Central NSW Tourism

Destination Management Plan Appendices

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Appendix 1: Sustainability indicators

Sustainable Destination Management Indicators

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

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

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

- destination management
- economic
- social
- environmental .

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

Sustainable Destinations Indicator System

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Appendix 2: Consultation with tourism providers

Tourism Providers Consultation workshops: Central NSW Tourism

12th May 2013

Observations, Community Vision for Tourism and Mind Mapping

Consultation facilitated by:
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Introduction

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

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

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

Consultation workshops

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

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

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

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

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

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

(Photographs: C. Warren)

Summary of findings

Factors effecting growth in tourism

Risks

Climate Change, lack of water

Loss of oral Aboriginal history

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

Economic decline (Wellington)

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

Weak changes

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

'GFC things are getting financially tighter for everyone'

Loss of staff to Sydney

Environmental issues of the land

Sudden changes

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

Floods

Resources

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

Trends

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

Awareness that school children are learning more about Indigenous culture.

Require wider accommodation, visitors like markets and shopping.

Wineries are under financial pressure as sales and visitation drop

More racing at Bathurst, more classic car touring groups.

Competitors

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

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

Observations on individual operators/destinations

Boutique Brewery (Parkes workshop)

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

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

Heritage trails Bathurst, Parkes and Cowra

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

The Dish/CSIRO

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

Cowra

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

The Mill

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

Mudgee Market Town/Villages

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

Wellington

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

Central NSW

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

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

Conclusion from the discussion and presentations

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

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

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

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

What do the mind maps tell us?

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

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

The mind maps have been modified slightly:

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

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

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

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

Conclusions from the mind maps

Bathurst

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

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

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

Villages

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

Ÿ Hill End was recognised as unique place

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

Mudgee

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

Orange

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

Wellington

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

Lachlan catchment

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

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

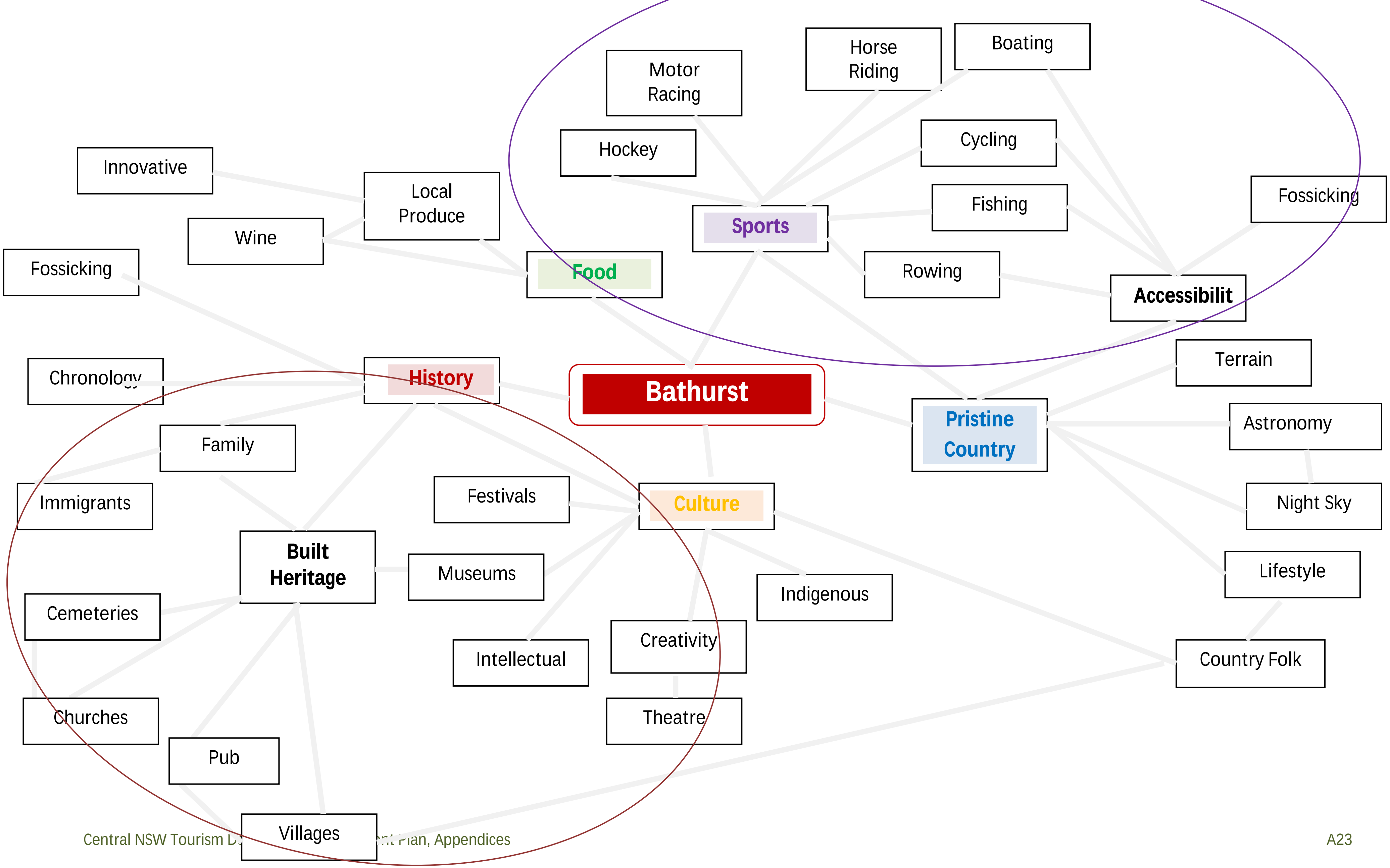
Wiradjuri

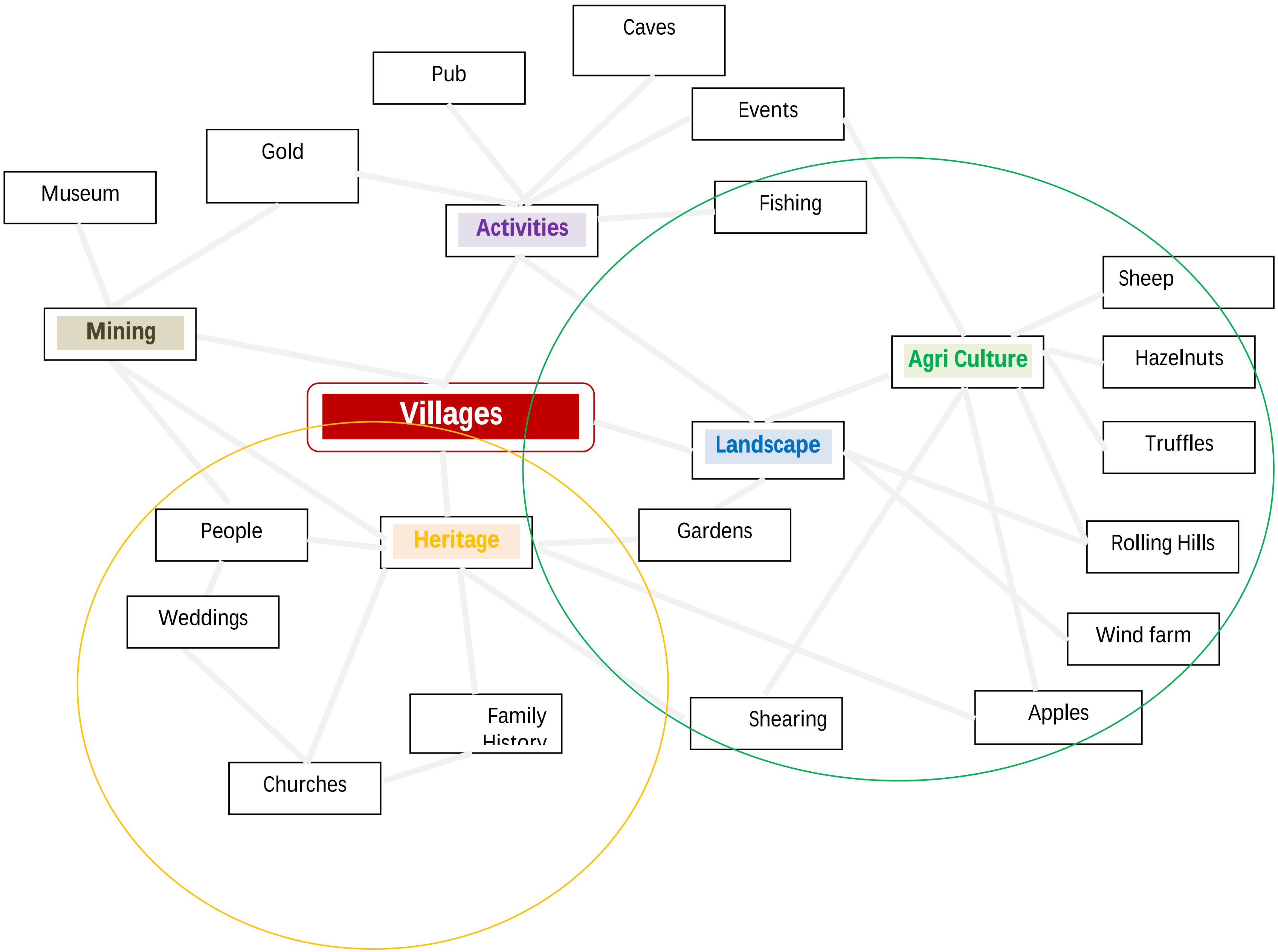
- A Wiradjuri community member developed their own mind map. There was noticeable enthusiasm from the rest of the participants to learn about the Aboriginal Cultural Heritage of the region.
- Every landmark and every star tell a story
- Through the emphasis of reading the night sky and transferring the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

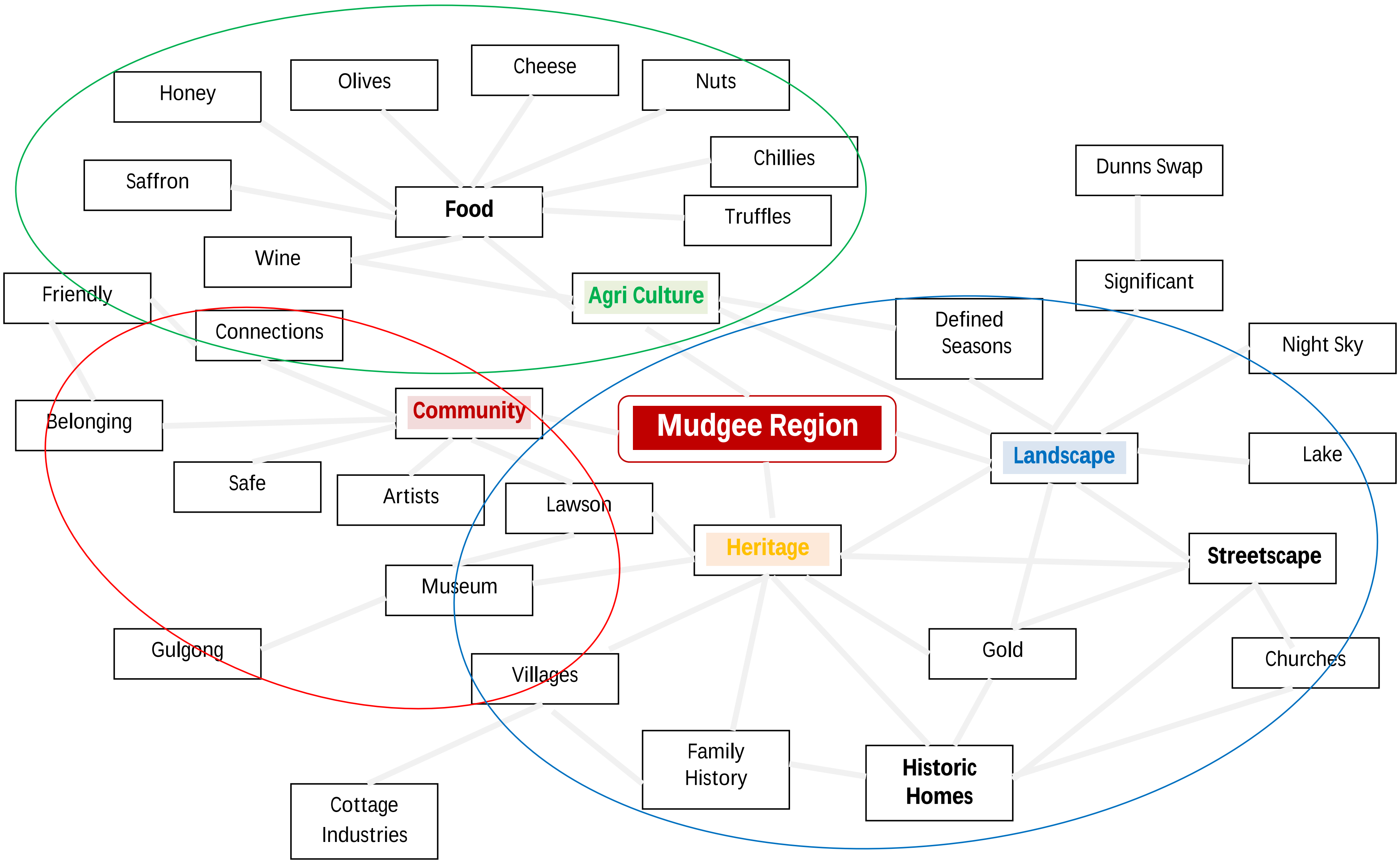
Cowra & region

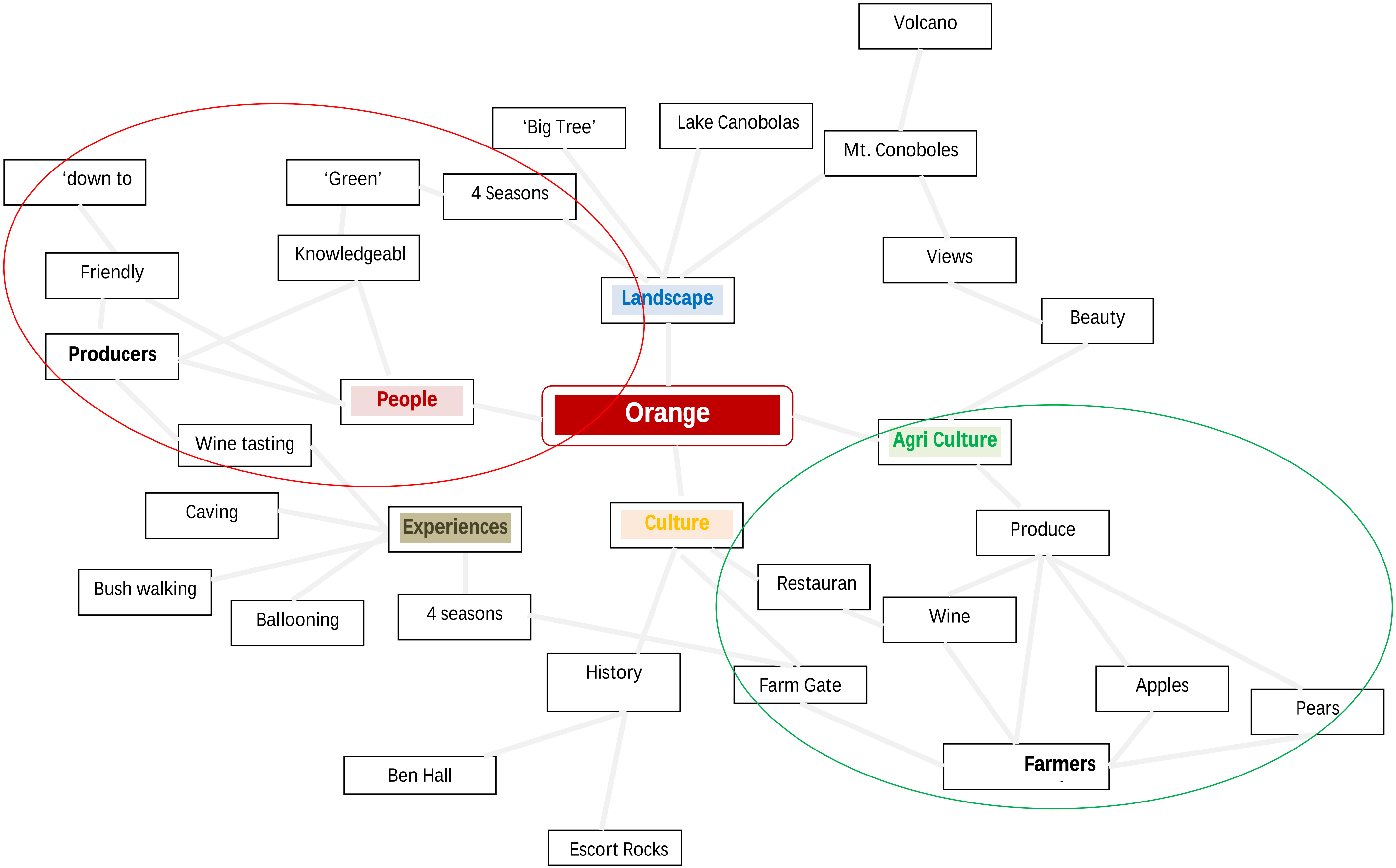
- Cowra and region were seen to have four distinct qualities: History, People, Artists and Food.
- The History and People sectors were enthusiastically emphasised through the POW Camp and the International Peace Bell. These were felt to be strong competitive points of difference.
- Some of the participants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

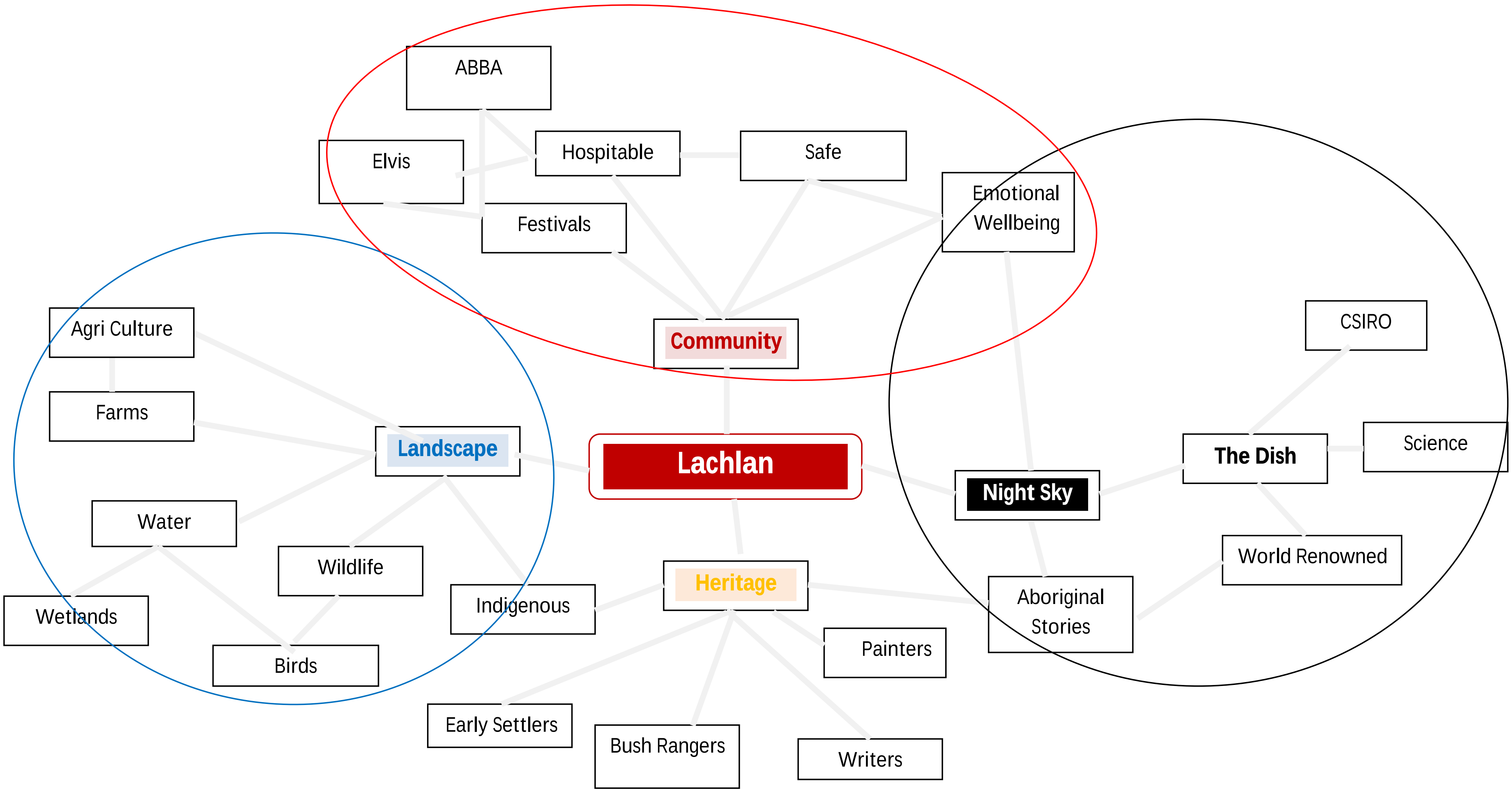
Mind maps from the consultation workshops

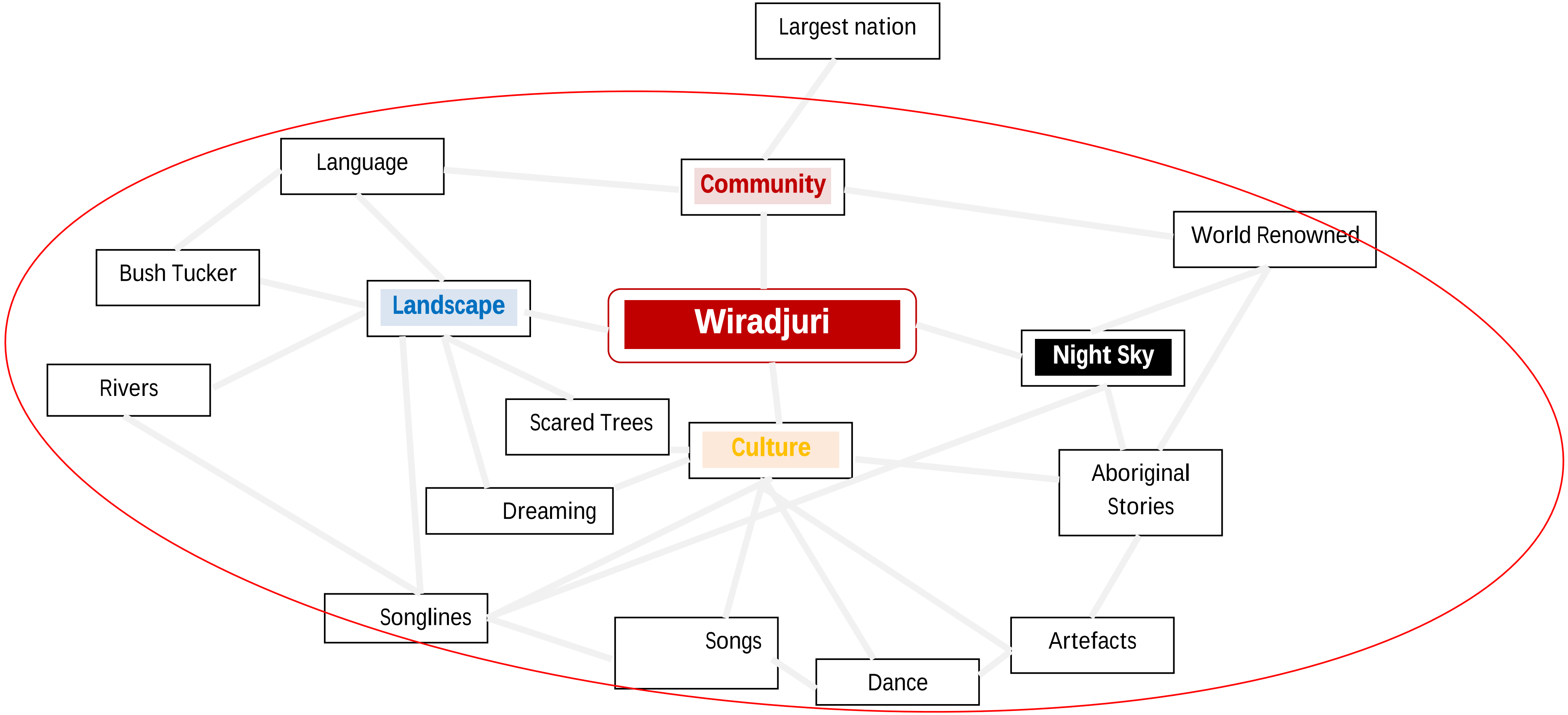


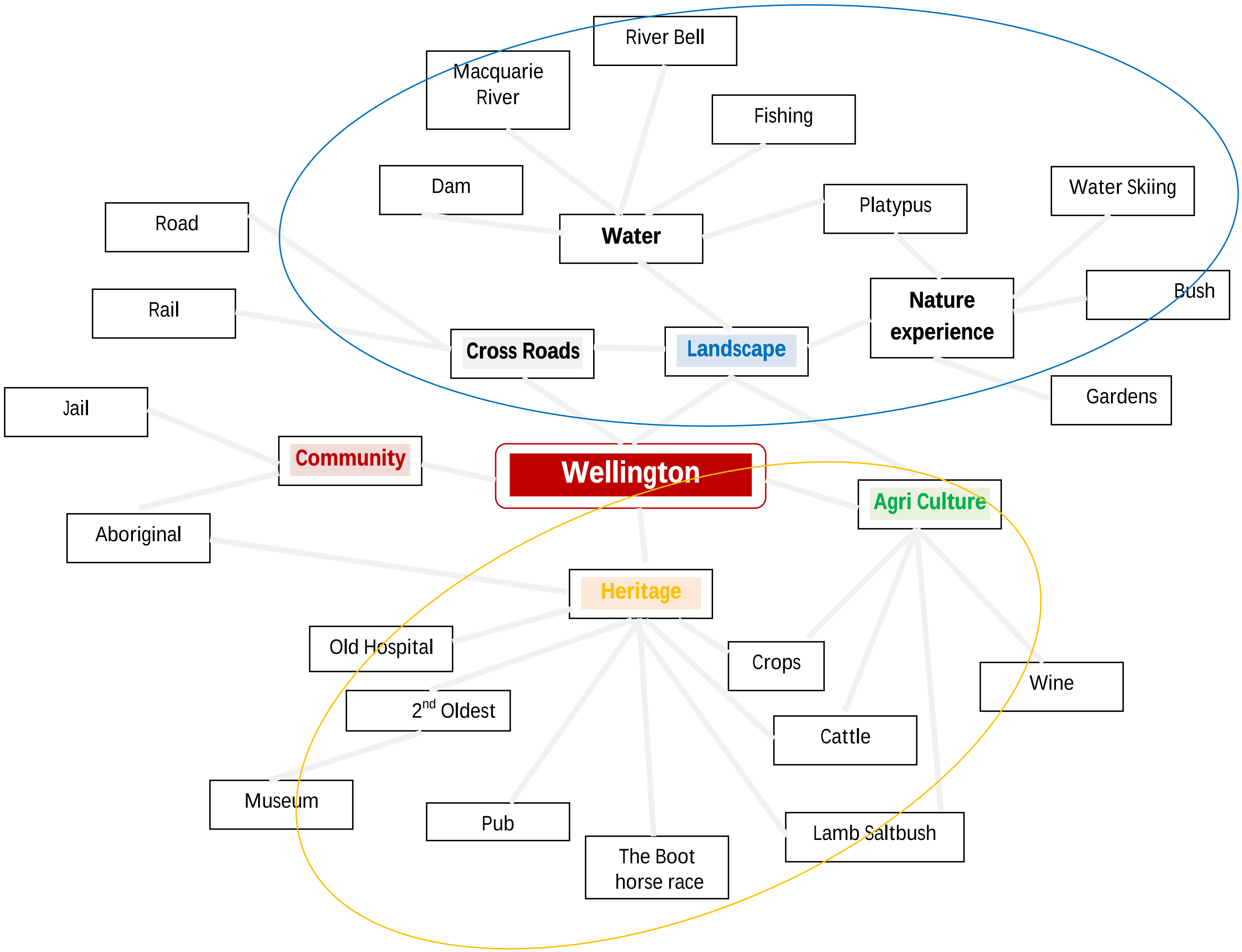

Caves
Pub
Events
Gold
Museum
Activities
Fishing
Sheep
Mining
Agri Culture
Hazelnuts
Villages
Landscape
Truffles
People
Heritage
Gardens
Rolling Hills
Weddings
Wind farm
Family History
Shearing
Apples
Churches

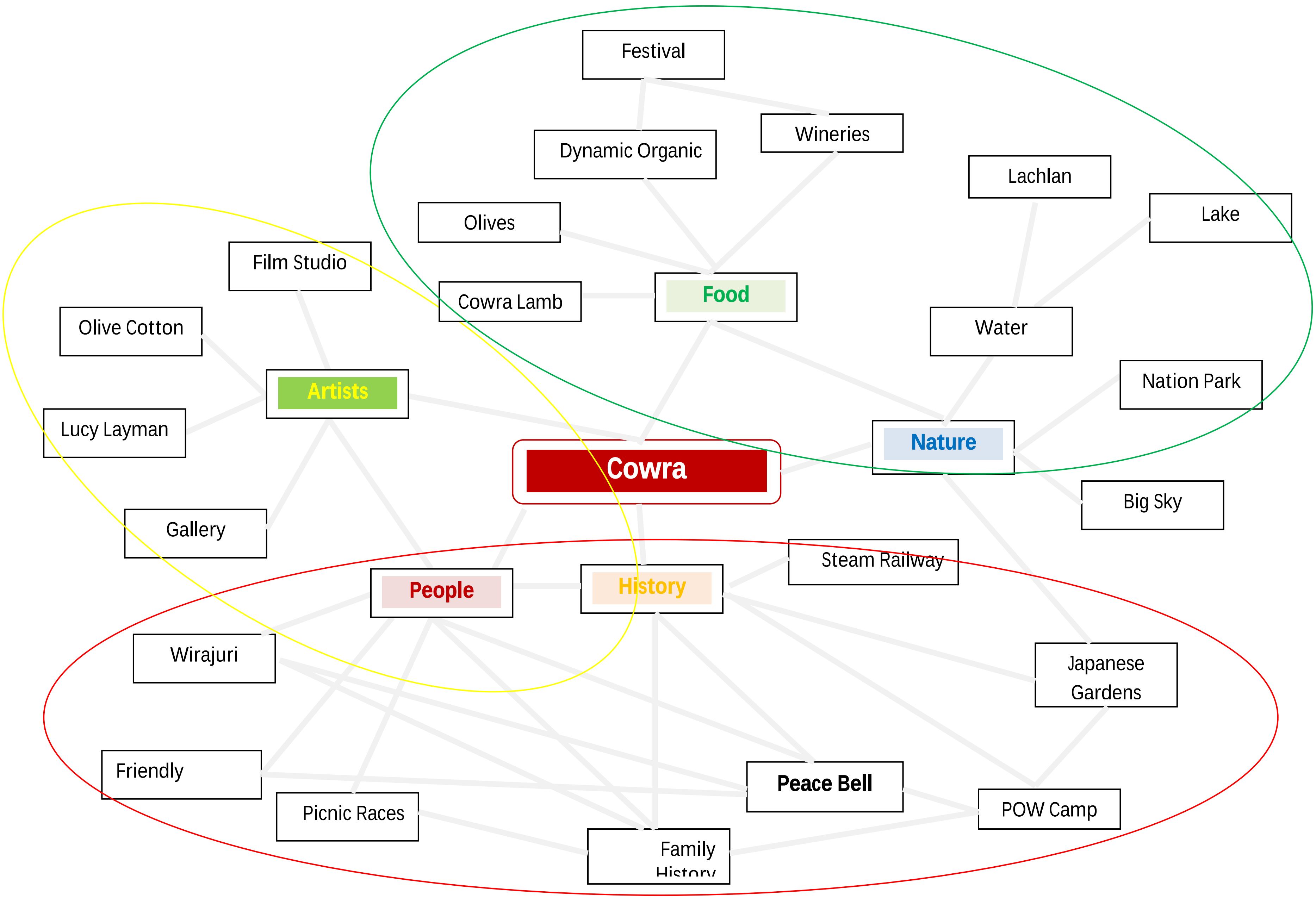

Honey
Olives
Cheese
Nuts
Chillies
Saffron
Food
Truffles
Wine
Agri Culture
Friendly
Connections
Dunns Swap
Significant
Defined Seasons
Night Sky
Community
Mudgee Region
Landscape
Lake
Belonging
Safe
Artists
Lawson
Heritage
Streetscape
Museum
Gulgong
Gold
Churches
Villages
Family History
Historic Homes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


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


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


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


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


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

Summary report from Phase Two Workshops

November 2012

Introduction

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

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

Recommendations

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

Findings from the surveys

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

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

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

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

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

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

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

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

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

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

Feedback on the training experience

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

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

Table 8 Feedback

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

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

Voluntary commitment

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

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

Appendix 3: Major stakeholders

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

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

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

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

Appendix 4: SWOT

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

Identification of principal opportunities and threats:

Opportunities: Low Medium Strong

Threats: Low Medium Strong

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

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

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

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