Orange Region
Destination Management Plan
2022-2026

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FILE

Orange Region Destination Management Plan - Sept22

VERSION

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ACKNOWLEDGEMENT OF COUNTRY

Blayney Council, Cabonne Council and Orange City Council is situated within the traditional lands of the Wiradjuri Nation. We acknowledge the traditional custodianship of these lands, and pay our respect to the Wiradjuri people for their care and stewardship of these lands for more than 40,000 years and to the Elders of the Wiradjuri Nation past, present and future.

ACKNOWLEDGMENTS

Urban Enterprise would like to gratefully acknowledge the support, assistance and input by the visitor economy and economic development teams at Orange City Council, Blayney Shire Council and Cabonne Council, as well as Orange360, in the preparation of this Destination Management Plan.

ACRONYMS

ABS	Australian Bureau of Statistics
BSC	Blayney Shire Council
CC	Cabonne Council
DMP	Destination Management Plan
IVS	International Visitor Survey
LGA	Local Government Area
O360	Orange360
OCC	Orange City Council
PA	Per Annum
NVS	National Visitor Survey
TRA	Tourism Research Australia
VIC	Visitor Information Centre

GLOSSARY OF TERMS

Orange Region	The area defined by the local governments of Orange, Blayney and Cabonne Councils.
Daytrip Visitor	Those who travel for a round trip distance of at least 50 kilometres, are away from home for at least 4 hours, and who do not spend a night away from home as part of their travel. Same day travel as part of overnight travel is excluded.
International Visitor	A person is defined as an international visitor to Australia if they are currently a resident overseas, have been in Australia for less than one year and are aged 15 years or over.
Overnight Visitor	People aged 15 years and over who undertake an overnight trip of one night or more and at least 40 kilometres away from home are referred to as overnight visitors. Only those trips where the respondent is away from home for less than 12 months are in scope of the NVS.

Executive Summary

Executive Summary

About the Destination Management Plan

Orange City Council have engaged Urban Enterprise to prepare a Destination Management Plan (DMP) for the Orange Region, in collaboration with Blayney Shire Council and Cabonne Council. Together, the three Local Government Areas form the Orange Region.

This Plan has been informed by independent research and analysis, as well as consultation with industry representatives, community groups, businesses, Council and Government stakeholders.

The Destination Management Plan aims to provide a strategic and unified direction for the development of the visitor economy between 2022 and 2026, with a focus on awareness, product development, and enabling infrastructure. This will be achieved by empowering and supporting the local tourism industry.

Orange Region Visitor Economy Overview

The Orange Region has a vibrant visitor economy, attracting 1.3 million visitors. The visitor economy contributes $377 million in direct expenditure to the Orange Region, which is largely driven by overnight visitor spend, with an average spend of $547 per visit.

The Orange Region has experienced considerable growth in its visitor economy over the past 10 years. Investment in the wine sector, followed by investment in dining, retail and quality accommodation has led to the region attracting an exceptionally high yield market. The three Council's collaborating together with industry through Orange360 has solidified the Orange Region brand and it is expected that strong growth will continue.

Tourist Tracka data highlights strong dispersal from Orange City to Blayney and Cabonne LGAs with more than a third of visitors to Orange City also visiting the two surrounding LGAs. The strength of the regional experience including wineries, farm gates, villages and natural attractions is important to the region's overall appeal.

63% Daytrip visitors

28% Spend by Daytrip visitors

1.3M Visitors

37% Overnight visitors

$377M Spend

72% Spend by Overnight visitors

$126 Spend per daytrip visitor

$547 Spend per overnight visitor
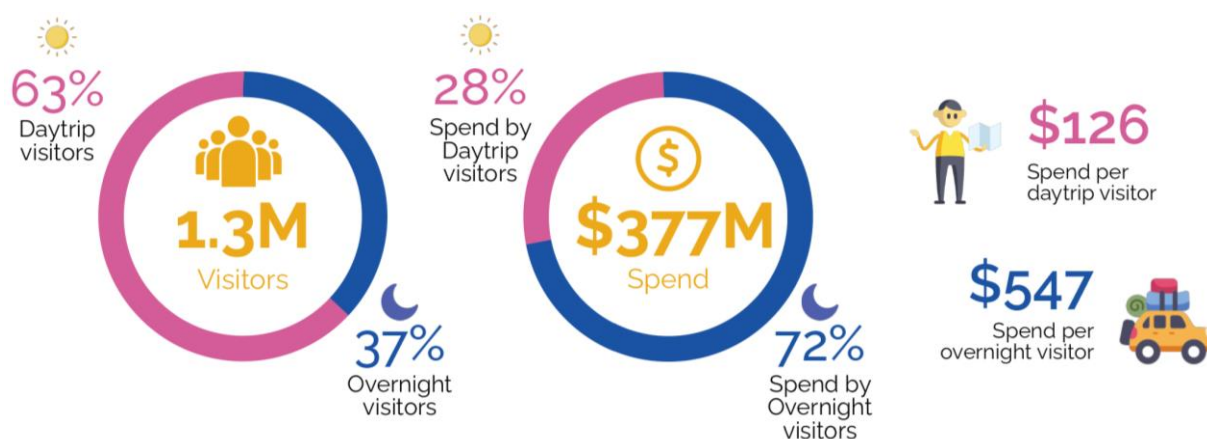
Existing Product Strengths

The table below highlights the existing product strengths of the Orange Region.

The Orange Region is well placed in terms of products targeted to the couples and singles markets, with quality cellar door and food experiences. The family market however is not well catered for in terms of product offer given the size of the market.

There is a need for continued investment in products and experiences that support the family market, as well as provide a more rounded experience for higher yield adult couple and singles visitors. This will lead to increase in length of stay and greater yield from visitors.

Primary Strength
Wine, Food, Beverage and Agritourism

Emerging Strengths
Nature-based
Arts, Culture and Heritage
Events and Festivals
Boutique Accommodation
Sport and recreation

Gaps / Opportunity
Business Events
Night-time Economy
Large-scale Accommodation
Family-friendly Activities and Product

What the Tourism Industry Have Said

The tourism industry of Orange Region was engaged through a survey questionnaire and workshop. Industry acknowledged the importance of food and wine as the primary strength of the visitor economy in the Orange Region, however there was wide agreement that activities, products and experiences beyond this are needed to provide a rounded visitor experience.

Specific ideas identified by industry include:

- Strengthening of existing markets and attraction of new markets to the region.
- Expansion of the tourism offering beyond wine and food.
- Promotion of the abundance of natural assets available throughout the region.
- Suitable accommodation for the tourism-based workforce.
- Enhancement of visitor amenities at nature-based attractions.
- Promotion of the smaller towns and villages.
- Diversification of the events calendar.
- Strengthening marketing and promotion undertaken by Orange360; and
- Development of new tracks and trails.

KEY CONSIDERATIONS FOR DEVELOPMENT OF THE ORANGE REGION VISITOR ECONOMY

The following strategic considerations draw on the research and assessment undertaken through preparation of the Destination Management Plan.

The vision, objectives and strategies identified in the Destination Management Plan respond to these.

EVENTS	PRODUCTS AND EXPERIENCES
- Need for increased accommodation capacity to support large-scale events - Opportunity to grow events during the off-peak season - Need for investment in mid-scale conferencing centres / facilities - Opportunity to develop events with strategic alignment to key product pillars, such as wine, culinary, nature, cycling etc. - Need to streamline and enhance events permit processing, funding and management	- Need for cycling and walking trail links to wineries, nature-based attractions and towns and villages - Investment in natural assets is needed to create motivating attractions and add depth to the visitor experience - Need for investment in products and experiences targeted to the family market - Opportunity for the development of arts, culture and Indigenous cultural experiences to enrich the visitor experience - Need to improve high quality dining experiences, particularly in smaller townships - Need for further on-farm experiences, such as foraging, cafes and restaurants, and educational experiences - Opportunity to deliver higher-end experiences for the adult couple market, such as spa and wellness, retreats, and other boutique experiences
ACCOMMODATION	ENABLING INFRASTRUCTURE
- Accommodation often at capacity, impacted by AIRBNB, large transient workforce and lack of housing supply - Difficulty attracting investment in large-scale contemporary accommodation, such as Quest, Mercure etc. - Lack of affordable housing for service sector workers impacts ability to attract and retain workers - Lack of accommodation suited to the family market - Opportunity to attract investment in experiential accommodation that provides a unique experience (farm stays, eco-cabins, eco-retreats etc.) - Attract investment in health and wellness accommodation facilities, aligned to target market preferences and opportunities	- Poor intra-region connectivity, including public transport, walking and cycling, and poor-quality roads - Need for improved public transport connectivity between major surrounding population centres, as well as smaller townships - Improvements to directional signage, as well as poor quality and outdated tourism signage - Continue advocating for increase in flights and new routes, including south-east Queensland destinations - Continue advocating for high-speed trains from Sydney, telecommunications improvements - Ongoing improvements to telecommunications networks and internet access

INDUSTRY COLLABORATION AND NEEDS	MARKETS, AWARENESS AND MARKETING
• Lack of industry collaboration and communication, as well as large proportion of the service sector not perceiving their business as part of the visitor economy • Support from Council for events and festival organisers and streamlined event permit processing for multi-Council events • Need to streamline development approvals processes • Customer excellence education and training for operators and staff • Need for enhanced industry collaboration to deliver product packaging • Reduced business operating hours on weekends impacts visitor experience and satisfaction	• Continued support for and collaboration with Orange360 • Need to expand marketing to emerging/new markets • Limited resources and funding for Orange360 prevent the organisation from performing at its full capacity • Need for enhanced collaboration with major regional cities, to capitalise on international and domestic touring opportunities, to align events calendars and develop product packaging

VISION

The following section outlines the strategic framework to guide development of the Orange Region visitor economy. This includes a vision for tourism across the Region, objectives and success measures, and seven key themes to guide public and private sector investment.

> **VISION**
>
> *The Orange Region will be a leading Australian visitor destination, enriched by vibrant towns and villages, providing the highest quality wine, food and escape to nature experiences.*

OBJECTIVES	TARGET	MEASURE/SOURCE
Grow the value of the visitor economy	• Increase in visitor expenditure • increase in visitor length of stay • Increase in visitation numbers	• Visitor expenditure, length of stay and visitation to the Orange Region, using industry accepted data source
Create a visitor ready and unified industry	• Increased industry engagement, communication and networking • Improvement in customer satisfaction	• Industry engagement • Qualitative and quantitative performance measures
Encourage visitor dispersal to towns and villages	• Increase in visitation to towns and villages	• Regional visitor dispersal from Orange City to Cabonne and Blaney, using industry accepted data source

THEMES

Key themes to guide future investment have been identified in response to strategic considerations. A range of priority initiatives have been identified for each project.

Theme 1: Visitor Economy Foundations

Provide enabling infrastructure and attract investment in accommodation and facilities that will support visitor economy growth.

Theme 2: Visitor Ready Region

Ensure the soft infrastructure is in place to empower a capable and connected industry to work together towards a unified vision.

Theme 3: Destination Marketing & Brand Awareness

Reinforce and strengthen the Orange Region brand through marketing, positioning and placemaking.

Theme 4: Creativity, Arts And Culture

Showcase and celebrate local culture, creativity, and heritage to provide a rich visitor experience.

Theme 5: Events, Festivals And Conferencing

Build a strong tourism events and festivals brand and grow business and conferencing events to develop a well-rounded and sustainable events calendar.

Theme 6: Ferments, Culinary, And Night-Time Economy

Deliver high quality, contemporary and authentically Orange Region wine, ferments and culinary experiences, and activate a vibrant night-time economy.

Theme 7: Nature And Recreation

Leverage the growth in nature based and recreational tourism through investment in infrastructure, promotions, activations and experiences, and passive recreation.

PART A
Assessment

This section provides a detailed assessment of the Orange Region visitor economy, underpinned by primary and secondary research, data and engagement with local stakeholders. This includes an analysis of:

- Visitor economy and target markets
- Products, events and supporting infrastructure
- Governance, marketing and visitor servicing

All assessment work undertaken is guided by best practice destination management principles, and has culminated in the identification of key considerations for development of the DMP Framework.

1. INTRODUCTION

The Orange Region Destination Management Plan will provide a strategic and unified direction for the development of the visitor economy between 2022 and 2026, with a focus on awareness, product development, enabling infrastructure, and continuing to market the Orange Region.

The Destination Management Plan has been prepared to respond to and achieve the following three objectives. These are to grow the value of the visitor economy, create a visitor ready and unified industry and encourage visitor dispersal to towns and villages.

About This Project

Orange City Council have engaged Urban Enterprise to prepare a Destination Management Plan (DMP) for the Orange Region, in collaboration with Blayney Shire Council and Cabonne Council. Together, the three Local Government Areas form the Orange Region.

This Plan has been informed by independent research and analysis, as well as consultation with industry representatives, community groups, businesses, Council and Government stakeholders.

The Orange Region is situated within 3.5 hours' drive from Sydney and Canberra, providing access to a drive market of almost six million people.

The Region encompasses an area of approximately 7,800 square kilometres and is located around 1,000 metres above sea level. This provides the perfect climate for yielding high-quality cool climate produce.

Project Process

The Plan has been informed by significant research, which has been drawn on as evidence as required. This includes engagement with key stakeholders, a business and community survey, and detailed product and experience assessments.

The following process was undertaken to inform the development of the Destination Management Plan.

Research, Discovery & Assessment	• Reviewed 20+ documents • Research into target markets (TRA) • Site visits to key towns and attractions • Tourism product, accommodation and events assessment
Engagement	• Industry workshop • Council and councillor workshops • Consultation with state government agencies and private operators • Community and Business Survey (250 responses)
Issues & Opportunities	• Identification of issues and opportunities based on assessment, engagement, site visits and product assessments
Strategy	• Development of strategic framework, including vision, objectives and identification of priority projects

Orange Region

ORANGE REGION

METROPOLITAN SYDNEY

CABONNE COUNCIL

ORANGE CITY COUNCIL

BLAYNEY SHIRE COUNCIL

Dubbo

Brisbane 2h

Mudgee

Yeoval

Cumnock

Molong

Mullion Creek

Sydney 3h30

Manildra

Borenore

Orange

Cudal

Nashdale

Lucknow

Spring Hill

Bathurst

Eugowra

Cargo

Millthorpe

Canowindra

Blayney

Carcoar

Newbridge

Mandurama

Sydney 1h30

Lyndhurst

Neville

Melbourne 1h30

Cowra

Canberra 3h30

F1. Orange Region Map

2. INFORMING THE DMP

2.1. Successful Destination Management

Best Practice Destination Management

Successful destination management is a holistic process that ensures tourism adds value to the economy, social fabric and ecology of our communities. It is achieved through strong leadership with consideration of the following factors.

The 3 Key Elements of Destination Management

Place	Defining the destination in the eyes of the visitor and communities of interest and understanding the visitor journey to and within the region.
People	Cohesive governance and strong leadership, engaged industry and qualified and experiences labour force.
Product	Motivating products, quality infrastructure and experiences on offer that draw visitors and provide to visitor needs.

The Destination Management Plan for the Orange Region follows the Guide to Best Practice in Destination Management, as developed by the Australian Regional Tourism Network (ARTN).

Understanding the Destination Lifecycle

Visitor destinations journey through a destination lifecycle across their development, as depicted below.

The Orange Region is within the growth phase, where significant demand has been built by the wine industry and regional marketing undertaken by Orange360. This has supported growth in the destination, and development of new products and experiences.

In the growth stage, it is important that Councils support industry growth through appropriate infrastructure planning and delivery, training and capacity building, and other facilitative activities.

Stages of the Destination Lifecycle

Introduction	Growth
The early development of a destination, typically driven by one sector – the wine industry in the case of the Orange Region.	This is characterized by growing demand and awareness, an increase in visitation, and increasing product development.
Maturity	**Decline / Revitalisation**
Products and experiences are refined, the destination brand and position is strong, and visitor yield is high.	The destination either begins to lose market share due to stagnation, or is re-ignited through revitalisation work.

Local Government's Visitor Economy Role

Local Government plays an essential role in the visitor economy of its region, acting as an enabler for the visitor economy by providing the foundations, including infrastructure, visitor information services, and support to the local industry.

The role of Local Government, at its essence, is to ensure liveability for its residents. By continually investing in liveability, Local Governments provide an investment climate that encourages the private sector to invest in products and experience, in turn facilitating the growth and vibrancy of the visitor economy.

Orange Region provides a strong example of Local Government leadership in tourism, with the three Local Government's working together to fund and support Orange360 in conjunction with industry. This helps to provide consistent messaging and a consistent brand for the Orange Region.

2.2. Strategic Policy Context

Alignment to existing strategic policy and direction is critical to the success of the Orange Region Destination Management Plan. Key documents reviewed are listed in Appendix A0.

The NSW Visitor Economy Strategy 2030, the NSW Government State-wide DMP (2019) and the DNCO NSW DMP (2018-2020) are the key strategies guiding visitor economy development across the State.

These documents provide a range of findings and strategic directions relevant to development of the Orange Region visitor economy. These have informed the development of the Destination Management Plan, to ensure alignment with State and regional tourism directions.

The NSW Visitor Economy Strategy outlines five strategic pillars, each with key areas of focus, set to achieve the NSW Government's vision to ensure the state becomes the premier visitor destination in the Asia Pacific. These five strategic pillars include:

- Road to Recovery
- Build the brand
- Showcase our strengths
- Facilitate growth
- Invest in world-class events

The State-wide DMP identifies the Orange Region as one of seventeen current hero destinations within NSW.

2.3. Local Insights

The development of the Strategy was underpinned by in-depth stakeholder engagement, which facilitated a comprehensive understanding of the unique local conditions, challenges and opportunities.

An overview of the stakeholder engagement program is shown adjacent. These engagements were undertaken across November and December 2021, including a combination of face to face and virtual sessions.

Internal Council Workshops

Internal Council Workshops were held with Council Executives and Councillors at the commencement of the project.

1:1 Stakeholder Engagements

One to one stakeholder engagements with key government agencies and key local operators identified by Council. These stakeholders included:

- Destination Country and Outback
- Regional Development Australia
- Regional Development NSW
- Central NSW Joint Organisation
- Orange360
- Orange Regional Vignerons Association

Industry workshop

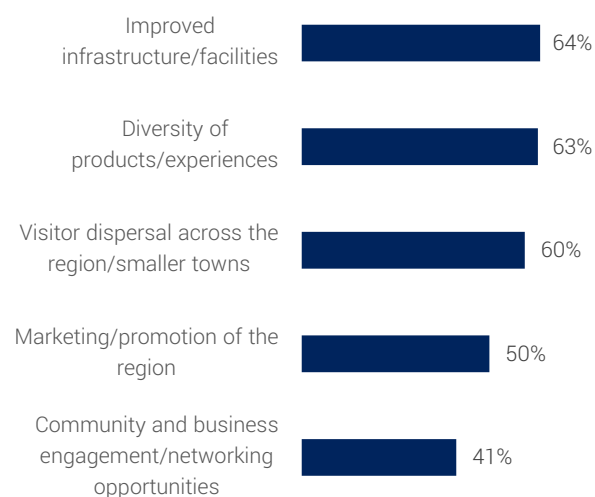An industry workshop with key stakeholders identified by Council.

250 survey responses

Community and business survey, distributed by Council to members of the community and local operators.

Key Outcomes sought from the DMP (quantitative and qualitative)

The business and community survey, which received 250 responses, sought to understand local aspirations for the visitor economy and key outcomes desired from delivery of this Plan.

These have been depicted in the two graphs below.

Category	Percentage
Improved infrastructure/facilities	64%
Diversity of products/experiences	63%
Visitor dispersal across the region/smaller towns	60%
Marketing/promotion of the region	50%
Community and business engagement/networking opportunities	41%

Key words and phrases taken from the unprompted question in the survey have been highlighted below, which reflect the key outcomes sought from community and industry as a result of the DMP.

cycling routes
more support for villages
tracks and trails
arts and culture guide   live shows
protect natural assets   visitor amenities
                          resident services
rail trails   product enhancements
high quality accommodation
winery open days   more dining   affordable attractions   public transport
worker housing
road quality   new visitors   retail
blayney platform arts hub   family friendly   festivals
sophistication
day bus trips   destination marketing   direct flights
dog friendly
accessibiltiy   tourism beyond food and wine   mbt
outdoor activities
extend business hours
high rate of airbnbs
weekend escapes   support orange360
events
railway services
town linkages
development initiatives
educate locals
winter activities
eco-tourism

Source: Orange Region Business and Community Survey, 2021.

Local Insights and Priorities

Through the survey and industry engagement, it was found that the local community has a strong desire for the following (identified in no particular order):

- Strengthening of existing markets and attraction of new markets to the region;
- Expansion of the tourism offering beyond wine and food;
- Promotion of the abundance of natural assets available throughout the region;
- Suitable accommodation for the tourism-based workforce;
- Enhancement of visitor amenities at nature-based attractions;
- Promotion of the smaller towns and villages;
- Diversification of the events calendar;
- Provision of activities for the family market;
- Strengthening marketing and promotion undertaken by Orange360; and
- Development of new tracks and trails.

Businesses acknowledged the importance of food and wine as the primary strength of the visitor economy in the Orange Region, however, there was a consensus that activities, products and experiences beyond this are needed to provide a rounded visitor experience, in addition to meeting the needs of the family market, which is not adequately serviced at present.

This was a key finding linked to both the survey and stakeholder engagement.

3. VISITOR ECONOMY

3.1. Visitor Economy Snapshot

The Orange Region has experienced considerable growth in its visitor economy over the past 10 years. Investment in the wine sector, followed by food and quality accommodation has led to the region attracting an exceptionally high yield market. The three Council's collaborating together with industry through Orange360 has solidified the Orange Region brand in the marketplace and it is expected that strong growth will continue.

This section draws on Tourism Research Australia (TRA), the widely-accepted Australian Government data source tracking visitation across Australia. This data has been presented as an average annual figure across the years between 2015-2019, in order to reflect a business-as-usual scenario prior to the COVID-19 pandemic, as well as to account for low survey sample size when reporting at a granular level.
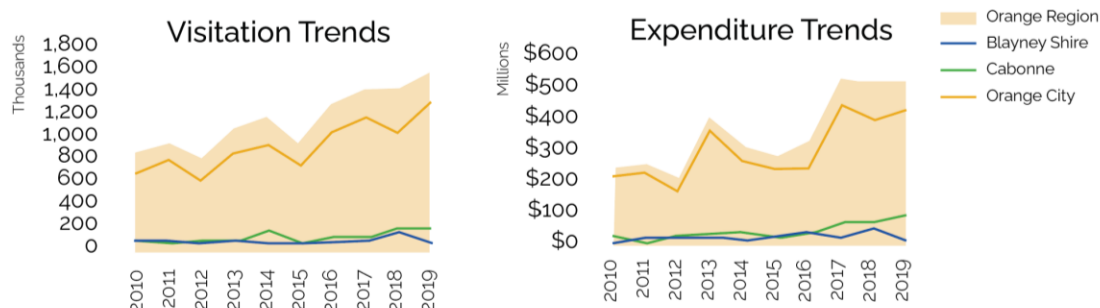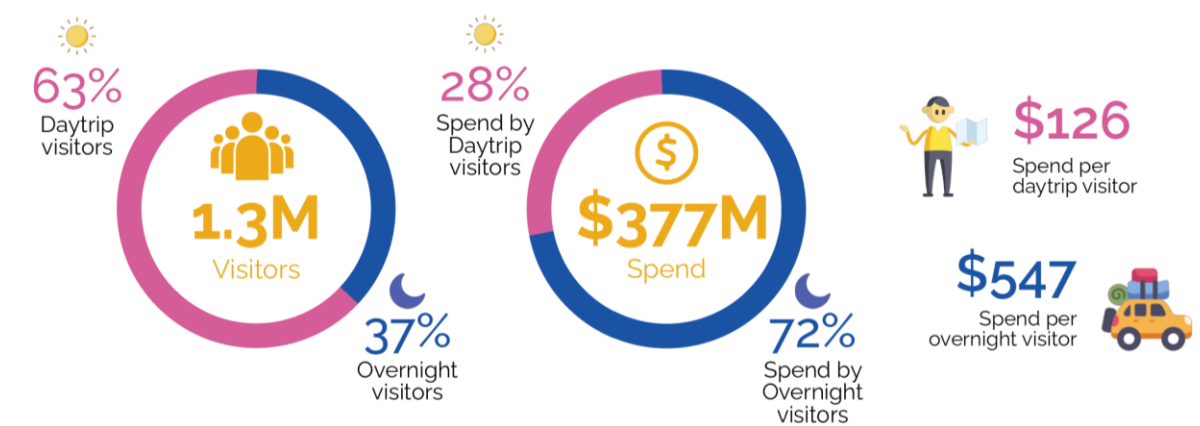
Source: TRA National Visitor Survey and International Visitor Survey, Annual average data 2015-2019.

The Orange Region has a vibrant visitor economy, attracting 1.3 million visitors.

Majority of visitors to the Orange Region are daytrip visitors (63%). The Orange Region owes its strong daytrip visitation to its proximity to major cities, such as Canberra and Sydney, as well being a major population centre for regional NSW in its own right. Daytrip visitors are relatively low yielding, accounting for $106 million in visitor spend (28% of total spend), with a low average expenditure of $126 per visitor.

Overnight visitation accounts for 37% of total visitors, however accounts for the majority of visitor expenditure ($271 million) as a result of high average spend per overnight visitor of $547 per trip.

The Orange Region experienced strong growth in visitation over the 10-year period between 2010 and 2019, with majority of this growth being driven by Orange City during this period. Expenditure in the Orange Region during the same period shows similar trends in growth to visitation, with spend growth being driven largely by Orange City.

3.2. Sub-Regional Visitation[1]

A comparative analysis of visitation and expenditure across the Orange Region was undertaken to understand the dispersal of the visitor economy across the three LGAs.

Tourism Research Australia data shows that the majority of visitors to the Orange Region are travelling to Orange City (80%). The large population in Orange City helps to service visitor amenities and services. This is reflected in the high proportion of visitors who travel to Orange City for other reasons which include employment, education medical and personal reasons.

Cabonne

106K visitors
12% of Orange region

$47M spend
13% of Orange region

Holiday **35%**
VFR **41%**
Business **13%**
Other **9%**

Orange

1.1M visitors
80% of Orange region

$305M spend
81% of Orange region

Holiday **34%**
VFR **24%**
Business **14%**
Other **28%**

Blayney

104K visitors
8% of Orange region

$25M spend
7% of Orange region

Holiday **34%**
VFR **44%**
Business **12%**
Other **10%**

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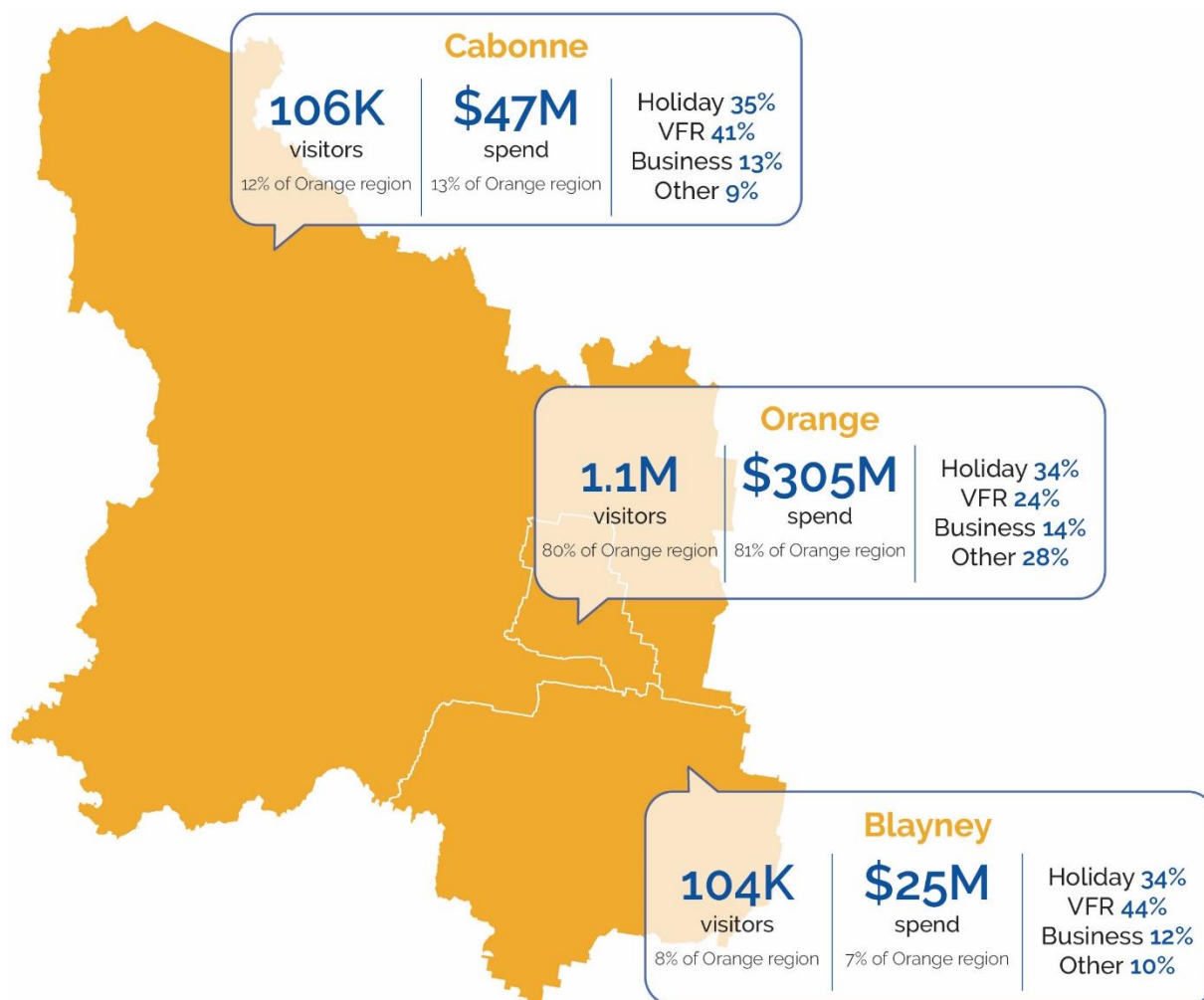
[1] Source: Tourism Research Australia National Visitor Survey, 2015-2019.

*Other reasons include employment, education, medical reasons, personal appointment/business (excluding health), providing transport, attending funeral and other nfd.

Visitor Dispersal within the Orange Region

Tourism Research Australia data does not present an accurate account of the way visitors travel through the Orange Region. Due to the questions used as part of the National Visitor Survey it is difficult for visitors to understand the location they are in and hence lack of representation in visitation in Cabonne and Blayney LGAs, even though almost all of the winery product is in Cabonne LGA.

Tourist Tracka data was utilised to analyse visitor dispersal throughout the Orange Region as TRA data understated the strength of the visitation to Orange City.

Approximately a third of visitors also travel to Blayney and Cabonne LGAs on their trip to Orange City[2]. A greater proportion of these visitors are travelling to Cabonne LGA than Blayney LGA.

There is a need for the DMP to explore opportunities for further tourism development and invest in products and experiences outside of Orange City to continue to encourage visitor dispersal across the region. In particular agri-tourism, cycling and village tourism.

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[2] Tourist Tracka, 2022..

3.3. Domestic Visitor Profile

The Orange Region visitor economy is driven by a variety of visitation purposes.

Holiday visitors (34%) account for the largest proportion of visitation. There is opportunity to grow the holiday market throughout the region in line with comparative destinations, such as the Hunter Region, a comparable NSW wine region and visitor destination.

Visiting friends and relatives is also a strong motivation for visit (28%). This is reinforced by the second most undertaken activity for visitors to the region being visiting friends and relatives.

Other reasons for visit, which includes purposes such as medical services, account for 25% of visitation to the Orange Region, which is significantly higher than the Hunter Region. This reinforces the strength of Orange City as a regional centre providing a range of services to the surrounding regional population.

Visitors to the Orange Region are primarily older couples (27%) and parents with children under 14 years (25%). With a high proportion of older couples, the Orange Region is in a strong position to grow mid-week travel.

The Orange Region has low levels of visitors staying in commercial accommodation, due in part to a large proportion of visitors staying at a friend or relatives' property (44%). This likely also reflects the limited supply of commercial accommodation. As a result, expenditure on accommodation is significantly less in the Orange Region than in comparable destinations such as the Hunter Region.

Whilst a high proportion of visitors to the Orange Region are dining out at a café or restaurant (55%), visitor expenditure on restaurant meals is considerably less in the Orange Region than in comparable destinations, highlighting a gap in motivating dining experiences.

The Orange Region is well placed in terms of products and experiences targeted to the couples and singles markets, with quality cellar door experiences and food experiences.

The family market however is not well catered for in terms of product offer given the size of the market. There is opportunity to extract greater yield and deliver a better visitor experience for the family market.

Purpose of Visit

Holiday

34% Orange Region

39% Hunter Region

Visiting Friends and Relative

28% Orange Region

35% Hunter Region

Other Reason*

25% Orange Region

14% Hunter Region

Lifecycle Group

Lifecycle Group	Orange Region	Hunter Region
Older Couple	27%	28%
Parent, children under 14 years	25%	24%
Older Single	14%	11%
Young/Midlife Single	13%	16%
Parent, children over 15 years	10%	9%
Young/Midlife Couple (no children)	10%	12%

Accommodation

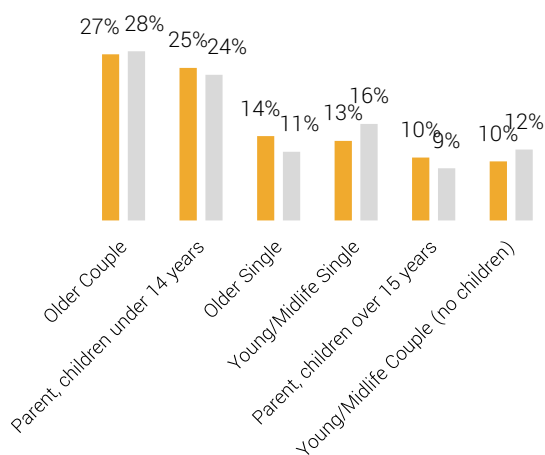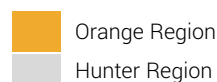| Accommodation	Orange Region	Hunter Region
Friends or relatives property	44%	40%
Hotel/resort/motel or motor Inn	33%	28%
Rented house/apartment/flat or unit	6%	9%
Caravan or camping - non commercial	4%	6%
Caravan park or commercial camping ground	4%	8%
Other Accommodation	2%	1%
Other Private Accommodation	2%	3%
Guest house or Bed & Breakfast	2%	2%
Own property	2%	4%

■ Orange Region
■ Hunter Region

Activity Profile

Activity	Orange Region	Hunter Region
Eat out / dine at a restaurant and/or cafe	55%	54%
Visit friends & relatives	37%	38%
Go shopping for pleasure	24%	18%
Pubs, clubs, discos etc	14%	14%
Sightseeing/looking around	14%	18%
None of these	13%	12%
Visit wineries	6%	4%
Visit botanical or other public gardens	5%	3%
Attend an organised sporting event	4%	2%
Visit museums or art galleries	4%	2%

Visitor Spend

Spend	Orange Region	Hunter Region
Accommodation	22%	33%
Petrol	21%	24%
Takeaways and restaurant meals	20%	28%
Shopping / gifts /souvenirs	18%	17%
Groceries for self-catering	9%	11%
Alcohol, drinks (not already reported)	7%	10%
Entertainment	2%	4%
Rental vehicles	0%	1%

Source/s: Tourism Research Australia, National Visitor Survey 2015-2019

3.4. Source Markets

Average Annual Visitor Origin
(TRA – 5 Year Average 2015-19)

Tourism Research Australia data was utilised to analyse the source markets for the Orange Region. This data is a snapshot of the visitor economy in January 2020, 2021, and 2022.

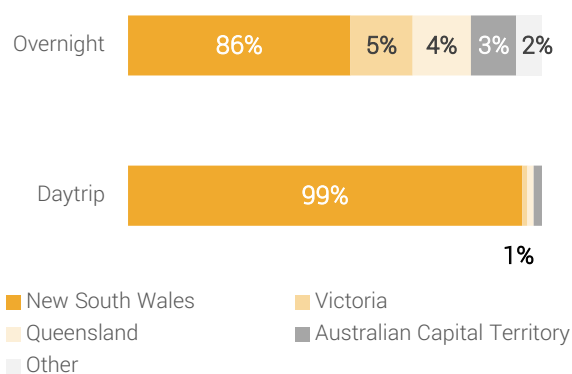The Orange Region is predominately an intrastate destination, with NSW making up the majority of domestic visitors (94%). Queensland, Victoria and the ACT are the strongest interstate source markets for the Orange Region.

F2. VISITOR ORIGIN – TOURISM RESEARCH AUSTRALIA

Source: Tourism Research Australia, National Visitor Survey, 5-year average (2015-2019)

Origin of NSW Visitors
(Tourist Tracka – Jan 2020-21-22)

Tourist Tracka data was utilised to analyse the source markets for the Orange Region. This data draws on mobile phone GPS signals, and provides a snapshot in time of the visitor economy in January 2020, 2021, and 2022.

Origin of intrastate visitors are almost equally split between Greater Sydney and Regional NSW. In January 2022, Greater Sydney made up 49% of visitation to the Orange Region, with majority of these visitors originating from the Outer West and Blue Mountains (13%), Blacktown (10%), City and Inner South Sydney (10%), South West Sydney (10%) and Parramatta (10%).

F3. ORIGIN OF NSW VISITORS – TOURIST TRACKA
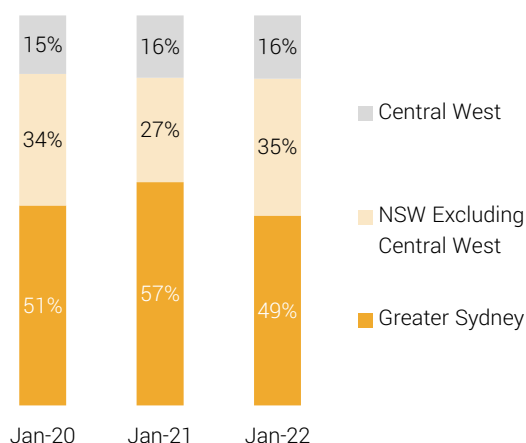
Source: Tourist Tracka, 2022.

NSW will remain the primary market for the Orange Region, however there is potential to target the South East Queensland market for weekend escapes or drive tourism. This was identified as an opportunity through stakeholder engagements, who experienced growth in this market during and since the Covid-19, which is difficult to demonstrate through the data.

In addition, South East Queensland is also a strategic market opportunity as they do not have access to similar regional product offerings, in comparison to Sydney and Melbourne who have similar offers at their doorstep. As such the unique cool climate wines, quality food and agriculture of the Orange Region would position it well in the South East Queensland market.

3.5. Consumer Trends

Tourist Tracka data was utilised to analyse the consumer trends for the Orange Region. This data is a snapshot of the visitor economy in January 2020, 2021, and 2022.

In January 2022, families made up 43% of the visitor market from Greater Sydney. Similar trends were seen in January 2020 and 2021. The strongest family market from Greater Sydney is the Mainstream Family Market. In January 2022, this market grew by 4% in comparison to January 2020.

There is opportunity to leverage the opportunity for further growth in the family market, through the provision of more family-friendly accommodation and activities throughout the region.

Comfortable Cruisers are also a strong visitor market from Greater Sydney, however decreased by almost 10% in January 2022 compared to January 2020. This decrease in visitation from the Comfortable Cruisers market is likely due to the apprehension of older demographics to travel during the pandemic.

The Regional NSW market contributes significantly to visitation in the Orange Region. Majority of these markets are an older demographic that is typically low yielding.

The predominate consumer markets are the Golden Ages and Savvy Retirees. Targeting the friends and relatives of these travellers provides a strong opportunity for growth in the Orange Region visitor economy.

The Tourist Tracka data highlights vastly different trends in consumers from Regional NSW and Sydney. The Sydney market segments that visit Orange Region are much higher yielding and are likely to have a much more significant impact on the visitor economy.

F4. CONSUMER TRENDS

Consumer Trends from Greater Sydney

Mainstream Families

- Family orientated
- 71% are in fulltime employment
- 30% live in rural locations

Comfortable Cruisers

- Financially secure, affluent,
- Aged between 50 and 65
- High income households (more than $150k p.a.)

Consumer Trends from Regional NSW

Golden Ages

- Aged 65-100
- Live in rural areas (39%)
- Most retired (74%) with a household income $20k - $40k
- Seek traditional media including newspapers and magazines

Savvy Retirees

- Retired but actively participate in cultural and sporting activities
- Largely metro dwelling to be near family and services.
- A keen interest in travel and current affairs

Source: Tourist Tracka, 2022.

3.6. Target Markets

The following have been identified as the target markets for the Orange Region. Whilst some are existing markets, emerging markets have also been identified in terms of their potential to drive visitation and yield.

Target markets have been summarised below based on existing visitor patterns and understating of market potential, as demonstrated in this section.

T1. TARGET MARKETS OVERVIEW

	PRIMARY / CURRENT MARKETS		SECONDARY / EMERGING MARKETS
GEOGRAPHIC MARKETS	**Sydney and surrounds** Sydney and surrounds are already the largest market for the Orange Region, contributing 49% of visitation, however with a population of 5.3+ million people there remains significant growth potential. Areas of western Sydney are within an easy 3.5 hours drive of the Orange Region. There is however also opportunity to target affluent suburbs of inner and coastal Sydney.	**Regional NSW** Regional NSW remains the second largest market for Orange Region. It is not considered as important as Sydney in terms of yield with higher levels of day tripping, however, remains critical in terms of economic benefit to the region. There are a number of Cities with large regional population bases within 1.5 hours drive that should be targeted including Forbes, Parkes, Dubbo and Corowa.	**Brisbane and S.E. Queensland** South-east Queensland lacks strong food and wine destinations similar to the Orange Region. This presents as a strong competitive advantage for the region in attracting this emerging market who seek to experience a high-quality food and wine region. Link Airways provide some services between Brisbane and Orange, however regularity of this service could be increased to support further visitation.
TOURING MARKETS	**Domestic Touring Visitors** Touring from Adelaide/Melbourne to Brisbane presents an opportunity for the Orange Region. Melbourne and Adelaide have highly mobile populations, with 5 million residents in Melbourne and 1 million residents in Adelaide. The region presents a unique stopover point for visitors seeking quality wine and dining experiences on journeys to Northern NSW and Queensland.		**International Touring Visitors** Prior to Covid-19, Sydney was attracting over 4 million annual international visitors. With COVID-19 travel restrictions easing and borders reopening, international travel is beginning to rebound. There is an opportunity for the Orange Region to capture greater share of this market with the development of formal touring routes for international visitors to maximise their stay in NSW. The development of the Western Sydney airport in the long term will support visitation to the Orange Region.
DEMOGRAPHIC / ACTIVITY MARKETS	**Comfortable Cruisers (55+)** 40% of the visitor market in the Orange Region is aged over 55 years. This market is strategically important as many are retired or semi-retired, with the flexibility to travel mid-week and during off-peak seasons.	**Visiting Friends and Relatives** The VFR market is strong for the region, with 28% of all visitors travelling for the purpose of visiting friends and relatives, as well as 44% of overnight visitors staying with friends and relatives. There is opportunity to undertake a campaign targeted campaign to educate residents on local products and experiences.	**Young Professionals** 26% of the Orange Region market is aged between 15 and 34 years of age. The compelling wine and food products within the region make it an enticing destination for weekend escapes for this market.

4. PRODUCTS, EVENTS & SUPPORTING INFRASTRUCTURE

4.1. Product Profile

The following product and experience assessment is a strategic review of the regions current experience offering. The review included existing inventories and desktop research of products, events and experiences, physical visitor information, site visits and consultation findings.

The Orange Region is characterised by its authentic experiences in wine and food. The high-quality wine, wineries, emerging breweries and distilleries, farmgate experiences and dining offerings are the primary strength and a key motivating visitation to the Orange Region.

Emerging strengths within the Orange Region include nature-based assets, arts, culture and heritage, events and festivals and boutique accommodation. These experiences require further investment and activation to become hero experiences. Although relatively untapped, these products are well-aligned to the Orange Region's primary strength of wine and food.

Although the Orange Region has seen strong visitor economy growth, there remain opportunities for further development to enhance the visitor experience throughout the Region. Gaps in the current product offering include large-scale accommodation, night-time economy, business events and family-friendly activities and products. Targeted and ongoing investment is required to meet the standards of the contemporary visitor market and attract target markets.

EXISTING PRODUCT PROFILE

PRIMARY STRENGTH

Wine, Food, Beverage and Agritourism

EMERGING STRENGTHS

Nature-based

Arts, Culture & Heritage

Sport and recreation

Events and Festivals

Boutique Accommodation

PRODUCT GAPS / OPPORTUNITIES

Business Events

Night-time Economy

Large-scale Accommodation

Family-friendly Activities and Product

4.2. Supporting Infrastructure

Supporting infrastructure, including towns and amenities, transport and access, and accommodation are crucial to the overall visitor experience, and the strength of the visitor economy industry.

The supporting infrastructure across the Orange Region does not appropriately service the growing visitor economy. The towns and villages within the Orange Region have potential to be vibrant destinations, however lack the supporting amenities and infrastructure to grow as visitor destinations.

Towns and Amenities

Orange City is a hub for business, retail and medical services for Regional NSW. As the primary visitor destination of the Orange Region, Orange City is well serviced and supported by a strong population and subsequent workforce.

There is an opportunity for Blayney and Cabonne LGAs to strengthen their services industry within their towns and villages by leveraging the strength and scale of the Orange regional city brand to support a growing visitor economy.

Telecommunication black spots and areas with poor services negatively impact the Orange Region visitor economy. Poor telecommunication infrastructure limits the ability of visitors to access visitor information, hinders business operations and impacts new business entrants. There is a need to improve telecommunications infrastructure throughout the region, particularly in Cabonne and Blayney LGAs.

Transport and Access

The Orange Region is well connected by road, with Orange City located on the Mitchell Highway. The highway experiences significant congestion on peak weekends across the Blue Mountains. The region is also connected by rail, which takes approximately five hours from Sydney, as well as by air through the Orange Regional Airport.

The Orange Region is well positioned for growth in visitation due to the region's proximity to Sydney, Canberra and other population centres, including Bathurst and Dubbo, as well as its strategic location on the Mitchell Highway.

Whilst the Orange Region is also well-connected to Sydney via the Orange Regional Airport, there could be improved passenger services across Australia,

including destinations in South-East Queensland, South Australia and Victoria.

Through the introduction of additional flights and new flight paths, the Orange Region is well-positioned to attract new markets and strengthen access for existing markets, such as Melbourne and Canberra.

Intra-region connectivity is poor. The Orange Region is poorly serviced by public transport, with infrequent bus routes and limited stops. Access between towns and villages via walking and cycling paths is also limited.

Accommodation

Accommodation in the Orange Region is often at its capacity due to its small accommodation stock and large transient workforce. The lack of capacity limits the regions' ability to support large-scale events and festivals.

Analysis of the current accommodation stock and consultation with stakeholders has highlighted the need for large-scale contemporary accommodation, such as Mercure, to accommodate the business market and fill gaps in current capacity.

Additionally, this analysis identified a need for accommodation suited towards family groups, such as self-contained apartments and houses. With a strong VFR market, the Orange Region must focus on providing adequate accommodation for this market.

There is an opportunity for the Orange Region to support investment in experiential accommodation that will provide a unique point of difference for the region and meet contemporary market expectations. Experiential accommodation includes farm stays, eco-cabins and eco-retreats.

5. GOVERNANCE, MARKETING & VISITOR SERVICING

5.1. Governance

The governance structure for tourism in the Orange Region is provided in the chart below, which outlines the responsibilities for each of the key organisations.

The structure below highlights how important Local Government is for supporting the visitor economy, particularly in terms of working closely with **industry and product development. There is opportunity for Orange360 to support some of this at a regional level to reduce duplication if resources were provided.**

F5. REGIONAL GOVERNANCE STRUCTURE

Organisation / Overview	Visitor services	Destination marketing	Investment attraction/ facilitation	Industry support and engagement	Industry training	Product development
Destination NSW Lead government agency for the NSW tourism and major events sectors. Role is to position NSW as one of the world's premier tourism and events destinations and achieve the NSW Government's goals of tripling visitation expenditure by 2030.		✓✓		✓	✓	✓
Destination Central West NSW One of six NSW Destination Networks responsible for delivering on the NSW Government's objective to triple visitor expenditure by 2030.		✓		✓	✓	
Central West Joint Organisation The Joint Organisation (JO) consists of 10 member Councils in the Central West region of NSW. The JO establishes strategic priorities, provides leadership, advocacy and identifies opportunities for the region.		✓	✓	✓		
Orange360 Launched in July 2018, Orange360 is the primary destination marketing organisation for the Orange region.	✓	✓✓		✓	✓	
Councils Councils act as enabler for the visitor economy by providing the foundations, including strategic planning, infrastructure services, assistance in product development, investment attraction, and support to the local industry.	✓✓	✓	✓✓	✓	✓	✓✓

Lead Role ✓✓ *Supporting Role* ✓

5.2. Marketing

Orange360

Orange360 is the primary destination marketing organisation for the Orange Region. The organisation launched in July 2018 and has since experienced great success through buy-in from the three LGAs and local industry, with close to 350 registered members.

The organisation provides marketing through a unified Orange360 brand, and undertakes a seasonal approach to marketing the region, with marketing activities undertaken to promote products and experiences within the destination.

The five strategic priorities for Orange360, as outlined in the Orange360 Strategic Plan 2020-2024, include:

- Enhance our visitor experience;
- Build collaborative relationships;
- Integrate premium marketing across all touchpoints to drive demand;
- Position Orange360 as an aspirational destination; and
- Grow and evolve.

The organisation's success has been demonstrated through the growth in visitation to the Orange Region, buy-in and support from local industry, and the anecdotal industry understanding that new markets are being attracted to the region, much of which occurs through digital marketing.
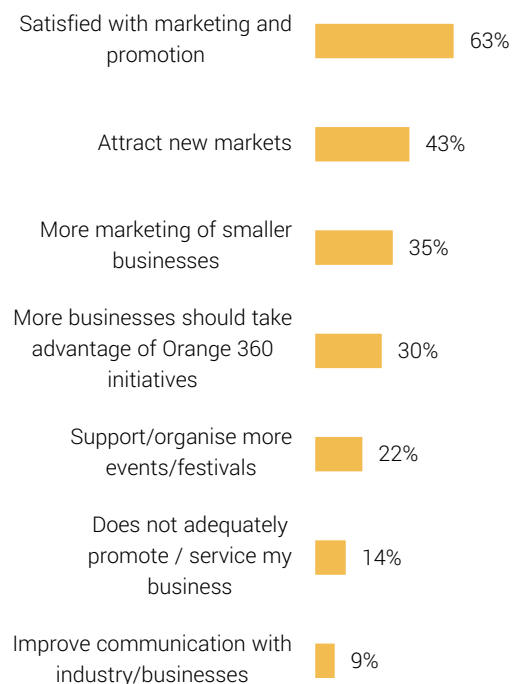
In addition to direct marketing, the organisation also plays an informal but important role in both supporting and developing industry. Orange360 play a critical role in elevating the industry offering.

The business and community survey conducted by Urban Enterprise in 2022 (250 responses), found that 87% of business respondents were a member of Orange360. Of these businesses, the majority are satisfied with the marketing and promotional activities undertaken by Orange360 (63%).

A high proportion of businesses would like to see Orange360 attract new markets (43%), undertake more marketing of smaller businesses (35%) and support and organise more festivals (22%).

At present, limited resources and funding prevent Orange360 from performing at its full capacity. Continued support for Orange360 will allow the organisation to expand its marketing to attract new target markets and increase its capacity to take on a greater workload.

F6. BUSINESS PERCEPTION OF ORANGE360

Perception	%
Satisfied with marketing and promotion	63%
Attract new markets	43%
More marketing of smaller businesses	35%
More businesses should take advantage of Orange 360 initiatives	30%
Support/organise more events/festivals	22%
Does not adequately promote / service my business	14%
Improve communication with industry/businesses	9%

Q. What has been your experience / perception of the marketing activities undertaken by Orange360?

Source/s: Orange Region Destination Management Plan 2022-2025 Business and Community Survey

Regional Collaboration

At present, the Orange Region undertakes limited collaboration with surrounding Councils and visitor destinations. Increasing collaborative marketing activities will enable the region to leverage visitation to surrounding regional cities and destinations.

Strengthening relationships with surrounding visitor destinations, such as Dubbo, Mudgee and Bathurst, can provide opportunities, such as international and domestic touring opportunities, alignment of events calendars to maximise visitation throughout the region and develop packaged products and experiences.

Partnership with the Central West Joint Organisation will be critical to achieving further regional collaboration. This will allow the Orange Region to leverage the visitation and success of the surrounding destinations for mutual benefit, by providing access to opportunities for joint marketing campaigns and ability to promote regional touring routes.

5.3. Visitor Servicing

Digital Visitor Servicing

The Orange360 website is the primary marketing asset utilised by the Orange Region, by the region, led by the Orange360 organisation. In addition, Orange360 social media accounts are utilised.

The website allows users to explore towns and villages through profiles and guides which include an inventory of accommodation, events, activities and dining available within the destination.

The Orange360 website has recently been updated and provides a high quality and engaging user experience. There is a need to continuously maintain and update the website to ensure it is contemporary, provides up to date visitor information, and is engaging for users.

Physical Visitor Information

The Orange Region is well-serviced by physical collateral such as visitor guides, brochures and maps developed by Orange360. The visually attractive physical collateral utilises QR codes to connect visitors to more information online.

There are two accredited Visitor Information Centres (VIC) in the Orange Region, located within the Orange Regional Museum and the Age of Fishes Museum. Both centres are open daily to service visitors.

There is a need to develop a regional approach to visitor services with consideration of physical collateral, digital information and reinforced branding and wayfinding. Orange, Cabonne and Blayney LGAs should consider collaborating on a regional visitor services and signage strategy.

Signage and Gateways

At present, visitors are experiencing a fragmented journey through the Orange Region.

Current tourism wayfinding and signage infrastructure throughout the three LGAs is outdated and varies in terms of colours, fonts and formats. This does not reflect the collective brand of the Orange Region.

The Orange Region lacks gateway signage that formally signals entrance into the region and smaller towns and villages. Gateway signage provides a sense of arrival for visitors and communicates the character and identity of the region.

There is opportunity to deliver gateway signage, as well as other wayfinding and signage infrastructure, that is well aligned to the Orange360 brand and positioning through the development of a signage strategy across the three LGAs.

F7. PRECEDENT – BAROSSA COUNCIL

Source: The Barossa Council, 2022.

F8. PRECEDENT – HEPBURN SHIRE COUNCIL

Source: Hepburn Shire Council, 2022.

6. KEY CONSIDERATIONS

The following are key considerations identified through research, engagement and site visits to the Orange Region.

EVENTS

- Need for increased accommodation capacity to support large-scale events
- Opportunity to grow events during the off-peak season
- Need for investment in mid-scale conferencing centres / facilities
- Opportunity to develop events with strategic alignment to key product pillars, such as wine, culinary, nature, cycling etc.
- Need to streamline and enhance events permit processing, funding and management

PRODUCTS AND EXPERIENCES

- Need for cycling and walking path links to wineries, nature-based attractions and towns and villages
- Investment in natural assets is needed to create motivating attractions and add depth to the visitor experience
- Need for investment in products and experiences targeted to the family market
- Opportunity for the development of arts, culture and Indigenous cultural experiences to enrich the visitor experience
- Need to improve high quality dining experiences, particularly in smaller townships
- Need for further on-farm experiences, such as foraging, cafes and restaurants, and educational experiences
- Opportunity to deliver higher-end experiences for the adult couple market, such as spa and wellness, retreats, and other boutique experiences

ACCOMMODATION

- Accommodation often at capacity, impacted by AIRBNB, large transient workforce and lack of housing supply
- Difficulty attracting investment in large-scale contemporary accommodation, such as Quest, Mercure etc.
- Lack of affordable housing for service sector workers impacts ability to attract and retain workers
- Lack of accommodation suited to the family market
- Opportunity to attract investment in experiential accommodation that provides a unique experience (farm stays, eco-cabins, eco-retreats etc.)
- Attract investment in health and wellness accommodation facilities, aligned to target market preferences and opportunities

ENABLING INFRASTRUCTURE

- Poor intra-region connectivity, including public transport, walking and cycling, and poor-quality roads
- Need for improved public transport connectivity between surrounding population centres, as well as smaller townships
- Improvements to directional signage, as well as poor quality and outdated tourism signage
- Continue advocating for increase in flights and new routes, including south-east Queensland destinations
- Continue advocating for high-speed trains from Sydney, telecommunications improvements
- Ongoing improvements to telecommunications networks and internet access

INDUSTRY COLLABORATION AND NEEDS

- Lack of industry collaboration and communication, as well as large proportion of the service sector not perceiving their business as part of the visitor economy
- Support from Council for events and festival organisers and streamlined event permit processing for multi-Council events
- Need to streamline development approvals processes
- Customer excellence education and training for operators and staff
- Need for enhanced industry collaboration to deliver product packaging
- Reduced business operating hours on weekends impacts visitor experience and satisfaction

MARKETS, AWARENESS AND MARKETING

- Continued support for and collaboration with Orange360
- Need to expand marketing to emerging/new markets
- Limited resources and funding for Orange360 prevent the organisation from performing at its full capacity
- Need for enhanced collaboration with major regional cities, to capitalise on international and domestic touring opportunities, to align events calendars and develop product packaging

Destination Management Plan Framework

The Orange Region Destination Management Plan Framework provides a vision, objectives, and measurable goals to guide visitor economy development over the next five years. This will be achieved through delivery of priority initiatives within the seven identified themes .

These have been prepared in response to the issues and opportunities for the region, and the destination management needs going forward.

7. Strategic Framework

7.1. Vision

The following section outlines the strategic framework to guide development of the Orange Region visitor economy. This includes a vision for tourism across the Region, objectives and success measures, and seven key themes to guide public and private sector investment.

> **VISION**
>
> *The Orange Region will be a leading Australian visitor destination, enriched by vibrant towns and villages, providing the highest quality wine, food and escape to nature experiences.*

OBJECTIVES	TARGET	MEASURE/SOURCE
Grow the value of the visitor economy	• Increase in visitor expenditure • increase in visitor length of stay • Increase in visitation numbers	• Visitor expenditure, length of stay and visitation to the Orange Region, using industry accepted data source
Create a visitor ready and unified industry	• Increased industry engagement, communication and networking • Improvement in customer satisfaction	• Industry engagement • Qualitative and quantitative performance measures
Encourage visitor dispersal to towns and villages	• Increase in visitation to towns and villages	• Regional visitor dispersal from Orange City to Cabonne and Blaney, using industry accepted data source

7.2. Themes

Key themes to guide future investment have been identified in response to strategic considerations.

Theme 1: Visitor Economy Foundations

Provide enabling infrastructure and attract investment in accommodation and facilities that will support visitor economy growth.

Theme 2: Visitor Ready Region

Ensure the soft infrastructure is in place to empower a capable and connected industry to work together towards a unified vision.

Theme 3: Destination Marketing & Brand Awareness

Reinforce and strengthen the Orange Region brand through marketing, positioning and placemaking.

Theme 4: Creativity, Arts And Culture

Showcase and celebrate local culture, creativity, and heritage to provide a rich visitor experience.

Theme 5: Events, Festivals And Conferencing

Build a strong tourism events and festivals brand and grow business and conferencing events to develop a well-rounded and sustainable events calendar.

Theme 6: Ferments, Culinary, And Night-Time Economy

Deliver high quality, contemporary and authentically Orange Region wine, ferments and culinary experiences, and activate a vibrant night-time economy.

Theme 7: Nature, And Recreation

Leverage the growth in nature based and recreational tourism through investment in infrastructure, promotions, activations and experiences, and passive recreation.

8. PRIORITIES AND ACTIONS

Identifying Priority Projects

In order to identify priorities, each project has been assessed against the overarching objectives.

Projects that align to these objectives and address critical issues or opportunities for the Orange Region have been prioritised above others to be included in the Destination Management Plan.

Timeframes

Projects have been identified using the following priority levels:

- Short term (within 1 year)
- Medium term (1-3 years)
- Long term (4 years +)

Actions identified as long term priorities are intended to begin during the Destination Management Plan period, however may have a longer delivery timeframe, into the next Destination Management Plan.

Delivery Responsibility

Stakeholders have been identified for each priority initiative in the action plans. Key stakeholders are:

- Councils (Orange, Blayney and Cabonne)
- Industry
- Destination Marketing Organization (DMO)
- Central West Joint Organisation (JO)
- State and Federal Governments and agencies

Current roles and responsibilities of these stakeholders are identified in section 5.1 Governance. Their roles in relation to delivery of the Destination Management Plan have been outlined below.

Council will deliver strategic planning projects that have been identified to support growth in the visitor economy. These should be led by Council and may require additional government funding and support. Additionally, Council may be required to initiate several identified projects and lead their direction; however initiatives may be delivered in partnership with industry, regional bodies and State Government.

Orange360, as the regional marketing organisation, manages the Orange360 brand and all content relating to the Orange360 brand.

Regional bodies, such as the Central West Joint Organisation (JO), will continue to undertake marketing for the broader central west region of NSW, including the Orange Region and major destinations such as Dubbo, Bathurst and Mudgee. Councils should continue to partner with the JO.

State and Federal Governments, as well as agencies such as Destination New South Wales, NPWS and Department of Forestry, guide state level project priorities and provide funding opportunities. Councils should continue to advocate to and develop strategic partnerships with these agencies, as well as seek funding opportunities when available, to support delivery of priority initiatives.

Actions within the plan will be as per individual Council resolutions and/ or individual Operational/ Delivery Plans, and thus not binding on partnering Councils.
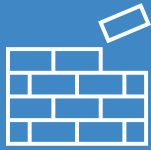
Theme 1 Visitor Economy Foundations

Provide enabling infrastructure and attract investment in accommodation and facilities that will support visitor economy growth.

Enabling infrastructure within destination management are the assets often delivered and funded by Government. This includes roads, township streetscapes, parks, telecommunications, water assets, and services such as sewer and power. These are the elements that support private sector investment and also provide the backbone to carrying capacity within a destination.

This theme focuses on delivering quality infrastructure and the attributes that will support the industry investment needed across the region, as well as an improved visitor experience.

In addition, there is a need to deliver a range of accommodation typologies to enable overnight stays from current and new visitors, and to support delivery of major events. Delivery of worker accommodation is also required to support a growing visitor economy workforce, as well as to mitigate regional housing pressures.

THEME 1 VISITOR ECONOMY FOUNDATIONS PRIORITY INITIATIVES

Township Enhancement and Infrastructure

Whilst there is an ongoing program of investment into Orange City streetscaping, there is a need for further enhancement of towns and villages to create attractive and high amenity destinations. This includes addressing streetscaping, landscaping, enhancement of amenity infrastructure, placemaking and road improvements.

Masterplans for each of the towns should be considered to deliver an improved investment climate, as well as provide higher amenity towns and villages suited to visitor expectations.

Specific projects that could be considered include:

- Landscaping and tree planting;
- Improvement of streetscapes and street furniture;
- Placemaking initiatives, events and casual activation;
- Re-sealing roadways; and
- Occasional closure of streets to create public spaces on weekends or during events.

Infrastructure Investment and Advocacy

The Orange Region experiences a range of infrastructure needs, which are required to support local businesses, improve the visitor experience, as well as support local residents. This includes:

- Telecommunications upgrades;
- Road capacity and quality;
- Rail and other public transport services;
- Services infrastructure for towns and villages (e.g. water, sewer).

Given the large number of towns and villages across the region, Councils should identify and prioritise strategic infrastructure projects that have the greatest need and that will provide the most economic and social benefit should be prioritised.

Accommodation Investment Attraction

The Orange Region requires significant investment in accommodation to service the current visitor market, expand its capacity for additional overnight stays, and attract large-scale events.

Whilst the existing supply of accommodation provides a range of boutique and smaller scale options to predominately service the adult couple and holiday leisure markets, there is a need for larger investments to support the business markets, family market and events visitors.

Councils can attract investors by promoting compelling, demand driven accommodation opportunities for the Orange Region. This should target the following accommodation gaps:

- Boutique, luxury accommodation (Orange Region);
- Large-scale hotel and serviced apartments (Orange City);
- Self-contained accommodation (Orange Region);
- High quality tourist park (Towns and Villages);
- Spa/wellness retreat accommodation (Towns and Villages); and
- Experiential accommodation e.g. glamping, farm stay, tiny homes (Towns and Villages).

In addition, there is a need for affordable housing across the region. Investment in accommodation should take into consideration the needs of the visitor economy workforce, mining industry housing needs impact on visitor accommodation, as well as needs of local community.

T2. THEME 1 VISITOR ECONOMY FOUNDATIONS ACTION PLAN

Priority Initiative	Stakeholder(s)	Timeframe	Actions
Township enhancement and infrastructure development	Council	Medium	1. Prepare masterplans for activation and enhancement of towns and villages. 2. Identify and prioritise strategic infrastructure projects for towns and villages and prioritise these across the region.
Infrastructure investment and advocacy	Council State and Federal Government	Ongoing	1. Prioritise infrastructure needs to support the visitor economy. 2. Advocate for funding from relevant government agencies/private investors.
Accommodation investment attraction	Council Industry	Short	1. Facilitate private sector investment in visitor accommodation by promoting investment and site opportunities and supporting the development approvals process. 2. Work with industry to identify housing needs and models for affordable housing delivery.

Theme 2 Visitor Ready Region

Empower a capable and connected industry to work together towards a unified vision.

The Orange Region is currently in the Growth stage of the destination lifecycle. At this stage, industry is experiencing significant growth and demand from products and experiences, and as a result experience significant growth pressures.

As a result, there are a range of industry capability and capacity needs that can be supported by Councils. This includes training and education for operators and staff in hospitality and industry support and engagement.

Council has a critical role in facilitating industry development. Council should provide the tools to ensure the existing business base can operate effectively. In addition, this will provide a sound investment climate for the private sector to invest in creating bookable and distributable tourism products and experiences.

Hospitality workforce skills and capacity

Training and education is needed for the visitor economy workforce, in particular the hospitality industry, to ensure the industry is capable and provide a high quality, professional experience to visitors.

There is opportunity to deliver high quality education for not only existing and new workforce, but also to attract students from across the country for hospitality training. The climate, local produce and strength of the food and wine scene in a very compact region provides the perfect setting for pathways in hospitality.

Collaboration is required between industry and Council to identify specific training and workforce needs, and explore opportunities for development.

Industry support and collaboration

The following capacity building activities would support industry development in the Orange Region:

- Deliver formal industry engagement.
- Establish a regional business concierge service to support industry engagement, business development and facilitate investment.
- Industry training to enhance digital presence, including digital, marketing, and social media training.

Council should consider increasing the resources allocated towards industry development and engagement opportunities in order to support industry growth.

Sustainable tourism management and resourcing

Currently, the resources to support tourism across the region are strained, with a heavy reliance on a declining volunteer base, limited pool of workers and financial resources for delivery.

In particular, Council arts and cultural facilities and tourism events rely heavily on volunteers to operate. This impacts the abilities of the facilities to operate consistently and invest in facilities.

In addition, workforce shortages result in understaffed businesses and may impact the ability of businesses to deliver high quality experiences, as well as limiting new business operations and expansion of existing businesses.

To improve sustainable tourism management and resourcing, Councils should consider:

- Strategies to attract new workers and retain existing workforce, including retaining youth in hospitality and providing improved pathways.
- Incentives and training to support volunteers and volunteer-based organisations, as well as to enable cross-Council events delivery.
- Potential increased funding allocation to support sustainable delivery of events by the local community and industry.

Priority Initiative	Stakeholder(s)	Timeframe	Actions
Hospitality workforce skills and capacity	Council Higher education TAFE Industry DNSW	Medium	1. Work with industry to identify local training and education needs to support the hospitality sector. 2. Establish a steering committee of Government, industry and education sector to explore potential models for training and education delivery.
Industry support and collaboration	Council Industry DNSW	Short	1. Explore potential to formalise the existing industry engagement undertaken by Orange360. 2. In conjunction with the planning and economic development teams, investigate the establishment of a regional business concierge service to support industry engagement and development. 3. Identify industry training needs to enhance business digital presence, including digital, marketing, and social media training.
Sustainable tourism management and resourcing	Council Industry / Local Associations	Short	1. Drive volunteerism through promotions and incentives. Consider the potential to undertake a regional volunteer ambassador program. 2. Undertake a review of governance organisations, facilities operations and event operations, to assess duplication of resources and identify ways to streamline delivery. 3. Identify local workforce gaps and consider options for workforce attraction, such as regional lifestyle campaigns and incentives to attract workers.

Theme 3 Identity, Awareness and Placemaking

Reinforce and strengthen the Orange Region brand through marketing, positioning and placemaking.

The Orange Region has experienced significant growth over the past 10 years. This is largely driven by demand-driving activities include regional marketing activities undertaken by Orange360, significant product development by the wine and dining sector, and a growing accommodation sector.

Establishing a unified and collaborative approach across the Orange Region will connect experiences, solidify the destination identity, and create compelling itineraries.

Continuing to strengthen the regional destination brand and growing market awareness is a priority for the Orange Region whilst in the growth phase. Ensuring destination marketing activities are tailored to attract target markets and grow market share of the destination will be critical.

Gateways, place making and brand reinforcement

Currently, town signage and entries are branded according to the Council's branding, however there is a lack of in-region 'Orange Region' marketing.

There is an opportunity to reinforce the Orange Region brand through a more co-ordinated approach to delivering in-region signage, billboards and other public activations.

Key opportunities include:

- Delivery of Orange Region branded public art and town activations;
- Delivery of Orange Region branded billboards at gateway locations to signify entry into the region, as well as at strategic locations in-region to reinforce visitor understanding that they are in the Orange Region.

Marketing the Orange Region

Building on the success of Orange360 marketing activities to date, there is a need to continue strengthening the regional destination brand and growing market awareness.

Key areas of focus for marketing should include:

- Developing and implementing a targeted marketing plan
- Identifying current market awareness of the Orange Region, and undertake marketing activities to increase visitor market share from target markets.
- Engage with locals as ambassadors for the visitor economy. Consider the former Destination Melbourne 'Discover your own backyard' program as a successful precedent.

Council may consider increasing the resources allocated towards regional marketing capacity in order to substantially grow market awareness of the Orange Region.

Digital visitor information transformation

There are substantial resources attributed to physical visitor information in the Orange Region, with two accredited Visitor Information Centres (VIC) in the Orange Region, located within the Orange Regional Museum and the Age of Fishes Museum.

Whilst the Orange360 website provides high quality visitor information, there is a need to consider other digital visitor information throughout the region to engage visitors, encourage dispersal and reinforce the brand in region. Examples include the use of QR codes in-region to connect to digital visitor information, interactive signage and billboards, and augmented reality tools.

Promoting visitor dispersal

Visitation to Orange City is strong, however there is opportunity to increase dispersal of visitation into towns and villages to encourage increased length of stay and extract greater yield from visitors. This may include encouraging daytrips from visitors already in the region as well as encouraging new visitors to extend their stay to towns and villages. This will in turn enhance the visitor experience by providing a diversity of experiences.

There is opportunity to promote touring itineraries, including:

- Local village and regional touring.
- Encouraging daytrips from visitors staying in Orange to towns and villages.
- Major inland tour from Sydney taking in Bathurst, Mudgee, Dubbo and Orange Region.
- Melbourne to Brisbane Touring and Adelaide to Brisbane Touring.

Priority Initiative	Stakeholder(s)	Timeframe	Actions
Gateways, place making and brand reinforcement	Council Industry	Short	1. Identify locations for in-region billboards that showcase the Orange Region brand. 2. Identify opportunities for public art and township activations across the region, and deliver these in a cohesive and strategic manner.
Strengthen the Orange Region identity	Council Industry Locals	Short / Ongoing	1. Continue to monitor, update and implement regional marketing plan. 2. Undertake primary market research to set a benchmark for current market awareness of Orange Region amongst the population. 3. Continue to undertake targeted marketing campaigns to attract target markets. 4. Seek to establish a local ambassador program that encourages residents to engage in their 'backyard'. Consider the former Destination Melbourne 'Discover your own backyard' program.
Digital visitor information transformation	Council Industry	Short	1. Undertake a digital visitor information services transformation program with consideration of digital and the contemporary consumer.

Promoting visitor dispersal	Council
	Industry
	Central West JO
		Short	1. Undertake a touring route strategy for the region with consideration of:
			  a. Local village and regional touring.
			  b. Major inland tour from Sydney taking in Bathurst, Mudgee, Dubbo and Orange Region.
			  c. Melbourne to Brisbane Touring and Adelaide to Brisbane Touring.
			2. Undertake in-region and online marketing activities to promote daytrips to Orange Region towns and villages, targeted towards visitors staying in Orange or planning a trip to the region. This could include promotions, discounts and other incentives to encourage exploration.

Theme 4 Creativity, Arts and Culture

Showcase, celebrate and preserve local culture, creativity and heritage to provide a rich visitor experience.

Arts and culture has the opportunity to be developed as a product pillar for the region, building on the growing arts scene, the range of makers and creators in the region, the Aboriginal living cultural history of the region, and the heritage and cultural backdrop of the region.

Arts and culture experiences add vibrancy to a destination, provide compelling reasons for new visitation to a destination, as well as enriching the experience for existing visitors to the region.

There are a range of existing museums, art galleries, arts and culture events that could be enhanced and activated. Development of a regional arts program across the three Councils should be considered, which will help to activate and brand the towns and villages through public art, art exhibits, cultural events and other activations.

In particular, the region has two major cultural assets that could be activated; the Orange cultural precinct and the Age of Fishes Museum.

The Orange cultural precinct has seen continual investment by Orange City Council, with the establishment of the Orange Library, Art Gallery and Orange Regional Museum. Further investment in the precinct is underway through the Orange Planetarium and Conservatorium. This will result in a compelling destination for visitors, and should be strengthened through delivery of an engaging program of exhibits and events, as well as branding and marketing.

The Age of Fishes Museum is one of only two fish fossil museums in the world and is a National Heritage site due to its international scientific significance. The existing museum could become an educational and cultural attraction with appropriate investment, activating and promotion.

In addition to these, working with Traditional Owners of the Wiradjari nation to develop products, experiences and educational offerings would provide a compelling experience for visitors, and create a platform for Traditional Owners to share their stories, culture and heritage.

Orange Region arts and culture development

Orange City has seen continued investment in its cultural precinct, with the establishment of the Orange Library, Art Gallery and Orange Regional Museum. Further investment in the precinct is underway through the Orange Planetarium and Conservatorium, however improved precinct planning and branding are required to unify, elevate and activate the precinct.

A masterplan should be considered for the precinct following investment in these two facilities to ensure that the precinct facilities interact well. This should consider streetscaping, public space improvement, pathways and wayfinding signage.

In addition, there is an opportunity to elevate the offering at the Age of Fishes Museum, which is one of only two fish fossil museums in the world and is a National Heritage site due to its international scientific significance.

A curatorial study and concept plan should be developed, which should consider indoor and outdoor heritage exhibits and interpretation, and marketing and branding for the Museum.

Heritage activation program

The Orange Region has an extensive amount of heritage assets that are either in disrepair or underutilised. This includes heritage retail spaces, former hotels and other heritage infrastructure.

A heritage activation plan should be prepared which explores ways to activate further heritage and non heritage buildings. This should consider:

- Art installations and gallery spaces;
- Makers and creators' spaces and studios;
- Activation for pop-up events; and
- Retail spaces.

Indigenous cultural experience development

There is significant living Aboriginal cultural heritage in the Orange Region, with sites of significance located across the three Councils, and a wealth of local stories, culture and heritage.

There is an opportunity for Orange Region Councils to develop relationships with local Traditional Owner groups and to facilitate the preparation of a cultural experience development plan. This should consider sites of significance and may consider building on the Orange Regional Museum as a commencement point for the visitor journey.

Priority Initiative	Stakeholder(s)	Timeframe	Actions
Orange Region arts and culture development	Council Industry	Short	1. Undertake a masterplan and branding strategy for the Orange cultural precinct, which ensures that the precinct is connected, activated and accessible. This includes streetscaping considerations, footpath linkages, wayfinding signage and branding. 2. Undertake a curatorial study and concept plan for the expansion and enhancement of the Age of Fishes Museum. This should consider indoor and outdoor heritage exhibits and interpretation. 3. Develop a regional arts program to activate and enhance museums, art galleries, arts and culture events, public art and other township activations.

Heritage activation program	Council
	Industry
		Short	1. A heritage activation plan should be prepared which explores ways to activate further heritage and non heritage buildings. This should consider:
			  a. Art installations and gallery spaces;
			  b. Makers and creators' spaces and studios;
			  c. Activation for pop-up events; and
			  d. Retail spaces.

Indigenous cultural experience development	Council Traditional owner groups	Short	1. Work with the local traditional owner groups to undertake a cultural experience development plan. This should consider sites of significance and build on the heritage centre as a commencement point for the visitor journey.

Theme 5 Events, Festivals and Conferencing

Build a strong tourism events and festivals brand and grow business and conferencing events to develop a well-rounded and sustainable events calendar.

The region has a strong and growing regional events calendar, with events such as FOOD Week experiencing substantial growth and attracting new markets to the region.

Events are a major driver of visitation, with recent research undertaken by Urban Enterprise indicating that events and festivals would motivate 48% of the Australian market to visit a new destination.[3]

Events are an important part of the visitor economy in terms of the direct economic contribution they provide but also in the way they bring awareness to destinations. Alignment of events to target visitor markets is a key consideration for event prioritisation. In addition, developing one or more flagship events that have pull in the domestic market would support development of the region and growth in awareness and visitation.

Business events and conferencing is an opportunity for the Orange Region, and will support mid-week visitation. In particular, there is opportunity to attract the MICE market (meeting, incentive, conference, and exhibition) in the health, mining and Government sectors, due to the strong business base in these sectors. There is a need for Council and industry to collaborate and invest in facilities to support this market.

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[3] Urban Enterprise, consumer research of representative sample of Victorian market, 2022.

Regional events approach

The Orange Region has a vibrant and growing events calendar, with events dispersed across the region.

There is opportunity to consider a regional approach to events. This already occurs to some extent, with a large number of events currently held across two or three Councils, however delivery, management and processing of events could be further streamlined.

Councils should support the delivery of coordinated events in the Orange Region. This provides the region with an opportunity to showcase small townships and villages, as well as the local makers, growers and creators.

Opportunities for regional events enhancement include:

- Development of a regional flagship event which has the potential to showcase and promote the region's comparative strengths, and grow visitation and awareness of the Orange Region.
- Development of a regional approach to delivery and marketing of farmers markets to ensure the region is known for its quality produce.
- Development of a consolidated events register to promote the region's events and to ensure events are well-dispersed across the year.
- Streamlining cross-Council event permit processing and delivery to support event operators.

Business events feasibility study and strategy

Develop and deliver a Feasibility Study and Strategy which identifies opportunities for the business events sector. Consideration should be given to business target markets, including agriculture, medical, wine industry and other industries that align to the Orange Region brand.

Additionally, Council should consider conducting a facility assessment and Feasibility Study to ensure the region is well equipped to accommodate large-scale business events.

Deliver events infrastructure

There is a need to deliver events infrastructure to support the attraction of new events and retention of existing events. This includes indoor and outdoor facilities to support a range of event typologies.

The Orange multi-sport stadium has received funding for delivery and will be a key piece of infrastructure that has potential to drive growth in the sports events market. The stadium precinct also has potential to host other events and festivals, and its delivery should be prioritised.

Priority Initiative	Stakeholder(s)	Timeframe	Actions
Regional events approach	Council Industry	Short	1. Identification of potential future flagship event(s) that reinforce the regional brand, align to product strengths and benefit the three Councils. Market the event funding to local, regional and state-wide cultural event organisers. 2. Consider implementing a regional approach to delivery and marketing of farmers markets, including a farmers market guide and utilisation of Orange Region branding. 3. Develop a comprehensive events register and calendar for Orange Region events. Review the regional events calendar to identify seasonal gaps and opportunities. 4. Review and streamline the events permit process for cross-Council events.
Deliver events infrastructure	Council	Short-Medium	1. Deliver the Orange Multi Sport Stadium and prepare an events development action plan to grow sports events tourism. 2. Undertake review of existing indoor and outdoor event spaces to support both tourism and business events.
Business events feasibility study and strategy	Council	Medium	1. Undertake a Feasibility Study and Strategy which identifies opportunities for the development of business events.

Theme 6 Food, Ferments & Night-Time Economy

Deliver high quality, contemporary and authentically Orange Region beverage, culinary and produce experiences, and activate a vibrant night-time economy.

The region has a strong wine sector, growing ferments scene with emerging number of breweries and distilleries, a strong dining offer in Orange City and some towns and villages, and a growing farmgate experience offer.

There is a need for further dining experiences, in particular by providing cellar door and on-farm offers that will extract greater yield from the existing market.

In addition, a vibrant, diverse and safe night-time economy is required for the region as it continues to grow its visitor economy. The existing offer is currently limited, and particularly lacking during the mid-week. With an affluent business market both visiting and working in the region, as well as the holiday leisure market, the region is well-placed to support a vibrant night time economy.

Ongoing attraction and investment in contemporary food and beverage establishments as well as bespoke initiatives such as interactive digital spaces, creative lighting and family focused activations will help cement the Orange Region as a premier food and entertainment destination.

Wine product enhancement

The Orange Region is uniquely placed in NSW as a cool climate wine region, however it is difficult to identify a signature wine variety that creates a point of differentiation. Think Barossa Shiraz, Tamar Valley Pinot Noir, King Valley Prosecco.

The Orange Region's area of unique comparative advantage is organic and biodynamic wines. This is an area that can be further leveraged and explored as part of the Orange Region branding, to grow awareness in the market and create a unique selling proposition.

In addition, there is opportunity for the Orange Region to establish itself as a leading wine region in Australia through the development of a Wine Education Centre, potentially leveraging the bio-dynamic and organic branding. This would provide a new visitor hub and be unique amongst Australia's wine regions. The wine education centre will be used to train vignerons, as well as the public, on biodynamic and organic wine techniques.

Food experience development

There is a need to support the development of 'visitor ready' local produce and dining experiences that align with the Orange Region brand to build the region's experiences offer. This includes:

- Fruit picking;
- Farmgate experiences;
- On-farm education;
- Provedores;
- Cellar doors; and
- Farm stays.

Council should work with local businesses, farmers, producers and industry leaders to develop unique, packaged farm experiences, such as education, farm exploration, hands-on experiences and farm stays, as well as to enhance existing cellar door experiences and deliver new and compelling cellar door offers.

Night time activation

Orange's City Centre is the region's hub for commercial activity and has a well-developed retail and services sector. At night however there are very few businesses operating and there is a lack of activity and vibrancy in the night time economy.

Placemaking should be considered which creates greater activation at night and builds vibrancy in Orange's City Centre.

This may consider artistic interventions such as projections and light sculpture as well as encouragement of a regular program of night time entertainment and activity such as music, night markets and activation of Robertson Park. Encouragement of businesses to extend opening hours should be considered as well as attracting new businesses into the town centre such as wine bars and other entertainment venues.

Priority Initiative	Stakeholder(s)	Timeframe	Actions
Wine product enhancement	Industry	Medium	1. Wine industry to work with Orange360 to establish a biodynamic and organic wine brand for Orange Region. This will have links with Orange Region branding. 2. Undertake a feasibility for the establishment of the Orange Wine Education Centre.
Food experience development	Industry	Short-Medium	1. Provide support to industry to develop food experiences. 2. Undertake communication to businesses to strengthen use of local produce at dining establishments, and facilitate networking between businesses.
Night time activation	Council Industry	Short-Medium	1. Orange City Council to lead a night time activation plan. This will focus on opportunities to create activity in Orange City centre and the key tourism villages across the region.

Theme 7 Nature & Recreation

Leverage the growth in nature based and recreational tourism through investment in infrastructure, promotions, activations and experiences, and passive recreation.

The Orange region provides a large offering of natural assets for both active and passive recreation, many of which are currently untapped.

Walking, cycling and other recreation activities enrich the visitor experience for existing markets, as well as service the resident population. Activating and enhancing natural assets for recreation, both active and passive, will strengthen the proposition for a visit to the Orange Region, as it will provide a well-rounded experience for visitors.

In developing natural assets, there is a need to ensure the preservation and protection of the regions natural assets by undertaking targeted investments, and education to encourage responsible and sustainable visitation.

There is a need for tracks and trails to connect the regions towns and product and experience offering. There is a game-changing opportunity to create a shared trail connecting the region's wineries, given their proximity to Orange City and to each other.

In particular, cycling is a major opportunity for the region, with domestic cycle visitation growth of 9% per annum across Australia.[4] Investment in infrastructure to support road cycling, gravel cycling, mountain biking and off road trails will position the Orange Region amongst Australia's premier nature-based and cycle destinations.

[4] Tourism Research Australia, cycling participation, 2015-2019.

Enhancing natural assets and recreation

The Orange Region has a range of high quality nature-based assets, including national and state parks, reserves, and conservation areas, as well as a range of recreational areas such as parks and gardens.

There is opportunity to enhance and develop these assets to support visitor and community engagement in passive and active recreation.

There are a range of activities that could be considered on a site basis, including:

- Activities (equipment hire etc)
- Walking and cycling trails
- Picnic infrastructure (seating, BBQs etc)
- Low impact camping
- Water-based activities (e.g. kayaking, splash parks)
- Destination playground
- Signage

Investment should be prioritised at key locations across the region. The level of investment and amenity should be targeted to the site based on its environmental and cultural values, as well as the strategic opportunity for investment (i.e. proximity to towns/villages, wineries etc.).

In addition, targeted promotion of key nature-based destinations in marketing activities will be critical to activating and enhancing the nature-based and recreational offering for visitors.

Connecting the Orange Region - Walking and cycling trails masterplan and implementation

The Orange Region is well placed as a walking and cycling destination. There is opportunity to strengthen the regional trails network and promote cycling across the region.

Key opportunities to be explored include:

- Orange wine trail;
- Towns and villages trail connectivity;
- Rail trails;
- Gravel and road cycling loops;
- Sealing of road shoulders to support road cycling;
- Linkages between towns and villages; and
- Encourage private sector operators to develop guided hiking, canoeing, kayaking, cycling and other experiences.

Priority Initiative	Stakeholder(s)	Timeframe	Actions
Enhancing natural assets and recreation	Council Local Aboriginal Land Council (LALC) User groups NSW Parks and Wildlife Department of Forestry	Short	1. Collaborate with stakeholders (user groups, land managers etc) to develop a regional plan that highlights the opportunities for each asset, taking into consideration existing plans for nature-based sites (e.g. masterplans, management plans etc). 2. Identify the priority natural assets and enhancements needed. 3. Identify opportunities for funding and investment.

Connecting the Orange Region; Walking and cycling trails masterplan and implementation	Council	Short-Medium	1. Undertake a masterplan for Orange Region trails which considers the following:
			   a. Orange wine trail
			   b. Towns and villages trail connectivity
			   c. Old Rail Trail Utilisation
			   d. Gravel and road cycling loops
			   e. Sealing of road shoulders to support road cycling
			   f. Linkages between towns and villages

APPENDIX A DOCUMENTS REVIEWED

Federal Documents

- Tourism 2020 Strategy; and
- A National Business Events Strategy for Australia 2020.

State/Regional Documents

- Destination Country and Outback NSW Destination Management Plan 2018-2020;
- NSW Visitor Economy Strategy 2030;
- NSW State-wide Destination Management Plan 2019;
- NSW Visitor Economy Industry Action Plan 2030;
- Destination NSW China Tourism Strategy 2012-2020;
- The NSW Regional Conference Strategy and Action Plan 2017-2021;
- Aboriginal Tourism Action Plan 2017-2020; and
- NSW Food and Wine Tourism Strategy and Action Plan 2018-2022.

Local Documents (Council Strategies / Plans)

- Orange360 Strategic Plan 2020-2024;
- Blayney Shire Destination Management Plan;
- Orange Community Strategic Plan 2018-2028;
- Activate Orange;
- Orange Tourism Strategy 2016;
- Cabonne Economic Development and Visitor Economy Strategy;
- Cabonne Tourism Plan 2012-2022; and
- Cabonne 2025 Community Strategic Plan.