



# eurobodalla

destination action plan 2018 to 2021

## Key Priorities and Actions from a Review of the Eurobodalla Destination Management Plan 2011 to 2020

5 July 2018

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## 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 specific recommendations should be analysed, and appropriate due diligence undertaken prior to making any investment decisions.

In the course of our preparation of the Eurobodalla Destination Action Plan 2018 to 2021, recommendations have been made on the basis of assumptions, methodology and information provided by many sources. 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.



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# Acronyms

<b>BMPA</b>	Batemans Marine Park Authority	<b>EDMP SC</b>	Eurobodalla Destination Management Plan Steering Committee
<b>CCIA</b>	Caravan and Camping Industry Association	<b>FCNSW</b>	Forestry Corporation of NSW
<b>DLPI</b>	Department of Lands and Primary Industries (NSW Government)	<b>INSW</b>	Infrastructure New South Wales
<b>DNSW</b>	Destination New South Wales	<b>NPWS</b>	National Parks and Wildlife Service
<b>DSNSW</b>	Destination Southern NSW	<b>RDA</b>	Regional Development Australia
<b>EDAP</b>	Eurobodalla Destination Action Plan	<b>RVEF</b>	Regional Visitor Economy Fund
<b>EDMP</b>	Eurobodalla Destination Management Plan		





# Executive Summary

A review of the Eurobodalla Destination Management Plan (EDMP) 2011 to 2020 was undertaken from September 2016 to March 2017 to prioritise opportunities and actions to develop a Destination Action Plan to guide the cooperative efforts of Council and industry to manage and grow Eurobodalla's visitor economy over the next four years. The Plan was further updated in May 2018 following the release of the Destination Southern New South Wales Regional Destination Management Plan in April 2018.

A bold aim has been established to increase visitor expenditure and overnight visitor stays by 25%<sup>1</sup> by 2021 and to encourage visitor dispersal throughout the year and across the Shire. The Plan identifies eight priority areas and associated actions to be implemented over the next four years to 2021 by Council in partnership with industry to achieve this aim:

1. Establish a Destination Management Framework within Council to lead and foster a strategic and cooperative approach to tourism, events and tourism business development for Eurobodalla that involves the business sector, and other important regional and state government stakeholders
2. Establish industry engagement and business development initiatives to support tourism and event operators to achieve best practice and sustainable operations
3. Determine a realistic destination research system to regularly track visitation, visitor expenditure, satisfaction and perceptions
4. Encourage and facilitate private and public sector investment for infrastructure and facilities development to position Eurobodalla as a great place to live, visit and do business
5. Develop a strategic and coordinated approach to tourism product and experience development to position Eurobodalla as an iconic nature-based tourism and regional food destination on the South Coast
6. Adopt a pro-active and strategic approach to event procurement and development to increase visitation expenditure across the year for Eurobodalla and its towns and villages
7. Establish strategic and tactical marketing campaigns to reach key visitor markets and promote Eurobodalla's distinct points of difference from coastal competitors
8. Continue to manage the operation and delivery of visitor information services for the Eurobodalla destination region to ensure economic viability of Visitor Information Centres, exceptional service, and delivery of visitor information that aligns with changing visitor information search behaviours and visitor information technologies.

<sup>1</sup>From the base of overnight visitation Eurobodalla Tourism Monitor Visitation YE June 2016



# 1.0 Introduction

The Eurobodalla Destination Management Plan (EDMP) 2011 to 2020 established eleven key directions and associated actions to guide the development, management and marketing of tourism for Eurobodalla and its towns and villages.

In 2015, Council's tourism staff and its Tourism Advisory Committee resolved that the EDMP required a comprehensive review and the need for an evidence based approach that identified and prioritised future opportunities to deliver an achievable action plan to guide Council's initiatives for tourism and events in cooperation with industry to 2021.

A Tourism Sector Analysis Report<sup>2</sup> was prepared in May 2016 as part of Council's broader Economic Growth and Development Strategy and to inform the EDMP process. The Report considered how tourism contributes to economic growth and development of the Shire including identifying:

- Influences on tourism sector from national, state, regional and local visitor economy perspectives
- Impediments to the tourism sector contributing to or facilitating economic growth and development
- Potential actions (including those outside of the responsibility of local government) that may assist overcoming such impediments.

From this analysis, the EDMP Review Process was undertaken from September 2016 to March 2017 by Dr Meredith Wray in cooperation with Council staff involved in tourism and events, Council's Executive Leadership Team, the EDMP Review Steering Committee, Council's Business and Advisory Committees,

and consultation with Eurobodalla Council's Citizen Jury (see Appendix 8.1 for an overview of the Review Process). The Plan was further updated in May 2018 following the release of the Destination Southern New South Wales Regional Destination Management Plan in April 2018.

The Eurobodalla Destination Action Plan (EDAP) 2018 to 2021 is an important outcome of the Review Process that prioritises opportunities and actions to deliver an achievable and realistic action plan to guide the cooperative efforts of Council and industry to manage and grow Eurobodalla's visitor economy. The Review Process has confirmed a strong commitment from Council and industry to develop trust and a solid working relationship to achieve outcomes of this Plan.

Ultimately, the successful implementation of this Plan will require effective leadership and strategic management from Council and its staff that is supported by the passion, expertise and cooperation of local tourism industry leaders and other key tourism stakeholders across regional and state levels. Specifically, the local industry has a key role in fostering support from tourism operations in the development, enhancement and promotion of tourism product and experience development opportunities to create distinctive and quality visitor experiences. Careful consideration has also been given to ensure that the development and promotion of tourism continues to celebrate and protect Eurobodalla's distinctive natural assets whilst providing benefits for the local community.

<sup>2</sup>Wray, M. (2016). Tourism Sector Analysis Report, prepared for Eurobodalla Shire Council, May

<sup>3</sup>From the base of overnight visitation Eurobodalla Tourism Monitor Visitation YE June 2016

## Aim

The aim of the Eurobodalla Destination Action Plan 2018 to 2021 is to strengthen the Eurobodalla visitor economy by increasing visitor expenditure and overnight visitor stays by 25%<sup>3</sup> and encouraging visitor dispersal throughout the year and across the Shire. This will be achieved by Council and industry working cooperatively to develop and promote Eurobodalla and its towns and villages as important destinations within the South Coast of NSW, increasing visitor awareness and satisfaction, attracting new investment for infrastructure, and integrating tourism across Council strategic planning initiatives.

## Proposed benchmarks to be achieved by YE December 2021<sup>4</sup>

Table 1: Proposed benchmarks visitation 2021

Visitor market	YE June 2011/2012	YE June 2015/2016	% change 2011/2012 to 2015/2016	YE June 2016/2017	% change 2011/2012 to 2016/2017	Goal 2021	Goal 2021 % increase on 2015/2016
Domestic overnight visitors	702	785	+ 11.8	793	+13	981	+ 25
Domestic nights	2,547	2,719	+ 6.8	2,630	+3	3,399	+ 25
International overnight visitors	24	29	+ 20.8	37	+28	36	+ 25
International nights	105	91	– 13.3	191	+82	114	+ 25
Domestic day visitors	488	706	+ 44.6	461	-25	776	+ 10

Source: Destination Research, Eurobodalla Tourism Monitor, 30 December 2017

Table 2: Proposed benchmark visitor expenditure 2021

Key measures	Estimated Expenditure YE June 2015 \$m	Estimated Expenditure YE June 2016 \$m	Change YE 2015 to YE 2016 %	Estimated Expenditure YE June 2017 \$m	Change YE 2016 to YE 2017 %	Goal 2021 %	Goal 2021 \$m
Total spend (overnight and domestic daytrip)	371	370	– 0.02	385	+ 4%	+ 25	462

Source: Valerio, Eurobodalla Shire: Visitor Volumes & Estimated Economic Impact, YE 30 June 2017

<sup>4</sup>Note: Achievement of benchmark goals may be influenced by external factors such as changes to broader economic conditions and other unforeseen conditions/influences.





## 2.0 Growing Eurobodalla's Visitor Economy

Eurobodalla is well positioned as an important domestic leisure travel destination within the South Coast region. Analysis of recent visitation data shows that the Eurobodalla received 1.3 million visitors for year ending 2016/2017 of which 61% were domestic overnight visitors, 36% were domestic day visitors, and 3% were international visitors<sup>5</sup>. The most recent analysis of tourism expenditure for the Eurobodalla LGA shows that tourism expenditure for the year ending June 2017 was \$385 million<sup>7</sup>. It is further estimated that 2,482 jobs (67%) are directly supported by tourism and 1,284 (23%) jobs are indirectly supported by tourism<sup>6</sup>.

Although these results indicate a relatively stable visitor economy, there are a number of important challenges that must be overcome in order to achieve the goal of increasing visitor expenditure and overnight stays by 25% by 2021. These include the need to:

- Establish an effective and collaborative working relationship between Council and tourism industry stakeholders
- Foster improved engagement with tourism businesses as part of a 'whole of destination' approach
- Address relatively flat visitation performance since 2011

- Revitalise Batemans Bay as an appealing gateway for the community and visitors to Eurobodalla
- Overcome aging accommodation infrastructure
- Attract new public and private sector investment for infrastructure and tourism product experience development
- Identify and promote Eurobodalla's unique experiences to attract repeat and new visitors and cut-through the cluttered coastal visitor marketplace
- Effectively package and promote innovative tourism products and experiences to create a 'total destination experience' to generate more overnight stays, increase expenditure, overcome seasonality and differentiate Eurobodalla from its competitors
- Pursue and support new and existing festivals and events that are key drivers of visitation to help overcome seasonality and generate increased visitor awareness of Eurobodalla and its experiences
- Overcome message confusion amongst visitors, tourism stakeholders and the community (e.g. 'Eurobodalla – a Land of Many Waters', 'Batemans Bay – Take it Easy', DNSW 'Unspoilt' marketing campaign).

<sup>5</sup>Destination Research, Eurobodalla Tourism Monitor, 12 December 2017

<sup>6</sup>Valerio, Eurobodalla Shire: Visitor Volumes & Estimated Economic Impact, YE 30 June 2016

<sup>7</sup>Valerio, Eurobodalla Tourism Monitor YE June 2017



There are a number of important opportunities that will assist in overcoming these challenges and achieving this Plan's goals. These include:

- A strong will from industry, Council and its staff to work cooperatively to achieve the priorities of this Plan
- The Batemans Bay Integrated Land Use and Transport Strategy project to ensure the Batemans Bay Town Centre can realise its potential as a place to live, work and visit
- Visioning projects that are proposed to guide the development of Moruya and Narooma town centres
- Other important Council strategic planning initiatives that will influence tourism growth include upgrades to the Moruya Regional Airport, Rural Lands Strategy, Mackay Park Regional Aquatic and Arts and Cultural Centre Shellfish Hatchery and the development of the Eurobodalla Destination Development Plan
- Distinctive and abundant natural and marine environments that continue to be protected and provide significant opportunities for nature-based tourism opportunities
- Emergence of regional food as an important and growing industry sector for Eurobodalla that is also appealing to visitors
- Promoting Eurobodalla's key experiences to an increasing number of international visitors arriving on new air services into Canberra
- Development of the South Batemans Bay Link Road that will alleviate traffic congestion to Batemans Bay in peak times
- A new management model for the delivery of visitor information services at the Narooma Visitor Centre that is working well
- Establishment of a new and expert-based regional tourism organisational structure, Destination Southern NSW, that has been created to provide greater support for the region.

Achieving growth will also require careful consideration of the Eurobodalla brand and identity to clearly distinguish and determine Eurobodalla's key points of difference to domestic and international visitor markets related to its strengths as an appealing destination for nature-based and recreational experiences as well as an emerging centre for regional food. Destination marketing initiatives for Eurobodalla should promote these competitive advantages, as well as better package and promote other experience opportunities to attract domestic and overnight visitors and provide investor confidence including:

- Support for the development and enhancement of key festivals and events to attract visitors and that align with the Eurobodalla brand
- Development of quality tourism and hospitality experiences as part of the Batemans Bay Integrative Tourism and Land Use project and township visioning projects (Moruya and Narooma)
- Working with relevant local groups and stakeholder agencies to further develop heritage, arts and cultural, and wellness tourism experiences to complement nature-based and regional food experiences.

It is also important to recognise that Eurobodalla is competing with other coastal destinations north and south of Sydney, so it is imperative that new marketing initiatives deliver a strong brand and identity that resonates and appeals to potential visitor markets to cut through the competitive 'coastal clutter'. We are mindful that upgrades to the Pacific Highway mean destinations such as Port Stephens, Port Macquarie and even Coffs Harbour are becoming closer for visitors to access out of Sydney.

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Engagement and collaboration with the local industry is also paramount. Council and local industry leaders have a significant role in motivating and inspiring local operators across Eurobodalla to work cooperatively and to encourage buy-in for new promotional strategies. Regular and effective engagement and capacity building with the local tourism industry is therefore essential to achieve a whole of destination approach. The establishment of Destination Southern New South Wales will also provide opportunities for industry training and capacity building.

It is also recognised that Eurobodalla is highly dependent on domestic tourism and any socio or macro-economic effect on the domestic tourism market may affect market growth potential. In addition, environmental risks such as bushfire, drought or flood may also impact tourism visitation to the area. The achievement of the Plan's aim and priorities may also be influenced by broader external factors and other unforeseen conditions such as any changes to the global and national economy; NSW policy and funding arrangements for tourism; environmental risks such as bushfire, drought or flood; and terrorism. As a consequence, there is a need for Eurobodalla to plan for risks to the visitor economy in order to be prepared for any unexpected crises or risk that may affect business viability, community and visitor wellbeing, and the environment.

### Nature Based Tourism Potential

Nature based tourism is recognised by Tourism Australia and Destination New South Wales as an important and growing experience sector for international, domestic and daytrip visitors.

For the year ending September 2017, NSW received nearly 28.3 million international and domestic overnight nature based visitors who spent nearly 129 million nights in the State. Nature based visitors accounted for 84% of international visitors to NSW, 37% of domestic overnight visitors and 23% of daytrip visitors.

Source: Nature Based Tourism to NSW YE September 2017



## 3.0 Key Visitor Markets

Analysis of Tourism Research Australia visitation research for Eurobodalla over five years from 2011/2012 to 2015/2016 clearly identifies:

- Canberra/ACT and Sydney as the main source markets for domestic overnight visitors
- The South Coast and Canberra are the main source markets for domestic daytrip visitors
- Families with children and older retired persons are the main lifecycle profiles for domestic overnight and daytrip visitors
- The UK and Europe are still the main source markets for international visitors but there has been a decline in visitation
- There has been growth in Asia, France and Germany source markets
- Domestic and international overnight visitors like to do social activities and participate in outdoor/nature activities/active sports (see Table 3).

Table 3: Visitor Summary: 5 year average to YE June 2017

Five year average	Domestic overnight	International	Domestic day trip	Total
<b>Visitors ('000)</b>	747	37	461	1,245
%	60	3	37	100
<b>Nights ('000)</b>	2,755	191	^	2,946
%	94	6		100
<b>Average night stay</b>	3.7	5.2	^	
<b>Average expenditure</b>	\$421 per trip \$160 per night	\$327 per trip \$81 per night	\$111 per trip	
<b>Lifecycle</b>	Families with children (30%) Older retired persons (21%)	N/A	Families with children (27%) Older retired couples (33%)	
<b>Activities</b>	1. Social activities 2. Outdoor/nature 3. Active sports	1. Social activities 2. Outdoor/nature 3. Local attractions	1. Social activities 2. Outdoor/nature 3. Active sports	
<b>Source markets</b>	Sydney (26%) ACT (25%) Capital Country (12%) Regional NSW (12%) Victoria (12%) South Coast (10%)	UK/Europe (62%) Nth America (16%) Asia (9%)	South Coast (60%) ACT (11%) Capital Country (11%) Sydney (11%)	

<sup>7</sup>For further information see the Eurobodalla Tourism Monitor 2017 prepared by Destination Research, 30 December 2017.

The focus for Eurobodalla promotional initiatives should be concentrated on the following key visitor markets:

1. **Domestic overnight visitors** from Canberra/ACT and Sydney (primary), Regional NSW and Victoria (secondary) targeting families, retirees, VFR with the intention of attracting them to stay longer
2. **Domestic daytrip visitors** from the South Coast and Canberra targeting families and friends, retirees and VFR with the intention of converting them to overnight stays
3. **International visitors** arriving in Canberra and Sydney with the intention of attracting them to stay longer in Eurobodalla.

See Appendix 8.2 for key findings of recent research undertaken by Destination New South Wales of domestic visitors to the South Coast.

## KEY EXPERIENCE SECTORS

### Nature

Leisure and recreation experiences provided by our beaches, waterways, National Parks & State Forests, local Recreational Areas including Adventure and Aboriginal Tourism

Food	Towns & Villages	Events
Opportunities for visitors to purchase and taste local produce	Opportunities for visitors to experience Distinct local village life	Major Tourism Events: That attract new & repeat visitors
Markets, Food Tourism Events, Restaurants, Cafes, Pop-ups	Shopping, Arts, Culture, Heritage, Entertainment	Special Interest Events: That enhance the visitor experience

<sup>8</sup>DNSW, (2015) NSW VFR Research

## Visiting Friends & Relatives

The VFR market may provide opportunities for Eurobodalla to further promote its tourism experiences to residents and their visitors. Recent research undertaken by DNSW shows that the Visiting Friends and Relatives (VFR) market is of considerable importance to NSW. It is the second largest purpose of visit segment amongst visitors to NSW, after the Holiday market. It is also a segment that has seen considerable growth over the last few years. Since year ended March 2011, the number of domestic overnight VFR visitors and expenditure to NSW has grown by 22% and 23% – nearly twice the rate of ‘holiday’ visitor growth expenditure. According to the report, domestic VFR visitation accounted for 37% of NSW domestic overnight visitors that spent over \$3.3 billion in the State (YE March 2016). The report further determined that hosts are well placed to be ambassadors for driving tourism in NSW and are receptive to encouraging visitation from family and friends, and their willingness to spend to provide their visitors a memorable experience. However, hosts need further inspiration and incentivisation to maximise their ambassador status and drive greater value from the VFR segment<sup>8</sup>.





# 4.0 Tourism Vision & Values

The tourism vision statement that was established for the EDMP 2011 to 2020 has been revised in consultation with the Tourism and Business Advisory Committees as follows:

## EUROBODALLA TOURISM VISION

Cooperate and support each other to achieve a strong and innovative visitor economy that preserves our natural environment, fosters support and pride from our community, celebrates and offers distinctive and quality visitor experiences related to our natural and marine assets, regional food, culture and heritage, and welcomes and cares for our visitors.

## VALUES

This vision is underpinned by the following values:

- Achieve a sustainable, innovative tourism sector to drive economic growth and job creation
- Preserve the natural environment
- Cooperate and support each other
- Communicate effectively with our community to foster acceptance and support for tourism
- Celebrate and offer a diversity of quality visitor experiences related to our natural environment, adventure, culture and heritage
- Welcome and care for our visitors.





## 5.0 Key Priorities to 2021

The following Destination Action Plan outlines priorities and associated actions for Council and industry stakeholders to implement cooperatively over the next four years to 2021.

The priority actions in this Plan have been assigned a priority time frame:

<b>HIGH</b>	commencing Year One
<b>MEDIUM</b>	commencing Year Two
<b>LOW</b>	commencing Year Three

Strategy numbers from the original DMP have been included in brackets on Actions that carry-over, or are similar, to the original EDMP 2011 to 2020. In addition, evaluation actions have been assigned to each priority to ensure progress and achievements are regularly monitored.

### STRATEGIC PRIORITIES

Priority One	Strategic Destination Management
Priority Two	Industry Engagement & Development
Priority Three	Destination Research
Priority Four	Destination Investment & Development
Priority Five	Tourism Product & Experience Development
Priority Six	Tourism Events
Priority Seven	Destination Marketing
Priority Eight	Visitor Information Services

## Priority 1 Strategic Destination Management

Establish a Destination Management Framework within Council to lead and foster a strategic and cooperative approach to tourism, events and tourism business development for Eurobodalla that involves the business sector, and other important regional and state government stakeholders.

ACTIONS	RESPONSIBILITY	PRIORITY
1.1 Integrate the Eurobodalla Destination Action Plan 2018 to 2021 into Council Delivery Programs and annual Operational Plans.	Council	High
1.2 Review Council staffing arrangements and associated position descriptions to integrate and provide effective and strategic leadership and management for tourism, events and tourism business development.	Council	High
1.3 Review Council's budget for tourism to adequately resource the management, development and marketing actions of the EDAP 2018 to 2021..	Council	High
1.4 Undertake a robust review of Council's Tourism and Business Advisory Committees in collaboration with current members.	Council	High
1.5 Ensure the priorities and actions of the EDAP 2018 to 2021 are communicated to all other Council Divisions.	Council	High
1.6 Identify and pursue strategic and cooperative partnerships with key tourism stakeholders to assist with the implementation of the EDAP 2018 to 2021 (e.g. BMPA, DNSW, NPWS, DSNSW, FCNSW, Visit Canberra).	Council	High
1.7 Assess and plan for potential risks related to the local visitor economy including natural disasters, threats to natural environments, currency fluctuations, and terrorist attacks and ensure visitor safety and security is assessed and integrated into current and future Council plans and policies.	Council	Medium
1.8 Evaluate annual implementation of EDAP 2018 to 2021 action across all Council divisions.	Council	Medium/High



## Priority 2 Industry Engagement & Development

Establish industry engagement and business development initiatives to support tourism and event operators to achieve best practice and sustainable operations.

ACTIONS	RESPONSIBILITY	PRIORITY
2.1 Communicate the key priorities of the EDAP 2018 to 2021 to tourism and events stakeholders across local, regional and state levels.	Council, Industry	High
2.2 Identify business development skills and training needs of tourism and event operators.	Council, Industry	High
2.3 Establish initiatives to regularly engage with the local tourism and events operators and develop best practice operations. Outcomes should include support for tourism and events operators to: <ul style="list-style-type: none"> <li>Understand digital media technologies</li> <li>Prepare tourism and business awards submissions</li> <li>Achieve eco-tourism accreditation and</li> <li>To celebrate and promote best practice tourism and hospitality operations.</li> </ul>	Council, Industry	Medium
2.4 Prepare an annual Industry Engagement & Development Report that evaluates: <ul style="list-style-type: none"> <li>Communication and attendance at tourism and events networking initiatives</li> <li>Feedback from participants on the usefulness of engagement activities for their businesses (e.g. develop a regular survey to gain feedback)</li> <li>The number of tourism and events operators that prepare tourism award submissions.</li> </ul>	Council, Industry	Medium/Low



### Priority 3 Destination Research

Determine a realistic destination research system to regularly track visitation, visitor expenditure, satisfaction and perceptions.

ACTIONS	RESPONSIBILITY	PRIORITY
3.1 Continue to use a specialised tourism research consultant to evaluate and analyse TRA visitation data half yearly data including visitor profile and activity data, and for key competitor destinations.	Council, Industry	High
3.2 Work with a research consultant to trial a system to evaluate visitation data from key tourist attractions and businesses in Eurobodalla to supplement TRA data analysis to be funded by industry and Council cooperatively.	Industry	Medium
3.3 Undertake consumer research to evaluate visitor perceptions of Eurobodalla and its destinations.	Council, Industry	Medium
3.4 Develop a Visitor Survey that can be administered and analysed regularly at key locations across Eurobodalla to better understand visitor profiles, activities and satisfaction.	Council, Industry	Medium
3.5 Train VIC staff and industry volunteers to help administer the Visitor Survey at key times throughout the year.	Council, Industry	Medium
3.6 Prepare an annual Research Report that evaluates and analyses data collected from Actions 3.1, 3.2, 3.4, 3.5 and communicate key findings to tourism businesses.	Council, Industry	Medium/Low



## Priority 4 Destination Investment & Development

Encourage and facilitate private and public sector investment for infrastructure and facilities development to position Eurobodalla as a great place to live, visit and do business.

ACTIONS	RESPONSIBILITY	PRIORITY
4.1 Ensure tourism is considered as an important part of Council physical and community infrastructure planning and development projects to attract quality tourism and hospitality investment and provide exceptional experiences for visitors and the community.	Council, Industry	High
4.2 Develop a Eurobodalla Destination Development Plan to identify land based and marine infrastructure and commercial opportunities that includes an infrastructure and product audit, gap analysis, supply/demand and competitive destination analysis, and potential site identification.	Council, Industry	High
4.3 Prepare a Investment Prospectus as part of Council's Attracting Investment project that identifies investment and development opportunities to engage and attract innovative and quality private sector tourism and hospitality investment for the Batemans Bay Town Centre Precinct and Eurobodalla's towns and villages including identification of Public Private Investment opportunities.	Council, Industry	High
4.4 Prepare fact sheets and web material that promote the tourism development opportunities that exist via Councils LEP and identify the land use zones within which they exist.	Council	High
4.5 Integrate tourism investment and business opportunities in Council's website.	Council	High
4.6 Encourage and support investment in the refurbishment and upgrade of existing accommodation facilities (e.g. motels, hotels, serviced apartments, caravan and camping parks) to provide quality facilities and experiences for visitors including development of facilities to make properties accessible.	Council, Industry	High
4.7 Continue to implement upgrades to the Moruya Regional Airport and leisure passenger services as recommended in the Moruya Airport Masterplan 2015.	Council	High
4.8 Work with relevant Council departments to improve the visual appeal of towns and villages through ongoing beautification works and manage impacts during construction of physical infrastructure development projects (e.g. bridge and road upgrades) gateway entrances, wayfinding signage).	Council	Medium
4.9 Develop strategic partnerships and lobby relevant NSW and Australian government departments to support and fund the development of appropriate public infrastructure and facilities to enhance the visitor experience, community amenity and local economy (e.g. NPWS, BMDPA, Crown Lands, State Forests, DNSW, DLPI, INSW, RDA).	Council	Medium
4.10 Distribute Best Practice Holiday Letting Guidelines for property owners of holiday houses and AirBnB properties to encourage responsible holiday-letting practices to minimise potential visitor impacts (e.g. adapt the Stayz Holiday Rental Code of Conduct).	Council	Medium
4.11 Encourage and support accommodation providers to upgrade and provide accessible tourism facilities as part of being an inclusive and accessible ready destination.	Council	Medium
4.12 Prepare an annual Investment Report that evaluates public and private sector investment in tourism related infrastructure and facility development and refurbishment projects.	Council, Industry	Medium



## Priority 5 Tourism Product & Experience Development

Develop a strategic and coordinated approach to tourism product and experience development to position Eurobodalla as an iconic nature-based tourism and regional food destination on the South Coast.

ACTIONS	RESPONSIBILITY	PRIORITY
5.1 Work with the Tourism Advisory Panel and external representatives from nature-based tourism stakeholder organisations (including NPWS, BMPA, State Forests) to lead a coordinated and strategic approach to Nature Based Tourism that identifies catalyst infrastructure and product and experience development projects that could realistically be pursued to enhance and better position Eurobodalla as significant nature-based tourism destination on the South Coast (including Aboriginal, adventure, fishing, mountain biking and other recreational tourism activities) that appeals to domestic and international visitor markets.	Council, Industry, NPWS, BMPA, State Forests	High
5.2 Engage with NPWS and FCNSW to identify industry and commercial partnership opportunities for nature-based tourism product and experience development including the development of a significant 4-day coastal walk in Murramarang National Park from Maloneys Beach to Bawley Point, interpretative signage and amenities for the Bingle Dreaming Track, mountain bike trail development and other eco-tourism development opportunities.	Council, Industry, NPWS	High
5.3 Develop a Food Tourism Strategy to increase the opportunities for regional food tourism and events in our rural areas that integrates with recommendations of the Rural Lands Strategy.	Council, Industry, SAGE	High
5.4 Prepare fact sheets and web material that promote nature-based and regional food tourism development opportunities that exist via Councils LEP and identify the land use zones within which they exist.	Council, Industry	High
5.5 Prepare submissions to leverage funding to assist with product and experience development (e.g. DNSW Regional Tourism Product Development Program other relevant government grant programs).	Council, Industry, DNSW	High
5.6 Work with DNSW experience sector specialists to provide advice on tourism product and experience development for Aboriginal tourism, international youth, food & wine, and accessible tourism sectors.	Council, Industry, DNSW	High
5.7 Undertake an audit of tourism products and experiences to identify those that are 'international ready' and to identify gaps and opportunities for potential investors.	Council, Industry	High



## Priority 5 cont.

ACTIONS	RESPONSIBILITY	PRIORITY
5.8 Undertake an audit of tourism products and experiences related to Nature, Food, Towns & Villages and Events to identify opportunities and ways to package and promote visitor experiences including trails and drives.	Council, Industry	Medium
5.9 Evaluate visitor satisfaction of tourism experiences as part of the Destination Research program.	Council, Industry	Medium
5.10 Prepare an annual Destination Eurobodalla Tourism Products and Experiences Report that evaluates results of the actions above	Council, Industry	Medium/Low

## International Ready Visitor Experiences

Tourism Australia and Destination New South Wales strongly advocate the need for nature-based 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 related to the Chinese market 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'.

Source: DNSW China Tourism Strategy 2012 to 2020





## Priority 6 Tourism Events

Adopt a pro-active and strategic approach to event procurement and development to increase visitation expenditure across the year for Eurobodalla and its towns and villages.

ACTIONS		RESPONSIBILITY	PRIORITY
6.1	Develop a Tourism Events Strategy that identifies strategies and actions to procure and support events to increase visitation expenditure across the year, attract event funding support, and to leverage public and private sector investment for new event infrastructure and facilities including consideration of seed funding to support the development of new tourism events that align with the four experience platforms – Nature, Food, Towns & Villages and Events.	Council, Industry	High
6.2	Review the position description of the Tourism Events Coordinator to ensure a strong focus on procurement, development and marketing of tourism events and to deliver associated actions of the EDAP 2018 to 2021.	Council	High
6.3	Effectively promote events to key visitor markets identified in the EDAP 2018 to 2021.	Council, Industry	Medium
6.4	Establish a consistent approach to event evaluation to regularly report and consistently evaluate visitation, visitor satisfaction and the economic impact of key tourism festivals and events.	Council	Medium
6.5	Prepare an annual Destination Eurobodalla Events Report that evaluates the impacts of tourism events: <ul style="list-style-type: none"> <li>On tourism visitation and expenditure</li> <li>Visitor satisfaction</li> <li>Community engagement (e.g. volunteers, community organisers, attendance).</li> </ul>	Council	High/Medium



## Priority 7 Destination Marketing

Establish strategic and tactical marketing campaigns to reach key visitor markets and promote Eurobodalla's distinct points of difference from coastal competitors.

ACTIONS		RESPONSIBILITY	PRIORITY
7.1	Participate in the DNSW 2018 'Unspoilt' campaign as the umbrella marketing initiative to generate broad visitor awareness of Eurobodalla as an important and appealing destination on the South Coast.	Council, Industry, DSNSW, DNSW	High
7.2	Investigate opportunities to partner with Destination Southern NSW in cooperative marketing campaigns and projects.	Council, Industry	High
7.3	Undertake a review of the Eurobodalla brand to evaluate stakeholder perceptions, brand identity, key messages and brand communication and management and ensure its attributes are distinctive and appeal to key visitor markets and are embraced by tourism businesses.	Council	High
7.4	Review and update existing marketing collateral and visitor information, based on the brand review findings to ensure brand consistency across visitor markets identified in the EDAP 2018 to 2021.	Council	High
7.5	Develop a Brand Style Guide for Council, local operators and businesses to ensure the consistent delivery of the brand marketing materials, (electronic, print-based, signage) that aligns with findings of the Brand Review process.	Council	High
7.6	Prepare a Tourism Marketing Strategy and Marketing Implementation Plan (including digital and social media strategies) to effectively package and promote destination experiences and ensure 'cut through' to appeal to and attract key visitor domestic markets identified in this Plan.	Council, Industry	High
7.7	Prepare an International Ready Marketing plan to effectively reach self-drive international visitor markets (ex-Canberra and Sydney) including the development of focused itineraries of international ready products and distinctive experiences.	Council, Industry	High
7.8	Explore opportunities to promote caravan and camping holidays in Eurobodalla to domestic and international visitors in cooperation with the Caravan and Camping Industry Association of NSW.	Council, Industry, CCIA	Medium
7.9	Work cooperatively with stakeholders in adjoining LGAs and regions on cooperative marketing initiatives that provide distinct opportunities to generate awareness of Eurobodalla to key domestic and international visitor markets .	Council, Industry	Medium
7.10	Educate and inform the community about the significance of tourism for Eurobodalla and the need to ensure visitors have exceptional experiences.	Council, Industry	Medium
7.11	Evaluate results of the DNSW 2018 'Unspoilt' campaign to ensure it provided effective visitor awareness and return on investment to inform future participation in this campaign.	Council, Industry, DNSW	Medium
7.12	Establish a system to track and evaluate industry results of annual Marketing Plans to inform the development of annual marketing plans for 2018/2019 and 2019/2020.	Council, Industry	Medium/Low

## Priority 8 Visitor Information Services

Continue to manage the operation and delivery of visitor information services for the Eurobodalla destination region to ensure economic viability of Visitor Information Centres, exceptional service, and delivery of visitor information that aligns with changing visitor information search behaviours and visitor information technologies.

ACTIONS		RESPONSIBILITY	PRIORITY
8.1	Continue to manage the contract for the Narooma VIC.	Council, Industry	Medium
8.2	Investigate the best model for the delivery of visitor information services in Batemans Bay as part of the Mackay Park Precinct project.	Council, Industry	Low
8.3	Review the Eurobodalla tourism website to package enticing experience-based visitor information related to key experience platforms nature, food, towns and villages, events and findings of the Brand Review and Marketing Strategy.	Council, Industry	High
8.4	Prepare a Tourism Signage Strategy that aligns with findings of the Brand Review and Marketing Strategy to create distinctive and innovative signage and visitor information displays at key tourism attractions; key transport hubs & gateway locations; and promotes diversity of experiences within the destination.	Council, Industry	Medium
8.5	Continue to educate and inform visitors about the environment, community values, appropriate visitor behaviour and safety and security (for e.g., road rules, surf conditions, and emergency procedures).	Council, Industry	Medium
8.6	Prepare an annual Visitor Information Services Report that evaluates the delivery of all visitor information services annually including use of VICs, digital services, retail and referral services, and communicate key findings to local tourism businesses.	Council, Industry	Medium



## 6.0 Implementation

An important priority of this Plan is to review Council resource arrangements for tourism, events and tourism business development and to establish a Tourism Advisory Panel as a strategic expert-based board that will work collaboratively with staff to implement the priorities and actions of this Plan. This new Panel should be positioned as the leading tourism expert working and advisory group to lead industry engagement with Council.

Monitoring of the implementation of the Plan's strategies is important to ensure the aim and vision is achieved and to provide valuable information that can be used to inform decision-making over the next four years.

A new Destination Management Plan should be prepared in 2021 for the period 2022 to 2026.

### Stakeholder Roles and Responsibilities

To ensure the effective implementation of this Plan, it is important that the roles and responsibilities of Council, industry and other key stakeholder organisations are clearly understood and communicated.

It is recommended that:

- **Eurobodalla Shire Council** is positioned as the umbrella authority to oversee the implementation of strategies and actions associated with this Plan over the next four years
- **A Panel** provides regular strategic advice to assist Council to implement the strategies and actions in this Plan over the next four years
- **Other key stakeholder organisations and agencies** identified as having a primary or supporting role are encouraged to provide on-going support over the next four years to implement strategies and actions associated with this Plan.





## 7.0 Evaluation

An annual reporting framework is assigned to each priority to help monitor implementation actions and to regularly communicate to stakeholders the outcomes of the Plan, and may also assist with funding submissions.

Review of the implementation of this Plan should be undertaken annually by Council and the Tourism Advisory Panel and may result in a revision and updating of the Plan.

### Evaluation and Reporting Process

The following evaluation and reporting process is recommended to monitor the implementation of the Plan:

- **Council** monitor the implementation of strategies and actions contained in this Plan on an annual basis
- **Council** prepare an annual report in cooperation with the Tourism Advisory Panel to communicate the progress undertaken in achieving priorities and actions contained in this plan and key outcomes achieved to government, industry and community stakeholders (see more below)
- **Consultants** undertake a review of implementation of the Plan annually for the next four years (a commitment of one working day per year) in collaboration with Council and relevant committees and makes recommendations for any adjustments to the Plan.

The following areas should also be evaluated specifically using quantitative and qualitative methods as part of the annual reporting process:

- **Visitor economy opportunities and challenges** – identification of any new or emerging opportunities and challenges to the visitor economy
- **Destination management** – review of the effectiveness of tourism governance and tourism advisory arrangements (Actions 1.2, 1.4, 1.8)
- **Integration of tourism across Council** – review of the implementation of actions within this plan across all Council departments (Action 1.5)
- **Industry engagement and development** – review of engagement and development programs with tourism businesses, awards and tourism industry achievements for Council's and tourism businesses (Action 2.4)

- **Destination performance** – findings of a comprehensive review of annual TRA visitation data to evaluate domestic, daytrip and international visitations including: overall visitor numbers, key visitor markets, number of overnight stays, length of stays, expenditure, visitor demographic profiles, purpose of trip, and visitor activities, findings of research that tracks key competitor coastal destinations in NSW, findings of research that evaluates visitor expectations and satisfaction (Action 3.6)
- **Infrastructure and facilities development** – review of new and proposed infrastructure and facilities development and identification of any accommodation refurbishment development activities (Action 4.12)
- **Tourism product and experience development** – review of new and proposed product development related to leisure, nature-based, adventure, fishing, regional food, wellness, and arts and cultural experiences (Action 5.10)
- **Events and festivals** – review of any new events and festivals; new event infrastructure; findings of research undertaken at events and festivals to evaluate visitation, satisfaction, and economic, social and environmental impacts; and an evaluation of the main reasons why events and festivals are no longer offered (Actions 6.4 & 6.5)
- **Destination marketing** – review of industry uptake of the Eurobodalla brand, results of the effectiveness of marketing campaigns, review of industry buy-in on Eurobodalla marketing initiatives; and measure of the number of operators listed on ATDW (Action 7.12)
- **Visitor information services** – review visitor information service delivery methods including: evaluation of volunteer participation, analysis of visitor usage of various visitor information delivery services, results of new and proposed visitor signage development (Action 8.6).





# 8.0 Appendices

## APPENDIX 1 THE EDMP REVIEW PROCESS

The EDMP Review process was undertaken by Dr Meredith Wray (who developed the EDMP 2011 to 2020) in cooperation with a Steering Committee from September 2016 to March 2017 and involved:

- Preparation of a Tourism Sector Analysis Report that was undertaken in May 2016 to examine trends in domestic and international tourism to Australia, and identify challenges and opportunities that may impede or drive the growth and development of tourism to Eurobodalla to 2020<sup>9</sup>
- Review of the DMP and existing strategies, plans and reports to determine what has been implemented and achieved to date<sup>10</sup>
- A comprehensive analysis of relevant visitation data for Eurobodalla and the South Coast region<sup>11</sup>
- One-on-one meetings with Council staff involved in tourism, events and business development
- Meetings (2) with Council's Executive Leadership Team
- Regular meetings with the EDMP Steering Committee to discuss and review findings and provide feedback
- Interviews with individuals and representatives of stakeholder organisations with knowledge and interest in the future of tourism for Eurobodalla including DNSW and NPWS
- Consultation meetings with Council's Tourism and Business and Advisory Committees (December 2016 and January 2017)
- Councillor briefing session (January 2017)
- Presentation and consultation with Council's Citizen Jury (September 2016) and a review of findings of the Citizen Jury process that was facilitated during September to December 2016 to deliberate 'Is Council spending our money on the right things? If not, what should change?'

<sup>9</sup> See Eurobodalla Tourism Sector Analysis Report, May 2016

<sup>10</sup> See Review Tourism Destination Management Plan 2011 to 2020, prepared by Cath Reilly, October & November 2016

<sup>11</sup> See Eurobodalla Tourism Monitor 2016 prepared by Destination Research

## APPENDIX 2 KEY FINDINGS OF VISITATION RESEARCH

### Recent research undertaken by Destination New South Wales of domestic visitors to the South Coast shows:

- Exceptional growth in the daytrip market
- Focus should be on domestic overnight (75%), daytrip (21%) and international (3%)
- Daytrip and shorter stay trend is a behavioural change experiences across Australia and regional NSW
- A need to convert daytrip visitors to convert to overnight and stay longer
- Average length of stay is in decline across the South Coast and NSW
- VFR is growing fast
- Top source markets (expenditure) for the South Coast are Sydney, Victoria, ACT
- Older demographics (55+ years) are the fastest growing segment in tourism spend
- 15 to 29 and 40 to 59 years are top age group segments, with Sydney the main source market
- Friends that travel with children are growing fast as well as those travelling alone and people travelling together (family groups, girls weekend, 15-19 years, friends and relatives)
- 'Eating out/dining at a restaurant and/or café' and 'going to the beach' are main visitor activities
- Growth in participation in surfing, cycling, wineries and markets
- Families travel during school holidays, November to March is in increasing in opportunity, weekends continue to be the most popular, Sunday is the most popular day for all travel parties.