Visitor Economy
Industry Action Plan
2030

NSW
GOVERNMENT

Forewords

Premier

New South Wales is not just Australia's international gateway, but a nationally and internationally recognised destination for visitors.

Shortly after coming to government, the NSW Liberals & Nationals Government released the NSW Visitor Economy Industry Action Plan (VEIAP), recognising the importance of the visitor economy sector to our state's prosperity. The results of this are plain to see, with 50.4% growth in the sector since March 2011.

This is a wonderful success, not just for the industry and the people it employs, but also for the broader population of NSW as the visitor economy contributes to our economic success and continues to showcase our state to a global audience.

As a government that is not content to sit back, we have recognised that the time is right for a review of the VEIAP; to identify lessons learned and opportunities to harness.

The resulting revised VEIAP identifies and articulates a number of areas for growth and has laid down new challenging targets for government and industry to drive our visitor economy to 2030 and beyond.

The NSW Government is committed to supporting further growth of tourism and ensuring the benefits of a thriving visitor economy are felt across the entire length and breadth of the state.

I applaud the work done in the review. It sets in place the foundations for continued growth and success.

Gladys Berejiklian
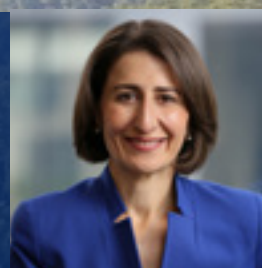
Deputy Premier

The importance of the visitor economy to NSW cannot be over stated. Latest figures show that over the period from December 2016 to December 2017, visitors to NSW stayed a total of 194.5 million nights and spent $29.1 billion. Importantly, the benefits of visitors to NSW are widely spread, with regional NSW attracting 65% share of all visitors to NSW.

These figures place the visitor economy sector up there with our agricultural and resources sectors as major contributors to the NSW economy. Properly managed and supported, the visitor economy sector will continue to deliver sustainable jobs and prosperity for the people of NSW into the future.

NSW Government activities strongly underpin our visitor economy. Support, marketing and other measures such as legislation and regulation ensure the conditions are right to deliver a supportive climate for continued growth and development of the sector.

While the successes of the visitor economy are undeniable this five-year review of the government's action plan is both timely and welcome. It affirms that we are on the right track, and provides new focus to ensure NSW continues to reap the benefits of the hard work put in by the people and businesses that drive our visitor economy.

The contribution by industry to this review has been most welcome, ensuring that the new Visitor Economy Industry Action Plan 2030 continues to provide a relevant and accessible blueprint for the sector's growth and prosperity.

John Barilaro

Minister for Tourism and Major Events

The NSW Visitor Economy Industry Action Plan (VEIAP) was first laid down in 2012 and has helped the NSW economy to prosper. In total, the visitor economy targets set in the VEIAP have delivered some $12 billion more value in overnight expenditure than would otherwise have been created.

In 2017, the NSW Government appointed an independent Visitor Economy Taskforce to review the VEIAP five years after its introduction. The Taskforce set out to validate the effectiveness of the VEIAP and to ensure the plan continues to meet the needs of the sector, the NSW Government, and the people of NSW.

This VEIAP 2030 incorporates the high-level findings from the *Independent Review of the NSW Visitor Economy Industry Action Plan*, the lessons learned in the past five years, and confirms the value the VEIAP has added to the visitor economy in working toward doubling overnight expenditure to $36.6 billion by 2020. With the support of the sector, significant value has been added to the visitor economy, with the 2012 targets identified as helping drive the sector to the outstanding successes that it is has achieved to date.

The taskforce review identified a number of areas for growth and recommended new targets be set to challenge industry and NSW Government. These targets are to:

- more than triple the 2009 overnight visitor expenditure amount by 2030, aiming to achieve $45 billion by 2025 and $55 billion by 2030
- aim to achieve $20 billion in regional overnight visitor expenditure by 2025 and $25 billion by 2030, in alignment with the overall 2030 target.

These targets will drive the continued success of the visitor economy well beyond the original 2020 target. In direct response to the Visitor Economy Taskfore review, the NSW Government will align cross-government departments and establish an ongoing communication channel with industry through a new 'Team NSW Tourism Taskforce'. The Team NSW Tourism Taskforce will oversee and support the development of the visitor economy and drive implementation of this VEIAP 2030.

The continued success of the visitor economy relies on the NSW Government providing a supportive legislative, marketing, and financial climate to deliver an environment supportive of continued expansion. NSW must actively compete to bring big events to the state and maintain those already here. As Minister for Tourism and Major Events, I will be guided by this action plan when considering NSW Government support for future major events.

I wish to congratulate all involved in the review process. In particular, the participation of industry has been crucial in delivering a document that reflects the needs of the visitor economy, the NSW Government and the people of NSW.
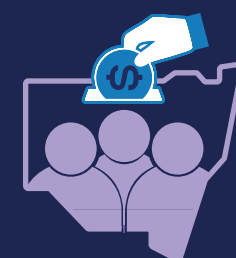
Adam Marshall

4,200,000 international visitors in 2017
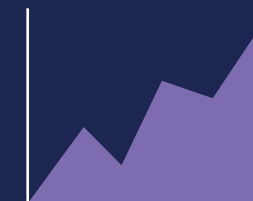
$10.4 BILLION international visitor spend '17

$34.2 BILLION GSP to NSW economy in 2016/17

171,100 people directly **employed** in tourism sector in 2016/17

90.9K JOBS indirectly employed in tourism sector

50.4% GROWTH in the sector since March '11

$29.1 BILLION overnight expenditure

194.5 MILLION nights per yr 57.9M day trips

9x average domestic spend international visitor spend per trip

$24.8 BILLION domestic visitor spend '17

$43 MILLION committed to **a new regional** tourism framework

588 EVENTS = $3 billion visitor spend

$16B regional expenditure = **regional jobs**

We set a course. The plan is working.

Timeline

2018
- **19 new airline services, 1.4M extra seats to Sydney**—Destination NSW has partnered with Sydney Airport Corp. and airlines
- **382% attendance growth to Vivid Sydney** festival since 2011 (2.3M attended in 2017)
- **Cruise Development Plan** launched to guide for the future of NSW cruise-based tourism

2017
- **40 year Tourism & Transport Plan** launched with focus on supporting growth in the NSW visitor economy
- **All 26 actions completed** from the Aboriginal Tourism Action Plan 2013–16
- **NSW wins Best Event State** from the Australian Event Awards. NSW: Australia's premier event destination
- Historic **memorandum of understanding** and the **Western Sydney Visitor Economy Strategy** signed by Western Sydney Chamber of Commerce and the Westen Sydney Business Connection
- **$300M** Regional Growth Environment & Tourism Fund created, programs started
- **Guangzhou China Destination NSW** office opened. South China BD Manager appointed
- **NSW Regional Conferencing Strategy & Action Plan** and website developed. Grants & pilot programs started

2016
- **Beijing China Destination NSW** office opened. North China BD Manager appointed
- **$49M in upgrades** to Sydney Opera House, Art Gallery of NSW, State Library, Australian Museum & Powerhouse Museum
- **$1.5B ICC opens** & the **Western Sydney Airport** plans announced
- **Six Destination Networks created** in place of the Regional Tourism Organisations

2015
- **Transformation Plan: The Bays Precinct released** with a $250M plan to redevelop the fish markets
- **$200M invested in Circular Quay upgrade** to the wharf & transport interchange
- **Barangaroo Point Reserve opens** to the public — **OPEN**
- **Brand NSW created** including 'Love Every Second' and 'It's On' promotional campaign brands
- Historic **Sydney CBD** standstone buildings to be converted to a luxury hotel. Goldfields House sold for $145M
- **$139M committed** to Walsh Bay Arts Precinct in the Cultural Infrastructure Program ($68M additionally added)
- **2M Facebook likes** on the Sydney Facebook page
- **China Market Toolkit** launched for tourism operators and businesses serving the Chinese market

2014
- **NSW hospitality careers campaign** to promote careers in hospitality to young people
- **Visitor supply and demand studies** for accomodation in Greater Sydney, the Hunter and Northern Rivers — **NO VACANCY**
- **China UnionPay promotion** of Sydney and NSW to 4.5B UnionPay cardholders worldwide — **UnionPay 银联**
- **Overseas Passenger Terminal upgrades** including the moorings for large ships to dock
- **Jhappi Time Bollywood campaign** inc. special travel offers and an Indian Bollywood movie
- **$2.4M invested** in the Great Walks of NSW initiative: Royal Coast Track and Sydney Harbour Scenic
- **$110M invested** in rail, airports and cruise infrastructure including 28 regional airport upgrades from the RTI fund
- **StudyNSW established** and **$47M invested** to attract and retain international students

2013
- **Chengdu China Destination NSW** office opened. West China BD Manager appointed
- Developed **NSW first workshop program** to support the tourism industry
- **Aboriginal Tourism Action Plan 2013–16** released to support indigenous based business and tourism
- **$57M invested** by the state into the development of a new **White Bay Cruise Terminal**
- **$21.6M Regional Visitor Economy Fund** to revitalise regional tourism funding reform announced
- **Destination management planning** resources to support NSW tourism and events developed

2012
Developed the **China Tourism Strategy** 2012–20 and **invested $15M** over four years

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In 2012, the NSW Government appointed an independent Visitor Economy Taskforce to develop a strategy to achieve double overnight visitor expenditure to the state by 2020[1]. At the time, the visitor economy was growing at a rate of only 2.2% a year[2].

In response, the NSW Government established the 2012 Visitor Economy Industry Action Plan (VEIAP). It detailed 167 actions and 48 recommendations, with the aim to double overnight visitor expenditure from $18.3 billion in 2009 to $36.6 billion by 2020.

To achieve this 'stretch target' consistent with a 'very high growth' scenario, bold action by the NSW Government and industry was required.

Annual average visitor economy growth of 7.1% a year was needed to achieve a total 44.8% increase in overnight visitor expenditure by 2020. Since 2012, 92% of all actions outlined in the VEIAP have been delivered and yielded substantial gains, including:

- overnight visitor expenditure increased from $20.3 billion to $29.1 billion per year
- growth in jobs increased to 171,100 people directly employed across the state and a further 90,900 people indirectly[3]
- 29.3% increase in overnight visitor numbers to 35.7 million visitors in 2017
- 27.3% increase in visitor nights comprising 100.1 million domestic and 94.4 million international visitor nights[4]
- $20 billion in new and upgraded infrastructure including contributions to regional transport, tourism, cultural and sporting assets as well as critical infrastructure such as the Western Sydney Airport, the Sydney Light Rail and Pacific Highway Upgrades
- a four-year $43 million investment in the creation of six new Destination Networks across NSW to facilitate visitor economy growth at the local level. Each Destination Network has a mandate to capitalise on tourism opportunities and deliver local visitor economy growth outcomes.

Cumulative expenditure in the visitor economy to 2017 was $18 billion above the performance baseline, including $6.5 billion cumulative expenditure in 2017.

Independent taskforce review of VEIAP 2012

In September 2017, the NSW Government established an industry-led taskforce to conduct a mid-term review of the 2012 VEIAP and provide recommendations and actions to achieve the 2020 targets. The taskforce review process included:

- 14 regional consultation sessions across NSW with 180 stakeholders including local councils and community groups, government agencies, tourism operators and local businesses
- three round tables in Sydney CBD with 33 key industry stakeholders
- 55 responses to an online survey developed and managed by the taskforce
- 18 email submissions for visitor– economy related opportunities.

The Taskforce released their *Independent Review of the NSW Visitor Economy Industry Action Plan* in January 2018.

The taskforce review confirmed the significant success of the 2012 VEIAP and made 34 recommendations to drive the visitor economy to 2020 and beyond.

[1] NSW 2021: a Plan to Make NSW Number One
[2] Corview Group economic modelling
[3] Economic Contribution of Tourism to NSW 2016-17. Destination NSW
[4] Travel to New South Wales Year ended December 2017. Destination NSW, National & International Visitor Surveys

Beyond 2020:
The road to 2030

The Visitor Economy Industry Action Plan 2030

This *Visitor Economy Industry Action Plan 2030* (VEIAP 2030) responds to the taskforce's *Independent Review of the NSW Visitor Economy Industry Action Plan* and provides a reinvigorated direction for the NSW visitor economy to the next decade.

VEIAP 2030 supports the Commonwealth Government's ambition to develop Australia's visitor economy industry to a top tier sector and will complement the Commonwealth's 2030 strategy[5].

Getting off the beaten track: Sydney to the regions

Sydney's reputation as a global city is key to growing the visitor economy in NSW. Sydney consistently outperforms every other state and territory capital city in Australia. The delivery of programs and activities that support the NSW visitor economy will be maintained or expanded to ensure Sydney and the Regions continue to deliver outstanding results.

Marketing of Sydney will continue to play an essential part of future campaigns, but there will be a greater emphasis on bringing visitors into NSW's regional areas by marketing regional events, attractions and unique selling points.

Customers must be at the centre of the visitor economy strategy. Modelling shows that every additional dollar spent by visitors to NSW has the potential to return significant profit to businesses[6]. This represents a significant economic benefit to be felt across both Sydney and regional NSW. Sydney is experiencing 87.9% room occupancy rates, compared to regional NSW at 67.3%.

Regional NSW presents an enormous opportunity to disperse visitor nights and expenditure and optimise visitor economy growth across the state.

In December 2017, NSW takings from accommodation were the highest on record increasing 8.4% to $1.4 billion, mainly due to revenue growth of 10.3% in regional NSW and 8.2% in Sydney[7]. In addition, Tourism Research Australia highlighted that in 2016–17, 43 cents of every tourist dollar went to regional Australia[8].

Many regional economies are influenced by visitation and tourism, with regional visitor expenditure heavily concentrated on a few activities.

The taskforce identified regional NSW as a stand out opportunity for the visitor economy. 32% of respondents to an online survey commented on how more could be done at a grass roots level to boost visitation and increase economic output in regional NSW[9].

The visitor economy benefits regional communities

Promoting the diversity our state's regional towns, attractions and landscapes as well as encouraging visitors to explore NSW will promote the growth of the regional visitor economy. The increased visitor expenditure entering regional communities has a direct positive impact on other sectors across the community as profits and wages are reinvested or spent.

The social and economic benefits realised from individual events and exhibitions in regional locations will also be given increased focus to ensure the greatest return on investment for communities.

VEIAP 2030 includes a new regional target for the visitor economy and sets revised actions and new targets for the state to 2030. The targets detailed in this plan will be supported by a new Visitor Economy Index.

The Index will provide better information to support progress on the new targets, produce data-driven insights into a range of key visitor economy metrics, support responsive tracking of initiatives and allow for targeted investments into the visitor economy to support growth over the next 12 years to 2030.

[5] The Commonwealth's 2030 strategy is currently being developed

[6] Review of the Visitor Economy Action Plan- Economic Analysis - Source Corview 2018

[7] Tourist Accommodation Snapshot – December Quarter 2017. Source Destination NSW.

[8] State of the Industry 2016 – 2017, Tourism Research Australia

[9] Stakeholder and industry consultation, Outcomes Report - Source Elton Consulting 2018

Targets and tracking

Driving Growth

The continued success of the visitor economy relies on the NSW Government closely tracking emerging markets to anticipate and respond to visitor needs. International visitor markets show an incredible return on investment, with individual spend by international visitors 10 times above the average expenditure yielded on individual domestic trips.

The Indian market represents a significant growth opportunity for Sydney and regional NSW. Over the last five years, India has been the fastest growing inbound tourism market for NSW. Since the year ending December 2012, the number of Indian visitors to NSW grew by 120.8 per cent, with the growth in Indian visitor expenditure (+88.9%) placing second only to the growth in Chinese visitor expenditure (+161.4%).

Visitation from China has increased to over 776,000 overnight visitors in the year ending December 2017. Of these overnight visitors, almost 758,000 stayed overnight in Sydney. However, only 7% of all Chinese visitors visited regional NSW.

In comparison, 38% of German visitors to Sydney also stayed in regional NSW in the year ending December 2017. Increasing international visitor dispersal presents an opportunity to optimise visitor economy benefits in regional NSW by aligning regional strategies and campaigns to international visitors. The VEIAP 2030 identifies strategies and actions to drive increased regional visitation.

To help drive growth in the Sydney and regional visitor economies, VEIAP 2030 engages and coordinates industry players. The NSW Government will invest in new ways to support the visitor economy, including in:

- innovation and emerging sectors, including a focus on nature-based tourism
- a statewide Destination Management Plan
- critical infrastructure
- improved wayfinding and digital access to information to ensure visitors have a great NSW experience.

Maintain the 2020 target

The NSW Government is committed to working with industry to achieve the original VEIAP goal of doubling overnight expenditure to $36 billion by 2020.

Target to 2030

The NSW visitor economy will more than triple 2009 overnight visitor expenditure to 2030, by aiming to achieve:

$45 billion by 2025

$55 billion by 2030

These targets are consistent with Treasury's medium to long-term view of the NSW economy and will continue the substantial visitor economy gains since 2012.

The 2025–30 growth targets will ensure NSW maintains a focus on sector momentum and continued visitor economy growth.

Figure 1. Alternative growth paths for NSW regional overnight visitor expenditure to 2030

Legend:
- Actual—regional NSW
- Projected to 2020—regional NSW
- Hotels, cafes and restaurants (selected) Household financial expenditure growth
- Pre-VEIAP low growth (low alternative)
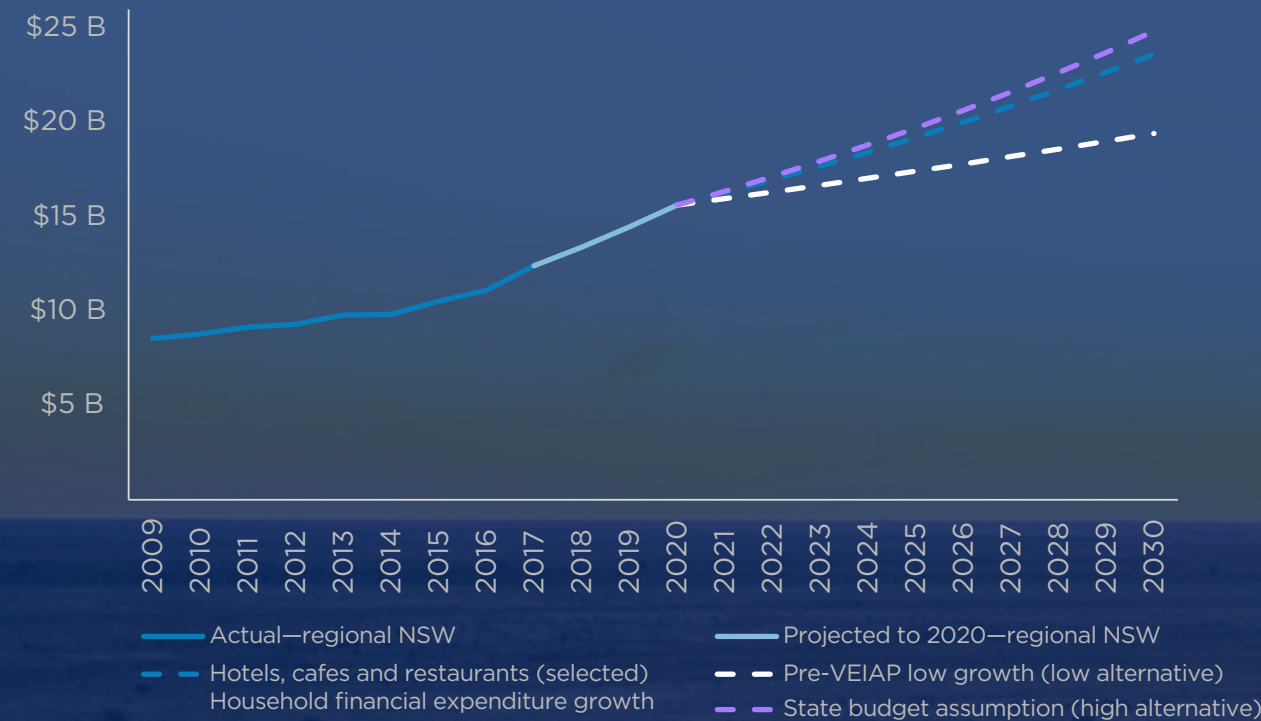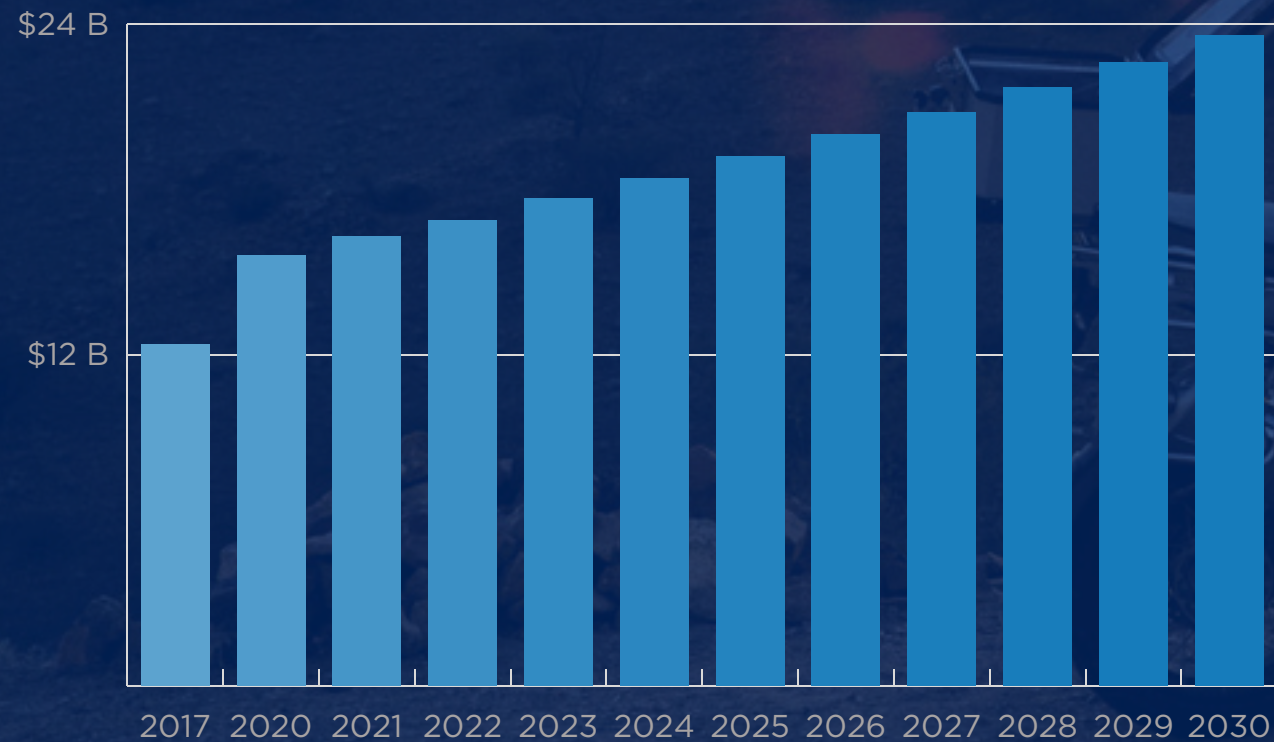- State budget assumption (high alternative)

Figure 2. Projected hotel, cafe, restaurant and household financial expenditure growth to 2030

Target to 2030: Regional measures

The taskforce's independent review highlighted the opportunity to consider a broader range of measures that capture both direct and indirect visitor expenditure, its drivers and distribution across regional NSW to develop a holistic understanding of the visitor economy. Regional overnight visitor expenditure in 2017 totalled $12.4 billion. By the end of 2020, it is projected that regional overnight visitor expenditure will reach $15.6 billion.

The VEIAP 2030 introduces a bold 2025 regional target level in line with the overall targets for overnight visitor expenditure, including:

$20 billion by 2025

$25 billion by 2030

The 2025–30 regional targets will be benchmarked against comparative metrics in NSW to track the state's relative performance.

Targets and tracking

Data-driven insights

To date, we have focused on a single target (overnight expenditure) to determine the success of the NSW visitor economy.

Since its introduction in 2012, the overnight visitor expenditure target has united the sector and driven outcomes. However, a more comprehensive richer story of success can be told. Moving forward, we will use a number of quantitative and qualitative metrics will be considered in determining the success of the visitor economy. These metrics will provide context for a new overnight visitor expenditure target.

Stakeholder surveys, conducted by the NSW Government in collaboration with industry, will capture quantitative and qualitative data.

The metrics will be used to establish three indices for the visitor economy, which will be used to create a composite Visitor Economy Index.

The indices will enable the NSW Government to track industry conditions, industry perceptions and the future industry outlook over time. The composition of the indices will also allow the NSW Government to:

- analyse differences in data across different industries and Destination Networks

- combine index datasets to conduct scenario analysis and support planning decisions

- combine all three indices into a composite measure of overall industry health.

The proposed new indices also provide the NSW Government with:

- a means to actively track conditions in the market, and respond more quickly to industry shifts

- the opportunity to share insights with industry and further collaborate on opportunities and initiatives to grow the visitor economy

- insights based on additional data to drive transformation.

The NSW Government will establish a Team NSW Tourism Taskforce that includes key industry stakeholders to test the new index options. Following a consultation phase, the new indices will be implemented using staged pilot studies in each Destination Network.

The indices will also capture changes over time in aspects such as regional dispersal rates or other measures of visitor composition and behaviour. The sustainability of visitation can also be monitored and tracked by new index metrics.

The three indices will provide deeper understanding of business conditions and industry sentiment across regional areas. This will help the NSW Government respond to regional issues efficiently and identify opportunities to invest in the regional visitor economy.
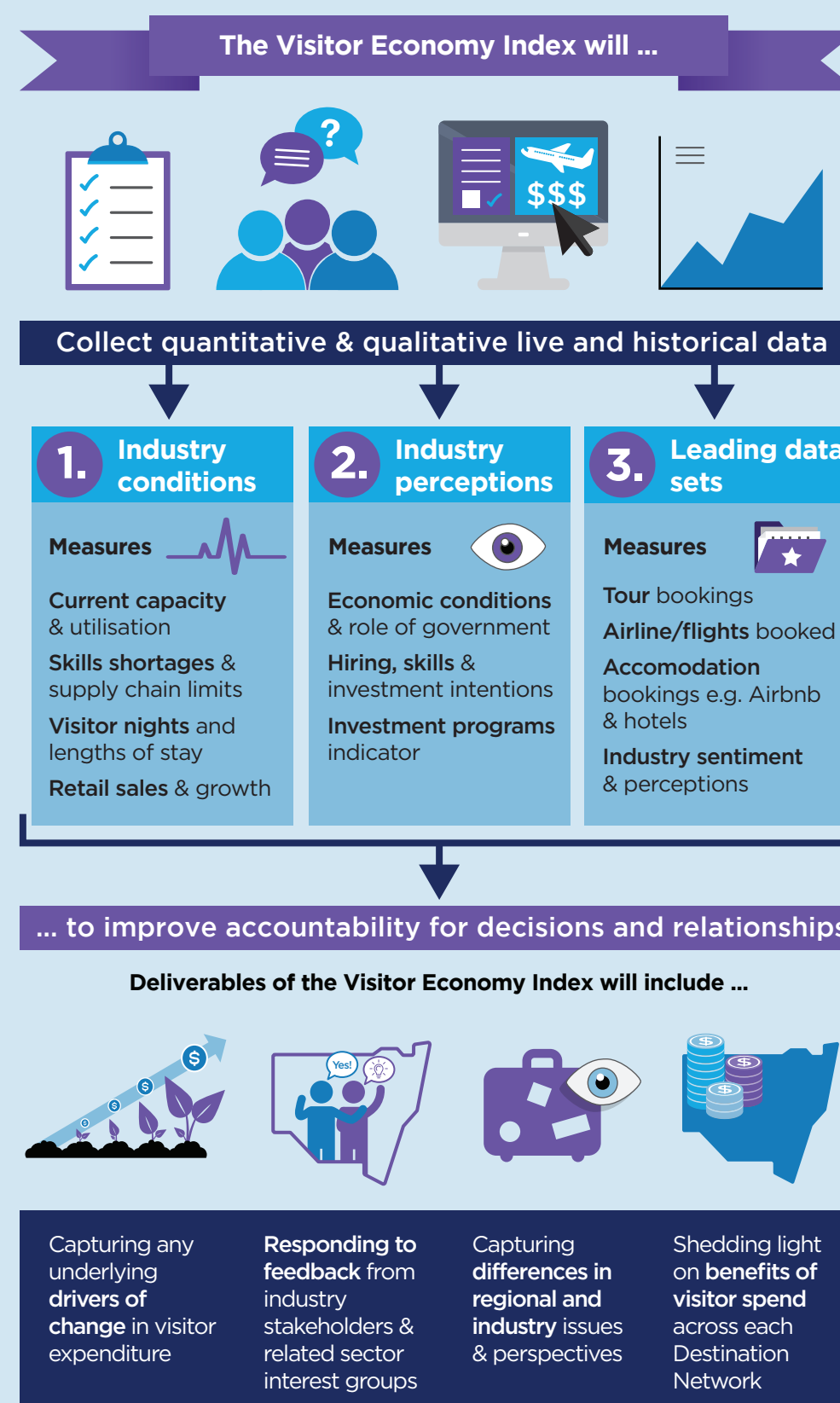
Pushing progress

To understand how the visitor economy is tracking against the new 2025–30 overnight visitor expenditure targets and complementary visitor economy measures, quarterly reports will be provided to the Team NSW Tourism Taskforce based on the three indices.

Each report will also be electronically published online for industry use to provide valuable insights to the sector on trends and growth.

Each year a statement on progress under the VEIAP 2030 will be published, and every four years the VEIAP 2030 will be reviewed in line with the NSW Government's budget cycle.

This approach means the VEIAP 2030 will remain current and responsive to major sector developments and trends.

The Visitor Economy Index will ...

Collect quantitative & qualitative live and historical data

1. Industry conditions

Measures

Current capacity & utilisation

Skills shortages & supply chain limits

Visitor nights and lengths of stay

Retail sales & growth

2. Industry perceptions

Measures

Economic conditions & role of government

Hiring, skills & investment intentions

Investment programs indicator

3. Leading data sets

Measures

Tour bookings

Airline/flights booked

Accomodation bookings e.g. Airbnb & hotels

Industry sentiment & perceptions

... to improve accountability for decisions and relationships

Deliverables of the Visitor Economy Index will include ...

Capturing any underlying **drivers of change** in visitor expenditure

Responding to feedback from industry stakeholders & related sector interest groups

Capturing **differences in regional and industry** issues & perspectives

Shedding light on **benefits of visitor spend** across each Destination Network

Future focus

Building on the last five years

VEIAP 2030 builds on five years of focused effort to grow NSW's position as the leading visitor economy in Australia.

From 34 actions and recommendations presented to the NSW Government by the taskforce's *Independent Review of the NSW Visitor Economy Industry Action Plan*, six key focus areas aimed at growing the visitor economy beyond 2020 have been developed for the VEIAP 2030:

01.   Listen. Understand. Act.

02.   Support regional decisions. Back regional NSW.

03.   Put the visitor first.

04.   Support, bolster and encourage the visitor economy.

05.   Invest in infrastructure.

06.   Make opportunities to support growth.

Visitor Economy
Industry Action Plan
2030

Listen.
Understand.
Act.

Make opportunities to support growth.

Support regional decisions.

Back regional NSW.

Put the visitor first.

#1

Support, bolster and encourage the visitor economy.

Invest in infrastructure.

TOURIST DRIVE

Focus 01.

Listen. Understand. Act.

The feedback from industry highlighted an opportunity for the NSW Government to better understand and address the needs of the sector. The NSW Government will collaborate with industry leaders and draw on the experience of the sector in the development of the visitor economy to drive the implementation of the VEIAP 2030.

What's the plan?

- Convene a new Team NSW Tourism Taskforce led by the Chair of Destination NSW and comprising industry leaders from the visitor economy sector and the NSW Government. The taskforce will meet four times a year including twice with the Minister for Tourism and Major Events. It will provide advice to the minister on:

  - emerging industry trends and actions needed to ensure VEIAP 2030 is driving the visitor economy

  - the scope and design of the Visitor Economy Index

  - actions to reduce planning and assessment timeframes for major tourism developments

  - statewide visitor economy plans such as the:

    - Tourism Infrastructure Strategy

    - Nature Based Tourism Strategy.

- A formal agreement will be created between the Minister for Tourism and Major Events and the Destination NSW Board to provide clear frameworks for Destination NSW:

  - objectives and key actions

  - Key Performance Indicators (KPI)

  - performance management and evaluation.

Focus 02.

Support regional decisions. Back regional NSW.

It is almost two years since the NSW Government announced the creation of six new Destination Networks. Each Destination Network is pivotal in supporting local visitor economy industries. VEIAP 2030 strengthens the role of Destination Networks in driving visitor economy development in their regions.

How are we going to better support the Destination Networks and increase local decision making?

- Introduce annual funding agreements between each Destination Network and the Chair of Destination NSW Board on behalf of the NSW Government.

- Redesign Destination NSW grant processes to increase Destination Network participation in grant design, assessment and funding allocations.

- Require the Destination Networks to actively engage with local councils.

- Increase short term funding to each Destination Network to reflect resources required to develop and implement destination management plans.

- Ensure each Destination Network has access to Destination NSW regional staff with the necessary skills and expertise to deliver on destination management plans.

#1 🧳

Focus 03.

Put the visitor first.

Great expectations should be exceeded by even greater experiences.

The visitor experience underpins each and every visit to NSW. Every visit should be an unforgettable one that inspires and encourages visitors to keep exploring and returning to our state.

Developing services skills, relevant and compelling destination information and creating unique experiences are key to making NSW competitive.
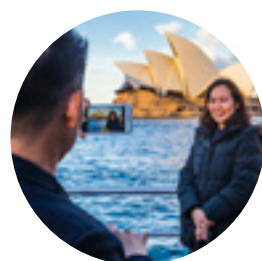
Accessible tourism

Visitors to NSW are online, mobile and more connected thanks to digital technology. The business case for inclusive tourism is well established as studies by University of Technology Sydney have identified that in 2010, accessible tourism was worth $8 billion and represented 11% of the tourism market in NSW.

Having easy access to information helps visitors feel confident to explore the state. Information should be presented simply and be easy to find, with relevant information in one place.

How will we ensure tourism experiences are inclusive?

- Get mobile. Continue the NSW Government's $39 million contribution to roll out the Commonwealth Mobile Black Spot Program from the Connecting Country Communities Fund.

- The Future Transport 2056 Strategy outlines the pathway of connecting transport and roads to the unique NSW destinations and experiences and identifies service integration mechanisms for more inclusive destinations experiences.

- Promoting of the NSW Companion Card program.

- Accessible tourism will be a focus of the statewide Destination Management Plan.

Put the visitor at the heart of every experience

To maintain NSW's position as the best visitor destination in Australia, the visitor experience has to meet and exceed the expectations of every visitor every time.

How are we supporting international tourists?

- Promote qualifications in tourism subsidised under the Smart and Skilled program to Chinese and other identified language speakers.

- Work with the Commonwealth to address low-quality tours and operators.

- Expand the NSW First industry education and webinar program delivered by Destination NSW.

Interest-based tourism

Adventure, activity and interest-based tourism are growing niche markets as like-minded visitors join together to explore new places to enjoy their activity or interest.

Tours and trails are popular ways of packaging destinations and experiences, such as hiking, downhill mountain biking and health-based tours and retreats.

Tours, trails and routes can help overcome geographic barriers for the visitor economy in remote NSW regions and enable the benefits of visitation to be more widely dispersed.

What's the next step?

- Incorporate interest-based visitation into the statewide Destination Management Plan.

Focus 04.

Support, bolster and encourage the visitor economy.

Supporting and encouraging businesses to develop great products and visitor experiences benefits the visitor economy.

The sector is ready to harness the potential of the visitor economy.

Remove barriers to business

A number of barriers to delivering innovative products and experiences have been identified. The VEIAP 2030 will seek to improve access to government grants, remove barriers to entry and reduce bureaucracy to make it easier for businesses to innovate.

What's improving?

- Expand the Small Business Friendly Councils and Easy to do Business initiatives to target visitor economy sectors.
- Through the Team NSW Tourism Taskforce, engage with industry by listening and responding to feedback on barriers for businesses.

Share insights

Powerful insights are gained through the analysis of data collected on industry trends. Sharing data, developing detailed and targeted reports and providing insights and information to industry promotes collaboration, innovation and growth of the visitor economy.

What's the approach?

- The Visitor Economy Index will provide industry with additional insights through various sources such as analysis of 'big data'. Insights from the Index and other sources will be provided to industry through an industry portal. Information available through the portal will also include relevant information such as grant funding.

- Gather evidence to develop a strategic framework to address skills supply issues and conduct research to understand the influence of demographics, student choices and school offerings on employment for Vocational Educational and Training (VET) students.

- Include visitor economy occupations as part of an interactive, real time dashboard on occupational shortages and surpluses. The dashboard will show movements in unemployment, vacancy rates and wages across different sectors. This will inform the work of the Team NSW Tourism Taskforce in responding to skills issues.

- Ensure an industry training representative is on the Team NSW Tourism Taskforce.

Encourage skills development

The NSW Government offers a range of programs to address industry employment needs including pre-apprenticeship and pre-traineeship training programs, as well as practical training options for business operators, students and individuals from different backgrounds. Programs include the Refugee Employment Support Program and Youth Employment Program (Smart, Skilled and Hired).

Regional offices work closely with job network providers, employers and training providers to upskill people for available employment (e.g. the Illawarra Youth Employment Strategy). It is important that staff and employers in visitor economy-related businesses are aware of, and are encouraged to engage in, skills development programs and avenues for flexible learning.

How will we raise awareness?

- Develop a consumer information strategy to promote visitor economy career paths and work with industry to:
  - strengthen school-business relationships and promote visitor economy career paths to school students
  - develop skill sets, pre-apprenticeship, pre-traineeship and training with funding through the Smart and Skilled program where a need is identified.

- Continue to roll out programs including:
  - Smart and Skilled
  - Smart, Skilled and Hired—youth employment
  - Hospitality Program with the Hospitality Network
  - Refugee Employment Support
  - The Way Ahead Program
  - Aboriginal Employment and Business Advisory Support Services.

Aboriginal tourism

Indigenous-based tourism has been identified as an opportunity for visitors to learn about Aboriginal culture and history, especially in regional and remote areas of NSW.

To support growth in indigenous-based tourism, training and mentoring must meet sector needs. This includes supporting operators to run their own business through appropriate qualifications and training.

What's next to better support Aboriginal tourism?

- Destination NSW will lead an interagency group that will work with the Aboriginal tourism sector to:
  - tailor relevant, nationally accredited qualifications for Aboriginal tourism operators
  - expand and improve coordination of Aboriginal mentoring programs and funding support for product development across Destination Networks
  - provide funding under the Regional Growth Environment and Tourism Fund
  - provide opportunities for Aboriginal businesses to develop cultural tourism experiences and participate in joint management of public land.

Focus 05.

Invest in infrastructure.

Investing in critical infrastructure, future planning and better ways to do business will ensure the continued growth and future prosperity of the NSW visitor economy.

Cultural and sporting infrastructure

The state's world class cultural and sporting infrastructure is positioned to support the visitor economy.

What's underway?

- The NSW Government is investing in stadia that better meet user needs and enable NSW to bid for and host a wider range of both national and international events. The Government's stadia priorities include:

  - a new rectangular Western Sydney Stadium including 30,000 seats at Parramatta

  - redevelopment of Sydney Football Stadium at Moore Park with up to 45,000 seats

  - refurbishment of Stadium Australia at Sydney Olympic Park with 70,000 seats

- The NSW Government will invest in major events for these stadiums to drive growth in the visitor economy, realise economic and social benefits of a strong cultural and sporting sector, and support liveability for the people of NSW.

- The International Convention Centre (ICC) has been successful in attracting 755 world class events in the year since opening in December 2016, attracting 1.3 million people to the venue and the Darling Harbour precinct and 1.5 million overnight visitor stays.

- Cultural investments underway include:

  - a new wing of the Art Gallery of NSW

  - renewal of the Sydney Opera House

  - redevelopment of the Walsh Bay Arts and Cultural Precinct, and

  - the redevelopment of the Riverside Theatres as part of the development of a Parramatta arts and cultural precinct including the relocation of the Powerhouse Museum.

Fast approvals

A straightforward and streamlined process for planning approvals and public land management will increase investment in tourism development and give greater process assurance to industry, reducing perceived risk.

What's the process?

- Reduce government assessment timeframes for state-significant tourism industry development proposals. Provide updates to the Team NSW Tourism Taskforce on approval timeframes for state-significant development proposals

- Revise environmental impact assessment guidelines to assist site selection and clarify development proposal assessment requirements.

Planning tomorrow

Visitor economy planning initiatives require whole-of-government collaboration at a state level. Consideration of future sector growth and future potential is required to ensure visitor economy needs are captured and addressed.

What's the plan?

- Develop a State Tourism Infrastructure Strategy to guide investment in state-owned tourism and nature-based, scientific, education, cultural, inclusive recreation and entertainment facilities

- Agree a NSW Government policy position on short term holiday letting

- Pilot initiatives for development and promotion of cross-tenure approaches to tourism and recreation so that visitors get an integrated 'experience in a region'. These projects will focus on:

  - the strategic identification, development and promotion of key recreational and tourism assets

  - providing improved opportunities for Aboriginal businesses to develop cultural tourism experiences and participate in the joint management of public land.

- Measure the impacts of over-visitation and report as part of the Visitor Economy Index.

## Getting here, there and everywhere

The state's airports, ports, roads and railways are the major gateways into NSW and need to support as many visitor arrivals and journeys as possible. Current infrastructure spend is dedicated to upgrading and improving NSW transport networks to improve visitor experience.

What's in the pipeline?

- Review regulations that may inhibit regional air services, including engagement with airport operators and airlines.

- Conduct a review of artificial capacity constraints at Sydney Airport. The review will consider issues preventing airlines from introducing new regional air services.

- Develop and implement a bypassed towns strategy and commence pilot programs in regional destinations including Berry, Holbrook and Macksville. Evaluate pilot outcomes and potential expansion.

- Streamline the s ignposting application process and work with

- Roads and Maritime Services to enhance tourist drive signposting in regional NSW.

- Release the Cruise Development Plan to support the growth of the cruise industry across Sydney and regional NSW.

- Implement visitor economy priorities under Future Transport 2056.

- The NSW Government's ongoing investment in cultural and transport infrastructure in Greater Sydney, including the Western Sydney Airport, and regional NSW underscores its commitment to maintaining NSW as the number one tourism and events state in Australia.
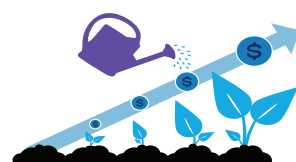
Focus 06.

Make opportunities to support growth.

Strategic thinking

New strategies will reflect identified priorities for the sector, such as growing the regional visitor economy and emerging markets. This will ensure continued growth in cultural tourism, food and wine tourism, the youth and international education sectors, all of which are key sectors of the NSW visitor economy.

What's being done?

- Develop a nature-based tourism strategy and increase funding for nature-based tourism projects through the Regional Growth Environment and Tourism Fund.

- Pilot initiatives for development and promotion of cross-tenure approaches to tourism and recreation so that visitors get an integrated 'experience in a region'.

- Continue to develop an international investment attraction program to grow investment, exports, and jobs to position NSW globally as an attractive location for trade and investment. This will include the development of a:
  - clear business strategy
  - new position for NSW
  - digital platform for international investors
  - new suite of collateral
  - new concierge model to attract investors and support.

- NSW Government will continue to work to drive growth in the visitor economy in Western Sydney through implementing the Western Sydney Visitor Economy Strategy.

Supporting events

Continued investment in major events will help NSW to maintain its position as the number one tourism and events state in Australia.

How will we grow events?

- Conduct a review of the Regional Conferencing Strategy and Action Plan. The findings of the review will be presented to the Minister for Tourism and Major Events, along with recommendations on improvements that can be made to ensure better alignment with the work of Business Events Sydney, and the findings of the Visitor Economy Taskforce.

Evidence-based marketing

Effective marketing is critical for getting the word out to key visitor segments about the wonderful travel opportunities NSW has to offer. Expanding marketing activity will capitalise on all identified opportunities for sector growth.

How will we gain return on investment?

- The Destination NSW Board will lead a medium-term review of marketing initiatives that target high-yield international visitor markets, including those that move into regional areas.

- Prepare a tourist drive strategy and supporting marketing campaign to increase regional overnight visitors and expenditure and encourage regional dispersal.

- Promote regional NSW through media famils and support more regional events.

Cross border opportunities

Interstate cooperation is needed to fully realise tourism potential, particularly for regional NSW.

How will we achieve this?

- Destination NSW and the NSW Cross Border Commissioner will meet annually with stakeholders close to the NSW border to progress cross-border issues and identify opportunities. Stakeholders could include state tourism organisations and airports in neighbouring states and territories.

- Cross-border visitor economy priority items will be included in annual work lists under cross-border agreements.

Research and evaluation

Research is the basis for driving the visitor economy. Insights from data and analysis are used to prioritise infrastructure, develop and market targeted visitor experiences and understand how NSW is tracking. Decisions need to be guided by the best available information.

How will we collate information?

- Develop an evaluation framework for Destination NSW that illustrates the linkages between program activities and social and economic outcomes.

- Publish annual progress reporting on VEIAP 2030 actions and against the 2025–30 targets.

- Maintain, track and report quarterly on the Visitor Economy Index.

Attachment A
Action Summary

New targets to build on the success of the sector

Taskforce report recommendations	Government response	#	VEIAP 2030 Action	Lead	Support	Timing
Support the continued growth of the sector and dispersal of gains across the state: • Maintain the NSW Government's Visitor Economy Industry Action Plan (VEIAP) 2020 target. • Develop a pilot benchmark study to recognise day trip visitation, particularly in regional areas. • Establish a new target for regional visitation. [Action 1.1]	Supported	1	Set new statewide overnight visitor expenditure targets to more than triple 2009 overnight visitor expenditure by 2030, aiming to achieve $45 billion by 2025 and $55 billion by 2030.	Department of Industry	Destination NSW	June 2018
		2	In alignment with the new state target for overnight visitor expenditure, set a regional target of $25 billion by 2030.	Department of Industry	Destination NSW	June 2018
		3	Establish Visitor Economy Index of complementary measures to support the overnight visitor expenditure target. The index will be: • piloted in each Destination Network • used to develop a baseline measure of customer satisfaction with NSW Government action to drive the visitor economy. It is also intended that the complementary measures will also capture changes over time in key underlying metrics like day trip visitation, regional dispersal rates or other measures of visitor composition and behaviour.	Department of Industry	Destination NSW	End of 2018
		4	Conduct pilot benchmark study across Blue Mountains, Orange, Byron Bay and Hunter Valley to monitor impacts of day-trip visitation. Expand pilot to include Tamworth, Dubbo and other identified regional locations following one year anniversary of pilot.	Destination NSW	-	March 2019

Strong leadership, governance and accountability

Taskforce report recommendations	Government response	#	VEIAP 2030 Action	Lead	Support	Timing
Form a visitor economy sub-committee of Cabinet to be supported by a committee of relevant departmental secretaries and agency CEOs. [Action 2.1]	Supported in principle	5	Convene a Team NSW Tourism Taskforce, led by the Chair of Destination NSW, and comprising industry leaders from the visitor economy sector and NSW Government. The taskforce will meet four times a year including twice-yearly with the minister. It will provide advice to the Minister on emerging industry trends, drive visitor economy growth and provide input on the scope and design of the Visitor Economy Index.	Department of Industry	Destination NSW Department of Premier & Cabinet	December 2018
Provide Destination Networks with the authority and funding to be accountable for visitor economy development in their regions. [Action 2.2]	Supported	6	Support Destination Networks and increased local decision making by introducing annual funding agreements between the Chair of Destination NSW Board on behalf of the NSW Government and each Destination Network. Each agreement will set out key accountabilities, KPIs and milestones. The funding agreements are to be approved by the minister prior to execution.	Destination NSW	Department of Industry Destination Networks (all areas)	December 2018
Greater staff support in the destination areas to support the work of the Destination Networks, with a focus on building capacity in regional communities. Upskilling in the area of digital skills should also be supported. [Action 2.3]	Supported		Areas for further authority and accountability for Destination Networks include: • participation in redesigning grant processes and increased involvement in grant assessment, application procurement and funding allocations • requiring Destination Networks to actively engage with local councils • increasing short term funding to Destination Networks to reflect increased resources required to develop and implement Destination Management Plans (DMPs) • ensuring Destination Networks have access to Destination NSW regional staff with the necessary skills and expertise to deliver on the DMPs • encouraging local government, towns and regions to apply for matched funding to build and maintain local websites to link to Destination NSW's sites.	Destination NSW	Office of Local Government	December 2018 December 2018 June 2018 December 2018 December 2018
Require Destination Networks to regularly report on outcomes with local government under their stakeholder engagement plans. [Action 2.4]	Supported					
Move Destination NSW to a governance structure and business-like operational framework where the Board enters into a funding agreement with NSW Government and is accountable to the responsible minister. The CEO should report to the Board. [Action 2.5]	Supported in principle	7	Prepare a formal statement of intent between the minister and the Destination NSW Board, providing a framework for balancing Destination NSW's multiple objectives and key performance metrics against which Destination NSW will be measured.	Department of Industry	Destination NSW Department of Premier & Cabinet NSW Treasury	December 2018

Greater strategic engagement and planning

Taskforce report recommendations	Government response	#	VEIAP 2030 Action	Lead	Support	Timing
Include visitor economy criteria in all relevant NSW Government decision making frameworks e.g. planning, land management and transport. [Action 3.1]	Supported in principle	-	See actions 19, 20 & 21.	-	-	-
Accelerate the development of a statewide destination management plan. [Action 3.2]	Supported	8	Develop and release a statewide destination management plan once the remaining two management plans have been completed.	Destination NSW	-	December 2018
Develop a nature-based tourism strategy. [Action 3.3]	Supported	9	Develop a nature-based tourism strategy and increase funding for nature-based tourism initiatives through the Regional Growth—Environment and Tourism Fund (RGET).	Department of Industry	OEH, DPC Regional, Destination NSW	End of 2018
Work with Tourism Australia, the cross-border commissioners, state tourism bodies and adjacent local government agencies to facilitate better cross-border marketing and infrastructure. [Action 3.4]	Supported	10	Destination NSW to meet with the NSW Cross Border Commissioner and Destination Network Chairs to proactively discuss and resolve cross-border marketing and infrastructure issues. Destination NSW to meet annually with the NSW Cross Border Commissioner, state tourism organisations and airports close to the VIC, ACT, SA and QLD borders to progress cross-border issues.	Destination NSW	OEH, DPC - Regional (Cross Border Commissioner)	From June 2018
		11	Include visitor economy priorities such as: • tourism opportunities and industry development • joint advocacy for major infrastructure projects • identifying infrastructure constraints and public domain improvements to encourage investment in cross-border regions in annual work lists under the cross-border agreements for publication by end 2018.	Cross Border Comissioner	-	End of 2018
Ensure the NSW Regional Conferencing Strategy is aligned with the recommendations in this report in prioritising and attracting increased events and exhibitions to regional NSW, and connect this work to Business Events Sydney. [Action 3.5]	Supported	12	Conduct a review of the Regional Conferencing Strategy and Action Plan, following the strategy's one-year anniversary in August 2018. The review will: • assess implementation of the strategy • involve broad stakeholder consultation, including with Business Events Sydney • assess better alignment with Business Events Sydney and the findings of the Visitor Economy Taskforce. The findings of the review, including recommendations to improve, will be presented to the minister, along with recommendations on improvements that can be made to ensure better alignment with the work of Business Events Sydney, and the findings of the Visitor Economy Taskforce.	Destination NSW	Business Events Sydney	End of 2018
		13	Promote regional NSW through media famils and support more regional events.	Destination NSW	Destination Networks	June 2018
Develop a public land strategy to prevent encroachment, preserve state-owned land assets for visitor economy purposes and reduce red tape to make it easier to do related business on public land. [Action 3.6]	Supported	-	See action 9.	-	-	-
		14	Pilot initiatives for development and promotion of cross-tenure approaches to tourism and recreation so that visitors get an integrated 'experience in a region'. These projects will focus on: • strategic identification, development and promotion of recreational and tourism assets • providing improved opportunities for Aboriginal businesses to develop cultural tourism experiences and participate in the joint management of public land.	Department of Industry	OEH (Office of Environment & Heritage)	From June 2019
Work with local council, chambers of commerce and industry/interest groups to monitor tourism activity and sustainability in high-visitation destination areas. Ensure the actions are in line with environment, social and cultural attributes of the area. [Action 3.7]	Supported	-	See action 3. Impacts of over-visitation will be measured and reported in the Visitor Economy Index.	-	-	-

Better alignment of skills to overcome shortages

Taskforce report recommendations	Government response	#	VEIAP 2030 Action	Lead	Support	Timing
Develop a strategic plan with targets to meet projected shortfall and future demand for qualified labour, in consultation with Jobs for NSW and industry. [Action 4.1]	Supported	15	Develop an evidence base to inform the development of a strategic framework to address skills supply issues: • Provide an overview of training and education outcomes as a regular input to the Team NSW Tourism Taskforce. • Commence research to understand the influence of demographics, student choices and school offerings on employment outcomes for VET students. • Include visitor economy occupations as part of an interactive, real time dashboard on occupational shortages and surpluses. The dashboard will show movements in unemployment, vacancy rates and wages across different sectors. This will be provided to inform the work of the Team NSW Tourism Taskforce in responding to skills issues. • Include an industry training representative on the Team NSW Tourism Taskforce.	Department of Industry	Jobs for NSW	From December 2018 March 2019 June 2019 From December 2018
Develop a range of job-ready programs in coordination with industry for identified target segments including youth, Aboriginal, mature age and migrant resettlement to grow new jobs in the sector. [Action 4.2]	Supported	16	Develop a consumer information strategy to promote visitor economy careers and work with industry and Destination Networks to: • strengthen school-business relationships and promote career pathways to school students • develop skill set, pre-apprenticeship and pre-traineeship training with funding through Smart and Skilled, where a need is identified.	Department of Industry	TAFE NSW	End of 2018
		17	Continue to roll out programs including: • Smart and Skilled Hospitality program with the Hospitality Network • Refugee Employment Support program • Smart Skilled & Hired Youth Program • The Way Ahead Program • Aboriginal Employment and Business Advisory Support Services.	Department of Industry	TAFE NSW	From May 2018
Support skills development and capacity building for Aboriginal tourism operators by: • working with Aboriginal tour operators to recognise learning of guiding and storytelling on Country through an appropriate qualification • securing resources to upscale its mentoring program for Aboriginal tourism operators. [Action 4.3]	Supported	18	Destination NSW will lead an interagency group comprised of Aboriginal Affairs, the Office of Environment and Heritage, the Department of Industry, NSW Land Council, TAFE NSW and the Department of Premier and Cabinet, that will work with the Aboriginal tourism sector to: • tailor relevant, nationally accredited qualifications for Aboriginal tourism operators • expand and improve coordination of Aboriginal mentoring programs and funding support for product development across Destination Networks • provide increased opportunities for Aboriginal businesses to develop cultural tourism experiences and participate in joint management of public land • provide funding under RGET. A forum will be held in 2018 between the working group and NATOC to progress this action.	Destination NSW	Department of Industry Aboriginal Affairs Office of Environment and Heritage NSW Land Council TAFE NSW Department of Premier & Cabinet Create NSW	End of 2018

Improved infrastucture

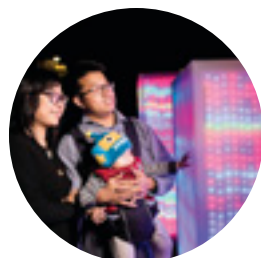| Taskforce report recommendations	Government response	#	VEIAP 2030 Action	Lead	Support	Timing
Recognise the importance of tourism in the creation of road, rail, intrastate aviation, cruise infrastructure and accommodation across metropolitan and regional NSW. [Action 5.1]	Supported	19	Develop and release a statewide tourism infrastructure strategy to guide investment in state-owned tourism and nature-based, scientific, education, cultural, inclusive, recreation and entertainment facilities.	Department of Industry	Infrastructure NSW Transport for NSW Department of Planning & Environment Destination NSW Create NSW	June 2019
Identify red tape and planning constraints on projected visitor economy infrastructure needs and drive the development approvals process from an evidence base. [Action 5.2]	Supported	20	Improve planning frameworks by: • implementing visitor economy priorities under Future Transport 2056 including finalising the tourism and transport plan • revising environmental impact assessment guidelines to assist site selection and clarify development proposal assessment.	Transport for NSW Department of Planning & Environment	-	Ongoing December 2018
		21	Halve NSW Government assessment timeframes for state significant tourism industry development proposals from November 2014 levels (298 days) to 149 days. Provide updates to the Team NSW Tourism Taskforce on approval timeframes for State-significant development proposals.	Department of Planning & Environment	-	March 2019
Improve the supply of visitor accommodation against projected demand by working with the private rental sector. [Action 5.3]	Supported in principle	22	Agree on a NSW Government policy position on short-term holiday letting.	Department of Planning & Environment Department of Finance, Services and Innovation	-	Ongoing
		23	Destination NSW will work with short term holiday letting providers to explore ways to improve data quality and collection for the short term holiday lettings sector. Where possible, this data will be incorporated in the Visitor Economy Index.	Destination NSW	Department of Finance, Services and Innovation	June 2019

Improved infrastucture (continued)

Taskforce report recommendations	Government response	#	VEIAP 2030 Action	Lead	Support	Timing
Accelerate work with the Commonwealth Government to: • address artificial capacity constraints at Sydney Airport, such as the movement cap and shoulder curfew • have new regional slots not counted within the movement cap. [Action 5.4]	Supported	24	Review regulations that may inhibit regional air services, including engagement with airport operators and airlines. Deregulate all intrastate routes except the routes connecting Sydney with Lord Howe Island and Moree. Deregulation will take effect on 29 March 2018.	Transport for NSW	-	April 2018
	Supported in principle	25	Conduct a review of artificial capacity constraints at Sydney Airport. The review will consider issues preventing airlines from introducing new regional air services, as determined in action 24. Further, the review will engage with the new Team NSW Tourism Taskforce to gauge industry perspectives. A report detailing outcomes of the review will be provided to the Minister for Tourism and Major Events and Minister for Transport by the end of 2018.	Department of Industry	Transport for NSW	End of 2018
Secure funding through the Restart NSW fund to develop and upgrade regional airports as high-priority infrastructure for the visitor economy. This should include upgrades to attract international flights to key locations such as Newcastle. [Action 5.5]	Supported in principle	26	This will be considered through the development of the Tourism Infrastructure Strategy (action 19).	Department of Industry	Infrastructure NSW Department of Premier & Cabinet Regional	Mid 2019
Work with Tourism Attraction Signposting Assessment Committee (TASAC) and relevant stakeholders to make it easier to showcase regions, visitor trails and attractions through streamlining requirements for signage. [Action 5.6]	Supported	27	Prepare a tourist drive strategy and supporting marketing campaign to increase regional overnight visitors and expenditure.	Destination NSW	Transport for NSW	December 2018
		28	Develop and implement a bypassed towns strategy. Commence pilot program including Berry, Holbrook and Macksville. Within six months of completing implementation, evaluate pilot outcomes and potential expansion. Within six months of completing implementation, evaluate pilot outcomes and potential expansion.	Transport for NSW	-	June 2018 December 2018
		29	Streamline the signposting application process and work with RMS to enhance tourist drive signposting in regional NSW.	Destination NSW	Transport for NSW	June 2019
Accelerate work to expand cruise capacity within Sydney ports. [Action 5.7]	Supported	30	Release the Cruise Development Plan to support the growth of the cruise industry across Sydney and regional NSW and commence implementation.	Department of Industry Transport for NSW	-	End of 2018

Product development and capacity building

| Taskforce report recommendations	Government response	#	VEIAP 2030 Action	Lead	Support	Timing
Increase target activity to high-yield international visitor markets, and undertake further detailed analysis to: • identify projected source markets for high-yield visitors • understand cultural expectations and preferences re supporting infrastructure and services—e.g. accommodation, events, leisure experiences • tailor marketing campaigns and communicate messages in appropriate languages. Share this information with the sector to encourage alignment of product opportunities. [Action 6.1]	Supported	31	Destination NSW Board to lead a medium-term review of marketing initiatives that target high-yield international visitor markets, including those that move into regional areas.	Destination NSW	-	March 2019
		32	Support high-yield international tourists by: • promoting guiding qualifications to Chinese speakers and other identified languages subsidised under the Smart and Skilled program, including through the 'EXCITE' program	Department of Industry	TAFE NSW, Destination NSW	From June 2019
			• working with the Commonwealth (Austrade) to address low-quality tours.	Destination NSW	Department of Industry	End of 2018
Improve the accessibility and experience for international visitors by: • working with industry and regional stakeholders to support recruitment and training of tour guides fluent in Chinese (and other key source market languages) in regional NSW • providing information, signage and wayfinding in appropriate languages and mediums (this also links to recommendation 7.1 on digital). [Action 6.2]	Supported	-	See actions 32 and 34.	-	-	-
Explore regulatory and commercial solutions to address factors causing consumer complaints from 'below cost' tours. [Action 6.3]	Supported	-	See action 32.	-	-	-
Engage with the NSW Small Business Commissioner to identify programs and support that could assist tourism operators in their product and business development aligned to employment growth. [Action 6.4]	Supported	33	Expand the Small Business Friendly Councils and Easy to do Business initiatives to target visitor economy sectors.	Department of Industry	-	End of 2018
To increase the uptake and timely allocation of grants, ensure the level of administration required to apply for grants is commensurate with the amount of grant funding. [Action 6.5]	Supported	-	See action 6.	-	-	-

Emphasis on customers, marketing and digital

Taskforce report recommendations	Government response	#	VEIAP 2030 Action	Lead	Support	Timing
Develop a digital strategy to improve customer experience and accelerate existing and emerging markets. The strategy could address: • capitalising on big data and analytics for the industry • development of an online industry portal for access to data and relevant information such as NSW Government policies and grants • how to target digital marketing to domestic and international visitor characteristics (6.1) • embracing the regional visitor economy such as developing a digital web and marketing presence for regions that links content to flagship sites such as Sydney.com • opportunities to improve information access and wayfinding through digital technology. [Action 7.1]	Supported	34	The Visitor Economy Index will provide industry insights including through big data (see action C). Insights from the Visitor Economy Index and other data sources will be provided to industry through an industry portal. Information available through the portal will also include access to relevant information such as grant funding.	Destination NSW	-	December 2018
		35	Expand Destination NSW's NSW First Program, which assists NSW tourism businesses to develop, promote and sell their tourism products through face to face workshops and online webcasts.	Destination NSW	-	February 2019
		36	Continue NSW Government $39M contribution to the roll out of Commonwealth Mobile Black Spot Program From the Connecting Country Communities Fund.	Department of Premier & Cabinet - Regional	-	June 2019
Accelerate the development of a whole-of-government strategy that leverages public and private sector effort to elevate the competitive positioning of Sydney for the broader benefit of NSW. [Action 7.2]	Supported	37	Continue to develop an international investment attraction program. This is an integrated approach to grow investment, exports, and jobs to position NSW globally as an attractive location for trade and investment. The program includes the development of a business strategy, new positioning for NSW, a digital platform for international investors, a new suite of collateral and a new concierge model for investor support. It builds on earlier NSW Government efforts on Project Sydney and the recently launched Regional Investment Prospectus and website.	Department of Industry	-	June 2019
Build on regional airport improvements by developing a strategy to package major visitor economy routes and experiences. [Action 7.3]	Supported	38	Incorporate interest-based visitation in the statewide Destination Management Plan. See action 8. See also actions 27 and 36.	Destination NSW	-	December 2018
Develop a customer experience program to capture customer trends, including in regional areas. [Action 7.4]	Supported	-	See action 3.	-	-	-
Actions to support the accessible tourism sector.	-	39	Promote the NSW Companion Card program.	Destination NSW	-	From December 2018
		40	Include accessible tourism as a focus in the statewide Destination Management Plan.	Destination NSW	-	December 2018

Transparent funding, reporting and evaluation

Taskforce report recommendations	Government response	#	VEIAP 2030 Action	Lead	Support	Timing
Maintain current funding in real terms for Destination NSW and Destination Networks for a minimum period of four years at a time to support longer term strategic planning, including major events attraction. [Action 8.1]	Noted	-	*Funding allocations for all NSW Government agencies are subject to decisions in the annual NSW budget process.*	-	-	-
Introduce Program Logic as an evaluation tool to demonstrate the value of investment and outcomes achieved. This should be consistent with NSW Government best practice. [Action 8.2]	Supported	41	Develop an evaluation framework for Destination NSW that illustrates the linkages between program activities and the economic and social benefits.	Destination NSW	Department of Industry	End of 2018
		42	Publish annual progress reporting on VEIAP 2030 actions and against 2030 target.	Department of Industry	Destination NSW	From end 2018
		43	Maintain, track and report quarterly on the Visitor Economy Index.	Destination NSW	-	From December 2018
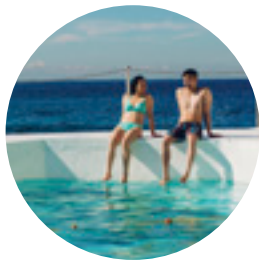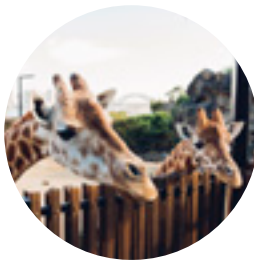
Attachment B

Major Events

19th International Symposium on Electronic Art 2013

3x3 Hustle Basketball 2018

AACTA (Australian Academy of Cinematic and Television Arts) Awards and Screen Week 2012-2020

AFL 9's 2016-2017

AFL Masters National Carnival 2018

AIS Sports Performance Awards 2016

Albury Gold Cup Carnival 2013-2018

Alexander the Great: 2000 Years of Treasures 2012-2013

American Quarter Horse Association Youth World Cup 2016

Amway China 2017

Amway Taiwan 2016

ARIA (Australian Recording Industry Association) Awards and ARIA Week 2012-2020

Arsenal FC V Sydney FC & Arsenal FC v Western Sydney Wanderers 2017

Artlands Dubbo 2016

ASTRA (Australian Subscription Television Awards Association) Awards 2015

Australia Day 2013-2018

Australian Athletics Championships 2017, 2019-2020

Australian Badminton Open 2012-2017

Australian Boardriders Battle (Regional Qualifier) 2013-2018

Australian Boardriders Battle (Regional Qualifier) 2014-2018

Australian Boardriders Battle National Final 2014-2016

Australian Boardriders Battle National Final 2017-2019

Australian Bowl-riding Championships 2014-2018

Australian Deaf Games 2018, 2022

Australian Fashion Laureate 2015-2018

Australian Fashion Week 2013-2018

Australian Fashion Weekend Edition 2014-2018

Australian Garden Show Sydney 2013-2014

Australian Hockey U15 Championships (Boy's & Girl's) 2016-2020

Australian Hockey U21 Championships (Men & Women) 2016-2020

Australian Indoor Hockey Championships 2018-2020

Australian Junior Athletics Championships 2012-2015, 2018

Australian Junior Surfing Titles 2013, 2017

Australian Ladies Classic Golf 2018-2022

Australian Little League Baseball Championships 2015-2020

Australian National Budgerigar Council Championships 2018

Australian National Cross Triathlon Championships 2016 & 2018-2020

Australian Open of Supercross 2015-2018

Australian Open of Surfing 2012-2017

Australian Open Surf Boat Championships 2013-2019

Australian Senior League Baseball Championships 2016-2020

Australian Surf Festival 2012-2019

Australian Surfing Awards 2014-2016

Australian Surfing Awards 2017

Australian Swimming Championships 2015

Australian Theatre Forum 2015

Australian University Games (Sydney and Western Sydney) 2014

Australian Youth Olympic Festival 2013

Aviatex 2018-2019

Babycare China Incentive 2017

Ballet Under the Stars 2016-2018

Banjo Paterson Festival 2014

Barbarians v Classic Wallabies 2017

Barbarians v Qantas Wallabies 2017

Bathurst 12 Hour 2013-2019

Battle on the Border 2013-2018

Beautiful: The Carole King Musical 2017-2018

Bingham Cup Sydney 2014

Blackmores Sydney Running Festival 2013-2018

Bledisloe Cup 2013-2021

Bledisloe Cup Festival 2013

Blender Festival 2015

Blue Man Group 2013

BMX Australia National Championships 2016

Bowl-a-Rama Bondi 2014-2019

Bowral Classic 2017-2019

Bravo Challenge 2015-2016

British and Irish Lions 2013

British and Irish Lions v Combined Country 2013

BWL International Convention 2019

Canoe Slalom Junior and Under 23 World Championship 2014

CeBIT Australia 2013-2019

Centenary of ANZAC Australian National Band Championships 2015-2017

Central Coast Sevens 2014-2017

Charlie & the Chocolate Factory 2019

Chelsea FC v Sydney FC 2015

CMC Rocks the Hunter 2013-2014

Coates Hire Newcastle 500 2017-2021

Collette Dinnigan: Unlaced 2015-2017

Communicating the Museum 2014

Corroboree Sydney 2013-2014

Crowded House 25 Year Reunion Concerts 2016

Culture Business 2016

Deni Blues and Roots Festival 2013-2014

Deni Ute Muster 2013-2018

Dirty Dancing - The Musical 2014-2015

Disney's Aladdin 2016-2017

Dream Lover, the Bobby Darin Musical 2016

Dungog Festival 2014-2016

Eastern University Games 2014-2016

Egyptian Mummies: Exploring Ancient Lives 2016-2017

Electronic Music Conference 2014-2016

Ellen DeGeneres 2013

Major Events (continued)

Emirates Australian Open Golf Championship 2013-2023

Evita 2018

Evocities MTB Series 2016

Extreme Sailing Series 2014-2015

FAI Junior World Gliding Championships 2015

Fast4 Tennis 2015-2018

Fed Cup by BNP Paribas World Play Off - Australia v Netherlands 2018

Ferrari Racing Days 2014

FFA Socceroos and Matildas Football Match Package 2018-2020

FIFA World Cup Qualifier 2014 - Socceroos v Iraq

FIFA World Cup Qualifier 2018

FIGO - World Congress of Gynaecology 2021

FIM Oceania Supermoto Championships 2016-2018

FIT Touch World Cup 2015

Football Federation Australia - National Youth Championships 2015-2019

Forever Living Rally 2020

Fuelarama 2013-2014

Game ON 2015

Good Design Festival and Awards 20148-2018

Grand Masters Hockey World Cup 2016

Great Sydney Swim 2014

Harley Days 2016-2017

Harvey Norman NRL Indigenous All Stars v World All Stars 2017

Helpmann Awards 2012-2018

Hobie 16 World Championships 2014

Holden Women's State of Origin 2018

HSBC Sydney Sevens 2016-2019

IBF Middle Weight Title Fight: Anthony Mundine v Daniel Geale 2013

Ice Hockey Classic - USA v Canada 2016

Indoor Cricket Australian Junior Championships 2016

Inter Dominion Championship, Grand Final 2013-2015

International Bar Association 2017

International Children's Games 2014

International Conference of Global Health Security 2019

International Conference of the Council on Tall Buildings and Urban Habitat - CTBUH 2017

International Council on Monuments and Sites General Assembly and Symposium - ICOMOS 2020

International Football Friendly - Matildas v Brazil 2017

International Football Friendly - Socceroos v Greece 2016

International Hockey Fixture 2018-2020

International Hockey Series 2015

International Society for Magnetic Resonance in Medicine (ISMRM) 2020

International Trademark Association 2026

Ironman 70.3 Asia Pacific Championships 2017

Ironman 70.3 Port Macquarie 2013-2015

Ironman 70.3 Western Sydney 2014-2016, 2018

Ironman Australia Port Macquarie 2013-2021

ISA World Kneeboarding Championships 2015

Isabella Blow: A Fashionable Life 2016

ITU Cross Triathlon World Championships 2016

Jack Newton Celebrity Classic 2012-2015

James Cameron: Challenging the Deep 2018-2019

Jersey Boys 2018

Jeunesse Greater China Incentive 2018

June Winter Test Series 2016-2019

Just for Laughs 2013

Juventus v A-League All Stars 2014

Kaldor Public Art Project: Jonathan Jones - barrangal dyara (skin and bones) 2016

Kellogg's Nutri-Grain Ironman Series and Ironwoman Series 2013

KFC T20 International 2013-2014

Kiama Bodyboard Slam 2018

Kidtopia Festival 2016-2017

LAUNCH Startup Festival 2017 and 2018

Les Misérables - The Musical 2015

L'Etape Australia by Le Tour de France 2016-2018

Liverpool Legends v Australian Legends 2016

Liverpool v Sydney FC 2017

Major League Baseball Opening Series 2014

Mammoths! Giants of the Ice Age 2017-2018

Mammoths! Giants of the Ice Age, 2017-2018

Manchester United v A-League All Stars 2013

Masters Women's Australian Championship (Hockey) 2017, 2019

Matilda - The Musical 2015

Men's Masters Australian Hockey Championships 2018, 2020

Mirror Dinghy World Championships (Nationals) 2018

Mirror Dinghy World Championships (Worlds) 2018-2019

Monster Jam 2013

MotorWorld Sydney 2016

MTV Beats and Eats 2015-2017

Mumbrella 360 2014-2015

Muriel's Wedding - The Musical 2017-2019

My Fair Lady - The Musical 2016

NAB AFL Draft 2016-2017

National Cutting Horse Association Futurity 2013-2018

National Touch League 2013-2022

National Variety Bash 2014

NCAA College Football - Stanford University v Rice University Owls 2016-2017

Netball World Cup 2015

Newton's Nation 2012-2013

NRL ANZAC Test - Australia v New Zealand 2016

NRL City v Country 2014, 2016-2017

NRL Grand Final 2013-2019

NRL Grand Final Week 2013-2019

NRL Pacific Double Header 2016

NRL Pacific Test Triple Header 2017

NRL State of Origin 2013-2019

NRL Test Match 2014

NSW Open Golf Championship 2015-2019

NSW Pro Surf Series - Carve Pro 2016-2018

NSW Pro Surf Series - Central Coast Pro 2016-2018

NSW Pro Surf Series - Great Lakes Pro 2016-2018

NSW Pro Surf Series - Tweed Coast Pro 2016-2018

NSW South Coast Crusade 2013

Major Events (continued)

Nu Skin Korea 2017

Nu Skin SEA Success Trip 2018

NuSkin Greater China Group 2014

Obstacle Course Racing World Championships Long Course 2018

Oceania Cross Triathlon Championships 2015

Oceania Cup Sydney (Hockey) 2017

Offshore Superboat Championships 2015-2017

Olympic Qualifiers and Australian Athletics Championships 2016

Open Trans Tasman Touch Series 2014, 2020 & 2022

Openstack Summit 2017

Opera in the Paddock 2015-2017

Opera on Sydney Harbour 2012-2020

Orange Challenge 2016-2018

Pacific Cup (Rugby League) 2013-2020

Paris Opera Ballet - Giselle 2013

Parkes Aero Spectacular 2018

Parkes Elvis Festival 2015-2018

Parramasala 2012-2015*

Port Stephens NSW Pro 2017-2018

Port to Port MTB 2014-2019

Pro Health China 2014

Prudential Hong Kong Convention 2017

Prudential Korea's Presidents Trophy Convention 2019

Rare Birds Con 2016

Real Film Festival 2013

Red Rooster Sydney SuperNight 300 2014 & 2018

Reigning Men: Fashion in Menswear 1715-2015, in 2018

Remix Sydney 2014-2016

Rob Guest Endowment Concert 2013-2016

Robocup 2019

Royal Australian Navy International Fleet Review 2013

Sail Port Stephens 2013-2019

Semen Indonesia Annual Incentive 2016

Semi Permanent Sydney 2013-2018

Shotokan Karate International Federation (SKIF) World Championship and World Congress 2012

Snowies Mountain Bike Festival 2018-2020

Southern 80 2013, 2016-2019

Superfoiler Grand Prix Grand Final 2018

Surfest Newcastle 2013-2019

Sustainable Brands Conference 2016

Sydney 500 2013-2016

Sydney Festival (Sydney & Parramatta) 2013-2019

Sydney Film Festival 2013-2019

Sydney Gay and Lesbian Mardi Gras Parade 2013-2018

Sydney Harbour Challenge 2016-2018

Sydney International Art Series - Art Gallery of NSW 2012-2019

Sydney International Art Series - Museum of Contemporary Art 2012-2019

Sydney International Piano Competition of Australia 2016

Sydney International Rowing Regatta 2013-2019

Sydney International Tennis 2015-2018

Sydney Moderns: Art for a New World 2013

Sydney Opera House: 40th Anniversary 2013

Sydney Royal Easter Show 2013-2018

Sydney Surf Film Festival 2015

Sydney Surf Pro 2018

Sydney Track Classic 2013-2015

Tamworth Country Music Festival 2014-2019

Temptation Reloaded 2013

The Big Issue Street Football Festival 2013-2015

The Lion King - The Musical 2013-2014

The Rolling Stones Exhibit 2018-2019

Top Gear Festival 2013-2014

Tottenham Hotspur v Sydney FC 2015

Trailblazers: Australia's 50 Greatest Explorers 2015 -2016

Tropfest Australia 2013-2014 & 2016

True Grit 2016-2018

Tyrannosaurs 2013-2014

V8 Supercars Sydney SuperSprint 2014-2017

Vanfest 2015-2017

Video Junkee 2017

Vivid Lights On 2012-2018

Vivid Live 2012-2018

Vivid Sydney at Carriageworks 2014-2018

Volleyfest 2016-2017

Wigan Warriors v Hull FC 2018

Wigan Warriors v South Sydney Rabbitohs &

Hull FC v St George Illawarra Dragons 2018

Wings Over Illawarra Air Show 2016-2019

Wollongong Gran Fondo and Multi Sport Festival 2012

Women's NSW Open Championship - Golf 2018-2019

World Angus Forum 2021

World Baseball Classic Qualifier 2016

World Congress of Accountants 2018

World Congress on Medical Informatics (MEDINFO) 2021

World Series International Mens Volleyball 2015

World Surf League Junior Championships 2017-2018

World Time Attack Challenge 2015-2017

X Media Lab: Global Media Ideas 2013

XI FIP World Polo Championships 2017

XPD Adventure World Racing Championships 2016

XTERRA Asia Pacific Championship 2014-2016

Yabun Festival 2013-2018

Youth Trans Tasman Touch Series 2015-2020

*Destination NSW invested in the 2015 event but the contract was managed through Multicultural NSW.

Attachment C
Images Index

For more information:

industry.nsw.gov.au