to success, as highlighted in the comprehensive product and experience audit undertaken across the Country and Outback NSW region in 2018/19 and is reinforced by the ATDW listings for the region.
- **Engagement of other businesses and sectors and increased promotion of regional events** will assist in growing the value of the visitor economy and enhance linkages with Regional Economic Development Strategies (REDS). Importantly, the REDS need to be reviewed and updated to reflect the current economic situation and influences, including interest rate and inflationary pressures.

⁷ THRIVE 2030 is Australia's national strategy for the long-term sustainable growth of the visitor economy – see: AUSTRALIA – <https://www.austrade.gov.au/news/publications/thrive-2030-strategy>



Main Opportunities & Challenges (continued)

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

- **Engagement with stakeholders is a key to success.** However, for DNCO the scope and scale of this task is significant, especially to support face-to-face engagement. To date, important stakeholder groups have included local tourism organisations (LTOs), local government (25 LGAs plus Unincorporated Far West Region), Joint Organisations (five JOs) and NSW Government agencies, among others. In more recent times, a positive addition has been the engagement of the region's economic development officers, which supports the VES action to link DMPs with REDS. However, while stakeholder engagement continues to be a high priority for DNCO, the level of resourcing available (human and financial resources) to effectively enable this across the wider region and sectors is currently insufficient.
- **While the wide range of initiatives is acknowledged, greater support is required for businesses** (especially small to medium-sized enterprises), new market entrants and industry development, including a more holistic, whole-of-government approach to building capability and capacity. This insight is consistent with the significant gap identified in the comprehensive Country and Outback NSW product and experience audit (2018/19).
- **Investment in infrastructure to support the visitor economy is critical**, including air transport. The planning and the design of this infrastructure should be customer-centric and involve in-region stakeholders and those with specialist expertise in the visitor economy.
- **Given limited resources, new or emerging opportunities could result from additional funding received through State or Commonwealth Governments' grant programs.** However, a challenge is identifying the resources to apply to this task, especially to ensure that robust feasibility and return on investment analysis and appropriate master planning can be undertaken to attract investment.
- **Cross-border collaboration with Queensland and South Australia**, as identified within the VES Detailed Action Plan⁸, offers opportunities to grow the visitor economy of the DNCO region and NSW more broadly.
- **A challenge for the region remains mobile connectivity.** While this needs to be addressed, it is still critical for visitor economy businesses to be online and to provide opportunities for visitors to connect in key locations.
- **Australia, like many places around the world, is currently facing significant challenges with attracting and retaining a viable and high-quality workforce.** In its 2022 Megatrends Report, SKIFT Research highlighted the ongoing challenge with labour supply, providing two insights (among many others) into the future: Firstly, shift focus on to the quality of the employee and invest in their ability to grow and learn in the industry; Secondly, consider the workforce issue within the broader context of technology, automation and innovation. These strategies will have the dual effect of increasing employee satisfaction and sense of value while also lifting the quality of the overall visitor experience. In adopting this approach, the region's reputation as an employer of choice will be enhanced, which will assist in attracting new talent.

See Appendix 2 for a summary of key insights gained from the consultation process.

⁸ See: Strategies and Actions 1.12 and 5.02 of the NSW Visitor Economy Strategy 2030

Vision & Positioning



Vision & Positioning

Vision

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

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

Mission

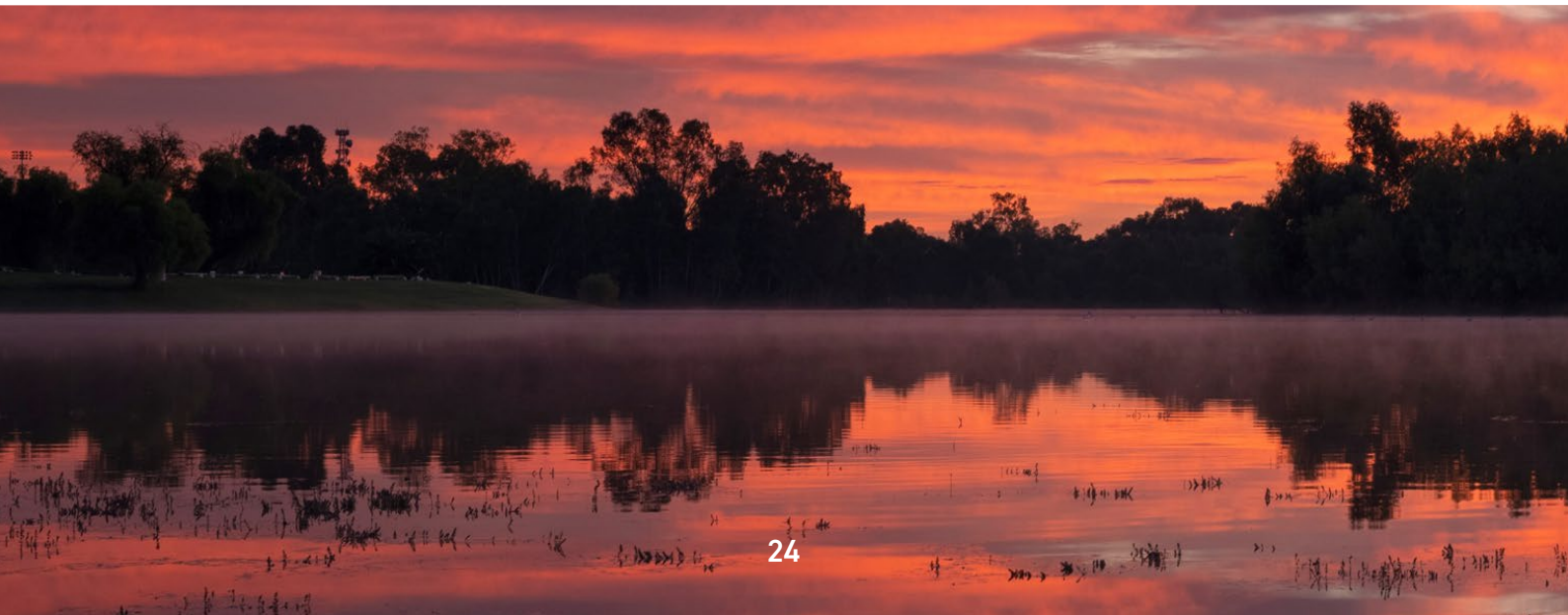
To achieve this vision, the mission of DNCO and the region's stakeholders is:

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

Positioning

The Country and Outback NSW region is geographically vast and diverse. However, the following positioning statement leverages the sense of freedom that the region offers, and which visitors seek from their experience. This sense of freedom frames the region's competitive advantage and positioning:

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



Experience strengths

The DNCO region is vast, home to many First Nations' peoples, the Traditional Custodians of the lands, waters and the sky. We acknowledge their enduring connection to Country and pay our respects to their Elders past, present and emerging.

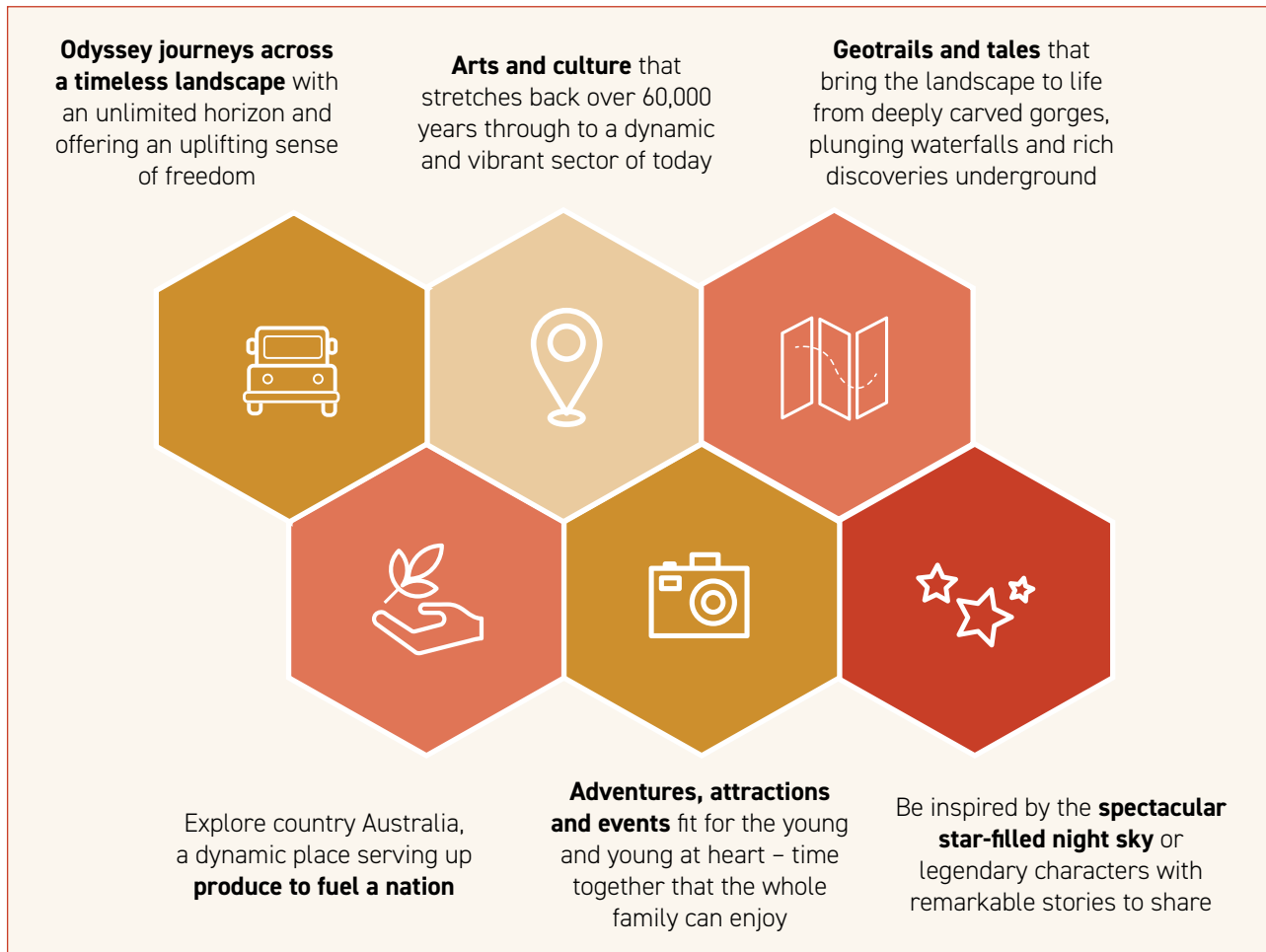
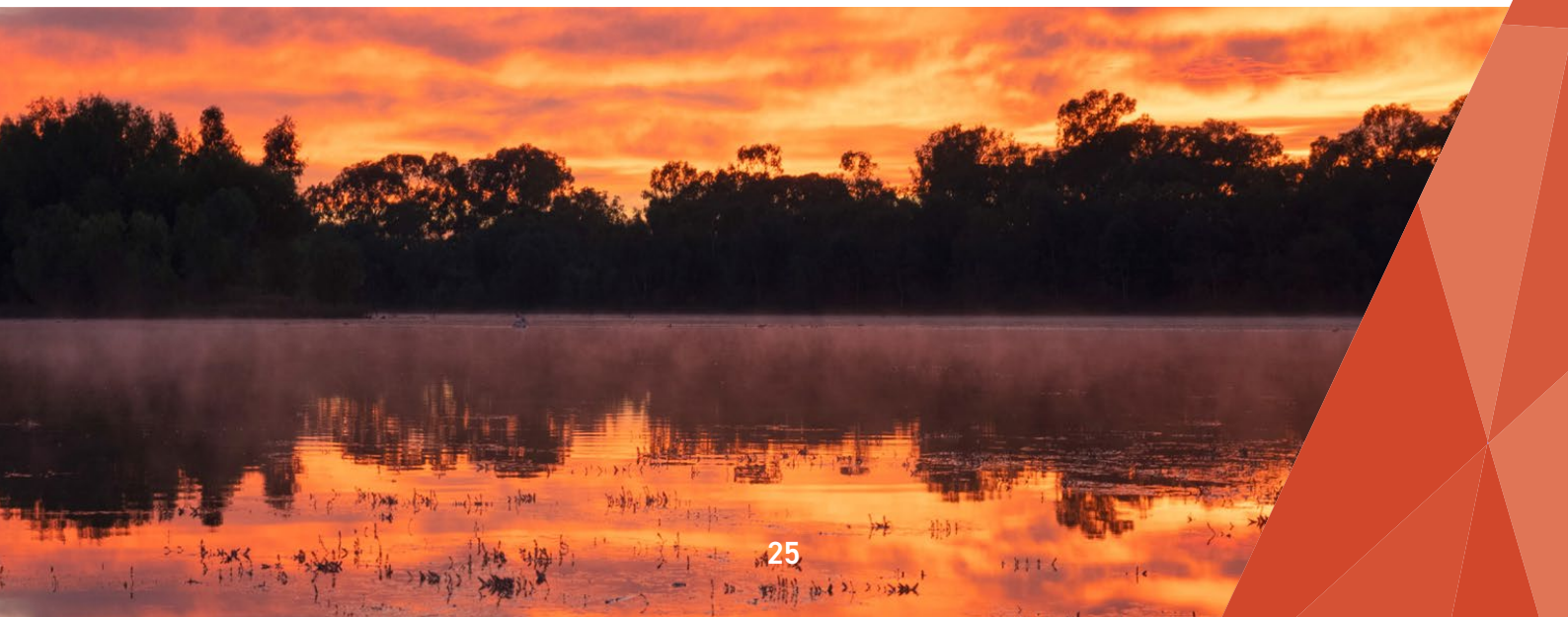


Figure 6. Key experience strengths for the Country and Outback NSW region



Experience strengths (continued)

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

SUB-REGION	EXPERIENCE STRENGTHS	
Outback NSW	<i>Out of the ordinary and into the extraordinary</i>	<ul style="list-style-type: none"> • Journey through ancient Australia, immersing yourself in culture on Country and marvelling at rock art over 40,000 years old. Explore the wonder of Earth's riches in Lightning Ridge, White Cliffs, and Broken Hill or retrace Sturt's Steps along the sculpture trail of Corner Country. • Be captivated by Dreamtime stories with Mutawintji Heritage Tours or follow the Darling River Run along inland rivers and waterways that have connected communities and supported trade for thousands of years. • Prepare to be entertained by events indoors and out, celebrating our diverse Australian culture from the contemporary to the ancient; evocative to provocative. • Experience the real Australian outback surrounded by spectacular scenery and remarkable characters. Be awe-struck by the star-filled night sky, capture a first glimpse of dawn or the setting sun from stunning lookouts like Mount Oxley and enjoy endless open spaces, where you can hear the silence and see into infinity.
New England North West	<i>Inspired by Nature; Fuelling a Nation</i>	<ul style="list-style-type: none"> • From the World Heritage-listed Gondwana rainforest, dramatic gorges and magnificent waterfalls of Oxley Wild Rivers National Park through to Cathedral Rock, the Gibraltar Ranges and the autumn colours, big sky country is chock full of natural inspiration. • It has inspired the geotrails that tell the story of the landscape. It's inspired motorcyclists to wind their way along the Waterfall Way and fossickers to search for sapphires in Inverell. • Meet the artists of Walcha or be entertained by events such the Celtic Festival held amidst the Australian Standing Stones of Glen Innes. • Soak up the atmosphere as the artesian baths restore your energy after a day wandering the galleries of the dynamic, art deco hub of Moree. • New England North West is also a place to discover your inner cowgirl or cowboy while exploring country Australia. The true home of country music, rodeos, and high-quality produce to fuel a nation.
Great Western Plains	<i>Great Big Adventures</i>	<ul style="list-style-type: none"> • Get the heart pumping on a breathtaking hike along the Breadknife and Grand High Tops walk or take time out camping in the Warrumbungle National Park, surrounded by iconic wildlife. • Grab a bike to explore the region along many of the gravel and mountain biking trails, including the Central West Cycle Trail. • Step back in time by venturing underground at Wellington Caves, a resting place of Australia's lost Megafauna. Explore Pillaga's ancient forest or meander along the award-winning Sculptures in the Scrub that celebrate a timeless connection to Country of the local Aboriginal people. • The sky's the limit, from exploring the Southern Night Sky at Milroy Observatory to flying a glider in Narromine or discovering the realities of the life-saving work of the Royal Flying Doctor Service. • Be transported back to convict life at Dubbo Gaol or wake up in the wild at Taronga Western Plains Zoo to experience a taste of African safari. • The Great Western Plains is packed full of great big adventures for the whole family.

Table 5. Experience strengths of Country and Outback NSW by sub-region

Target Markets & Visitor Profiles



Target Markets & Visitor Profiles

The Country and Outback NSW destination management planning process identified the following main visitor markets and growth development opportunities.

Domestic Overnight Visitor Market

The domestic overnight visitor market is the critical market for sustainable success in terms of both volume of visitors and value of visitors. While day visitors are also an important segment, especially for **Greater Western Plains** (GWP) and **New England North West** (NENW), they arguably require less motivation to visit and they definitely contribute far fewer dollars to the visitor economy. For example, overnight visitors to **Outback NSW** region provide 73% of visitors and 90% of all visitor expenditure.

Source Markets

Tracking visitor flows is made complex by the sheer size of the Country and Outback NSW area including:

- A high volume of visitors reside within the network area
- Inter-state visitors tend to visit towns on the edges of the network area more than the interior. For example, NENW receives 21% of overnight visitors from Queensland
- International visitors comprise less than 1% of visitors across the whole network area. While the number of international visitors is low, the international market may still offer opportunities to target the Free & Independent Travellers (FIT) market; a segment that pre-COVID represented 83% of all international visitor arrivals to NSW.

The following table provides the source markets as an average over eight years from 2012 to 2019 using Tourism Research Australia (TRA) data. This data is more consistent than 2020 and 2021, when interstate travel was restricted. Current data (2021) may show different results due to changes in border and travel restrictions.

TRA 2012-2019	Outback NSW		New England North West		Greater Western Plains	
	Overnight %	Day %	Overnight %	Day %	Overnight %	Day %
NSW	59	98	69	95	70	100
Sydney	15		16	3	21	7
Intra-region	26	93	21	76	26	89
Hunter	4		10	6	7	2
North Coast	3		12	7	4	
Riverina	2	2	1		2	1
Other NSW	10	3	7	3	11	1
QLD	11		21	5	15	
VIC	15	2	6		9	
ACT	1		1		2	
SA	11		2		2	
WA	1					

Table 6. Country and Outback NSW source markets averaged over eight years from 2012 to 2019.

Country and Outback NSW Destination Management Plan

Drive tourism

Major highways intersect the network area, carrying visitors through multiple LGAs and hubs. With over 95% of visitors driving to and through the network area, this is a critically important segment for the Country and Outback NSW region. The importance of understanding the drive tourism or touring market and their needs and aspirations is critical.

A key insight is that these markets are seeking more experiential itineraries compared to visitors who stop somewhere as part of 'point to point' travel, for example in Tamworth when travelling between Sydney and Brisbane.

The growing interest and demand for drive tourism is not restricted to older demographics. Younger generations, including Millennials are taking the opportunity of more flexible work arrangements and a desire to explore Australia by road. A key to success in drive tourism is experience-led itineraries and touring routes that showcase opportunities to slow-down and spend longer in the destination.

Age and Lifestyle Segments

Lifecycle segments discussed identified over the past 5 years highlight 55+ couples and families as the key lifecycle segments in the network area. Current TRA data indicates there are three key segments across the network: Baby Boomer couples, Gen X families and Gen X couples. Interestingly, TRA data shows an increase in **45+ working couples/singles**. This most closely aligns to **Gen X Couples**.

Gen X are eager to experience new places and are especially drawn to cultural experiences. *Expedia Group Media Solutions found that 71% like to explore off-the-beaten-path activities and seek local recommendations.*

Millennials continue to travel more domestically than previous generations of their age. The COVID-19 pandemic has increased the interest of this market in road trips and regional holidays.

Potential audience focus for network hubs

New England North-West

- Key visitor segments in both day and overnight markets comprise **Gen X families, 45+ workers along with Baby Boomer/Retirees**.
- The **Visiting Friends & Relatives (VFR)** market is a higher value market for the region compared to the holiday markets in terms of visitor numbers and expenditure (including host expenditure). There is an opportunity to increase engagement with this market and encourage them to be advocates of the region to extend the reach of marketing activities.
- NENW receives more **Millennials** than other parts of the network. Given that the Tamworth Region attracts a greater ratio of visitors specifically for festivals, concerts, and sporting events than most other regional areas it may be able to grow this market segment through the development of relevant events.
- Another potential opportunity, given the proximity to South-East Queensland and the region's airport access, could be the growing **digital nomad** segment (housing and accommodation barriers would need to be resolved first).

Greater Western Plains

- Visitors in both day and overnight markets comprise **Gen X families, 45+ workers along with Baby Boomers/Retirees**.
- The **Visiting Friends & Relatives (VFR)** market. VFR is as strong a motivator for travel as taking a holiday
- This sub-region has several attractions popular with the **family market**, most significantly Taronga Western Plains Zoo.

Potential audience focus for network hubs (continued)

Outback NSW

- Visitors in both day and overnight markets comprise Gen X (working families and couples) along with **Baby Boomer/retirees** (55+ couples).
- Nature-based and Aboriginal cultural tourism are important drivers of interest for Outback NSW.
- Special interest tourism has long been used to identify unique segments based on their interest or passion – rather than demographics. A number of special interests are particularly relevant to Outback NSW, including 4WDing, photography and birdwatching. Outdoor events have also provided a major drawcard, such as the Mundi Mundi Bash in Broken Hill.

Future market growth opportunities

There are several market segments where significant growth is expected to continue both within Australia and around the world, including:

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

Strategic Objectives

Strategic Objectives

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

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

Table 7. Strategic objectives for Country and Outback NSW visitor economy

Country and Outback NSW Destination Management Plan

Relevant actions from the VES have been identified in Table 2 below, noting that these actions only relate to DNCO as a supporting partner with the exception of Action 5.07, for which it has direct responsibility.

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

Table 8. Relevant strategies or actions of the VES⁹

⁹ See: <https://www.destinationnsw.com.au/wp-content/uploads/2020/12/nsw-ves-2030.pdf>



Action Plan



Action Plan

The following sections identify actions related to the five Country and Outback NSW DMP strategic objectives.

Actions align with the three phases of the VES 2030:

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

1.0 Road to Recovery

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

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
1.1	Work with DNSW to deliver First NSW initiatives to strengthen industry sustainability, capability, and resilience	DNSW	DNCO LGAs, LTOs	2022 to 2024
1.2	Work with the Destination Network Project Management Group to create an 'Understanding the Regional Visitor Economy Program' to improve understanding of local government, industry and community about the Country and Outback NSW visitor economy	DNPMG	DNCO DRNSW LGAs	2022 to 2024
1.3	Work with the Destination Network Project Management Group to advocate and maximise the opportunities and resources available from external grant funding opportunities to support regional visitor economy resilience and growth	DNPMG	DNCO DRNSW	2022 to 2024
1.4	Work with the Destination Network Project Management Group and regional stakeholders to advocate for work force solutions around visitor economy staff and skills and housing shortages	DRNSW	DNPMG DNCO	2022 to 2024
1.5	Host an annual visitor economy seminar or forum that is inspirational and highlights best practice in the visitor economy, including for events, tours and accommodation	DNCO	DNCO JOs LGAs, LTOs	2022 to 2024
1.6	Work with the JOs, LTOs and LGAs to coordinate a regular visitor research program to provide meaningful insights into the region's visitor economy and the dynamic and evolving nature of consumer behaviour in tourism and travel, including for events	DNCO	DNCO JOs LGAs, LTOs	2022 to 2024
1.7	Strengthen industry engagement and networking, including through hosting forums and continue creating and distributing newsletters that enhance awareness of the latest trends and best practice in the visitor economy	DNCO	DNCO LGAs, LTOs	2022 to 2030

Country and Outback NSW Destination Management Plan

2.0 Build the Brand

Strategic Objective: Position and promote Country and Outback NSW and its destinations to align to the Feel NSW brand.

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
2.1	Work with DNSW, LGAs and LTOs to create a Country and Outback NSW Marketing Toolkit that maps the destination brand identities, product and experience strengths and ways to align with Feel NSW brand	DNSW	DNCO LGAs, LTOs	2022 to 2024
2.2	Encourage the creation of experience-led remarkable content for multichannel distribution and support a shared program to capture and curate content (images, videos and copy)	DNSW	DNCO LGAs, LTOs	2022 to 2030
2.3	Facilitate collaboration to strengthen content relating to cross-regional 'trails and multiday itineraries that profile the existing and emerging strengths of the region (across the five VES pillars) and to support drive tourism	DNSW	DNCO LGAs, LTOs	2022 to 2024
2.4	Act as a conduit between DNSW, LGAs and LTOs to facilitate media famils, photo-shoots and other opportunities for content development – strengthen collaboration to avoid duplication and maximise budgets for content development	DNSW	DNCO LGAs, LTOs	2022 to 2030
2.5	Facilitate awareness of content travellers should know and plan for before they arrive in-region. The program could provide helpful 'local tips' as well as safety and sustainability messages, including: <ul style="list-style-type: none"> • Promote links to DNSW's road trip guides such as: Outback Road Trip Essentials and other information on weather/ seasonality, safety and road access • Provide a guide or map to mobile connectivity, highlighting centres, facilities and services 	DNSW	DNCO LGAs, LTOs	2022 to 2030

3.0 Showcase our Strengths

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

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
3.1	Work with DNSW to coordinate famils and deliver NSW First programs that encourage and support development and packaging of new and improved existing products and services	DNSW	DNCO	2022 to 2030
3.2	Work with NATOC, First Nations' communities, representative organisations and businesses across Country and Outback NSW to support the development of new or enhance existing Aboriginal cultural experiences and events, including opportunities for accommodation	DNSW	DNCO NATOC NIAA DNPMG LGAs, LTOs	2022 to 2024
3.3	Work with the Destination Network Project Management Group to advocate and support the development of Aboriginal and Heritage products and experiences including tailored industry development and support to help bring forward new cultural tourism product development opportunities	DNPMG	DNSW NATOC, LALCs Museums & Galleries NSW DNPMG LGAs, LTOs	2022 to 2030
3.4	Work with Destination Riverina Murray, Destination Central West and market-ready operators to bring to life the <i>Wonder of Gondwana</i> concept and experience themes, incorporating geotourism and night skies experiences	DNCO	DNSW DCW DRM LGAs, LTOs	2022 to 2030
3.5	<p>Prioritise high-value touring routes to strengthen and promote a visitor-centric, experience-led approach to drive tourism, including:</p> <ul style="list-style-type: none"> • Ongoing enhancement and promotion of touring routes such as Sturt's Steps, Darling River Run, Great Artesian Drive and Fossickers Way, among others • Support the extension of major cross-border initiatives such as Silver to Sea Way from South Australia into Broken Hill and Silverton (Stage 2 and beyond) • Expand the number of touring routes targeting motorcycles, for example leveraging the motorcycle touring routes throughout NENW 	DNCO	DNSW DRNSW CBC LGAs, LTOs	2022 to 2030

Country and Outback NSW Destination Management Plan

3.0 Showcase our Strengths (continued)

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
3.6	Work with the Destination Network Project Management Group, NPWS and NSWFC and private landowners to identify opportunities for nature-based product and experience development. Consider opportunities to activate small-scale and personalised experiences. For example: <ul style="list-style-type: none"> • Behind the scenes tours • Special-interest, sports and nature tourism markets 	DNPMG	DNSW DRNSW LGAs, LTOs	2022 to 2030
3.7	Work with the Destination Network Project Management Group to support operators to further develop agritourism and produce product development opportunities	DNPMG	DNSW DRNSW LGAs, LTOs	2022 to 2026

4.0 Invest in World Class Events

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

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
4.1	Support LGAs and LTOs to proactively pursue, attract and support new event initiatives, including business events and conferences as well as leisure and cultural events	DNCO	DNSW LGAs, LTOs	2022 to 2024
4.2	Identify and support applications for grants to enable event development for First Nations' cultural events, for example the Mutawintji Cultural Festival	DNCO	DNSW LGAs, LTOs	2022 to 2030
4.3	Advocate and support investment in facilities for and programming of events that reinforce the point of difference of the region or destinations of DNCO, including outdoor and larger-scale events	DNCO	DNSW LGAs, LTOs	2022 to 2030
4.4	Encourage event organisers, LGAs and LTOs to implement commercial opportunities to minimise the use of volunteers to manage and run events	DNCO	DNSW LGAs, LTOs	2022 to 2030
4.5	Encourage LGAs and LTOs to provide pre-event and in-destination information and inspiration to extend the length of stay, including encouraging regional dispersal	DNCO	DNSW LGAs, LTOs	2022 to 2030

5.0 Facilitate Growth

Strategic Objective: Provide an enabling environment to attract investment in the Country and Outback NSW visitor economy.

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
5.1	Support the strengthening of visitor servicing standards and content across the Country and Outback NSW region	DNCO	DNSW JOs LGAs, LTOs	2022 to 2024
5.2	Encourage and facilitate digital transformation to future-proof the region's visitor economy, involving: <ul style="list-style-type: none"> Industry awareness of consumer behavior and expectations about online and digital services, including e-commerce, online booking and flexibility Adoption of technology to promote the region and provide contemporary visitor services at all touch points along the customer journey as well as revitalise interpretation Encourage more tourism and hospitality businesses to participate in DNSW's Digital Skills Accelerator for Tourism program, which is part of the NSW First program 	DNCO	DNSW JOs LGAs, LTOs	2022 to 2030
5.3	Identify opportunities to connect major industry tourism operators with local tourism and hospitality providers in the region to enable development of experience packages and extend distribution to market <ul style="list-style-type: none"> Consider opportunities with commercial airlines, private air charter, rail and event packages or product bundling as well as car/campervan rental and car share companies 	DNCO	DNSW LGAs, LTOs	2022 to 2030
5.4	Advocate with organisations such as Ecotourism Australia to increase awareness of sustainability and green destinations as well as to assist strengthen the ecotourism offering of the region	DNCO	DNSW JOs LGAs, LTOs	2022 to 2030
5.5	Collaborate with LGAs and JOs to inform priorities and attract investment for major infrastructure projects and improvements that enhance connectivity and accessibility, deliver shared benefits and enable greater linkages between the LGAs. <ul style="list-style-type: none"> Incorporate active transport options, such as regional cycleways (options for mountain, gravel and road bikes) Advocate for accelerating growth in the network of high-speed charging stations for electric vehicles (EV) Activate the region's airstrips (public and private) to support private air charters for both the leisure and business markets 	DNCO	DNSW DRNSW JOs LGAs, LTOs	2022 to 2030

Country and Outback NSW Destination Management Plan

5.0 Facilitate Growth (continued)

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
5.6	<p>Continue to provide advice and support to local businesses, organisations and community or volunteer groups to apply for visitor economy or other grants that can assist them grow, revitalise or enhance their experience or offering, including for events.</p> <ul style="list-style-type: none"> • Support cross-boundary infrastructure projects that enhance access to and within the region as well as provide high quality visitor experiences • Ensure customer-centric design and the costs associated with attracting investment are built into all proposals for new major projects. This includes robust master planning, feasibility analysis and demonstrating return on investment • Adopt and apply the VES' Visitor Infrastructure Framework and its assessment criteria 	DNCO	DNSW DRNSW JOs LGAs, LTOs	2022 to 2030
5.7	Work with Destination NSW and the Destination Network Project Management to disseminate and communicate relevant visitor economy research to regional stakeholders	DNCO DNPMG	LGAs, LTOs	2022 to 2030
5.8	Work with the Destination Network Project Management Group to advocate to the NSW Government and LGAs to streamline planning requirements to better support the growth of the visitor economy	DNMPG	NSW Govt DNSW DRNSW LGAs, LTOs	2022 to 2030
5.9	Work with the Destination Network Project Management Group to advocate to the Australian and NSW Government to collectively advocate for improved digital and transport connectivity	DNMPG	NSW Govt DNSW	2022 to 2030
5.10	Work with the Destination Network Project Management Group to leverage opportunities for international and domestic airway route development	DNMPG	NSW Govt DNSW	2024 to 2030



Regional Priorities

Regional Priorities

Regional priorities for Country and Outback NSW region have been informed by the situation analysis and structured to reflect the role of the DN and contribute to the ambitions and regional visitor expenditure target across the three phases of the VES 2030.

As a result, **five priority focus areas have been identified for DNCO**, which reflect the strategic objectives of DNCO and align to its role and responsibilities, specifically:

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

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

1. Aboriginal cultural tourism development with support from the NSW Aboriginal Tourism Operators Council (NATOC), Destination NSW (DNSW) and the Commonwealth Government through the National Indigenous Australians Agency (NIAA)
2. Implementation of an expanded Wonder of Gondwana concept that incorporates night skies' experiences and geotourism, especially to support Actions 1.08 and 1.11 of the VES, specifically:
 - » *Deliver and expand road trip programs and support more regional events to facilitate regional dispersal (1.08)* – this is particularly important given 95% of visitors to the DNCO region arrive by private vehicle
 - » *Invest in content in the form of images and video to showcase Sydney and NSW current and emerging strengths (1.11)*
3. Comprehensive review of visitor servicing, identifying gaps and opportunities for revitalising visitor services, including through accelerating digital innovation.

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

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

A critical consideration for DNCO is to reinforce the character and point of difference of the various destinations within the broader region. This is best understood at a high-level through the differences between the **three primary hubs** utilised for the analysis of visitor research informing this DMP:

- Outback;
- Greater Western Plains; and
- New England North West.

DNCO is the 'shopfront' of DNSW for Country and Outback NSW, supporting the sustainable growth of the region's visitor economy and delivering on the VES' visitation and expenditure targets for regional NSW.

This will be most effectively achieved through:

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

Stakeholder Roles in Growing the Regional NSW Visitor Economy



Stakeholder Roles in Growing the Regional NSW Visitor Economy

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

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

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

Destination Country and Outback NSW

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

The NSW Destination Networks are considered the champions of the visitor economy in their regions, proactively engaging with stakeholders to identify, prioritise and facilitate opportunities for regional visitor economy growth. They also play a key support role for Destination NSW in the delivery of its industry development and visitor experience and regional event funding programs¹⁰.

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

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

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

Their core responsibilities include:

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

Specifically, Destination Networks:

- **Develop and implement the region's Destination Management Plan and Business Plan**, in alignment with the NSW Visitor Economy Strategy 2030, and ensure alignment with local tourism and related plans
- **Work with Local Government and industry** on product development, including investment attraction
- **Work in collaboration with DNSW** led marketing and communications activity for their 'hero' destinations, experiences, events and festivals and regional campaigns
- **Explore Industry Development initiatives** (i.e., identify opportunities for growth) eg., Conferencing, Field Study Tours, local industry education and training needs especially for small to medium sized tourism operators
- **Assist local industry to prepare DNSW grant applications**¹¹.

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

¹⁰ NSW Visitor Economy Strategy 2030

¹¹ Destination Networks: Driving Growth of the Visitor Economy in Regional NSW <https://www.destinationnsw.com.au/wp-content/uploads/2016/07/Destination-Networks-29-June-2017.pdf>

Destination NSW

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

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

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

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

Department of Regional NSW

The Department of Regional NSW is the NSW Government's central agency for regional issues, building resilient regional economies and communities, strengthening primary industries, managing the use of our valuable regional land, overseeing the state's mineral and mining resources and ensuring that government investment into regional NSW is fair and delivers positive outcomes for local communities and businesses¹².

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

¹² www.regional.nsw.gov.au



Local Government

Local Government plays a pivotal role in tourism activity, with councils actively involved in promoting tourism, providing infrastructure and services to support tourism, and managing the impacts of tourism. The Australian Regional Tourism and Economic Development Australia benchmarking survey of local governments (2020) shows that each council spends on average \$761,000 on tourism annually. Whether it's through the provision of infrastructure, cultural facilities, events, visitor services or public spaces, councils support the economic development of their local communities via either direct financial or in-kind support to tourism. The role of local government in tourism is also recognised in the State Government's NSW Visitor Economy Strategy 2030, which contains a commitment for Destination NSW to work closely with councils and a principle of collaboration between the industry and government, including councils¹³.

Other Key Support Partners

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

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

Review

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

Visitor Infrastructure Framework Assessment Criteria

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

¹³ <https://lgnsw.org.au/Public/Public/Policy/Tourism.aspx>



Appendices



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

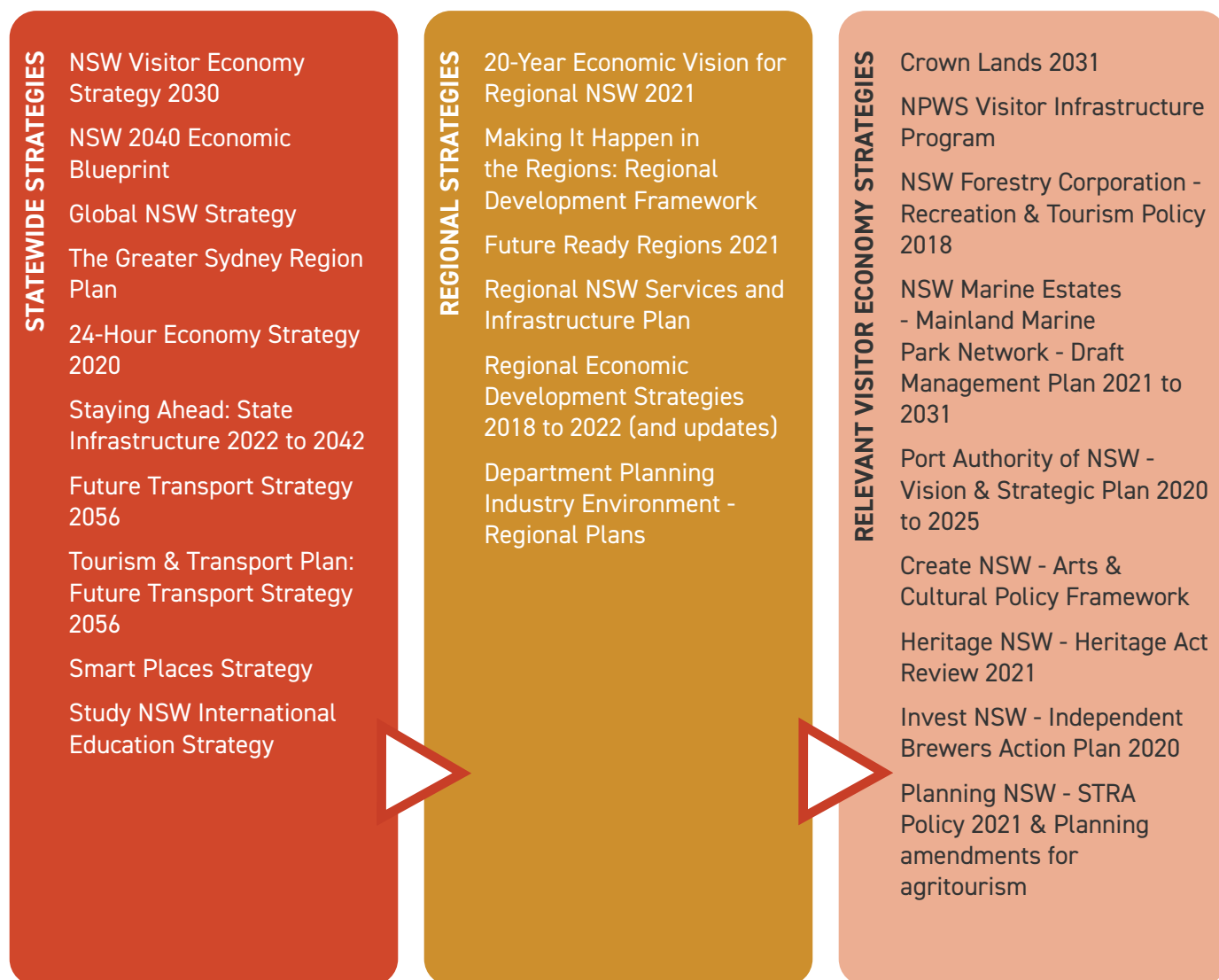


Figure 5. Strategies relevant to the regional visitor economy

Appendix 2: Research Insights

DESTINATION NETWORK COUNTRY AND OUTBACK NSW		
<p>The total network area averages just under 6 million visitors per year (2017-2021)</p> <ol style="list-style-type: none"> Overnight visitors comprise 49.5% of visitors and contribute approximately \$1,251 million per year Day visitors also comprise 49.5% of visitors and contribute approximately \$401 million per year International visitors comprise less than 1% and contribute approximately \$70 million per year <p>Average visitor expenditure is estimated at over \$1.7 billion per year</p>		
OUTBACK NSW	NEW ENGLAND NORTH WEST	GREATER WESTERN PLAINS
0.7 million visitors or 13% of the total network area	3.3 million visitors or 57% of the total network area	1.7 million visitors or 30% of the total network area
Domestic overnight average spend is \$143 , which is lower than the average Regional NSW spend (\$171)	Domestic overnight average spend is \$142 , which is lower than the average Regional NSW spend (\$171)	Domestic overnight average spend is \$180 , which is higher than the average Regional NSW spend (\$171)
Average night stay is on par with the Regional NSW average of 3.2 nights	Average night stay is 2.9 nights , which is lower than the Regional NSW average (3.2 nights)	Average night stay is 2.4 nights , which is lower than the Regional NSW average (3.2 nights)

Table 9. Visitation and spend for Country and Outback NSW (2017-2021)

Reason for Travel

Except for Outback, VFR is as strong a motivator for travel as taking a holiday. This is also strongly reinforced in New England North West where people's choice of accommodation is split evenly between commercial and private. The following table provides the purpose of travel for each sub-region (*Source: TRA NVS data: data for 2017 calendar year*).

PURPOSE OF TRAVEL	Outback NSW		New England North West		Greater Western Plains	
	Overnight %	Day %	Overnight %	Day %	Overnight %	Day %
Holiday	40	44	32	40	32	26
Visiting Friends & Relatives (VFR)	20	19	32	23	30	23
Business	33	21	23	13	26	18
Other	5	17	7	24	8	33
Transit	3		7		4	

Table 10. Reason for travel for visitors to Country and Outback NSW

Visitor Flows

- The number of touring routes is extensive to covering all the towns and attractions in the network area
- Over **95% of visitors drive to the network area**, which signifies the importance of understanding the Drive Tourism market and their needs and aspirations

High-level summary of key activities by research hub

- **Outback**
 - » Broken Hill is the main destination attracting 30% of overnight visitors
 - » Arts/heritage is the key activity
- **New England & North West**
 - » Tamworth attracts a greater ratio of visitors (17%) for festivals, concerts, and sporting events than any other area
 - » Nature is the key activity
- **Greater Western Plains**
 - » Tourist attractions are the key activity in the Greater Western Plains
 - » 250,000 people visit Taronga Western Plains Zoo per annum (nearly 15%)

As shown below, the market segments for each research/data hub are different in size and composition. These variances are reflected in the economic contribution of each data hub, with New England North West providing 52% of the \$1.722 billion total network contribution.

5-YEAR AVERAGE (2017-2021)		# visitors ('000)	% of total	\$ contribution	Domestic \$ per night^
DNCO Network Area	Domestic overnight	2,893	49.5	1,251 m	159
	Domestic day*	2,891	49.5	401 m	144
	International	50	1	70 m	
	Total	5,834	100	1,722 m	
Outback	Domestic overnight	520	70	285 m	143
	Domestic day *^	228	29	28 m	123
	International	9	1	12 m	
	Total	757	100	326 m	
New England North West	Domestic overnight	1,495	45	594 m	142
	Domestic day	1,816	54	253 m	139
	International	31	1	56 m	
	Total	3,342	100	903 m	
Greater Western Plains	Domestic overnight	878	51	374 m	180
	Domestic day	849	49	139 m	164
	International	9	1	7 m	
	Total	1,736	100	502m	

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

* Small sample size for day visitors

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

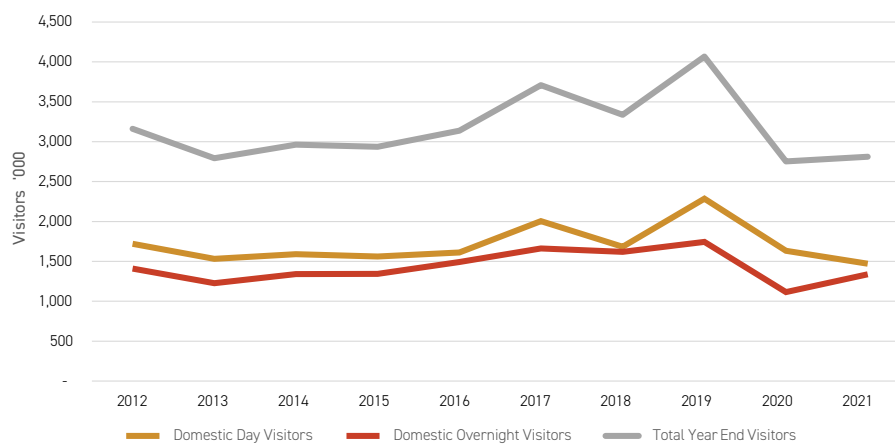
Table 11. 5-year average (2017-2021) visitation and spend for Country and Outback NSW

Country and Outback NSW Destination Management Plan

Visitor research by research/data hub

New England North West (NENW)

Visitation to NENW had been steadily increasing to reach 4.0 million visitors in 2019 before the impact from COVID-19 resulted in visitation decreasing 35% in 2020 and 5% in 2021. This data hub represents 32% of visitation in the network area in 2019.



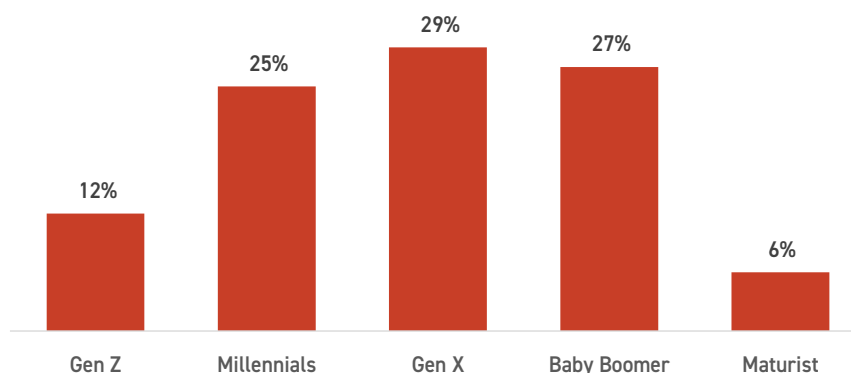
TRA data (2012-2021) highlights the strength of both overnight and day visitors, with overnight visitors providing less visitors, but more economic impact. The high volume of day visitors has implications for tourism infrastructure such as roads, parks and amenities.

- Tamworth is the main destination attracting 28% of overnight visitors in the data hub (Armidale 16%)
- Queensland is a key segment for overnight visitors (21%)
- Overnight markets seeking dining (51%) and VFR (41%) and lower interest in nature experiences (19%)

Average 2017-2021	# visitors ('000)	% of total	\$ contribution	Domestic \$ per night	Av night stay
Domestic overnight	1,495	45%	\$594 m	\$142	2.9
Domestic day*	1,815	54%	\$253 m	\$139	
International	31	1%	\$56 m		
Total	3,342	100%	\$903 m		

Table 12. 5-year average (2017-2021) for the New England North West sub-region

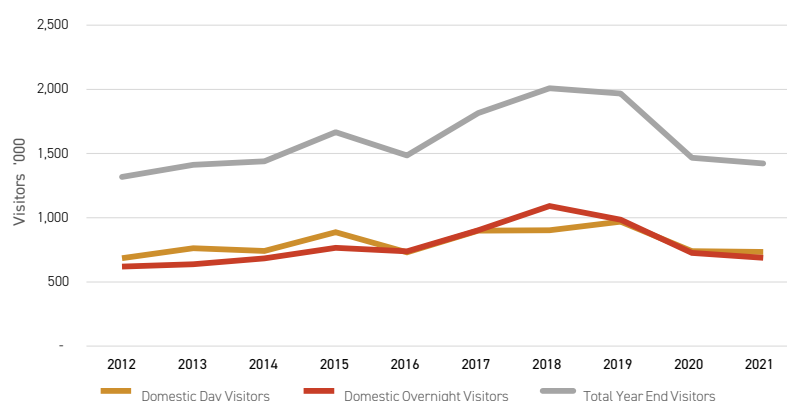
Visitors in both day and overnight markets comprise Gen X families and 45+ workers along with Baby Boomer retirees. NE/NW receives more Millennials than other parts of the network.



Visitor research by research/data hub (continued)

Greater Western Plains

Visitation to the Greater Western Plains had been steadily increasing to reach **2.0 million visitors** in 2019 before the impact from COVID-19 saw visitation decreasing 35% in 2020 and 5% in 2021. This data hub represented 16% of visitation in the network area in 2019.



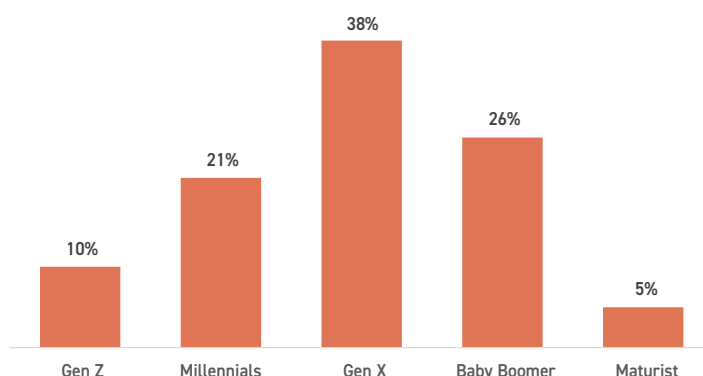
TRA data (2012-2021) highlights the strength of both overnight and day visitors, with both providing an equal share of visitors; yet **overnight visitors** provide double the economic contribution.

- Dubbo is the main destination attracting 66% of overnight visitors
- Sydney (23%) is a key segment for overnight visitors
- Overnight markets seeking dining (54%) and VFR (29%); lower interest in nature experiences (13%) and higher interest in tourist attractions (17%) eg., zoo.

Average 2017-2021	# visitors ('000)	% of total	\$ contribution	Domestic \$ per night	Av night stay
Domestic overnight	878	51%	\$374 m	\$180	2.4
Domestic day*	849	49%	\$139 m	\$164	
International	9	1%	\$7 m		
Total	1736	100%	\$502m		

Table 13. 5-year average (2017-2021) for the Greater Western Plains sub-region

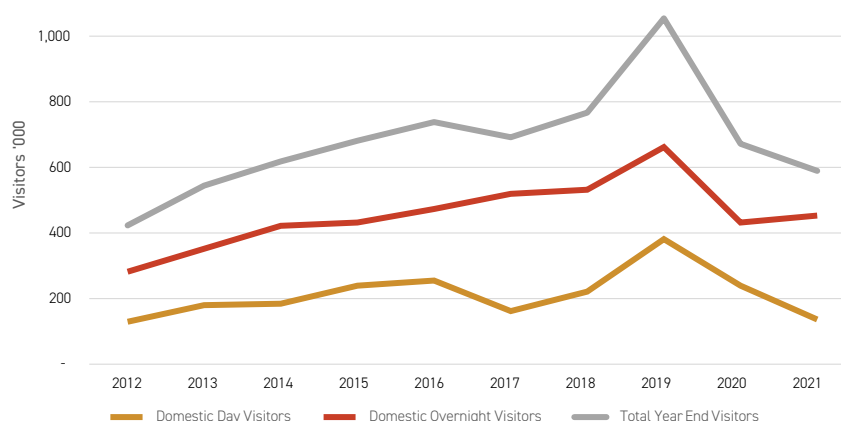
Visitors in both day and overnight markets comprise Gen X families and 45+ workers along with Baby Boomer retirees.



Country and Outback NSW Destination Management Plan

Outback NSW

Visitation to Outback NSW had been steadily increasing to reach **1.0 million visitors** in 2019 before the impact from COVID-19 resulted in visitation decreasing 35% in 2020 and 5% in 2021. This data hub represents 8% of visitation in the network area in 2019.



TRA data for **Day Visitors** has a very small sample size and therefore has not been reported by TRA or DNSW as they are statistically too small. As an **indicator**, it is possible to assess the average number of day trippers over the past 10 years as being approximately 200,000 per year, with most of these visitors coming from within the network area itself (60%) often for the purpose of business (30%).

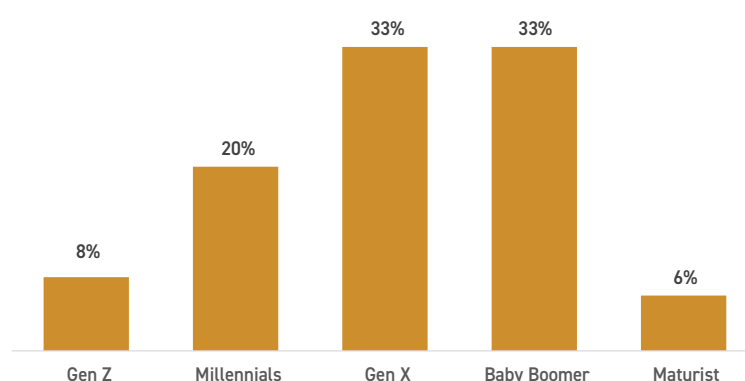
Overnight visitors are the priority market, providing 70% of visitors, mostly from within NSW (59%) and Victoria (15%) as well as SA (11%) and Queensland (11%).

- Broken Hill is the main destination attracting 30% of overnight visitors
- Sydney (20%) is a key segment for overnight visitors along with intra-region (eg., Dubbo)
- All markets seeking dining (49%), pub/clubs (35%) and arts/heritage (21%) experiences.

Average 2017-2021	# visitors ('000)	% of total	\$ contribution	Domestic \$ per night	Av night stay
Domestic overnight	520	70%	\$285 m	\$143	3.2
Domestic day*	228	29%	\$28 m	\$123	
International	9	1%	\$12 m		
Total	757	100%	\$326 m		

Table 14. 5-year average (2017-2021) for the Outback NSW sub-region

Visitors in both day and overnight markets comprise Gen X (working families and couples) along with Baby Boomer retirees (60+ couples).



Appendix 3: Consultation Insights

Over 120 representatives from across the Destination Network were consulted to inform the development of the DMP.

WHO WE CONSULTED

- Over 120 participants
- Councillors and Council staff
- Local industry
- Representatives of the local Aboriginal communities
- Representatives of regional organisations, State and Commonwealth Government agencies
- Australian Geoscience Council
- Unincorporated Far West (Corner Country) and Sturt's Steps

HOW WE CONSULTED

- Workshops and meetings in Armidale, Broken Hill, Coonabarabran, Dubbo and White Cliffs
- Sessions via video-conferencing, including with Bourke, Brewarrina, Walgett and Moree Plains
- One-on-one and small group meetings with key stakeholders

High-level summary of insights:

- The entire region has experienced an increased **diversity in visitor markets**, in particular families and younger travelers
- The importance of being **inclusive of the entire region and all communities**, including to encourage greater regional dispersal
- The need to build a more **capable and cohesive tourism community**. This could be achieved through providing access to better information, research and insights into the visitor economy
- **Experience and event development** would enhance the perception of the region. A specific area highlighted was the need for more cross-landscape experiences and experientially-led multi-day itineraries that better connect and link the region across LGA boundaries
- A desire to **address key challenges** such as barriers to agri-tourism and eco-tourism, improved connectivity (digital and communication technology) and accessibility (esp. road access and intra-region transport options) and a more sustainable workforce
- The need to **revitalise visitor services**, especially to meet the needs of different visitor markets
- Growing **Aboriginal cultural tourism** is viewed as an important opportunity for the region
- Supporting **greater collaboration** (industry, government and other sectors) will be a key to success

Appendix 4: Opportunities for Regional Collaboration

Major Initiatives: Existing & Emerging Strengths

1. Aboriginal cultural tourism

The motivations and way that people travel constantly evolves. It is influencing change to the more traditional tourism model. This has been amplified by the market's desire for more personalised, immersive and transformative experiences, including those involving the sharing of Aboriginal and Torres Strait Islander culture.

This is reinforced by recent research undertaken by Tourism Australia's Consumer Demand Project, *The Top Travel Trends in Australia Heading into 2022*. The report highlighted that in recent years there has been a significant growth in the number of Aboriginal and Torres Strait Islander owned and operated travel experiences, and with it, Australia is seeing a more diverse range of experiences on offer, 'all highlighting a whole new side of the world's oldest living culture'.

There is an opportunity to capitalise on this shift and reimagine the way that Aboriginal cultural experiences can be developed and shared, in particular to deliver meaningful benefits to Aboriginal communities, tourism operators and businesses.

This is consistent with the goal of the *NSW Aboriginal Tourism Action Plan 2017 – 2020*, which is to further develop the sector in a manner that is endorsed by Aboriginal people, respects their cultural identity and creates a greater understanding of, and engagement with Aboriginal culture in NSW. It aims to deliver:

- A greater understanding of the richness of Aboriginal culture, and
- Economic and social benefits for Aboriginal people, both as operators and employees.

The development, support and promotion of Aboriginal cultural experiences represents a significant opportunity for Country and Outback NSW and NSW more broadly. However, this is a complex task, involving numerous stakeholders. While both NATOC and DNSW play a critical role in supporting Aboriginal cultural tourism in NSW, there is an opportunity for DNCO to play an important role in-region and on-Country. Support for this significant initiative should be sought from the Commonwealth Government through the NIAA.

Adopting a long-term, consistent approach is paramount to success. This means that dedicated resources are required. While relatively new organisations, such as Welcome to Country¹⁴, are taking a lead in the promotion and distribution of Aboriginal cultural experiences and products, there remains a gap in the development and support for new market entrants as well as ongoing support to help evolve or grow existing businesses.

The current tourism model has rarely met the needs of those who are interested in and have the right to deliver Aboriginal cultural experiences on Country. A new model should balance an understanding of Aboriginal communities' needs, expectations and ambitions with the requirements of the tourism industry.

This approach will be critical to the success of any new model. It needs to involve the region's Aboriginal communities through a genuine co-design process. It also requires an understanding of the evolving environment for tourism in order to ensure that the products, services and businesses are viable and sustainable.

It should investigate opportunities beyond traditional tourism experiences such as tours by considering the many ways that Aboriginal culture may be shared, from Caring for Country programs to bush tucker production, hospitality, unique accommodation and the arts.

Fundamental to begin crafting a new model is the consent, involvement and active participation of the local Aboriginal communities and organisations. The new model would aim to:

- Encourage and support the development of new experiences and enable the revitalisation of existing experiences
- Create a practical, viable and sustainable business model – for individual and family businesses as well as at a regional scale to facilitate collaboration, for example, through a shared business hub and network of Aboriginal-owned and managed enterprises
- Consider opportunities for creating pathways from training to employment or establishing and running businesses, especially to encourage individual or family owned and managed enterprises
- Provide a high-level analysis of the ongoing resourcing needs (financial and human)
- Identifying potential partnerships and/or opportunities to attract investment, including in experience and event development.

¹⁴ See: <https://www.welcometocountry.com/>

1. Aboriginal cultural tourism (continued)

ABORIGINAL CULTURAL TOURISM	
<p>Continue to work with NATOC, the Aboriginal communities, representative organisations and businesses of DNCO to support the development of new or enhance existing experiences and events and to scope the pathway towards a new model for Aboriginal cultural tourism</p> <ul style="list-style-type: none"> Engage with organisations such as the NSW Aboriginal Tourism Operators Council (NATOC), Local Aboriginal Land Councils (LALC), NSW Department of Aboriginal Affairs, National Indigenous Australians Agency (NIAA), peak Aboriginal organisations across the region, such as Murdi Paaki Regional Assembly (MPRA) and the other Destination Networks to support the scoping of this model 	
<p>Host an inspiring forum to showcase best practice in Indigenous cultural tourism and explore opportunities for a new model in Aboriginal cultural tourism</p>	<ul style="list-style-type: none"> Work with NATOC to design the format of the forum, identify an appropriate location (or locations) and operators who can share their experience and learnings – this may include operators from New Zealand <ul style="list-style-type: none"> Seek sponsors for the Forum Work with peak Aboriginal organisations across the region, such as LALC and MPRA as well as NIAA and other key stakeholders including DNSW, the Department of Aboriginal Affairs, TAFE NSW, NSW National Parks and Wildlife Service (NPWS) and Welcome to Country (among others) to identify speakers and participants <ul style="list-style-type: none"> Invite Aboriginal stakeholders from across the region to participate
<p>Work with the region's Joint Organisations (JOs) to scope the pathway towards a new model for Aboriginal cultural tourism</p>	<p>As part of the scoping process, consider:</p> <ul style="list-style-type: none"> Undertaking an audit (potentially utilising ADTW data) of existing experiences and products Identifying the aspirations, needs and expectations of Aboriginal communities with regard to the visitor economy – integrate best practice examples to provide inspiration for participants Identifying opportunities for individual and family owned and managed enterprises within the visitor economy <ul style="list-style-type: none"> Ensure a holistic approach is adopted with regard to the types of businesses or activities that contribute to the visitor economy Consider the range of scale from infrequent involvement (such as voluntourism programs linked to Caring for Country) to more regular programming of business activities (such as tour guiding or hospitality services) Incorporating a high-level analysis of the evolving environment for tourism in order to ensure that businesses are viable and sustainable Involving local champions within the communities to build support, engagement and participation\ Identifying grant funding and partnership opportunities (eg., with NIAA and NATOC) to develop a new model
<p>Develop a new model for Aboriginal cultural experiences</p>	<ul style="list-style-type: none"> Subject to the outcomes of the scoping process, commit to the co-design of a new model for Aboriginal cultural experiences with the local Aboriginal communities and organisations
<p>Support existing Aboriginal cultural experiences delivered on Country</p>	<ul style="list-style-type: none"> Support emerging and existing Aboriginal cultural experiences Identify and support applications for grants to enable experience and event development, for example to enhance and promote the Mutawintji Cultural Festival

Table 15. Aboriginal Cultural Tourism opportunities for Country and Outback NSW

2. Activate an expanded *Wonder of Gondwana* concept

Before there was Australia, there was Gondwana. The Earth's powerful forces created ancient Australia and forged the beginning of a great nation.

Today, the DNCO region is home to a bounty of riches that offer unique insights into a time before time began; across a landscape that has been shaped by generations over thousands of years.

The ***Wonder of Gondwana - A Journey into Ancient Australia*** is a concept¹⁵ originally developed for Destination Network Country and Outback NSW (DNCO), which at the time incorporated the recently formed Destination Network Central West NSW (DNCW). It aims to connect Australians and our visitors from abroad to the extraordinary history and heritage of our timeless land.

It would deliver on the major trend identified by Tourism Australia relating to **Odyssey Journeys and increased demand for drive tourism**, including with younger markets such as Millennials and Gen Z markets. This is even more important given that 95% of visitors to the DNCO region arrive by private vehicle.

Time not only evolves our landscape and nature but it transforms our culture. This project pays respect to and recognises the inherent **connection to Country of the Aboriginal communities** throughout the region while also highlighting the amazing opportunities to **step back into Gondwana or marvel at Earth's riches** formed by forces of nature beyond our imagination.

This **flagship concept** identifies opportunities for **collaboration** with the new DNCW, Destination Riverina Murray (DRM) as well as cross-border with Queensland and South Australia (Cross-Border Commissioner). It provides a platform to integrate the **extraordinary experiences offered by the night sky** as well as a visitor-centric approach to the way in which **geotourism**¹⁶ across the region can be brought to life and interpreted.

It is time to capitalise on the increased interest of the domestic market in remarkable experiences offered across regional NSW and bring it to life in a way that **positions the region as a must-visit destination**. It would assist the region to **compete on tourism's global stage**.

At its heart, this project is about delivering something remarkable. With so much choice and so little time, people ignore the ordinary. This means our primary goal is to ensure we create and promote remarkable experiences, which have the power to transform lives in a meaningful way.

Its ambition is to entice people to leave the everyday behind and immerse themselves in a time that helped to shape the Australia of today. We want to leave them with a sense of awe, curious to find out more and inspired by the characters and culture they meet on their journey into the heart of ancient Australia.

While the concept has been well received, a core challenge is to activate it in a tangible or meaningful way for local operators and organisations, including councils. This should commence by working with those operators who are market-ready to build support for and an understanding of what can be achieved through collaboration. This would be strengthened through developing partnerships with organisations such as the Australian Museum as well as enterprises involved in drive tourism, such as NRMA and car and campervan rental companies.

¹⁵ Further information on the original DNCO concept can be accessed at: <https://www.wonderofgondwana.com/> (password: gondwanaproject) - it includes an outline of the experience themes, product and experience development opportunities, insights into market trends and best-practice interpretation as well as potential creative concepts or ideas

¹⁶ See AUSTRALIA, THRIVE 2030 Strategy, Action 7.5: <https://www.austrade.gov.au/news/publications/thrive-2030-strategy>

2. Activate an expanded *Wonder of Gondwana* concept (continued)

ACTIVATE AN EXPANDED WONDER OF GONDWANA CONCEPT	
<p>Collaborate with DNCW and DRM to expand and operationalise the Wonder of Gondwana concept, incorporating night skies experiences</p> <ul style="list-style-type: none"> • Engage with Joint Organisations, Councils, Local Tourism Organisations (LTOs) and Regional Tourism Organisations (RTOs) across the DNCO region • Develop cross-border partnerships with Queensland, South Australia and Victoria 	
<p>Collaborate with DNCW and DRM to expand and operationalise the <i>Wonder of Gondwana</i> concept, incorporating night skies experiences</p>	<ul style="list-style-type: none"> • Identify and work with market-ready operators who offer existing experiences that link to and bring to life the <i>Wonder of Gondwana</i> concept and experience themes <ul style="list-style-type: none"> » The current themes include: <ul style="list-style-type: none"> • Fish to Footprints – for example, Age of Fishes Museum and Mungo National Park in the Willandra Lakes World Heritage Area • Riches of the Earth – for example, the Australian Opal Centre in Lightning Ridge • Sites of Cultural Significance – for example, Mutawintji Heritage Tours in the Unincorporated Far West » Incorporate night sky experiences, for example in Coonabarabran and Broken Hill • Identify opportunities to stage in and integrate emerging experiences and to encourage experience development, for example in collaboration with private air charter companies and on-ground operators • Create a partnership with the Australian Museum to distribute and promote opportunities to connect the museum to the experience offering in-region • Develop a partnership program for corporate partners such as NRMA and car and campervan rental companies
<p>Lead the development of an Inspiration Guide to the <i>Wonder of Gondwana</i></p>	<ul style="list-style-type: none"> • Develop an inspirational guide to provide information on and promote the <i>Wonder of Gondwana</i> – it could be modelled on the style of the <i>Inspiration for a Kimberley Venture</i>, which has recently been released <ul style="list-style-type: none"> » Work with DNCW and DRM to identify a broader cross-landscape approach that connects the <i>Wonder of Gondwana</i> story across all three Destination Networks » Identify opportunities for cross-border collaboration with Queensland and South Australia • Create and curate high-quality content (images, short videos and copy) to support the development of the guide as well as for use in other owned assets (eg., destination websites) and for multichannel distribution <ul style="list-style-type: none"> » The content framework should be guided by the experience themes and story narratives » Operationalise it through multiday itineraries and high-quality creative executions

Table 16. Activate an expanded Wonder of Gondwana concept for the greater region

3. Collaborate to revitalise visitor services across the region

Technology and people's increasing reliance on it, continue to influence the visitor economy. The days of simply being online are over. Digital transformation is necessary to future-proof the visitor economy. This extends from revitalising visitor services to addressing key challenges (for example, staffing shortages) and attracting new markets segments such as digital nomads.

A major opportunity for the DNCO region is to strengthen the network of Visitor Information Centres (VIC) and collaborate to revitalise visitor servicing. While there are many strengths of the region's VICs, the dynamics of visitor servicing have significantly changed in line with consumer trends, needs, behaviours and expectations.

World-class visitor servicing is now about ensuring potential visitors and those in-region have access to the right information at the right stage in the customer journey (see the diagram below). From providing inspiration during the dream phase through to more detailed guides that assist with planning and e-commerce functionality to convert interest to bookings. It should facilitate visitors becoming advocates of the destination, helping to extend the reach of marketing efforts through word of mouth.

Customer journey for tourism:

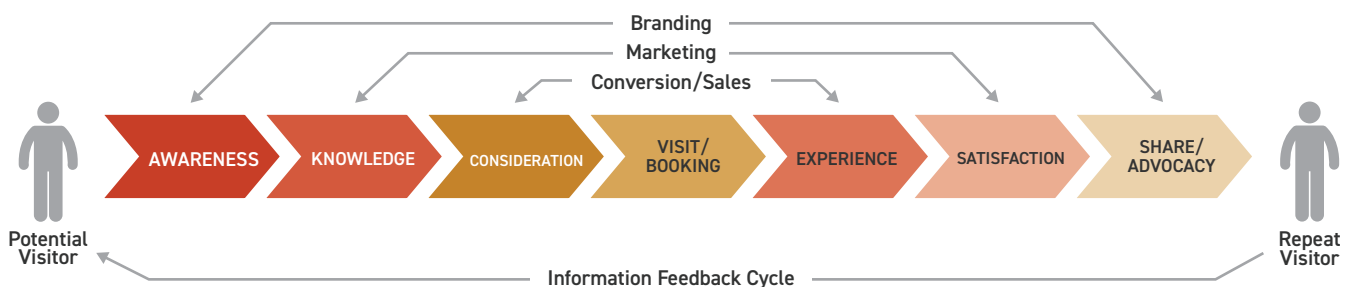


Figure 6. The customer journey through tourism

This approach provides numerous benefits, from increased visitor satisfaction to improved visitor safety, encouraging repeat visitation as well as attracting new markets. It should aim to:

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

A significant opportunity is to create more remarkable content that activates the *Wonder of Gondwana and Night Skies* concepts as well as experientially-focus, multi-day itineraries for multichannel distribution.

These priorities should align with and reinforce the new brand for regional NSW (core strategy of the NSW Visitor Economy Strategy 2030) while supporting third party distribution through organisations such as DNSW and Tourism Australia.

3. Collaborate to revitalise visitor services across the region (continued)

REVITALISE VISITOR SERVICES ACROSS THE REGION	
<p>Strengthen visitor servicing standards and content across the DNCO region</p> <ul style="list-style-type: none"> • <i>Engage with Joint Organisations, Councils, Local Tourism Organisations (LTOs) and Regional Tourism Organisations (RTOs) across the DNCO region to inform and share the insights from the review</i> • <i>Build cross-border collaboration</i> 	
<p>Lead a comprehensive review of visitor servicing to inform a pathway to delivering high-quality visitor services</p>	<ul style="list-style-type: none"> • Undertake a visitor-centric review of visitor servicing and share insights with Joint Organisations, Councils, LTOs and RTOs of the DNCO region <ul style="list-style-type: none"> » Identify gaps and opportunities for enhancing visitor servicing, including through accelerating digital innovation
<p>Lead the development of signature, cross-regional content, including multiday itineraries that link the experience offering and lift awareness and appeal of the DNCO region</p>	<ul style="list-style-type: none"> • Encourage the creation of remarkable content for multichannel distribution and support a shared program to capture and curate content (images, videos and copy) <ul style="list-style-type: none"> » Focus on signature, cross-regional content for initiatives such as the <i>Wonder of Gondwana</i>, which integrates <i>Night Skies</i>' experiences » Strengthen content relating to trails that profile the existing and emerging strengths of the region (across the five pillars from the VES) and drive tourism, including but not limited to: <ul style="list-style-type: none"> • Taste trails, highlighting the culinary, drink and produce experiences of the region • History and heritage trails, including linking in with the myriad museums and heritage attractions of the region • Geotourism, nature and outdoor recreation trails • Special-interest trails, such as those leveraging the increased demand for activities such as birdwatching • Arts, music and culture trails, including linking Aboriginal art sites with art galleries and local artists and artisans as well as profiling the range of related events • Sustainable tourism experiences • Act as a conduit between DNSW and local councils, LTOs and RTOs to facilitate media famils, photo-shoots and other opportunities for content development – a critical issue will be to strengthen coordination to avoid duplication and maximise budgets for content development • Create a shared program that builds awareness of all things travellers should know and plan for before they arrive. This could be modelled on the Iceland Academy, which is presented in a fun and engaging way albeit with serious messages for travellers. The program could provide helpful 'local tips' as well as safety and sustainability messages. It should, among other things: <ul style="list-style-type: none"> » Promote links to DNSW's road trip guides such as: Outback Road Trip Essentials and other information on weather/seasonality, safety and road access » Provide a guide or map to mobile connectivity, highlighting centres, facilities and services » Provide information for younger families about the region's playground or family-friendly attractions » Include blogs or short videos made with local operators or characters of the region

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REVITALISE VISITOR SERVICES ACROSS THE REGION	
Facilitate digital transformation and visitor services to future-proof the region's visitor economy	<ul style="list-style-type: none"> • Increase industry awareness of consumer behavior and expectations with regard to online and digital services, including e-commerce, online booking and flexibility <ul style="list-style-type: none"> » Encourage adoption of technology to promote the region and provide contemporary visitor services at all touch points along the customer journey » Work with organisations such as Outback Beds to increase accommodation providers with online booking » Subject to eligibility, encourage more tourism and hospitality businesses to participate in <u>DNSW's Digital Skills Accelerator for Tourism program</u>, which is part of the <u>NSW First program</u> • Identify opportunities to expand facilities and services for digital nomads or remote working as part of an odyssey journey as well as to support and enhance visitor experiences <ul style="list-style-type: none"> » Increase awareness of local accommodation providers about the current and emerging expectations and needs of digital nomads • Promote more rapid adoption of new technology into traditional tourism and hospitality business practices as well as to enhance or create more interactive and immersive interpretation, especially of the region's history and heritage
Lead the development of experiences packages that link commercial airlines, private air charters and rail services with on-ground experiences and services , including transport providers	<ul style="list-style-type: none"> • Work with the local tourism industry, transport providers and the hospitality sector to develop experience packages, including bespoke small group tours <ul style="list-style-type: none"> » Packages can also be sold through the VIC network and promoted by local accommodation providers » Consider partnership opportunities with rental car and campervan companies and distribution through organisations such as NRMA and car share companies • Host a series of industry famils for air charter service providers and rail package retailers in key source markets such as Sydney, Melbourne and Adelaide to develop and promote packages of the on-ground experience offer <ul style="list-style-type: none"> » Focus on multiday itineraries to extend the average length of stay, increase spend and encourage regional dispersal

Table 17. Revitalise visitor services across the Country and Outback NSW region

Appendix 5: Priority Focus Areas

Priority Focus Area 1: Industry engagement and capability development

Strengthen **industry engagement and capability**

A shared program would mitigate duplication and provide cost savings for local councils and other organisations while creating greater opportunities for access and participation by the local industry

Develop and implement a **shared engagement and capacity development program**

- Strengthen industry **engagement and networking**, including through hosting forums and creating and distributing newsletter articles that enhance awareness of the latest trends and best practices in the visitor economy
- Implement a **product and experience development program** focused on enhancing existing and developing new experiences, products, accommodation and events - incorporate a business mentoring program tailored to suit the needs of each business
- Lead a **pilot study to identify and activate bespoke or small-scale, personalised and transformational experiences** – delivering benefits to local businesses that want to diversify through offering a visitor experience. It should provide a pathway to market for those who are not solely aiming to be a tourism business but who would enrich the experience offer of the region. For example:
 - » Agritourism
 - » *Wonder of Gondwana* and *Night Skies*' experiences
 - » Enriching the experience offering - elevating it to transformational experiences through:
 - Farm stays and tours
 - Behind the scenes tours
 - Special-interest markets – from outdoor recreation (kayaking or fishing with a local) to tag-along tours or opportunities to meet/spend time with the local expert, farmer, artist, artisan, historian or Aboriginal Elder
- Implement a program to **connect major industry tourism operators with local tourism and hospitality providers** in the region and extend distribution to market
 - » Include private air charter, rail and event packages or product bundling as well as car/campervan rental and car share companies
 - » Profile sustainability
- Partner with **Ecotourism Australia to increase awareness of sustainability** and green destinations as well as to assist strengthen the ecotourism offering of the region
 - » Encourage an increased supply of eco-accredited experiences and accommodation

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Priority Focus Area 2: Regular visitor research program

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

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

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

Priority Focus Area 3: Strategic approach to attracting investment

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

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

Appendix 5: Priority Focus Areas (continued)

Priority Focus Area 4: Attract, retain and develop talent

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

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

Priority Focus Area 5: Connectivity and accessibility

Continue to improve **connectivity and accessibility** of the region

Stakeholders consistently raised challenges relating to connectivity and accessibility. This includes communication technology, road access and safety. These challenges are steadily being addressed with a range of major infrastructure projects. However, it remains a key enabler for the region to address

- Collaborate with local Councils to **shape priorities and attract investment for major infrastructure projects and improvements that enhance connectivity and accessibility**, deliver shared benefits to communities and the visitor economy and enable greater linkages between the LGAs
 - » Incorporate **active transport options**, such as regional cycleways (options for mountain, gravel and road bikes) and rail trails – this is particularly but not exclusively important for the New England North West Hub within DNCO. This is critical to support the increased interest in and demand for outdoor recreation, health and well-being and more sustainable visitor experiences
 - » Advocate for **accelerating growth in the network of high-speed charging stations for electric vehicles (EV)** – this is critical to meet the significantly increased demand for EVs, assist in the transition being made by motor vehicle manufacturers to EVs and to address competition (and balance or improve market share) from coastal destinations created by EV touring routes. A proactive approach would also enhance the region's perception with regard to sustainability
 - » Activate the **region's airstrips (public and private)** to support **private air charters** for both the leisure and business markets – the region is vast and the activation of private and small public airstrips would enhance access by air (Game-changer project identified in the 2018 DNCO DMP)
 - » **Develop partnership opportunities with NRMA** (including for accelerating the EV network) and car/campervan rental and car share companies

Priority Focus Area 5: Connectivity and accessibility (continued)	
	<ul style="list-style-type: none"> • Prioritise high-value touring routes to strengthen and promote a visitor-centric, experience-led approach to drive tourism, including: <ul style="list-style-type: none"> » Develop a <i>Wonder of Gondwana</i> touring route across LGA and Destination Network boundaries and to support cross-border collaboration with Queensland and South Australia » Support the extension of major cross-border initiatives such as <i>Silver to Sea Way</i> from South Australia into Broken Hill and Silverton (Stage 2 and beyond) to strengthen access, provide more immersive visitor experiences and encourage drive tourism – work with the Cross Border Commissioner to identify and promote opportunities » Support investment, enhancement and promotion of the region's existing touring routes such as Sturt's Steps, Darling River Run, Great Artesian Drive and Fossickers Way, among others » Expand the number of touring routes targeting motorcycles, for example leveraging the motorcycle touring routes throughout the New England North West • Most visitors (95%) travel to the region by private vehicle, including 4WD or SUV. Persistent issues relate to visitor/road safety, unplanned road closures and alternative routes for wet weather. This is exacerbated by an increasing number of inexperienced 'country-road' drivers. A priority is to enhance visitor information pre and during trip via online and digital channels (the most common source of information for source markets) <ul style="list-style-type: none"> » Promote links to DNSW's road trip guides such as: Outback Road Trip Essentials » Online mapping service, such as links to pre-prepared, downloadable Google map routes (checked by those with local knowledge) • Initiatives such as Silver to Sea Way provide an opportunity to consider social enterprise models that enable and enhance community participation in the visitor economy

Table 18. Priority focus areas for Country and Outback NSW

Appendix 6: NSW Government Cost Benefit Analysis

ASSESSMENT CRITERIA

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

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

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

Table 19. Assessment criteria for NSW Government Cost Benefit Analysis



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