

# North Coast

Destination Management Plan 2018 to 2021

9 March 2018







## Disclaimer

The information contained in this report is intended only to inform and should not be relied upon for future investment or other decisions. It is expected that any investment decisions made using these specific recommendations will be fully analysed and appropriate due diligence undertaken.

In the course of our preparation of the North Coast Destination Management Plan 2018 to 2021, recommendations have been made using information and assumptions provided by many sources and from the methodology adopted for this Plan. The authors accept no responsibility or liability for any errors, omissions or resultant consequences including any loss or damage arising from reliance on the information contained in this report.

It should also be noted that visitation data presented in this Plan for the North Coast is an approximation of the administrative boundaries of the North Coast. Definitions can vary between data sources and over time and data should be used with caution.







# Acknowledgements

We would like to acknowledge the traditional owners of the land that the geographic scope of this Plan covers and elders past and present.

This Destination Management Plan has been prepared by Destination North Coast management (Phil Harman, General Manager and Jacquie Burnside, Business Development Manager) in collaboration with consultants Meredith Wray (Wray Sustainable Tourism Research) and Claire Ellis (Claire Ellis Consulting).

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We would also like to acknowledge the representatives of North Coast stakeholder organisations who participated in the consultation process representing government, business and community interests across national, state, regional and destination levels. Thank you for your interest and your valuable contributions to help create this Destination Management Plan to serve as a framework to guide and foster our on-going collaboration, and aspirations of our region over the next four years (see Appendix 1 for a list of contributors).

## Destination North Coast Board

Cameron Arnold – Chair

Rod Barnaby – Director

Donna Carrier – Director

Michael Grieve – Director

Professor Elizabeth Roberts – Director

Alex Smith – Director

Images used within this document are courtesy of the Lord Howe Island Tourist Association and Destination NSW.



**Destination North Coast Board and Management**

Left to Right – Michael Grieve, Professor Elizabeth Roberts, Donna Carrier, Alex Smith, Jacquie Burnside, Rod Barnaby, Phil Harman, Cameron Arnold



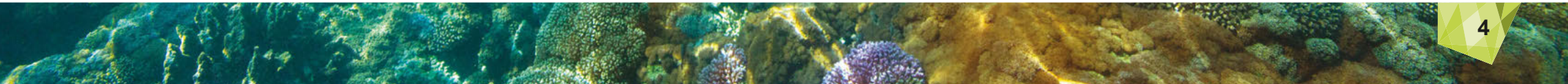


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## ACRONYMS

<b>ABS</b>	Australian Bureau of Statistics	<b>KPI</b>	Key Performance Indicator	<b>RTO</b>	Regional Tourism Organisation
<b>ANSW</b>	Arts NSW	<b>LGA</b>	Local Government Area	<b>RV</b>	Recreational Vehicle
<b>ATDW</b>	Australian Tourism Data Warehouse	<b>LHIB</b>	Lord Howe Island Board	<b>SCU</b>	Southern Cross University
<b>BCNSW</b>	Business Chamber NSW	<b>LTO</b>	Local Tourism Organisation	<b>SME</b>	Small to Medium Enterprises
<b>CCWRG</b>	Caravan and Camping Working Group	<b>INSW</b>	Infrastructure New South Wales	<b>TAFE</b>	Technical and Further Education NSW
<b>CCIA</b>	Caravan and Camping Industry Association	<b>FCNSW</b>	Forestry Corporation of NSW	<b>TRA</b>	Tourism Research Australia
<b>DNC</b>	Destination North Coast NSW	<b>NPWS</b>	NSW National Parks and Wildlife Service	<b>TRWG</b>	Tourism Research Working Group
<b>DNSW</b>	Destination New South Wales	<b>NOROC</b>	Northern Rivers Regional Organisation of Councils	<b>UNWTO</b>	United Nations World Tourism Organisation
<b>EA</b>	Ecotourism Australia	<b>MIDROC</b>	Mid Coast Region of Councils	<b>VFR</b>	Visiting Friends and Relatives
<b>FIT</b>	Free independent (traveller)	<b>RDA</b>	Regional Development Australia	<b>YE</b>	Year End
<b>HCNSW</b>	Heritage Council of NSW	<b>ROI</b>	Return on Investment		
<b>IBA</b>	Indigenous Business Australia	<b>RMS</b>	NSW Roads and Maritime Services		





## Executive Summary

The North Coast Destination Management Plan 2018 to 2021 has been developed to provide strategic direction for Destination North Coast NSW and North Coast NSW tourism stakeholders to plan for the sustainable management, development and marketing of tourism for the North Coast of NSW over the next four years to 2021.

The North Coast NSW region stretches from MidCoast to Tweed including Lord Howe Island and comprises popular coastal destinations and rural and hinterland towns and villages that appeal to domestic and international visitor markets.

In 2015/16 tourism contributed an estimated \$2.8 billion to the North Coast regional economy and accounted for 12% of the North Coast's gross regional product.<sup>1</sup> The North Coast is the third largest domestic region in Australia with 20.0 million visitor nights, and attracts 3.7 million international visitor nights.<sup>2</sup>

As the tourism agency for the North Coast region, Destination North Coast is well positioned to work with stakeholders to drive, coordinate and support the sustainable management and development of tourism across the region.

This Plan has been developed in cooperation with Destination New South Wales and the Destination North Coast Board, and is underpinned by a comprehensive situational analysis and stakeholder engagement process. In developing this Plan, careful consideration has also been given to adopting a sustainable approach to ensure that the development of tourism also improves the livability of North Coast communities.

The aim of the North Coast Destination Management Plan 2018 to 2021 is to help sustainably grow the North Coast visitor economy and in doing so support the NSW Government's goal of doubling overnight visitor expenditure by the year 2020.

This will involve working with rural and hinterland areas to grow local visitor economies that can benefit from increased tourism and to help mature destinations that are impacted by high tourist numbers in peak times (e.g. those in prime coastal areas) to plan and manage tourism. This includes:

- Attracting an appropriate mix of intrastate, interstate and international visitors;
- Increasing visitation in low and shoulder seasons;
- Encouraging greater dispersal and spend; and
- Ensuring tourism is managed sustainably.

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Importantly, this Plan identifies seven key strategic priorities that have been determined through the consultation process, assessment of marketing trends, and review of the current and potential North Coast tourism operating environment:

<b>Priority One</b>	<b>Tourism Leadership and Advocacy:</b> Advocate, lobby and engage with external stakeholder organisations across local, regional, state and national levels to best represent and coordinate the needs of North Coast tourism stakeholders
<b>Priority Two</b>	<b>Tourism Research and Insights:</b> Establish a realistic tourism research system to regularly track visitation, visitor expenditure, satisfaction, behaviour and perceptions for North Coast sub-regions and destinations and to explore industry needs including benchmarking models
<b>Priority Three</b>	<b>Tourism Investment Attraction:</b> Work with government and industry partners to identify, promote and facilitate public and private sector investment that will have a catalytic impact on the visitor economy and deliver sustainable tourism development that is in balance with the community and environment
<b>Priority Four</b>	<b>Tourism Product and Experience Development:</b> Support North Coast tourism stakeholders to enhance and develop innovative and contemporary tourism product and experiences related to the North Coast's Seven Experience Platforms that will strongly appeal to domestic and international visitor markets
<b>Priority Five</b>	<b>Tourism Marketing Coordination:</b> Harness the combined marketing power of the industry by providing strategic direction and facilitating cooperative campaigns with DNSW and other partners
<b>Priority Six</b>	<b>Tourism Training and Capacity Building:</b> Assist with tourism workforce planning, provide effective training and skills development support for North Coast tourism operators, and capacity building initiatives for tourism industry professionals
<b>Priority Seven</b>	<b>Tourism Crisis and Risk Management:</b> Identify and help plan for potential risks to the North Coast visitor economy and provide support to tourism stakeholders during times of crisis.

In addition Seven Experience Platforms have been identified to drive and coordinate tourism product and experience development across the North Coast over the next four years. Developing nature experiences will be a key focus. Nature has close links with the other six Experience Platforms and can differentiate the North Coast from other coastal destinations.

## Seven Experience Platforms



This Plan is intended to be a living, practical document. It will need the support of the broad range of North Coast visitor economy stakeholders to achieve its objectives and priorities. The Plan includes tangible actions and a shared annual review and reporting process to respond to the dynamic tourism environment and North Coast needs.

Key priorities and catalytic projects that will be undertaken in 2018 include:

- **Engaging with RMS to advocate the need for critical road infrastructure and improved signage** across the North Coast
- **Developing a Sustainable Tourism Program** that can be communicated to North Coast Councils to highlight the value of sustainable tourism to local economies and the importance of appropriate planning
- **Communicate tourism research insights** to industry on a regular basis to better inform product development, investment decision making and marketing
- **Advocating for flagship tourism experiences in the region** including the Northern Rivers Rail Trail and the Great Lakes Great Walk
- **Developing a five-year North Coast Nature-based Tourism Development Strategy** to identify opportunities and strategies to coordinate and encourage nature-based tourism product and experience development and investment across the North Coast in collaboration with NPWS and FCNSW
- **Developing a 'marketing framework' for the North Coast** that explains the different destinations and sub-regions, their product strengths and target markets to ensure the North Coast leverages DNSW, Tourism Australia and other partner opportunities
- **Undertaking a feasibility study** to assess the return on investment of Destination North Coast taking an active role in attracting business events
- **Establishing an annual North Coast Tourism Training and Skills Development Program** for North Coast tourism SMEs that provides regular, worthwhile and cost effective training initiatives in the areas of digital marketing, quality customer service for tourism and hospitality operations.



# 1.0 Introduction

This Destination Management Plan (DMP) has been developed by Destination North Coast, one of six new regional Destination Networks that was established by Destination New South Wales (DNSW) during 2017 to drive the growth of the visitor economy in regional New South Wales (NSW) through increased jobs and investment.

As the peak tourism agency for the North Coast NSW region, Destination North Coast is well positioned to work with stakeholders to drive, coordinate and support the sustainable management and development of tourism across the region – from MidCoast to Tweed including Lord Howe Island.

This Plan is a strategy for the region from 2018-2021, and has been developed in conjunction with a broad range of stakeholders. It will guide Destination North Coast priorities for the next four years and will also feed into the DNSW Statewide Destination Management Plan that will be developed in 2018. In developing this Plan, careful consideration has been given to adopting a sustainable approach to ensure that the development and promotion of tourism celebrates and protects the North Coast's distinctive natural, built and socio-cultural environments. The sustainable approach used to develop this Plan is depicted below.

**Figure 1: Sustainable Tourism Triangle**



Source: Adapted from Dredge, D. 2008. Managing Local Tourism Master Class: Eastern Metropolitan Regional Council Workshop Materials, Southern Cross University, Tweed Heads, Australia.

The methodology to develop the Plan has included:

- An analysis of global, national, state, regional and local tourism trends
- A review of the previous North Coast Destination Management Plan and the existing Destination Management Plans from within the region
- A review of relevant State strategies
- A survey of tourism managers to determine tourism product and experience strengths, infrastructure priorities and support required from Destination North Coast
- A strategic session with the Destination North Coast Board
- Stakeholder engagement including:
  - Four planning workshops (Port Macquarie, Tweed, and two on Lord Howe Island)
  - Two marketing specific workshops (Port Macquarie and Ballina)
  - On-on-one consultation meetings with representatives of key tourism stakeholder organisations (government, community organisations and businesses across the region)
  - A workshop to present and review the draft DMP (Coffs Harbour)
  - Distribution of the draft Plan for comment
  - Briefing session with National and State tourism organisations and relevant NSW government agencies (Sydney).

This Plan is intended to be a living, practical document. It will need the support of the broad range of North Coast visitor economy stakeholders to achieve its objectives and priorities. The Plan includes tangible actions and a shared annual review and reporting process to respond to the dynamic tourism environment and North Coast needs.

## Aim

The aim of the North Coast Destination Management Plan 2018 to 2021 is to help sustainably grow the North Coast visitor economy and in doing so support the NSW Government's goal of doubling overnight visitor expenditure by the year 2020.



# North Coast Visitor Economy Snapshot

1.0 Introduction cont.

The North Coast Destination Management Plan 2018 to 2021 is an important outcome of a comprehensive situational analysis and stakeholder engagement process. The Plan prioritises strategic opportunities and actions and includes an achievable and realistic Action Plan that will guide the cooperative efforts of Destination North Coast and industry stakeholders to manage and grow the North Coast visitor economy. The stakeholder engagement process has confirmed a strong commitment from Destination North Coast, Destination New South Wales, Regional Development Australia, NSW government agencies, local governments and industry to develop a solid working relationship to achieve the outcomes prioritised in this Plan.



**6,904<sup>3</sup>** tourism  
businesses



**\$2.8 billion<sup>1</sup>**  
contribution to  
regional economy



**28,600<sup>3</sup>** jobs –  
12% of the  
workforce



**3rd** biggest  
tourism region in  
Australia



**76%<sup>2</sup>** of Sydney  
domestic visitor  
nights



**7,768**  
commercial  
accommodation  
rooms



**19.9 million<sup>2</sup>**  
domestic visitor  
nights



**3.6 million<sup>12</sup>**  
international visitor  
nights – top NSW  
regional destination



**7** airports with  
848,100 available  
seats (not including  
Gold Coast or other  
neighboring airports)



**78%** of Pacific  
Highway upgrade  
complete





## 2.0 The Tourism Environment

This Plan has been developed in the context of global, national, state, regional and local trends and issues. Desktop research and the stakeholder consultation process identified the following key issues that may influence tourism on the North Coast. The analysis included mega-trends through to shorter term factors that impact our visitor markets, communities and destinations.

### Economic Outlook

Globally, there has been a broad-based recovery across most major economies, although the future is far from certain with a weaker recovery in investment compared to previous recoveries.<sup>4</sup> After 26 years of uninterrupted economic growth, the Australian economy is entering a period of greater uncertainty with the slow-down in the mining sector. Recent projections forecast a gradual step up in economic growth to reach 3% in 2018 with the non-resource sectors of the economy building momentum and underpinning wage and employment growth and ultimately an increase in consumer spending.<sup>5</sup>

### Climate Change and Sustainable Tourism

The issue of climate change impacts all industries including tourism and there are responsive measures that the industry should take to both mitigate and adapt to climate change. For tourism, the impact could be severe in terms of changes in biodiversity, loss of key natural attractions, increased extreme weather patterns, and location-specific ramifications such as beach erosion which is already an issue at some of the major destinations in the region. Typically, the tourism industry, especially high-end resorts and hotels as well as the transport sector are large users of resources including water and energy. The sector is responsible for an estimated 5% of global greenhouse gas emissions, which is equivalent to its contribution to global GDP.<sup>6</sup> Environmentally-oriented tourism (nature-based tourism) can play an important role in maintaining areas of high conservation value by raising awareness and helping local governments and communities understand the economic and social benefits tourism can bring if natural attractions are maintained sustainably.<sup>7</sup>

Positively, consumers are becoming increasingly more aware and sophisticated in their purchase choices which include travel and tourism. In response to the pressure of daily

life and increasing urbanisation, nature-based and ecotourism style holidays and more sustainable experiences are increasing in popularity. There is also a percentage of the market willing to pay more for the experience.<sup>6</sup> The growing interest in nature-based tourism, the desire for a pristine environment and the value this brings to other local industries (such as wine, food and other produce) becomes a strong economic argument to properly manage a destination and to avoid new developments that are not compatible with environmental sustainability. Globally tourism is growing fastest in the world's biodiversity hot spots.<sup>8</sup> There is also increasing evidence that more sustainable tourism has greater economic multipliers due to increased local inputs and more of the money being spent in the local community. Given its reliance on quality natural attractions, there are both threats and opportunities for the North Coast in how it utilises these assets.

### Visitor Safety

Safety, particularly terrorism, is impacting travel and tourism destinations. To some extent, Australia has benefitted from being perceived as a safe destination. However, Australia and the North Coast are not immune to a major terrorism incident or other events including shark attacks, violent crimes, or natural disasters such as the recent floods in the wake of Cyclone Debbie. As a destination, it is important to have a crisis management plan in place to mitigate difficulties and respond quickly and effectively to safety issues or natural disasters.

### Over-tourism

The combination of a growing world population, improved technology resulting in cheaper air and sea travel and growing affluence has resulted in a tourism boom, which is putting pressure on tourism hotspots around the world.<sup>9</sup> Some destinations on the North Coast are already experiencing strains on infrastructure and amenities and socio-cultural impacts including resentment from some local communities due to the year-round volume of tourism activity, as well as peak season overcrowding problems. It is therefore important to consider these impacts and carefully plan to ensure that tourism growth is managed sustainably considering overall outcomes, with a quality, not quantity approach. For instance, along the North Coast visitors can be dispersed to destinations seeking to grow their local visitor economies.





### The Sharing Economy and Digital Disrupters

The sharing economy provides both challenges and opportunities to destinations. As it uses under-utilised assets such as homes (e.g. Airbnb) or cars (e.g. Uber) to provide services to visitors, it can arguably be a much more environmentally sustainable approach to tourism development. This can be especially appropriate for smaller/rural destinations on the North Coast that may not have sufficient services for visitors and can potentially encourage dispersal. From the visitor perspective, these types of services can deliver a more local experience compared to a traditional hotel or using conventional forms of transport. Companies such as Airbnb are also rapidly increasing the opportunities to connect with visitors and so can be valuable partners for cooperative marketing activities.

From a government perspective, the sharing economy can provide challenges in terms of missed tax revenue or avoiding local regulations (such as safety regulations). The issue of short-term holiday rentals has been a problem in tourism hot spots on the North Coast even before the emergence of Airbnb where residents have reported being impacted by visitor activity in their neighbourhoods. Affordable housing for staff and local communities is also an issue. While some of these policy issues can be tackled at a local government level, others require state or national approaches. During the life of this Plan, there are likely to be other digital innovations that will impact business as usual, residential amenity and natural environments. This could include the growing use of artificial intelligence to select and book holiday destinations and the advent of driverless cars.

### Social Media and User-generated Content

The use of social media, user-generated content, and smartphone travel booking is transforming how visitors research destinations before and during travel and how regions are promoted. It is therefore important for the industry to build marketing and visitor servicing strategies that capitalise on these opportunities and also ensure that our industry is up to speed with social media, digital marketing and e-commerce. User-generated information such as TripAdvisor reviews can also be cost effective tools to drive visitation. The marketplace is however very cluttered, competitive and dynamic resulting in the need for destinations/regions to develop a contemporary and strategic approach to digital marketing to reach priority visitor markets and for local operators to better understand the impacts and application of this dynamic medium.

### Caravan and Camping

An estimated \$8.6 billion of visitor expenditure is generated every year by caravan and camping consumers nationally and this is a critical segment for the North Coast. Caravans are in fact the fastest growing vehicle class in Australia, up 5.3% on the previous year with campervans up by 4.4% over the same period. Key segments include the grey nomads exploring Australia and migrating north during the cooler months, families, and millennials seeking nature experiences and social interaction.<sup>10</sup>

### Visitor Market Segmentation Trends

There are market trends that may present both opportunities and challenges for the North Coast including:

- Asia's emerging consumer class that is driving growth in visitation from China and India in particular
- Millennials desire to travel
- Growth in senior travellers
- Growth in accessible/inclusive tourism as a market segment – 17% of all tourism expenditure in Australia
- Growth in nature-based tourism
- Growth in the lifestyle, health and well-being segment
- Desire for immersive and experiential travel
- More fuel-efficient vessels underpinning growth in the cruise segment
- Continued growth in low cost carriers that is opening up new domestic and international markets for the region.





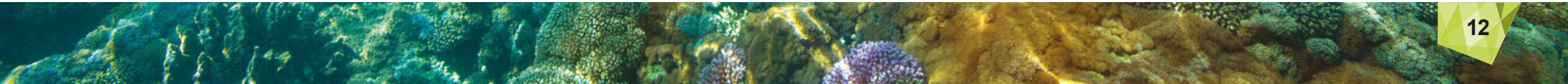
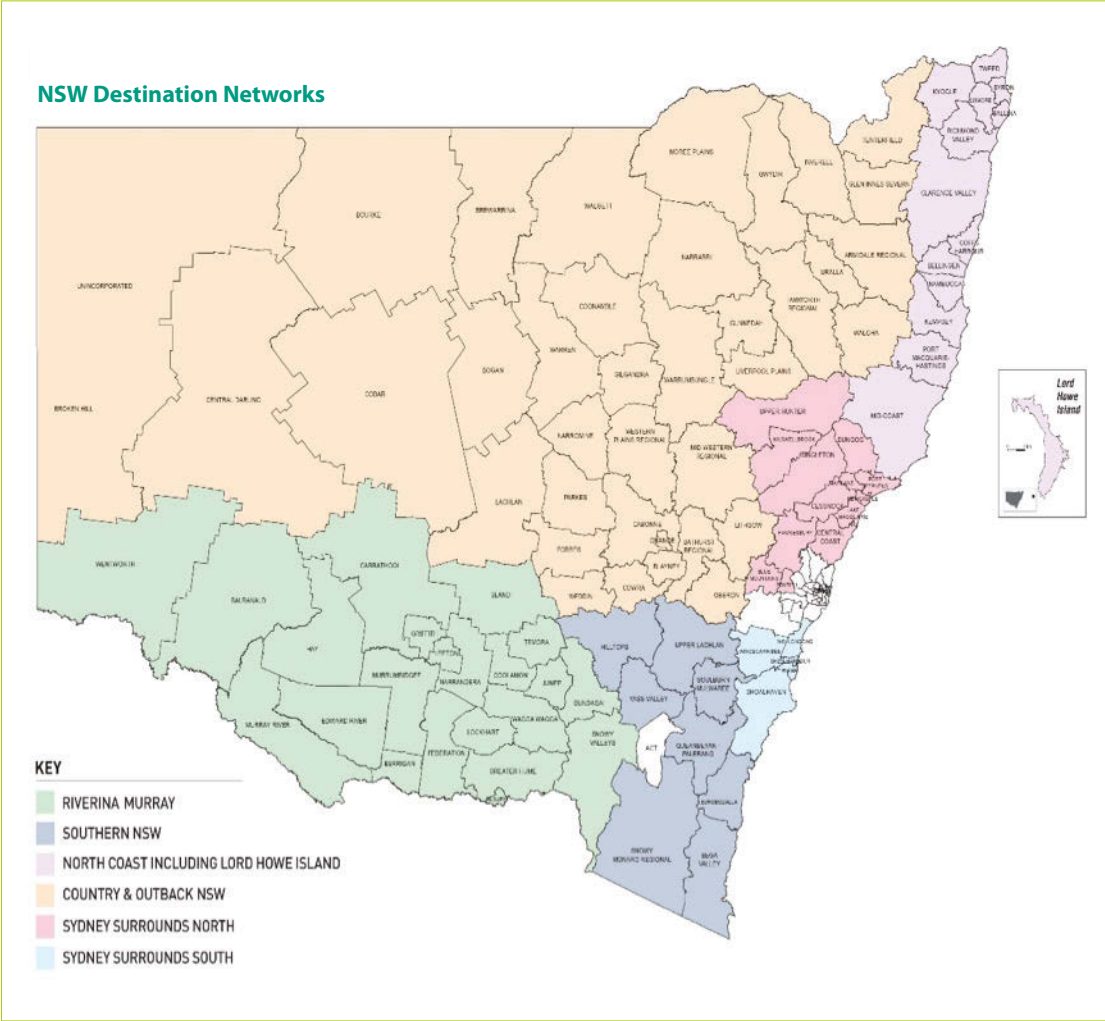
# 3.0 The North Coast Visitor Economy

## Regional Description

The North Coast New South Wales tourism region covers 14 Local Government Areas (LGAs) including the key regional centres of Taree, Port Macquarie, Coffs Harbour, Grafton, Lismore, Ballina and Tweed Heads and Lord Howe Island. The region spans from Hawkes Nest in the south to the Queensland border in the north with the Great Dividing Range approximating the western border (see Figure 2.)

The North Coast’s enviable lifestyle makes it a great place to live as well as visit. The estimated population is nearing 600,000 representing 20% of regional NSW’s total. Along with tourism, key economic sectors include services, health and aged care. Covering 42,083 km<sup>2</sup> (6% of Regional NSW total), 89 National Parks are located or cross into the region. These include some of the best beaches, spectacular walking tracks, top whale watching, snorkelling and fishing and World Heritage Gondwana rainforests as well as the World Heritage listed Lord Howe Island<sup>11</sup>.

Figure 2: NSW Destination Networks





## North Coast Local Government Areas

A brief snapshot of the 14 LGAs are presented below.

## 3.0 North Coast Visitor Economy cont.

LGA	Description	Key Product
<b>MidCoast</b>	Including the Manning Valley, Great Lakes and Gloucester the MidCoast is within easy reach of Sydney and Newcastle and is popular for its stunning National Parks and wilderness, pristine coastline and river systems and food experiences.	<ul style="list-style-type: none"> <li>National Parks, State Conservation Areas and Nature Reserves including Barrington Tops, Crowdy Bay and Myall Lakes</li> <li>200m Ellenborough Falls – one of the longest single drop falls in the Southern Hemisphere</li> <li>The Great Lakes has an incredible and unique triple lakes system found nowhere else in Australia</li> <li>Beautiful beaches</li> </ul>
<b>Port Macquarie-Hastings</b>	Located mid-way between Sydney and Byron Bay, the area is surrounded by waterways, beaches and stunning hinterland. The main centre of Port Macquarie, on the Hastings River is known for its beaches, wildlife and penal colony past and increasingly its restaurants and cafes.	<ul style="list-style-type: none"> <li>Port Macquarie Hastings boasts 17 gorgeous beaches and a lush hinterland</li> <li>Family attractions including the Koala Hospital and Sea Acres Rainforest Centre</li> <li>Key events including Ironman Australia, Tastings on Hastings and State Touch Football</li> <li>The charming town of Wauchope is the gateway to the hinterland with a wonderland of drives through National Parks, State Forests and villages</li> <li>Beautiful waterways and nature experiences abound in the Camden Haven region</li> <li>The burgeoning food scene includes wineries, breweries and farm gate experiences</li> </ul>
<b>Kempsey</b>	The Macleay Valley is nestled between the coastal towns of Port Macquarie and Coffs Harbour and is known for world-famous waves, the beautiful Macleay River and bushwalking in the national parks throughout the region.	<ul style="list-style-type: none"> <li>The coastal towns of Grassy Head, South West Rocks, Hat Head and Crescent Head provide some of the best surfing beaches on the east coast</li> <li>The 'Crescent Head Classic' attracts surfers coming from far and wide to compete in an annual competition that celebrates surfing's history</li> <li>Historic Trial Bay Lighthouse, Smoky Cape Lighthouse and the 90 metre underwater cave Fish Dive Rock</li> <li>Dunghutti-Ngaku Aboriginal Art Gallery and Wigay Aboriginal Cultural Park</li> <li>Slim Dusty Centre in Kempsey</li> </ul>
<b>Nambucca</b>	Located between Port Macquarie and Coffs Harbour, Nambucca Shire is a popular holiday destination particularly for beach-goers, river users and nature lovers.	<ul style="list-style-type: none"> <li>Heritage town of Bowraville with 2 high-quality museums</li> <li>Nambucca Heads – breathtaking views of pristine beaches and coastal scenery, foreshore boardwalks and rainforest walks</li> <li>Scotts Head – renowned surf-beaches with surf schools, good boating &amp; fishing</li> <li>Stunning hinterland with attractions, e.g. The Pub With No Beer, Buffalo Farm</li> </ul>
<b>Bellingen Shire</b>	Bellingen Shire is located between Coffs Harbour and Nambucca Shire. The region is renowned for its ecological diversity with State Forests and National Parks covering over 53% of the area.	<ul style="list-style-type: none"> <li>Urunga; unspoilt seaside town where Bellinger and Kalang Rivers meet</li> <li>Bellingen; renowned for its alternative lifestyle and bohemian vibe. Strong art/music/festival culture</li> <li>Dorrigo; high on the plateau. Home to Dorriggo World Heritage National Park including Dorriggo Rainforest Centre and part of the ancient Gondwana Rainforests</li> <li>Bellingen Shire is linked by the Waterfall Way – one of the most scenic drives in Australia</li> </ul>
<b>Coffs Harbour</b>	A key regional city along the Pacific Highway between Newcastle and the Gold Coast, known for its beaches, being home to the Solitary Islands Marine Park and the Big Banana. Coffs Harbour attracts family holiday makers and adventure travellers alike and is the only place in New South Wales where the Great Dividing Range meets the Pacific Ocean.	<ul style="list-style-type: none"> <li>Nature-based and soft adventure tourism experiences, distinctive cultural experiences, regional food and produce experiences</li> <li>Coffs Harbour Regional Airport</li> <li>Key family attractions</li> <li>Sealy Lookout, Sky Pier and Orara East State Forest</li> <li>Solitary Islands Marine Park and coastal walk</li> <li>Sports and event hub</li> </ul>
<b>Clarence Valley</b>	The Clarence Valley is located on the Clarence River, the largest river on the east coast of Australia. Major towns include Grafton, Maclean and Yamba, surrounded by 60 quaint villages. The Clarence Valley is the largest local government area in the North Coast of NSW.	<ul style="list-style-type: none"> <li>Clarence Canoe &amp; Kayak Trail – the longest white-water trail in Australia</li> <li>Events – Grafton Jacaranda Festival, Maclean Highland Gathering, Bridge 2 Bridge Ski Race, July Racing Carnival</li> <li>Yamba – famous for its prawns and Angourie Surfing Reserve</li> <li>100 km coastline and 36 beaches</li> <li>Over 5,000 square km of National and State Parks</li> <li>Yuraygir Coastal Walk</li> </ul>



LGA	Description	Key Product
<b>Richmond Valley</b>	Casino, the main town in the region, is located on the banks of the beautiful Richmond River, and is fast becoming the beef capital of Australia. The Richmond Valley also includes the pretty coastal town of Evans Head.	<ul style="list-style-type: none"> <li>The 11-day annual Beef Week festival</li> <li>Evans Head boasts long unspoilt beaches, sandy river flats, fantastic fishing and world-class surfing</li> <li>Rural landscapes and agri-tourism attractions</li> </ul>
<b>Kyogle</b>	Gateway to the rainforest, Kyogle makes a great base for exploring World Heritage-listed wilderness. Located just two hours from Brisbane and the Gold Coast, Kyogle is surrounded by rich farmlands and ancient Gondwana Rainforest.	<ul style="list-style-type: none"> <li>Renowned Border Ranges and Toonumbar World Heritage-listed National Parks</li> <li>The area is a biodiversity hot spot with National Parks and State Forests, rich in flora and fauna, surrounding the town and villages</li> <li>Art deco character of Kyogle town</li> <li>Nature-based recreation</li> </ul>
<b>Lismore</b>	Nestled between the rainforest and the sea, Lismore is the cultural and economic capital of the Northern Rivers region. The eclectic village of Nimbin presents a new-age contrast. On the doorstep of several magnificent World Heritage National Parks with walking trails, waterfalls and amazing views.	<ul style="list-style-type: none"> <li>Nightcap National Park including Minyon Falls &amp; Protesters Falls</li> <li>Colourful 'hippy' village of Nimbin</li> <li>Shopping and café culture in Lismore City</li> <li>The Channon Craft Market – the original North Coast market</li> <li>The new Lismore Regional Gallery</li> <li>A regional hub for sport and key events including the Lantern Parade and Eat The Street</li> </ul>
<b>Ballina</b>	A popular holiday destination with water-based activities on the river and surf beaches and over 25 kms of cycle paths. The nearby hinterland area makes for scenic explorations.	<ul style="list-style-type: none"> <li>Strong family attractions and the beach town of Lennox Head with its eateries, and famous surf-break</li> <li>Home of the Big Prawn and Ballina Prawnfest</li> <li>Ballina Byron Gateway Airport – a key gateway to the Northern Rivers</li> <li>Quaint villages and hamlets e.g. Newrybar, Alstonville, Tintenbar</li> <li>Foreshore bike path with indigenous interpretive panels</li> </ul>
<b>Byron</b>	Its stunning natural attractions and laid-back beach lifestyle, attracts both domestic and international visitors alike. The Cape Byron headland and iconic lighthouse marks Australia's most easterly mainland point. Byron Bay has many beautiful surf beaches, a bustling shopping strip and café culture. Bangalow, Mullumbimby and Brunswick Heads are also popular village destinations.	<ul style="list-style-type: none"> <li>Well-known surf beaches and breaks</li> <li>Cape Byron National Park and Lighthouse</li> <li>International standard accommodation and restaurants</li> <li>Scenic drives through rolling hills to hinterland towns and villages</li> <li>Key music events including Byron Bluesfest and Splendour in the Grass</li> <li>Health, wellness and alternative lifestyles</li> <li>Learn about local Indigenous Culture of the Arakwal People</li> </ul>
<b>The Tweed</b>	With beaches, estuaries, the beautiful Tweed River, rainforest and majestic Mount Wollumbin/Mount Warning, the Tweed region forms part of an ancient caldera. Given its proximity to southeast Queensland, the Tweed is both a popular holiday and day-trip destination. Kingscliff is an important destination on the Tweed Coast that stretches through to Pottsville.	<ul style="list-style-type: none"> <li>Tweed River with river sports, boating activities and scenic cruises</li> <li>Tweed Regional Gallery and Margaret Olley Centre</li> <li>Mount Wollumbin (Warning) in World Heritage listed Wollumbin Park</li> <li>Hinterland villages accessed along scenic drives</li> <li>Developing food/distillery/agri-tourism industry</li> <li>Family attractions</li> </ul>
<b>Lord Howe Island</b>	Located 600 km east of Port Macquarie, World Heritage-listed Lord Howe Island is characterised by sandy beaches, subtropical forests, crystal clear waters revealing pristine coral reefs and the towering Mt Gower.	<ul style="list-style-type: none"> <li>World Heritage status in recognition of the global significance of the island's beauty and biodiversity</li> <li>Pristine wilderness and walking trails, world-class fishing and coral reef diving</li> <li>Abundant marine life in crystal clear waters, snorkeling off the beach, hand-feed fish</li> <li>Bird watching paradise</li> </ul>



### Importance of the Visitor Economy to the North Coast

The tourism industry contributed an estimated \$2.8 billion to the North Coast regional economy in 2015/16 accounting for 12% of the North Coast's Gross Regional Product. The industry directly employed 20,700 people, with further 7,900 indirect jobs created – accounting for a combined 11.6% of the workforce in the region. Cafes, restaurants and takeaway food services (31.3%) accounted for the highest portion of jobs generated, followed by retail trade (22.1%), and accommodation (16.5%).<sup>1</sup> The North Coast has an estimated 6,904 tourism businesses, 96% of these have less than 20 employees.<sup>3</sup> The intrastate market was the most significant contributor to Gross Regional Product, with the interstate market and international market also important (see Table 1).

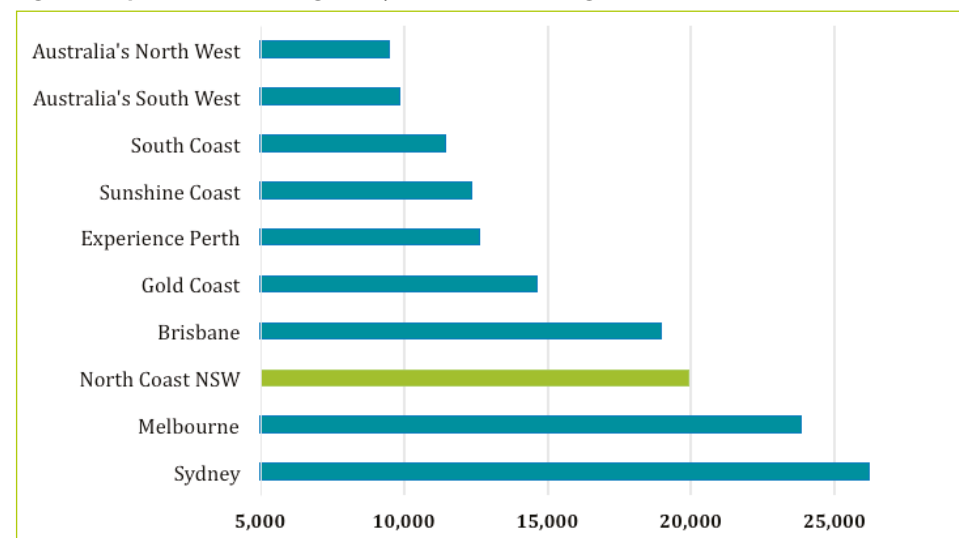
The North Coast is Australia's third largest tourism region based on domestic visitor nights, behind only Sydney and Melbourne and ahead of Brisbane, Gold Coast, Perth and the Sunshine Coast (see Figure 3).

Table 1: Visitor origin and contribution to GRP, North Coast

Visitor Segment	Gross Regional Product \$ million	Contribution (%)
Day-trippers	187	12.1
Intrastate	625	40.5
Interstate	464	30.1
International	267	17.3
Direct	1,544	
Indirect	1,304	
<b>TOTAL IMPACT</b>	<b>2,848</b>	

Source: Deloitte Access Economics (2017), North Coast Tourism Satellite Accounts 2015-16.

Figure 3: Top Ten Australian Regions by Domestic Visitor Nights ('000)



Source: Tourism Research Australia, National Visitors Survey, Visitor Nights by Top 50 Regions (YE June 2017).

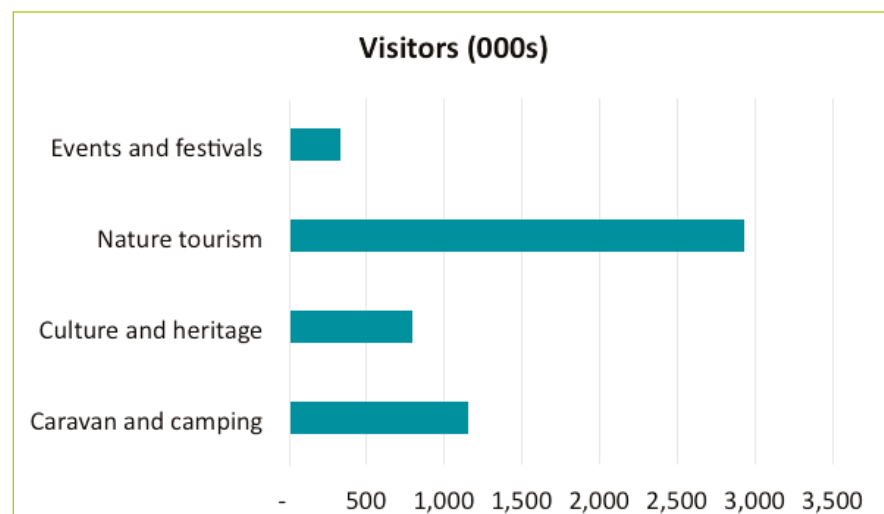


### Domestic Visitation

There was an estimated 5.1 million overnight domestic visitors to the North Coast for the year ending June 2017, generating 20.0 million visitor nights. The average length of stay was 3.9 nights with an average trip spend of \$549. The source markets vary significantly across the region – overall 38% of domestic overnight visitors come from regional NSW, 24% from Sydney and 38% from interstate. Queensland contributes 77% of all interstate visitors. Over the same period, there was 7.2 million domestic day trip visitors, spending an average \$94. An estimated 30% of day trip visitors were from interstate, once again indicating the importance of the South-East Queensland market.<sup>2</sup>

Domestic overnight visitors are strongly motivated by nature, with caravan and camping also significant. Events are a key driver for the region including the Port Macquarie Iron Man, Rally Australia in Coffs Harbour as well as Splendour in the Grass and BluesFest. Food and wine and Aboriginal tourism were not significant segments but have the potential to develop (see Figure 4).

Figure 4: Domestic Visitor Segments



Source: Tourism Research Australia, National Visitors Survey, YE June 2017.

### International Visitation

International visitors to the North Coast have increased by 17% since 2009. For the year ending June 2017, there was an estimated 345,000 international visitors generating 3.7 million visitor nights. The average length of stay was 10.6 nights with an average spend in the region of \$655. The key source markets are the United Kingdom, Germany and the United States. The Asia market is growing strongly, up 138% since 2009 to reach 40,000 visitors. China accounts for 28% of these visitors and 17% of spend.<sup>12</sup>

The primary motivation for North Coast international visitors coming to Australia is to experience natural attractions. Cultural heritage and Aboriginal tourism are also important attractors, although international visitors may not necessarily engage in these activities within the North Coast. The importance of the youth segment is evident with backpackers and working holiday-makers significant segments (see Figure 5).

Figure 5: International Visitor Segments



Source: Tourism Research Australia, International Visitors Survey, YE June 2017.



## Infrastructure Assets

### Commercial Accommodation

There are an estimated 7,768 commercial accommodation rooms in the region, with an average occupancy of 57.6%.<sup>3</sup> This does not take into account the large number of holiday let homes and apartments in the region. The moderate occupancy rate illustrates the seasonal nature of the industry on the North Coast and one of the key challenges that needs to be addressed.

### Airports

The seven airports in the region (Ballina Byron Gateway Airport, Coffs Harbour, Grafton, Lismore, Port Macquarie, Taree and Lord Howe Island), provide an estimated 848,100 available seats.<sup>3</sup> The seat utilisation is estimated at 67.6%.<sup>3</sup> This does not take into account the significant number of visitors accessing the region from airports neighbouring the region. Gold Coast Airport, Australia's sixth busiest, is an international airport three kilometers from the centre of Tweed Heads and within 45 minutes drive of Byron Bay. Brisbane Airport, a 90 minute drive from Tweed Heads also provides access to the region for international visitors. In the south of the region, Newcastle airport is a 40 minute drive from Tea Gardens and 90 minutes from Taree. There has been significant investment in airports in the region including a \$6.5 million upgrade to Coffs Harbour Airport that enlarged the Airport parking apron, resealing the runway and building a new terminal at Lord Howe Island Airport and expansion of the airport terminal building at Ballina-Byron Gateway Airport. A \$7.5 million upgrade for the Port Macquarie Airport terminal building is expected to commence in 2018.

### Pacific Highway Upgrade

The Pacific Highway upgrade will result in reduced travel times, safer travel and increased tourism flows to and within the region. Jointly funded by the Australian and NSW governments, the Pacific Highway upgrade is one of the largest infrastructure projects in NSW and will deliver a four-lane divided road from Hexham, a suburb of Newcastle, to Queensland. The project will be finished by 2020 with 78% of the road (510 km) already constructed.<sup>13</sup>

### Rail and Bus Links

NSW TrainLink provides a passenger rail service from Sydney to Brisbane. Principle stations on the North Coast Line are Taree, Wauchope, Kempsey, Coffs Harbour, Grafton, Casino and on to Brisbane with additional connecting coach services to neighbouring towns and centres. There are also public and private bus operators that facilitate travel to and within the region.

### Tourism Associations and Visitor Information Centres

There are five destination based tourism associations in the region, Lord Howe Island Tourism Association, Greater Port Macquarie Tourism Authority, Nambucca Tourism Association, Destination Byron and Destination Tweed. There are 28 accredited visitor information centres in the region.

### Tourism Training

Southern Cross University's School of Business and Tourism with campuses in Lismore, the Gold Coast and Coffs Harbour provides industry-relevant business management, hospitality and tourism degrees. TAFE NSW has courses in tourism, events and aviation with campuses in most major centres throughout the region. Coffs Harbour has been selected as the location for the TAFE NSW Tourism and Experience Services SkillsPoint which will leverage TAFE NSW's statewide educational expertise. It will work in close partnership with industry, business and employers to design training that responds to emerging trends. Courses vary from Certificate to Diploma level. The new Charles Sturt University campus in Port Macquarie has a Bachelor of Applied Science (Outdoor Recreation and Ecotourism). There are also a number of other private and not-for-profit training providers in the region including NORTEC.





## 4.0 Objectives and Strategic Priorities

The overarching objective of the North Coast Destination Management Plan 2018 to 2021 is to help grow the North Coast NSW visitor economy in a sustainable way that supports the NSW Government's goal of doubling overnight visitor expenditure by the year 2020. This includes:

- Attracting an appropriate mix of intrastate, interstate and international visitors;
- Increasing visitation in low and shoulder seasons;
- Encouraging greater dispersal and spend; and
- Ensuring tourism is managed sustainably.

The following seven strategic priorities have been determined from the stakeholder consultation process, assessment of marketing trends, and review of the current and potential North Coast tourism operating environment.

For each of these strategic priorities, an action plan has been created that identifies key activities, stakeholder responsibilities, Key Performance Indicators (KPIs) and time frames:

<b>HIGH</b>	within the first year
<b>MEDIUM</b>	within one to two years
<b>LOW</b>	within the next four years

An annual review process, including updating, has been incorporated into this Plan.

<b>Priority One</b>	<b>Tourism Leadership and Advocacy:</b> Advocate, lobby and engage with external stakeholder organisations across local, regional, state and national levels to best represent and coordinate the needs of North Coast tourism stakeholders
<b>Priority Two</b>	<b>Tourism Research and Insights:</b> Establish a realistic tourism research system to regularly track visitation, visitor expenditure, satisfaction, behaviour and perceptions for North Coast sub-regions and destinations and to explore industry needs including benchmarking models
<b>Priority Three</b>	<b>Tourism Investment Attraction:</b> Work with government and industry partners to identify, promote and facilitate public and private sector investment that will have a catalytic impact on the visitor economy and deliver sustainable tourism development that is in balance with the community and environment
<b>Priority Four</b>	<b>Tourism Product and Experience Development:</b> Support North Coast tourism stakeholders to enhance and develop innovative and contemporary tourism product and experiences related to the North Coast's Seven Experience Platforms that will strongly appeal to domestic and international visitor markets
<b>Priority Five</b>	<b>Tourism Marketing Coordination:</b> Harness the combined marketing power of the industry by providing strategic direction and facilitating cooperative campaigns with DNSW and other partners
<b>Priority Six</b>	<b>Tourism Training and Capacity Building:</b> Assist with tourism workforce planning, provide effective training and skills development support for North Coast tourism operators, and capacity building initiatives for tourism industry professionals
<b>Priority Seven</b>	<b>Tourism Crisis and Risk Management:</b> Identify and help plan for potential risks to the North Coast visitor economy and provide support to tourism stakeholders during times of crisis.

### Strategic Priority One: Tourism Leadership and Advocacy

The change in the regional tourism framework in NSW has provided an opportunity for Destination Networks to determine their role and responsibilities as to how best support tourism stakeholder interests across the region. Previously Regional Tourism Organisations (RTOs) assumed mainly a marketing role, but the new Network structure has emphasised the role of the Destination Networks as Destination Managers. As highlighted by DNSW, 'through active communication, Destination Networks will act as a conduit for all other Government agencies, and commercial partners to engage with the regional tourism industry and vice versa'.<sup>14</sup>

The stakeholder engagement process undertaken to inform this Plan identified a clear role for Destination North Coast as an important coordinating body to work in partnership with destination and sub-regional tourism stakeholders to develop a shared vision for tourism in terms of destination management and planning, tourism research, product and experience development, marketing and other elements of destination planning (investment and infrastructure development, training and capacity building, crisis and risk management).

Stakeholders further confirmed Destination North Coast was well-positioned to advocate, lobby and engage with external stakeholder organisations across local, regional, state and national levels to best represent and coordinate their needs on important tourism policy issues such as the role of shared economy for the North Coast and input into broader economic planning for the region.

Figure 6 on the next page shows the central role that advocacy and engagement has for Destination North Coast over the next four years. It is important that this is evidence based supported by reliable data and informed by the views of stakeholders within the region.

Tourism advocacy will include engaging with government departments and industry organisations including:

- Providing a strong voice for the North Coast tourism stakeholders when engaging with DNSW on a broad range of tourism issues
- Engaging with the NSW Department of Roads and Maritime Services and other government bodies relating to the Pacific Highway upgrade and other important road infrastructure development projects across the North Coast including advocating for improved directional and wayfinding signage
- Advocating to Local Governments the value of tourism for local areas and helping to facilitate sustainable tourism planning including management of visitor impacts in hot spots and consideration of climate change impacts
- Liaising with relevant government departments and events agencies to identify opportunities to encourage regional dispersal
- Engaging with NSW and Australian Government departments and agencies with aligned interests across the North Coast (e.g. NPWS, Health, Arts, Regional Development, Indigenous Business Australia).



## Figure 6: Central Role of Advocacy & Engagement







## 4.0 Objectives and Strategic Priorities cont.

### Strategic Priority One: Tourism Leadership and Advocacy

Advocate, lobby and engage with external stakeholder organisations across local, regional, state and national levels to best represent and coordinate the needs of North Coast tourism stakeholders

ACTIONS	RESPONSIBILITY	SUPPORT	PRIORITY	KPI
<b>1.1</b> Represent and advocate the needs of North Coast tourism stakeholders with DNSW and relevant national, state and regional government departments as important issues and opportunities arise	DNC, BCNSW	RDA, DNSW	HIGH	As identified
<b>1.2</b> Engage with RMS to advocate the need for strategies to improve directional and wayfinding signage associated with the upgrade of the Pacific Highway and other important road infrastructure development projects across the North Coast	DNC	DNSW	HIGH	Initial RMS meeting by February 2018
<b>1.3</b> Work with North Coast tourism stakeholders to establish a policy position on key issues that may influence visitor economies on the North Coast (e.g. the sharing economy, the role of online travel agencies)	DNC	DNSW, RDA, BCNSW	HIGH	As identified
<b>1.4</b> Develop a program that can be communicated to North Coast Councils (Councillors and senior staff) to highlight the value of sustainable tourism to local economies and the importance of appropriate planning	DNC	SCU, NOROC, MIDROC, DNSW	HIGH	During 2018



## Strategic Priority Two: Tourism Research and Insights

Destinations and regions that have established research and data collection systems to support tourism planning and decision-making are better able to plan effectively, analyse options and adapt to changing market trends and circumstances and support the industry in its endeavours.

Tourism Research Australia (TRA) provides a reliable source of visitor data that enables tourism stakeholders to evaluate a consistent visitation data set over time. Although there are reliability and availability issues of data for some LGAs where tourism is not significant, the TRA data is considered the most reliable source of visitor data available that also provides time-series historical data.

DNSW currently provides a consistent overview of the main TRA findings for NSW regions and regional LGAs including:

- North Coast NSW Region Snapshots, updated quarterly with key findings of annual TRA visitation data including some time-series analysis
- Sub Region Snapshots, provided quarterly for the Mid North Coast and Northern Rivers\*
- LGA Visitor Profiles, provided annually that present four-year averages of TRA visitation data of domestic day-trips, domestic overnight visitors and international visitors (visitors, visitor nights and expenditure, purpose of trip, origin of visitor, accommodation used, travel party type)
- LGA Accommodation Profiles, provided annually from ABS Survey of Tourist Accommodation (limited to 15 rooms or more).

**\* Note:** From the Year Ending March 2014, data for the North Coast no longer includes the Port Stephens Local Government Area. As a result, data from YE March 2014 onwards cannot be compared to previously published information. Note also, the North Coast data as published is not completely aligned to the new geographic scope of Destination North Coast however this information is available on request.

The previous North Coast RTO subscribed to the TRA online data that was made available to LGA Tourism Managers. In addition, some of the main North Coast LGAs engage tourism research consultants (that subscribe to TRA online data) to undertake more detailed analysis of the TRA data sets at LGA and destination levels, and also undertake consumer perceptions and visitor satisfaction research to inform their marketing and development plans. Examples include the Lord Howe Island Visitor Market and Travel Patterns Survey 2016 to 2017 and Great Lakes Summer Visitor Survey 2015.

**The stakeholder engagement process undertaken to develop this Plan identified an overwhelming need for improved and timely data to enhance evidence based decision-making for tourism and support destination management planning and industry development initiatives including:**

- Establishing a reliable regional platform where current and comparative regional visitor research is available and easily accessible
- Providing further analysis of existing visitation datasets provided by Tourism Research Australia/Destination New South Wales
- Identifying potential methodologies and models to access more detailed visitation data including consumer perceptions, satisfaction and behavioural research
- Providing industry benchmarking to assist operators assess their own business performance
- Providing targeted data for high priority needs such as investment and infrastructure development business cases, grant applications and feasibility studies
- Identifying opportunities for North Coast education providers to assist with research.





## Strategic Priority Two: Tourism Research and Insights

## 4.0 Objectives and Strategic Priorities cont.

Establish a realistic tourism research system to regularly track visitation, visitor expenditure, satisfaction, behaviour and perceptions for North Coast sub-regions and destinations and to explore industry needs including benchmarking models

ACTIONS	RESPONSIBILITY	SUPPORT	PRIORITY	KPI
<b>2.1</b> Establish a DNC Tourism Research Working Group (TRWG) comprising interested North Coast LGA Tourism Managers to identify tourism research needs related to TRA subscription, visitation data sets, consumer perceptions, satisfaction and behavior and industry benchmarking	DNC	DNSW	HIGH	Group established by March 2018
<b>2.2</b> Develop a user-friendly DNC Tourism Research Report that presents an evaluation of TRA visitation half-yearly data and other relevant data that is made available on the DNC website twice-yearly	DNSW	DNSW, TRWG	HIGH	Twice-yearly report on DNC website
<b>2.3</b> Regularly evaluate new consumer research and tourism industry trends reports relevant to the North Coast to understand visitor profiles and activities (e.g. Roy Morgan, DNSW Insights, Tourism Research Australia, Tourism Australia) and provide relevant findings and links on the DNC Tourism Research Page	DNC	DNC, TRWG	HIGH	Regular posting of findings & links on DNC website
<b>2.4</b> Evaluate existing tourism industry benchmarking models to determine if there is an appropriate framework that could be used for the North Coast and provide support to industry to better inform decision-making	TRWG	DNC	MEDIUM	Achieved during 2019
<b>2.5</b> Work with North Coast tourism stakeholders to provide relevant research findings to support the preparation of business cases for tourism development applications and event grant applications on the North Coast (see also Strategic Priority 3)	DNC	DNSW	MEDIUM	As identified





#### 4.0 Objectives and Strategic Priorities cont.

### Strategic Priority Three: Tourism Investment Attraction

New public and private sector tourism investment can have a catalytic impact on the region through flow on effects and can also help with knowledge transfer and improved market access. Specific strategies that can help facilitate increased inward tourism investment include:

- Providing and packaging information for prospective investors on the tourism potential of the North Coast
- Pro-actively engaging with potential investors through one-on-one meetings, investor forums, or working with partner organisations such as Austrade
- Preparing competitive tenders for high potential sites which have been well researched
- Establishing strong partnerships with local tourism industry, local investors and land owners/managers
- Increasing tourism knowledge and contacts within relevant local and State agencies that cater to investor inquiries
- Providing solid research to potential investors including tailored data such as benchmarking comparisons with other destinations/regions and case studies
- Providing information on approval processes and useful contacts for investors such as legal firms.<sup>15</sup>

The stakeholder engagement process undertaken to inform this Plan identified and supported a focus on enabling regionally significant projects that will improve visitor access and encourage dispersal across the North Coast including improved road and air access, public transport and potentially cruise infrastructure. It was also considered important to:

- Identify specific infrastructure development priorities in the region, and broader requirements across the region to ensure funding applications are supported
- Identify ways private sector tourism stakeholders can be best supported to develop feasibility and business cases
- Engage with local governments to convey the need for improved land-use planning to remove barriers and to support sustainable tourism development opportunities such as agri-tourism and ecotourism
- Provide support for local governments for master planning processes for key infrastructure development projects, as these costs are often ineligible in grant programs
- Identify public and private sector investment development opportunities in National Parks and State Forests for nature-based tourism
- Determine major trails and touring routes to drive visitation and dispersal from demand and supply side perspectives
- Support regional airports to attract infrastructure investment to improve air services to the North Coast
- Assist in identifying infrastructure grant and other funding opportunities.



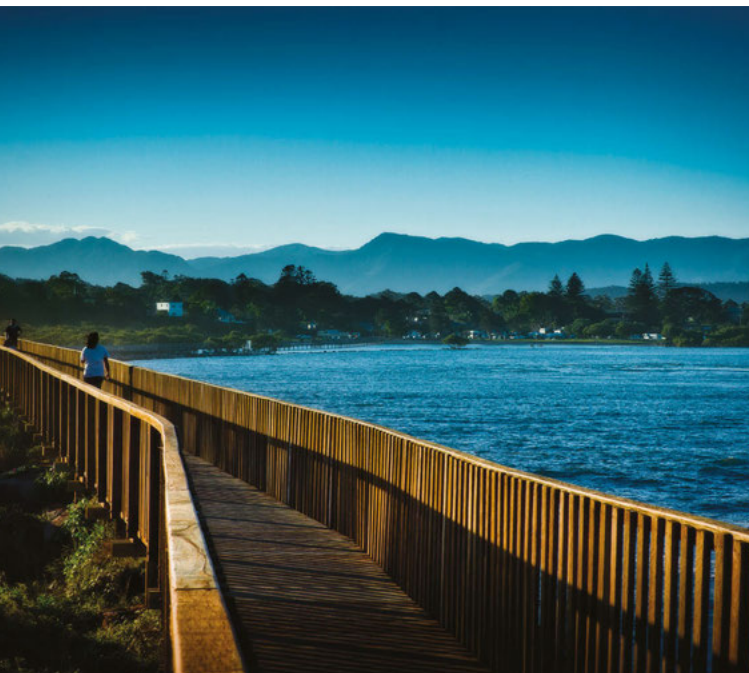


Destination North Coast will largely play a facilitation and advocacy role and work with partners including local government, Destination NSW, the Office of Regional Development (Department of Premier and Cabinet) and NSW Department of Industry, Regional Development Australia (North Coast, Mid North Coast) and Austrade to promote specific opportunities. There is also an opportunity to encourage public and private sector investment to support the key strengths of the region including nature-based tourism, Aboriginal tourism, food and agri-tourism (cellar door, farm gate and food trails), arts (galleries and art trails), heritage (history trails and interpretation), health and wellbeing, business events, events, and family attractions including educational experiences.

Other potential opportunities include:

- Nature experiences such as skywalks, zip lines, viewing platforms/lookouts, improved interpretation/signage, signature walks, mountain bike trails and wildlife experiences such as koala sanctuaries

- Coastal experiences including marinas, boat ramps, foreshore and river front redevelopment
- New accommodation including 'iconic' properties that complement regional strengths and accommodation suitable for new markets including eco-lodges, farm-stays, caravan/RV parks, backpacker accommodation, multi-market accommodation (e.g. budget dorms through to higher standard in one property)
- Accessible/inclusive facilities: accommodation/restaurants, attractions and paths to support the potential for destinations in the region to be known for accessible tourism
- Improved services and amenities such as parking for boats/caravans/RVs and toilet facilities
- Regional conference and culturally significant facilities.







### Strategic Priority Three: Tourism Investment Attraction

### 4.0 Objectives and Strategic Priorities cont.

Work with government and industry partners to identify, promote and facilitate public and private sector investment that will have a catalytic impact on the visitor economy and deliver sustainable tourism development that is in balance with the community and environment

ACTIONS		RESPONSIBILITY	SUPPORT	PRIORITY	KPI
3.1	Advocate for flagship tourism experiences in the region including the Northern Rivers Rail Trail, the Great Lakes Great Walk, the Port Macquarie Coastal Walk and the Historic Nightcap Walk	LGAs	NPWS, FCNSW, DNC	HIGH	Funding confirmed for at least one flagship experience by December 2019
3.2	Commission a research study into accommodation gaps across the North Coast to identify current/future demand opportunities and priority locations	DNC	RDA	MEDIUM	Study completed and forum held by June 2019
3.3	Work with local governments, other government agencies and the private sector to identify and attract key investment opportunities and facilitate support for high priority projects in the region (e.g infrastructure master planning)	DNC	LGAs, RDA	HIGH	Priority investments documented by Nov 2018
3.4	Commission a study into ROI on hotel/motel refurbishment and best practice examples from Australian and overseas and share findings with industry including environmental management and use of renewable energies to reduce costs/emissions (see also Action 7.2)	DNC	RDA	MEDIUM	Study completed and forum held by Nov 2018
3.5	Advocate for business event infrastructure in the region for larger conferences such as the proposed facility at Southern Cross University, conference facilities attached to accommodation as well as smaller boutique venues	Proponents	DNC, RDA	HIGH	Minimum 3 funding proposals supported by 2020
3.6	Advocate for critical road infrastructure in the region such as dual carriageway from Lismore to Ballina, the bypass to alleviate traffic congestion in the Byron Bay CBD and a flood free airport link road in Port Macquarie as well as for the refined concept design for the Coffs Harbour Pacific Bypass to be released as quickly as possible to provide certainty for the local tourism industry	DNC	RDA, LGAs	HIGH	Engaged with RMS by March 2018
3.7	Work with traditional owners, Forestry Corporation of NSW, National Parks and Wildlife Service and other land owners to identify potential locations for suitable nature-based tourism investment such as new attractions and eco-lodges	DNC	FCNSW, NPWS	HIGH	Study completed and forum held by March 2019
3.8	Support investments that will enhance the appeal of waterfront precincts including the Ballina Boat Harbour proposal, and proposed waterfront developments in locations including Grafton, Taree and Port Macquarie	LGA	NC, RDA	MEDIUM	As identified
3.9	Monitor the results of the Lord Howe Island runway extension feasibility study and provide advocacy support for the maintenance of air services	DNC	DNSW	HIGH	Briefing from LHIB by June 2018

**Note:** Actions in other Strategic Priorities also specifically assist outcomes in this area including (Actions 1.4, 2.7, 4.2)

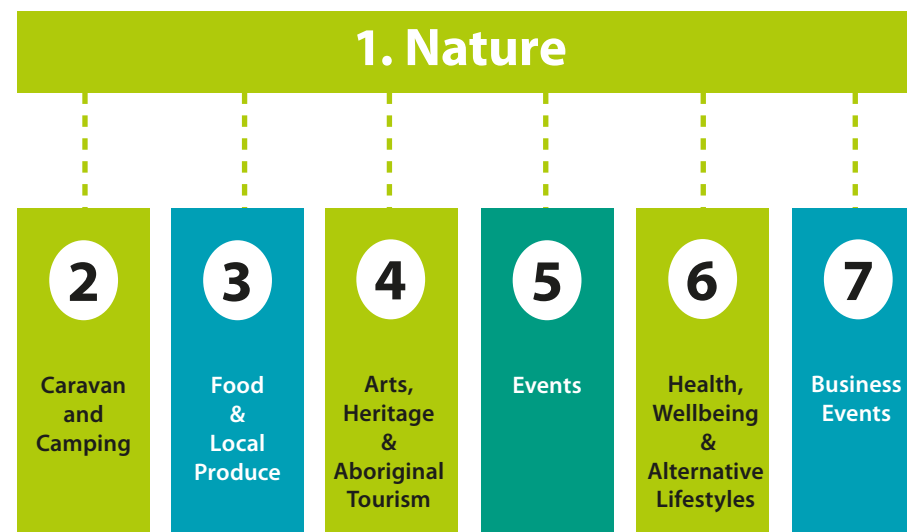


### Strategic Priority Four: Tourism Product and Experience Development

As described in Strategic Priority Two, the North Coast offers a range of visitor attractions and experiences in coastal, hinterland and rural village settings. The North Coast also has considerable competitive advantages over other coastal regions given that its green hinterland areas are within easy distance to many of its popular beach destinations. There is an opportunity to further enhance and develop innovative and contemporary tourism product and experiences related to the North Coast's natural attractions and emerging product and experience sectors.

Seven Experience Platforms are proposed to drive and coordinate tourism product and experience development across the North Coast over the next four years. The aim is to grow local visitor economies that would benefit from increased tourism (e.g. those in rural and hinterland areas), and to attract higher yielding and appropriate/respectful visitor markets to achieve sustainable tourism outcomes for mature destinations that are impacted by high tourist numbers in peak times (e.g. those in prime coastal areas). Developing nature experiences will be a key focus of this Plan. Nature has close links with the other six Experience Platforms and can be a key differentiator for the North Coast from other coastal destinations. Increasingly, quality nature experience will be a key driver of tourism given the growing urbanisation and overcrowding of many of the world's cities.

### Seven Experience Platforms





The situational analysis and stakeholder engagement process undertaken to inform this Plan confirmed the need to:

- Understand existing tourism product and experience gaps and collaborative opportunities and determine strategies to achieve new product development and sustainable business opportunities across key experience segments including nature-based tourism, food and agri-tourism, arts, heritage and Aboriginal tourism, health and wellbeing, business events, and events
- Identify opportunities where destination/sub-regions can collaborate to facilitate regional dispersal based on agreed priority experience segments
- Leverage the potential of the region's natural attractions through the development, enhancement and promotion of significant drives and trails that encourage visitor dispersal and connect visitors to distinctive nature experiences and attract an appropriate mix of visitors (e.g. international, grey nomads, business events, and educational that are more likely to travel outside of peak school holiday seasons)
- Partner with the National Parks and Wildlife Service and the Forestry Commission of NSW to develop and promote nature-based experiences
- Work with arts and heritage stakeholder organisations to develop and better promote arts and heritage opportunities
- Develop more 'export ready' product and experiences to better appeal to, and attract, international visitors across the North Coast
- Support Lord Howe Island to build awareness of existing experiences and build new opportunities that will appeal to new visitor markets (e.g. small meetings, weddings, adventure, events).

Effective tourism product and experience development requires consideration of a number of features often in combination including clustering, critical mass, accessibility and uniqueness. There is also a need to provide a diversity of visitor products and activities to complement core visitor attractions including a range of accommodation types to suit different visitor markets, vibrant events and festivals, nature-based experiences, recreational and leisure activities, quality food and beverage experiences, and cultural and heritage experiences. Support is also required to identify the gaps and opportunities to encourage entrepreneurs to establish quality and innovative tourism products.<sup>16</sup>

Tourism Australia and Destination New South Wales strongly advocate the need for nature-based and Aboriginal tourism product and experiences to be 'international ready' and specifically 'China ready' if targeting international visitors. DNSW's China Tourism Strategy 2012 to 2020 identifies that a major challenge for NSW in China is that despite the fact that the State clearly has many compelling experiences with which to engage consumers, there is currently a very limited range of products represented in-market. Concerns around product quality, consumer relevance and language needs are also emerging. The Strategy proposes that the most compelling proposition for Australian destination promotion in China is 'City plus Nature' or 'Accessible Nature' and the broader element of 'naturalness.' This coupled with perceived attributes of Australia as being a welcoming and a safe destination creates positive expectations and motivations among Chinese visitors. The key experiences requested by Chinese visitors relate to how Australians live, work and play. What and where do they eat? How do they spend their leisure time? How do they use 'nature' and maximise 'naturalness'.<sup>17</sup>





## Strategic Priority Four: Tourism Product and Experience Development

## 4.0 Objectives and Strategic Priorities cont.

Support North Coast tourism stakeholders to enhance and develop innovative and contemporary tourism product and experiences related to the North Coast's Seven Experience Platforms that will strongly appeal to domestic and international visitor markets

ACTIONS		RESPONSIBILITY	SUPPORT	PRIORITY	KPI
4.1	Undertake detailed analysis of TRA visitation data and other available consumer data to gauge visitor profiles and demand for activities related to the North Coast Seven Experience Platforms	DNC	DNSW	HIGH	Completed by November 2018
4.2	Provide support for North Coast tourism businesses with strong potential to apply for funding from the DNSW Regional Tourism Product Development Program and other NSW and Australian Government funding programs	DNSW	DNC	HIGH	Minimum 5 businesses funded by 2019
4.3	Develop a five-year North Coast Nature-based Tourism Development Strategy to identify opportunities and strategies to coordinate and encourage nature-based tourism product and experience development across the North Coast in collaboration with NPWS, FCNSW (see also Action 4.5)	DNC	NPWS, FCNSW, DNSW, LGAs	HIGH	Strategy completed by December 2018
4.4	Work with local food groups and the DNSW Food and Wine Specialist, and the private sector to identify, create and promote new and existing food/beverage/produce trails to connect visitors to North Coast food, beverage and agri-tourism experiences and advocate on policy issues that are constraining the sector	DNC	DNSW, Local Food Groups	HIGH	Engaged with DNSW Specialist by March 2018
4.5	Work with the DNSW Aboriginal Tourism Specialist and other relevant government departments and agencies to identify ways to enhance existing, and promote new export ready Aboriginal tourism experiences across the North Coast including linking current available Indigenous product	DNC	DNSW, NPWS, IBA	HIGH	Engaged with DNSW Specialist by March 2018





## Strategic Priority Four: Tourism Product and Experience Development cont.

## 4.0 Objectives and Strategic Priorities cont.

Support North Coast tourism stakeholders to enhance and develop innovative and contemporary tourism product and experiences related to the North Coast's Seven Experience Platforms that will strongly appeal to domestic and international visitor markets

ACTIONS	RESPONSIBILITY	SUPPORT	PRIORITY	KPI
<b>4.6</b> Establish a DNC Caravan & Camping Working Group to address common policy issues such as freedom camping, to share best practice and to cooperatively grow the sector	DNC	DNSW, CCWRG, NPWS	HIGH	Group established by June 2018
<b>4.7</b> Develop a bike tourism strategy for the North Coast and advocate for support for bike tourism at a State level	DNC	DNSW, FCNSW, NPWS, LTOs, LGAs	MEDIUM	Strategy completed by June 2019
<b>4.8</b> Work with Arts Northern Rivers, Arts Mid North Coast, Arts NSW and local galleries, local government and local venues to identify strategies to support local arts and cultural attractions to develop and promote distinctive arts, cultural and heritage experiences across the North Coast	DNC	ANSW, CNSW	MEDIUM	Engaged with ANSW and HCNSW Specialist during 2018
<b>4.9</b> Identify and support the development of tourism products and experiences related to health, well-being and alternate lifestyles to grow the segment	DNC	DNSW, LGAs, LTOs,	MEDIUM	Report prepared by June 2019
<b>4.10</b> Support the development and promotion of events that align with the North Coast's Seven Experience Platforms to attract overnight visitation, help address seasonality, dispersal and raise awareness for North Coast destinations and sub-regions	DNC	DNSW	HIGH, MEDIUM LOW	As identified
<b>4.11</b> Work with North Coast business events stakeholders to develop a North Coast Business Events Strategy and undertake a feasibility study to assess the return on investment of Destination North Coast taking an active role in attracting business events	DNC	DNSW, LTOs, LGAs	HIGH	Feasibility completed by June 2018
<b>4.12</b> Identify and support the development of export ready tourism products and experiences in the region	DNSW	DNC	HIGH	Training conducted by October 2018
<b>4.13</b> Support Lord Howe Island to develop products that will appeal to new visitor markets (e.g. small meetings, weddings and adventure, events)	DNC	DNSW	HIGH	Initial workshop conducted by June 2018



### Strategic Priority Five: Tourism Marketing Coordination

Marketing traditionally has been the focus of a Regional Tourism Organisation in NSW, and currently there is a strong expectation from industry that RTOs have an active role in the market place. The new DNSW Network structure provides an opportunity for Destination North Coast to adopt less of an implementation role and more of a tourism marketing coordination role, identifying opportunities for collaboration across the North Coast, with destination marketing strategies designed and implemented by local stakeholders (LGAs, LTOs, industry) and DNSW.

Internationally, there is a strong advantage to promote the North Coast regionally. There is also an opportunity to build on the brand equity of The Legendary Pacific Coast and better integrate and promote coastal and hinterland experiences to encourage greater visitor dispersal without losing marketing focus. The key international source markets for the North Coast are: Europe accounting for 55% of all international visitors, followed by North America (17%), Asia (12%), and New Zealand (11%).<sup>12</sup> The Asian market including China is still relatively small, but growing over recent years.

Domestically, with the exception of the drive market, the North Coast is not perceived or consumed as a single destination so it makes more sense to promote the specific destinations or grouping of the destinations within the North Coast. It will be important to establish a marketing framework for the region where there are key overall attributes and specific core messages identified at the sub-destination level. There is an opportunity to promote particular themes such as food that can help connect the coast and the hinterland. Increasingly, marketing activities will utilise social media, with public relations also likely to prove an effective return on investment.

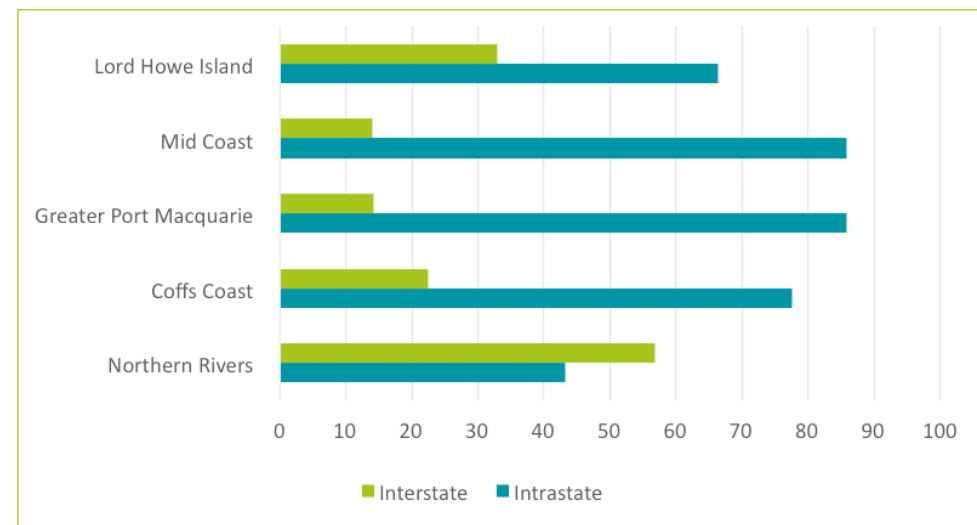
From 2009-2017, some of the key domestic trends that have been identified in an analysis of visitation to the North Coast include:

- The length of stay is declining – down 10.5% to 3.8 nights. This is likely due to the continued move to short breaks in Australia and the shorter trips associated with improved air access
- VFR (+40%), Business (+41%) and 'other' (+135%) growing faster than leisure

- Queensland is the fastest growing source market (+66%), helped by improved road access to the 3.4 million people that live in South East Queensland, followed by Victoria which is up 53% off a much smaller base supported by an increased number of direct flights
- Strong growth in 60-69 age segment (+51%) and >70 (+75%), with the ageing of the Australian population.<sup>2</sup>

Figure 7 below shows the different nature of domestic source markets across the region. With its proximity to Queensland, the Northern Rivers get a far higher proportion of interstate visitors. The closer to Sydney, the more important Sydney is a source of visitors to the region. For Lord Howe Island, NSW accounts for an estimated 66% of domestic visitors followed by Victoria with 17%.

**Figure 7: Domestic Source Markets (%)**



Source: Derived from National Visitors Survey YE June 2017 and Lord Howe Island Visitors Survey 2017.



**The stakeholder engagement process undertaken to inform this Plan confirmed the need to:**

- Establish a collaborative marketing framework to inform regional stakeholders and partners including DNSW on how destinations within the region should best be promoted
- Establish a 12-month forward calendar of regional and local events to assist planning to highlight gaps in low seasons and opportunities to encourage regional visitor dispersal and longer stays
- Form strategic partnerships with airports servicing the region including Port Macquarie, Coffs Harbour, Ballina-Byron Gateway Airport, the Gold Coast Airport and smaller regional airports (Grafton, Lismore, Taree) to promote the region
- Determine opportunities where destination/sub-regions can collaborate to facilitate regional dispersal based on agreed priority experience segments (e.g. nature-based tourism, water-based tourism, Aboriginal tourism, food and beverage, agri-tourism, events and business tourism)
- Host branding review workshop/s in the Northern Rivers to develop a consistent positioning for the region and to explore funding options for joint marketing campaigns
- Support broader touring routes and partnerships including the Waterfall Way, Rainforest Way and the Green Cauldron and work together with neighbouring regions including Sydney Surrounds North, Country and Outback and Southern Queensland destinations
- Improve international marketing by developing export ready product in the region
- Encourage DNSW to continue to use the Legendary Pacific Coast as an umbrella vehicle to market the North Coast internationally and domestically where appropriate, and to promote Lord Howe Island as a specific experience to relevant markets
- Identify ways to support Lord Howe Island to continue to promote the destination and to reach new visitor markets.







## Strategic Priority Five: Tourism Marketing Coordination

## 4.0 Objectives and Strategic Priorities cont.

Harness the combined marketing power of the industry by providing strategic direction and facilitating cooperative campaigns with DNSW and other partners

ACTIONS	RESPONSIBILITY	SUPPORT	PRIORITY	KPI
<b>5.1</b> Work with regions across the destination to articulate a clear positioning, identify core target markets and to develop destination fact sheets. These will be used to leverage support from DNSW, Tourism Australia and other partners.	DNC	DNSW, LGAs, LTOs, NPWS	MEDIUM	Framework completed and communicated to partners by June 2018
<b>5.2</b> Encourage and support North Coast tourism businesses to list their products and services on ATDW/Get Connected	LGAs, LTOs	DNSW	HIGH	On-going
<b>5.3</b> Communicate DNSW and partner cooperative marketing opportunities and support destinations/industry to access these opportunities	DNC	DNSW	HIGH	On-going
<b>5.4</b> Develop a 12-month forward calendar of regional and local events to be available on the DNC website to assist event organisers to identify gaps in low seasons and opportunities to encourage regional visitor dispersal and longer stays	DNC	DNSW	HIGH	By December 2018
<b>5.5</b> Conduct branding review workshop/s in the Northern Rivers to develop a consistent positioning for the region and to explore interest for cooperative funding options for joint campaigns related to the North Coast's Seven Experience Platforms	DNC	7 LGAs	MEDIUM	Workshop/s held by June 2018
<b>5.6</b> Encourage DNSW and other industry support for major touring routes and partnerships including The Legendary Pacific Coast, Waterfall Way, Rainforest Way and the Green Cauldron and work together with neighbouring regions including Sydney Surrounds North, Country and Outback and Southern Queensland destinations	DNC	DNSW, LGAs	MEDIUM	Touring routes feature in DNSW marketing activities
<b>5.7</b> Form strategic partnerships with airports/local government owners servicing the region including Port Macquarie, Coffs Harbour, Ballina-Byron Gateway Airport, the Gold Coast Airport and smaller regional airports to promote the region	DNC	LGAs, Airports, DNSW	MEDIUM	2 partnerships developed by December 2018





## Strategic Priority Five: Tourism Marketing Coordination cont.

Harness the combined marketing power of the industry by providing strategic direction and facilitating cooperative campaigns with DNSW and other partners

## 4.0 Objectives and Strategic Priorities cont.

ACTIONS		RESPONSIBILITY	SUPPORT	PRIORITY	KPI
5.8	Continue to use the Legendary Pacific Coast as an umbrella vehicle for DNSW to market the North Coast internationally	DNSW	DNC	MEDIUM	Agreement reached with DNSW by May 2018
5.9	Continue to promote Lord Howe Island's specific product and experience attributes to relevant visitor markets	LTO	DNSW, DNC	MEDIUM	As identified
5.10	Assess a new partnership model for cooperative international marketing of the region	DNC	DNSW, LGAs, NPWS, LTOs	LOW	Model proposed to partners by June 2020
5.11	Review with DNSW the cooperative DNSW program guidelines to make them more flexible to meet the needs of regional partners	DNC	DNSW, LGAs	HIGH	Discussion held by March 2018
5.12	Coordinate trade familiarisation and public relations/media visits to region	DNC, LGAs, LTOs,	DNSW	MEDIUM	As identified



### Strategic Priority Six: Tourism Training and Capacity Building

The quality of a visitor's experience comprises a range of promotional and service encounters provided by various tourism businesses pre-visit, in-transit, in-destination and post-visit. The quality of these interactions plays an important role in a destination's and a region's ability to assemble and deliver a complete and satisfying visitor experience, build word of mouth recommendations and repeat visitation. The advent of digital media technologies has also meant that visitors are making more informed decisions about where they want to stay and what they want to experience during their trips.

The challenge for the North Coast is to determine how to best influence workforce planning to meet tourism and hospitality industry needs and identify ways to best support local operators to deliver quality service and experiences and keep up to date with the latest recreation and leisure and digital marketing trends. There is also a need to provide support for LGA and LTO tourism managers and executives to keep abreast of trends and issues influencing regional tourism across the North Coast and Australia more broadly.

The stakeholder engagement process undertaken to inform this Plan confirmed the need to provide effective training and up-skilling opportunities for tourism operators and professionals and improved workforce planning for tourism and hospitality across the region. This includes the design, availability and support for:

- Regularly available and cost effective programs for small to medium enterprises to assist operators to understand how to be more effective including targeting areas such as digital marketing, customer service, business activation/growth and event management
- Shared materials, use of mentors, sharing success stories, and encouraging self-help between operators to create a legacy of material for future use
- Capacity building programs for tourism professionals to assist LGA managers and industry professionals to be more effective in their work and to foster collaboration across the North Coast
- Engagement with North Coast training and education providers to assist with tourism workforce planning, training and education opportunities.







## Strategic Priority Six: Tourism Training and Capacity Building

### 4.0 Objectives and Strategic Priorities cont.

Assist with tourism workforce planning, provide effective training and skills development support for North Coast tourism operators, and capacity building initiatives for tourism industry professionals

ACTIONS	RESPONSIBILITY	SUPPORT	PRIORITY	KPI
<b>6.1</b> Create a Tourism Best Practices and Tools page on the DNC website to showcase case studies of North Coast operations that are achieving success including: digital marketing, customer service, accommodation development/motel refurbishment, business activation/growth, event management, and environmental management (see also Action 3.4)	DNC	DNSW, RDA, LGAs, BCNSW	LOW	By June 2019
<b>6.2</b> Engage with the NSW Department of Premier and Cabinet's Career Pathways project and other stakeholders to positively influence tourism workforce planning and ensure that skilled staff are available locally and that there are good employment opportunities locally	DNC	RDA, DPI, BCNSW, SCU, TAFE	MEDIUM	During 2018
<b>6.3</b> Establish an annual North Coast Tourism Training and Skills Development Program that provides regular, worthwhile and cost effective training including digital marketing, quality customer service and important segments such as inclusive/accessible tourism	DNC	DNSW, RDA, BCNSW, SCU, TAFE	HIGH	By December 2018
<b>6.4</b> Re-establish the annual North Coast Tourism Awards held in conjunction with a tourism symposium to build capacity, showcase best practice and encourage more entries into the NSW and National Tourism Awards and to provide a forum for celebrating success	BCNSW, DNC	DNSW, RDA, SCU, TAFE	HIGH	First Award Ceremony July 2018



### Strategic Priority Seven: Tourism Crisis and Risk Management

The vulnerability of tourism destinations to socio-economic and environmental shocks (rapid-onset events) and stressors (slow-onset events) is widely recognised.<sup>18</sup> On-going concerns have also been raised about the vulnerability of the tourism industry globally to threats including financial and economic instability, health epidemics, the increasing price of oil, impact of natural hazards, and accelerating global environmental change.<sup>19</sup> Political unrest and terrorist attacks are also problematic for an industry that relies on the maintenance of positive visitor experiences and images. Overdevelopment and the pursuit of short-term economic gains also threaten the image and the sustainability of destinations and host communities, particularly those whose appeal depends on pristine natural environments.<sup>20</sup>

The North Coast visitor economy is not immune to risks and crises. Variations in economic conditions such as fluctuating fuel prices and currency values may impact visitation and expenditure in the region as was experienced between 2011 and 2015. Environmental risks that may impact the North Coast visitor economy include risks of drought, bushfire and flood.

Effective crisis and risk management planning, as well as efficient preparation, speedy response, and strategic recovery following crises, are crucial for tourism businesses and local visitor economies. Best practice regional tourism organisations work with local governments and tourism businesses to prepare crisis management strategies in order to be prepared for any unexpected crises or risk that may affect business viability, community and visitor wellbeing, and the environment. This includes developing emergency management plans for infrastructure sites in town centres and key visitor sites, incorporating crises and risk management plans for tourism into relevant local government plans, encouraging tourism business to develop risk management strategies for their own operations, and developing and implementing tactical marketing campaigns to respond immediately and across the longer term to crisis situations.<sup>16</sup>

The floods in the Northern Rivers during March 2017 are recent reminders of environmental shocks that have impacted communities, businesses, and local visitor economies. One of the first tasks of DNC was to work with DNSW to activate a \$300,000 Northern Rivers Flood Recovery Campaign immediately after the floodwaters settled to drive return visitation and expenditure to the area. On-going debate about sharks and mitigation strategies is another important risk that has the potential to influence visitor perceptions and travel behaviors to our coastal destinations as well as resident safety and attitudes. Changes in environmental conditions due to climate change along the North Coast also require assessment and mitigation measures for tourism into the future.

The stakeholder engagement process undertaken to inform the development of this Plan confirmed a role for Destination North Coast to assist with crisis mitigation and crisis management planning and recovery.







## Strategic Priority Seven: Tourism Crisis and Risk Management

### 4.0 Objectives and Strategic Priorities cont.

Identify and help plan for potential risks to the North Coast visitor economy and provide support to tourism stakeholders during times of crisis building initiatives for tourism industry professionals

ACTIONS		RESPONSIBILITY	SUPPORT	PRIORITY	KPI
7.1	Provide tourism crisis and risk management resources on the DNC website (e.g. UNWTO Toolbox for communications and resources; Attorney-General's Department Emergency Management website, DNSW)	DNC	DPC, DNSW, NPWS	HIGH	Web page developed by June 2018
7.2	Identify and communicate information resources about tourism and climate change that would be relevant to North Coast tourism businesses	SCU	DNC	MEDIUM	By June 2019
7.3	Advocate for Local Governments to incorporate crisis management planning for tourism in their own strategies and plans	DNC	RDA	HIGH	During 2018
7.4	Provide crisis recovery support for LGAs when required including assisting with recovery funding applications for communications and marketing campaigns	DNC	RDA	HIGH	As required







## 5.0 Implementation

To ensure the effective implementation of this Plan, it is important that Destination North Coast takes the lead role in coordinating the implementation of the strategic priorities and associated actions of this Plan.

Key Performance Indicators have been included in each of the Actions Plans to provide a timeline and deliverable outcome for each action. Collaboration with other national, state, regional and local level tourism stakeholders identified as having a primary responsibility or support role in the delivery of this Plan will be critical to its success. This will involve working cooperatively with tourism managers and executives from Local Government and Local Tourism Organisations across the North Coast and the following stakeholder organisations:

- Destination New South Wales (All strategic priorities)
- Regional Development Australia (Actions 1.1, 1.3, 3.2, 3.3, 3.4, 3.5, 3.6, 3.8, 6.1, 6.2, 6.3, 6.4, 7.3, 7.4)
- NSW Department of Premier and Cabinet (Action 6.2)
- NSW Roads and Maritime Services (Action 1.2)
- National Parks and Wildlife Service (Actions 3.1, 3.7, 4.3, 4.5, 4.6, 4.7, 5.1, 5.10, 7.1)
- Forestry Commission NSW (Actions 3.1, 3.7, 4.3, 4.7)
- NSW Business Chamber (Actions 1.1, 1.3, 6.1, 6.2, 6.3, 6.4)
- Southern Cross University (Actions 1.4, 6.2, 6.3, 6.4)
- TAFE NSW (Actions 6.2, 6.3, 6.4)

In addition, support and advice will be sought from other Australian and NSW government departments and tourism organisations identified in this Plan, and as more detailed needs are identified.

Destination North Coast will monitor the implementation of the DMP on an annual basis and prepare an Annual DMP Report to evaluate the progress undertaken in achieving priorities and actions contained in this Plan. Key outcomes will then be communicated to North Coast tourism stakeholders, including presentation and discussion of key achievements and at the proposed annual North Coast Tourism Symposium.

Given this DMP has been developed as a four-year plan it will be important to identify any new opportunities and challenges influencing tourism on the North Coast and adjust the Plan accordingly in collaboration with the DNC Board and North Coast tourism stakeholders.







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## 7.0 Appendices

### Appendix 1: LIST OF STAKEHOLDER ORGANISATIONS REPRESENTED IN THE STAKEHOLDER ENGAGEMENT PROCESS

#### Stakeholder Organisations represented at DMP Workshop – Port Macquarie (13 September 2017)

Bellingen Shire Council	Glasshouse Port Macquarie	Port Macquarie Hastings Council
Bent On Food	Greater Port Macquarie Tourism	Rydges & Sails Resort
Coffs Harbour City Council	MidCoast Council	Sea Acres NPWS
Big 4 Sunshine South West Rocks	Mansfield on the Manning	
Big 4 Great Lakes	Nambucca Shire Council	
Clarence Valley Council	NSW National Parks and Wildlife Service	
Diamond Waters Treehouse Retreat	NSW Department of Premier and Cabinet	
Dorrigo Rainforest Centre NPWS	NSW State Forestry Corporation	

#### Stakeholder Organisations represented at DMP Workshop – Kingscliff (19 September 2017)

Ballina Shire Council	Eltham Valley Pantry	Queensland Airports Ltd
Ballina Byron Gateway Airport	Evans Head Business Chamber	Richmond Valley Council
Brunswick Heads Visitor Information Centre/	Kyogle Council	Strategy Monsters Marketing the Evans Head Tourist Guide
Green Cauldron Tours	Kingscliff Chamber of Commerce	Southern Cross University
Byron Shire Council	Lismore City Council	TAFE NSW
Casino Beef Week	Macadamia Castle	The Byron at Byron
Clarence Valley Council	NSW Department of Premier and Cabinet	
Destination Byron	NSW State Forestry Corporation	
Destination Tweed	Nightcap Ridge	



## Appendix 1: LIST OF STAKEHOLDER ORGANISATIONS REPRESENTED IN THE STAKEHOLDER ENGAGEMENT PROCESS cont.

**Stakeholder Organisations represented at DMP Workshop – Lord Howe Island (12 & 13 October 2017)**

Arajilla Resort	Lord Howe Island Environmental Tours
Bowker Beach House/Lagoon Landing	Lord Howe Island Tourism Association (Chair, Committee Members, Executive Officer, Tourism Officer, Visitor Centre Officer)
Coral Café	Milkyway Apartments
Hideaway Apartments	Pro Dive Lord Howe Island
Leanda Lei/Marine Adventures	Somerset Apartments
Lord Howe Island Board (CEO, Manager Operations & Corporate Services, Project Manager Rodent Eradication, Manager Environment World Heritage)	

**Stakeholder Organisations represented at DMP Marketing Workshop – Port Macquarie (9 November 2017)**

Bellingen Council	Eastern Tour Services	Port Macquarie Hastings Council
Bent on Food	Forestry Corporation of NSW	Rydgcs/Sails PMQ
Big4 Great Lakes Holiday Park	Greater Port Macquarie Tourism Association	Unkya Cultural Eco Tours
Coffs Harbour City Council	Mansfield on the Manning	
Diamond Waters Tree House	NSW National Parks and Wildlife Service	

**Stakeholder Organisations represented at DMP Marketing Workshop – Ballina (14 November 2017)**

Ballina Council	Destination Tweed	Middle Star
Ballina Byron Airport	Elements of Byron	Nightcap Ridge
Byron Business Events Bureau	Green Cauldron Tours/Brunswick Heads VIC	North Coast Holiday Parks – Lennox Head
Byron Shire Council	Hertz	Richmond Valley Council
Casino Beef Week	Iluka Riverside Tourist Park, Clarence Valley Council	The Byron at Byron
Clarence Valley Council	Lismore Tourism	
Destination Byron	Mavis's Kitchen	



## Appendix 1: LIST OF STAKEHOLDER ORGANISATIONS REPRESENTED IN THE STAKEHOLDER ENGAGEMENT PROCESS cont.

**Stakeholder Organisations represented at DMP Review Workshop – Coffs Harbour (29 November 2017)**

Aanuka Beach Breakfree Resorts	Diamond Waters Treehouse Retreat	Riverside Holiday Park – Urunga
Bellingen Shire Council	Dorrigo Rainforest Centre NPWS	Sea Acres NPWS
Bent on Food	Eastern Tour Services	Southern Cross University
Big 4 Great Lakes Holiday Park	Nambucca Shire Council	TAFE NSW
Big 4 Sunshine South West Rocks	National Parks and Wildlife Service	Wajaana Yaam Adventure Tours
Bonville International Golf Course	NORTEC	
Casino Beef Week	Opal Cove Resort	
Clarence Valley Council	Port Macquarie Hastings Council	
Coffs Harbour City Council	Regional Development Australia	

**NSW and National Stakeholder Briefing Session – Sydney (29 January 2018)**

Destination NSW Executive Team	NSW National Parks and Wildlife Services
Lord Howe Island Tourism Association	NSW Roads and Maritime Services
NSW Caravan & Camping Industry Association	Tourism Accommodation Australia