Destination Action Plan
2023 - 2028

Eurobodalla
Shire Council

Acknowledgement of Country

Eurobodalla Shire Council recognises Aboriginal people as the original inhabitants and custodians of all land and water in the Eurobodalla and respects their enduring cultural and spiritual connection to it. Eurobodalla Shire Council acknowledges the Traditional Owners of the land in which we live. Council pays respect to Elders past, present and future.

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Image: Yuin smoking ceremony, Eurobodalla Shire Council

Executive Summary

The Eurobodalla Destination Action Plan (EDAP) is about setting the direction and priorities to **sustainably grow the visitor economy of the Eurobodalla Local Government Area (LGA) to 2028 and beyond**.

It provides a **practical and prioritised Action Plan** that supports regional promotion, visitation and prosperity while addressing barriers and challenges faced by the region. Importantly, it is **a plan for the whole destination**, not just individual businesses or operators. It aims to foster a vibrant visitor economy and promote liveability, which will deliver tangible benefits to businesses as well as the community.

EDAP 2023 - 2028 builds on the extensive work done since the previous EDAP 2018 - 2021, including development of a range of place and master plans, ongoing implementation of significant infrastructure investment across the LGA as well as delivery of an increasingly popular events program and marketing activities to raise awareness of and preference for Eurobodalla in primary source markets.

Over this time, Eurobodalla has faced many challenges brought by significant natural events (Black Summer Bushfires and floods) and COVID-19. However, these devastating events have provided opportunities to strengthen the region's experience offering, which will contribute to growing the appeal of Eurobodalla as a short break and holiday destination into the future.

Eurobodalla's natural beauty, nature-based and agri-tourism offering (especially seafood) as well as its popular hallmark events continue to underpin its perception as a nature-based tourism destination. However, there are many other **existing and emerging strengths of the LGA**, from an enlivened, diverse, year-round events program and high-profile attractions popular with families through to a vibrant arts and music scene, and an expanding range of accommodation options, among other experiences. Together, it means that Eurobodalla has a strong foundation to continue to enrich the perception of and sustainably grow the region's visitor economy.

Informed, prioritised, future-focused and visitor-centric

A critical task in preparing the EDAP 2023 – 2028 was to ensure it was informed, which included preparation of a detailed Situation Analysis. It considered and analysed insights from a wide range of credible sources as well as from significant consultation undertaken with Council, stakeholders, the local industry and community representatives.

It also involved detailed consideration of important local, regional and state strategies, plans and programs, including (but not limited to) Advancing Eurobodalla – Integrated Economic Growth & Development Strategy as well as the Destination Southern NSW (DSNSW) Destination Management Plan 2022 – 2030 and the NSW Government's Visitor Economy Strategy 2030. The result is an EDAP that is both **future-focused and visitor-centric**. A summary of key findings is outlined in Part B, *Setting the Scene*.

Executive Summary

In alignment with best practice planning, EDAP 2023 – 2028 is designed to address:

- Supply-side, including the region's experience offering
- Demand-side, including marketing and visitor servicing
- Enablers, which are those priorities that assist and enable implementation of the Action Plan.

Part C, Priority Projects, is structured around these three core or focal areas. Importantly, **Appendix 2 provides a Prioritised Action Plan**, which enables all of the strategies and actions identified to be aligned to available resources, both human and financial.

An important point is that not all strategies and actions are the responsibility of Eurobodalla Shire Council. **Collaboration, partnerships and cooperation** with stakeholders, the industry and the community will be critical to the successful implementation of the EDAP between 2023 – 2028.

Snapshot: strategies and actions identified for 2023 to 2028

3 Focal Areas → **18 Strategies** → **47 Actions**

FOCAL AREA	ENABLERS	SUPPLY	DEMAND
STRATEGIES	6	7	5
ACTIONS	18	18	11

Turning challenges into opportunities

Several themes emerged throughout the process involved in developing the EDAP. Specifically:

- Ability of the LGA's name, Eurobodalla, to stand out in a highly competitive marketplace. As a result, reviewing the destination brand - *All Kinds of Natural* - is a strategic priority. However, at this stage, evolving the destination brand rather than wholesale change is recommended.

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- Wellness and culinary tourism, agri-tourism and events are competitive advantages of the destination. It will be essential for Eurobodalla's destination brand to be evolved in a way that amplifies and capitalises on these existing and emerging strengths and brings them to life in a compelling and meaningful way.
- Industry engagement and development was identified as a current weakness. However, a vibrant visitor economy relies on collaboration and partnerships. A clear priority is to strengthen collaboration with industry as well as with stakeholders and potential partners beyond the LGA's boundaries.
- Enhanced support for First Nations experiences and businesses to grow and thrive. This should start with co-designing the most effective way to achieve this with the First Nations' communities, businesses and operators of the region.
- Significant recent investment in infrastructure and landscape-scale planning is highly valued across the LGA as it delivers benefits to both residents and visitors. Activating these investments and creating opportunities for local businesses to utilise or leverage them is an important future focus. A top priority is completing and activating the extensive mountain bike trail networks at Mogo and Narooma as well as supporting the growth of cycle tourism in line with the Destination Southern NSW Destination Management Plan 2022 - 2030.
- While its outstanding nature offering and natural beauty are strengths of the region, conservation values must be protected. A wholistic approach to sustainability and encouraging sustainable tourism sits at the heart of the EDAP's recommended strategies and actions.

In addition to the above issues, there is an imperative for the industry to take greater responsibility for marketing and distribution of their own products, services and experiences. Advances in technology and familiarity with online booking of all markets (across all demographics) means that local businesses need to be connected and taking greater advantage of third-party online channels to market.

Across Australia, the industry is challenged with several significant issues or externalities, from staffing shortages to limited housing supply, cost of living pressures and a downturn in global economic conditions. These will continue to impact the region. Fortunately, Eurobodalla is well positioned to create new opportunities for attracting markets that continue to take holidays and short breaks, albeit while more closely managing their discretionary spend on travel.

Targeting the right visitor markets

A critical success factor is attracting the right visitors, who will enjoy their experience of Eurobodalla and become advocates for the destination. While there are many markets that will be attracted to the LGA and its diverse experience offering, as a destination it is critical to identify and target those market segments with the greatest propensity to visit the destination, year-round.

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EDAP highlights several priority emerging markets, specifically: Active families (Millennials); Wellness tourism market (secondary wellness tourism focus); Younger adults (Gen Z); ‘Work from anywhere’ market. These market segments represent the sweet-spot between psychographic and demographic or generational market segments. They also reflect opportunities within the international free and independent travellers (FIT) market. Together, they leverage the existing and emerging strengths of the region. Importantly, these markets are already arriving. However, while they could be classified as ‘existing’ they are still an emerging market opportunity for the region.

In addition, the Visiting Friends & Relatives (VFR) market should be a high priority. This market is already important to the LGA’s visitor economy year-round. With VFR it is critical to remember that the primary target audience is the local host (residents), who play a major influence on the VFR market’s travel decisions. This also helps to build civic pride and encourage locals to discover their own backyard.

Finally, it is critical to focus on the mountain bike market segments that are more likely to travel to Eurobodalla or the NSW South Coast for a mountain bike experience. This will facilitate better targeting of marketing efforts to drive demand for and ensure the long-term success of the Mogo and Narooma mountain bike trail networks.

Enablers for success

Tourism is a dynamic industry, which means it’s essential to know the preferences, expectations and needs of today’s travellers as well as their barriers to travel. It’s also important to recognise that sometimes the little things make the biggest difference.

Long-term success starts with building a broad base of support with residents and local businesses as well as across all areas of Council. This should be coupled with genuine and effective industry engagement. These strategies provide the foundations to sustainably grow a vibrant visitor economy and enhance the liveability of the LGA.

Strengthening the experience offering

An opportunity for Eurobodalla is to build the supply of paid visitor experiences, such as guided tours and activities as well as culinary and agri-tourism experiences that take advantage of the LGA’s spectacular nature and rural setting.

A broad experience offering that appeals to a range of target markets would enable Eurobodalla to realise an even greater potential from its visitor economy. This involves, among other things:

- Experience-led itineraries and destination events that support and reinforce the destination’s positioning and point of difference
- Continuing focus on integrated place planning and activation

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- Influence of contemporary consumer behaviour on travel, including the motivations, expectations and barriers to travel as well as for events and other leisure activities, in particular outdoor recreation such as mountain biking, hiking and kayaking.

Investment in and activation of shared infrastructure, such as the mountain bike and other trail networks is also important for both visitors and the community, including connectivity between town centres, community assets and attractions, and the surrounding nature-based offering (from beaches and waterways to national parks). Ancillary infrastructure or facilities, such as parking, pedestrian access, and toilets should be integrated into a best-practice, landscape-based approach to place planning.

Effective marketing and visitor services

There are a range of influences on demand for Eurobodalla. These have been outlined clearly throughout the EDAP. Knowing how to integrate these influences and effectively reach, inspire, engage and connect with your target markets is the next step. EDAP sets out several priorities to achieve this, including:

- Evolve the Eurobodalla destination brand and positioning as well as develop a world-class experiential brand that brings the Mogo mountain bike trails and other trails to life in a compelling and meaningful way.
- Develop and implement a multi-year marketing plan that drives consistency in the way in which Eurobodalla shows up in the marketplace. It needs to find the right balance between always-on content as well as that shared through paid, owned and earned channels along the visitor journey.
- Create and distribute remarkable content, including videos, images, copy and inspiring itineraries that:
    - Bring Eurobodalla’s stories, characters and landscape to life by ‘pulling on the heart strings’ (inspirational content)
    - Provide high quality information to assist visitors plan and enjoy their trip (informational or rational content)
    - Enable multichannel distribution, including through third-party channels such as Destination NSW, NPWS, and Tourism Australia as well as to support public relations (PR)
- Leverage and cross-promote marketing activities undertaken for South Coast NSW, including by Destination NSW and the *Feel New in NSW* campaign.
- Continue to grow the VFR market through engaging your local community to invite their friends and family to visit.

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Evaluating success

The plan represents the next stage in evolving Eurobodalla's visitor economy and keeping pace with a dynamic industry and marketplace. As a result, it should be reviewed and updated across its lifespan, from 2023 to 2028 and beyond.

Measuring and evaluating success is critical. It means that the destination can be more responsive and adjust the strategies and actions over time to ensure they remain relevant and effective. A set of recommended key performance indicators (KPIs) has been provided to make this task easier for all involved.

Appreciation to all those involved

The development of the EDAP is the result of a comprehensive process. There were many people involved, representing Eurobodalla Shire Council, local, regional and state-wide stakeholders, local businesses and the region's community. The insights so generously shared have informed and helped shape the EDAP. Thank you.

PART A: INTRODUCTION

Image: Mill Bay Boardwalk, Eurobodalla Shire Council

About the Eurobodalla Destination Action Plan

The Eurobodalla Destination Action Plan (EDAP) is about setting the direction and priorities to **sustainably grow the visitor economy of the local government area (LGA) over the next five years (2023 – 2028)**.

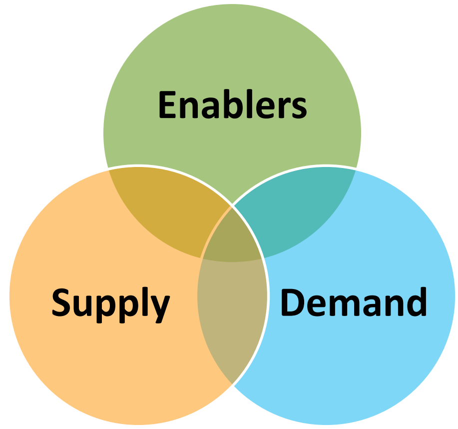
It provides a vision to lead a **practical and prioritised Action Plan** that supports regional promotion, visitation and prosperity while addressing barriers and challenges faced by the region. Importantly, it builds on the extensive work done over the last five years in line with the previous EDAP.

The **guiding principles** established for the EDAP are:

1. Inclusive of the whole region and all communities
2. Informed - evidence-based
3. Showcasing the destination’s existing and emerging strengths
4. Customer-centric - putting the visitor first
5. Future-focused and sustainable - understanding a dynamic industry and the importance of protecting the destination’s values and attributes
6. Foster collaboration across sectors and between industries and stakeholders
7. Demonstrate leadership through effective implementation, partnerships and communication - including through alignment with NSW Visitor Economy Strategy 2030
8. Measurable in terms of both deliverables and outcomes

The EDAP has been informed by a comprehensive Situation Analysis, which involved a detailed review of:

1. **Global and domestic trends that are influencing consumer behaviour in travel**
    - Motivations, interests, preferences, and barriers to travel
    - Future-focused and putting the visitor first
2. **Visitor research**
    - Influences on travel to the destination over time and as consumer behaviours have evolved
3. **Existing strategies, plans and programs**
    - National, State, regional and local level



AMBITION: Eurobodalla is renowned as a destination offering remarkable experiences that nourish the senses and contribute to the well-being of our visitors and the planet.

PURPOSE: Provide a prioritised roadmap for the sustainable growth of the Eurobodalla visitor economy from 2023 - 2028

GOALS	1. Ensure that the visitor economy is viable & vibrant, year round	2. Benefits of the visitor economy are shared across the region (inclusive)	3. Contribute to enhancing social & environmental values (sense of place)

HIGH-LEVEL OBJECTIVES

ENABLERS	1. Foster a broad base of support for the visitor economy	2. Lead genuine and effective industry engagement	3. Establish a pathway to genuine sustainability at the destination & business level
SUPPLY	1. Enhance existing experiences and events	2. Increase the number of brand-aligned visitor experiences and events, year round	3. Attract investment for infrastructure & facilities that deliver shared benefits for residents & visitors
DEMAND	1. Increase awareness and appeal of Eurobodalla in the marketplace	2. Increase overnight visitor yield	3. Increase regional dispersal

PRIORITISED ACTION PLAN

Ambition and measurable objectives

Ambition

Eurobodalla is renowned as a destination offering remarkable experiences that nourish the senses and contribute to the well-being of our visitors and the planet.

The purpose of the EDAP is best described as follows:

Provide a prioritised roadmap for the sustainable growth of the Eurobodalla visitor economy from 2023 - 2028

GOALS	HIGH-LEVEL OBJECTIVES	KEY PERFORMANCE INDICATORS OR OUTPUTS DELIVERED
1. Ensure that the visitor economy is viable & vibrant, year round	Increase awareness and appeal of Eurobodalla in the marketplace	Implement brand tracker research in 2nd half of 2023 to establish a baseline for reporting improvements every 24 months to 2028
	Increase overnight visitor yield	• Increase of 20%* overnight visitor spend on 2019 by 2028 • Double international overnight visitors from 2019 (baseline) by 2028 (2.5% to 5% per TRA data)
	Enhance existing experiences and events	• Increase in the number of packages involving existing tourism providers • Increase of 25% in the number of existing tourism providers who become international-ready by 2028 • Increase of 20% in the number of accommodation providers who are bike-friendly by 2028
	Increase the number of brand-aligned visitor experiences and events, year round	• Increase of 15% in the number of ATDW-listed experiences, events or attractions by 2028 • Increase of 25% in the total number of international-ready products by 2028 • 3 new First Nations experiences created and operating by 2028
	Lead genuine and effective industry engagement	• Establish an ongoing Industry Advisory Group, which meets a minimum of 4 times per year • Host a minimum of four networking sessions for industry annually • Conduct an industry satisfaction survey every second year

Ambition and measurable objectives

GOALS	HIGH-LEVEL OBJECTIVES	KEY PERFORMANCE INDICATORS OR OUTPUTS DELIVERED
2. Benefits of the visitor economy are shared across the region (inclusive)	Increase regional dispersal	Increase of 20%* overnight visitor spend on 2019 across all sub-regions by 2028
	Attract investment for infrastructure & facilities that deliver shared benefits for residents & visitors	• Attract investment for and implement priorities identified within the Nature Based Tourism Study and the Wayfinding Strategy • Focus on infrastructure and facilities planned but as yet unfunded for significant experiences
	Foster a broad base of support for the visitor economy	• Implement a proactive annual communication and local champions program to reinforce the value of the visitor economy to a vibrant destination • Implement a VFR campaign to engage residents as part of a more sustainable visitor economy
3. Contribute to enhancing social & environmental values (sense of place)	Establish a pathway to genuine sustainability at the destination & business level	• Eurobodalla Shire Council achieves green destination accreditation by 2028 • 15% increase in new sustainable tourism^ experiences and accommodation by 2028 • 30% increase in the number of existing tourism businesses and accommodation providers achieving sustainable tourism^ accreditation or certification by 2028

- *Adjusted for CPI to take account of inflation over the period 2019 – 2028*
- *^ Sustainable tourism businesses are defined as those that have achieved appropriate accreditation or certification (eg Ecotourism Australia (EA) or Earth Check programs) or completed programs such as EA's Sustainability Scorecard with a satisfactory rating*

Primary experience themes

Continued strengthening of experiential travel

ESC's previous EDAP (2018) identified a number of **primary experience themes or sectors**, which continue to underpin the LGA's experience offering. Specifically, the four themes or '*Key experience sectors*', as represented in the diagram below are:

1. Nature
2. Food
3. Towns and villages
4. Events

However, while they remain current, the way in which they are expressed through marketing and visitor services should be evolved to maximise opportunities from the increased and growing interest in wellness tourism. The influence on experience development, place activation planning and strengthening supply and packaging of products, services and experiences also needs to be evolved in line with the desires, expectations, and needs of contemporary visitor markets.

It is important to note that while these serve as primary experience themes, there are **many other experiences, products, activities and interests** that are addressed within this EDAP. Together, they create an opportunity to further elevate the perception of Eurobodalla in the context of experiential travel.

The **culinary and local produce offering** of the region has continued to grow - both terrestrial and marine. It will be important to capitalise on the work done over recent years relating to the food and produce trails and events such as the Narooma Oyster Festival, which have strengthened the culinary reputation of the LGA.

The significant investment in **outdoor recreation infrastructure and facilities** reinforces the value of these activities to the way that the LGA is positioned in the marketplace. Activating this infrastructure and continuing to expand, enhance and maintain it will be a key to success into the future.

Emerging strengths of the region include a **vibrant arts, music and cultural sector**, including museums, galleries and events that bring the region's culture and heritage to life, and the River of Art Festival. The emergence of new First Nations' cultural experiences across the LGA also enriches the LGA's experience offering.

Extract from the 2018 EDAP:

One vibrant destination; four enticing sub-regions

Eurobodalla region offers a wide range of experiences, events and accommodation. The following table highlights some of the key experiences grouped by sub-region (although is not an exhaustive list of all businesses, activities or experiences).

SUB-REGIONS	HIGH-LEVEL OVERVIEW
CROSS-REGIONAL	• Wide range of events, including Narooma Oyster Festival, River of Art Festival, and Sculpture for Clyde • Eurobodalla Food Trail and the region's outstanding food and produce (agricultural and aquacultural offerings), including Farmers and Country Markets • Extensive network of national parks, state forests, rivers, beaches and waterways, including Batemans Marine Park • Great South Coast Walks • Drive tourism touring routes • Heritage buildings and villages • Wide range of sporting facilities catering to a range of interests, from football to golf, horse racing, motor sports, among many others
BATEMANS BAY & SURROUNDS	• Waterfront Masterplan and redevelopment • Bay Pavilions and precinct • Batemans Bay Coastal Headlands Walking Trail and Observation Point upgrade • Murramurang South Coast Walk – a NSW Great Walk • Small-scale cruise ship port and opportunity for seaplane access
MOGO & SURROUNDS	• Mogo Adventure Trails • Mogo Wildlife Park • Mogo Cultural Centre (proposed as part of the Mogo LALC office redevelopment) • Eurobodalla Regional Botanic Gardens
MORUYA & SURROUNDS	• Moruya Airport (REX flights connecting daily with Sydney & Melbourne) • South Coast Seaplanes – scenic flights and direct flights Moruya-Canberra • Skydive Oz (ex Moruya Airport) • Broulee Brewhouse and Tuross Boatshed & Cafe • Bingi Dreaming walking track
NAROOMA – BODALLA – TILBA	• Narooma Mountain Bike Trails • Boat access to Barunguba (Montague Island) • Narooma Arts & Community Centre • Wagonga Living Shoreline Project • Wagonga LALC Cultural Centre • Gulaga Mountain Walk • Coastal and heritage villages, including the proposed Rock Oyster Country Gateway Centre • Merivale's significant hospitality offering

Image: Mountain Biking, Eurobodalla Shire Council

Importance of collaboration, partnerships and personalisation

A key to success for any destination is to foster and strengthen collaboration and partnerships within the region and beyond its borders. This in turn creates opportunities for personalisation.

Tourism Australia in the *Future of Global Tourism Demand* research report, recognised the importance of collaboration and personalisation for international markets, which equally applies to domestic markets:

> ***Collaboration and Personalisation:*** *travellers enjoy drawing from multiple experiences within and across sectors. Understanding the underlying patterns in traveller appeal for experiences unlocks opportunities to cross-sell experiences, … develop partnerships, … and build out compelling touring trails or itinerary packaging tailored to audience desires*

Collaboration can deliver bigger and better results by strengthening cooperation and building partnerships. Cooperation and partnerships with industry, within Eurobodalla as well as cooperation and partnerships with surrounding LGAs such as Sapphire Coast and external stakeholders involved in the NSW South Coast like the NSW National Parks and Wildlife Service (NPWS), NSW Forestry Corporation (State Forests), Destination NSW, and Destination Southern NSW, among many others.

Maximising success will definitely be a case of ***the whole being greater than the sum of its parts.*** Shared infrastructure projects, such as Mogo Adventure Trails and Narooma Mountain Bike Trails, enable connectivity with core features of the destination, including its towns and villages and all elements of the experience - from accommodation to tours, attractions, retail and hospitality through to amenities and services such as parking, toilets and bike hire. This can be further strengthened through collaboration with Gravity Eden Mountain Bike Park within Sapphire Coast.

A further opportunity for collaboration relates to events, especially the Hallmark Events. A way to elevate the perception of and preference for the region would be to **build on the established and emerging partnerships to support the delivery, operations and growth of the these events**.

Collaboration means taking an integrated approach to developing the destination brand and marketing, not a siloed one. Stakeholder insights and 'buy-in' are critical. The product offer will be as important as the brand identity. The visitor experience as important as the visitor marketing.

An important outcome is the creation of **personalised or tailored packages or bundling of products and experiences** that meet the desires, expectations and preferences of specific target market segments. This should be core to any **experience and event development program**. It also provides an opportunity to integrate First Nations' experiences into destination packages and itineraries as well as attracting the smaller-scale and boutique business events market.

Only by adopting a wholistic approach will you be able to deliver on the full potential of your destination brand.

NSW Visitor Economy Strategy 2030

NSW Visitor Economy Strategy 2030 (VES) sets a target to **triple 2009 overnight visitor expenditure in NSW by 2030**, surpassing previous targets despite recent challenges. There are specific targets set for regional NSW as well as for domestic tourism:

- Regional Overnight Visitor Expenditure: $25 Billion by 2030 (from $20.5 billion in 2019)
- Total Domestic Visitor Expenditure: $47 Billion by 2030 (from $31.9 billion in 2019)

Five strategic pillars underpin the NSW Government's vision to be the premier visitor economy in the Asia-Pacific by 2030.

It identifies **five guiding principles** (one of which is provided below) as well as **three core phases**: Recovery (to 2024); Momentum (to 2026); and Accelerate (to 2030).

Strategic Pillar 3 of the VES is about **showcasing our strengths** – both our existing strengths and emerging ones. From vibrant contemporary culture, reconnecting with nature and small-town charm through to events and eco-wellbeing, there are significant opportunities for **Eurobodalla to contribute to the regional NSW VES targets**.

For further information see: https://www.destinationnsw.com.au/about-us/strategies-and-plans/visitor-economy-strategy-2030

GUIDING PRINCIPLE 1: PUT THE VISITOR FIRST

We have put visitors front and centre of this strategy to enable better targeted marketing, experience design and industry support through a greater understanding of potential visitors. Every visit should be an unforgettable one that inspires and encourages visitors to keep exploring and returning to NSW. Consumer trends and visitor needs will inform experience design, event development, infrastructure investment and marketing. This visitor-centric approach will involve: › A deep understanding of the needs and aspirations of potential visitors › Tracking and analysis of evolving consumer preferences and trends › A dynamic market prioritisation and segmentation approach › Working with industry to deliver exceptional visitor experiences › Personalised marketing and communications to guide visitors to experiences in NSW that match their specific interests and needs and encourage them to return.

NSW VES 2030, page 28

Destination Southern NSW
Destination Management Plan 2022 - 2030

Destination Southern NSW's Destination Management Plan 2022 – 2030 (DMP) was released in early 2023.

Destination Southern NSW (DSNSW) is an important conduit between the NSW Government, local government, tourism organisations and businesses. Our primary role is to coordinate tourism-related strategies and projects that promote the growth and prominence of the visitor economy across the region. We do this by delivering regional funding and industry development programs and identifying infrastructure needs and investment opportunities.

DSNSW's priorities align with the objectives, strategies, and commitments of the NSW Government and are facilitated in partnership with government agencies, tourism organisations, and operators, guided by the Southern NSW Destination Management Plan 2022-2030 (DMP).

The DMP sets out **five strategic objectives** and an associated plan of action for the region from 2022 to 2030, reflecting current market trends and local priorities, and aligning with NSW Government's Visitor Economy Strategy 2030:

1. Support the Southern NSW visitor economy to recover and be sustainable, capable, and resilient.
2. Position and promote Southern NSW's three sub- regions and their destinations to align to the Feel NSW brand.
3. Develop authentic visitor products and experiences to drive visitation to Southern NSW.
4. Grow current events and attract new events that grow the Southern NSW visitor economy and are aligned to our community.
5. Provide an enabling environment to attract investment in the Southern NSW visitor economy.

Eurobodalla Visitor Focus

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

- 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
- 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
- International visitors arriving in Canberra and Sydney with the intention of attracting them to stay longer in Eurobodalla.

Destination Southern NSW
Destination Management Plan 2022 - 2030

REGIONAL PRIORITY PROJECTS

The DMP highlights the following priority regional projects, which are relevant to growing Eurobodalla's visitor economy:

- **Cycling (all forms)** that includes:
    - The significant cluster of MTB trails from the Snowies to Canberra and along the coast including world-class MTB events
    - The rail trails in development across the region that have the potential to provide a variety of cycling experiences
    - Road cycling including events such as L'Etape and leveraging off neighbouring Wollongong as a UCI Bike City
- **Great South Coast Walks** - the continued development and promotion of the cluster of overnight hikes and high-quality day walks from the Royal National Park to the Victorian border with a focus on increasing products, packages and services that commercially leverage off the core trail infrastructure.
- **South Coast Centre of Excellence** (Shoalhaven, Bega Valley, Eurobodalla) – skills and development program to provide skilled workers, develop career pathways, ensure employees are educated and enthusiastic and drive longer stays, repeat visitation and higher yields. Potential to expand program to include Snowy Monaro.
- **Agritourism** - engaging regional producers and growers to recognise and take advantage of the growth sector of Agritourism, including strategies and programs that identify hero produce, support industry to become 'visitor ready' and to foster partnerships that increase the promotion and profile of the products, linking purchase to place
- **Canberra Partnership Framework** - capitalise on the region's proximity to Canberra. The region comprises a diversity of tourism opportunities with attractions including an international airport, national cultural institutions, growing regional food and wine offerings, and easy access to the coast and Snowy Mountains. This unique geographic situation presents a range of opportunities and challenges for the development and delivery of tourism experiences and products

For further information see: https://dsnsw.com.au/download/southern-nsw-destination-management-plan-2022-2030/

Advancing Eurobodalla

Integrated Economic Growth & Development Strategy (2019-2028)

Tourism is and will continue to be a significant driving force of the Eurobodalla economy. As a result, the EDAP identifies specific actions that align with the goals, high-level priorities, and opportunities identified in Advancing Eurobodalla (AE).

The AE and this EDAP should be considered as **companion documents**, with the EDAP providing specific actions that contribute to the broader economic goals for Eurobodalla identified within the AE.

The AE identifies a number of **challenges for the LGA** at a more macro-economic level. Some of these directly impact the capacity or capability of the LGA to grow or strengthen the visitor economy. A number of more specific limitations that should be addressed at a whole-of-Council level are identified within the priority actions relating to enablers.

The key **job growth opportunities for the visitor economy**, which align with EDAP priorities include:

- Support diversification in tourism to offer new experiences to our growing visitor markets outside of peak tourist seasons.
    - *Specifically addressed in the context of experience and event development as well as marketing and visitor services*
    - *Aligns with priorities identified within the **Eurobodalla Nature Based Tourism Feasibility Study** (2019)*
- Help our local producers grow the food industry, including food tourism, regional food branding and promotion and distribution.
    - *Specifically addressed in the context of experience and event development as well as marketing and visitor services*

High-level priorities identified within the AE that are addressed within this EDAP include:

- Industry engagement and business development
- Investment attraction
- Infrastructure and place enhancement

Stakeholder feedback received through the AE consultation process focused on the following key areas, which align with many of the priority actions within this EDAP:

a. More and better collaboration across sectors
b. More research and evidence- based initiatives
c. Focus on infrastructure that supports business and tourism
d. Development of strong business cases to support investment
e. Support for more small-scale agriculture, and arts and cultural facilities

First Nations Engagement
Aboriginal Cultural Experiences

Integral to development of the Eurobodalla Destination Action Plan (EDAP) was engagement with members of First Nations communities across the local government area. The purpose was to better understand their ambitions for Eurobodalla's visitor economy as well as the opportunities, challenges and barriers to participation, including the **development and delivery of First Nations cultural experiences on Country**.

The openness of those who were involved in these discussions was greatly appreciated and highly valued.

A number of critical insights were shared during this process, which have informed the actions included in the EDAP, specifically Actions 1.3 and 2.1(i).

More importantly, it is recognised that a genuine co-designed process is required to engage with the First Nations communities of the local government area and surrounding areas that form part of Country. The aim of this process would be to create a pathway that truly inspires and enables participation by local First Nations people and organisations in the visitor economy in a way that recognises and respects their inherent connection to Country. This aligns with Eurobodalla's ***Aboriginal Action Plan 2020 – 2024***.

An overview of the insights shared include:

- Opportunity of cultural centres as a hub for development and delivery of First Nations cultural experiences.
- Cultural programs can inspire business opportunities for the leisure market.
- Barriers to the establishment and management of First Nations owned and operated businesses should be addressed as a high priority.

More detail on these insights are included in the *Situation Analysis Report* that informed the EDAP (see pages 31 – 33).

An immediate and growing opportunity is to create more **personalised packages or bundling of products and experiences** that integrate First Nations' experiences into destination packages and itineraries.

There are several established First Nations businesses, artists and tourism operators, including some focused on the delivery of cultural programs. The programs, products and services they provide should be a high priority for inclusion in packages and itineraries to showcase the cultural experiences that the First Nations operators would like to share with residents and visitors alike.

First Nations Engagement

Aboriginal Cultural Experiences

A high priority for the **co-design process** should be to consider ways to **address the barriers to participation** as well as **creating meaningful employment pathways**. Many of these will necessarily involve organisations such as the NSW Aboriginal Tour Operators Council (NATOC) and other levels of government, including Destination NSW, NSW National Parks and Wildlife Service (NPWS) and NSW Crown Lands. A priority is to support grant funding applications to enable or progress this process.

An outstanding recommendation from the engagement process was for Eurobodalla to **host a First Nations visitor economy forum or expo.** This would be a great step towards showcasing cultural tourism as well as supporting a local First Nations network to inspire, encourage, and mentor others within the community to develop and deliver cultural experiences on Country.

Target Markets

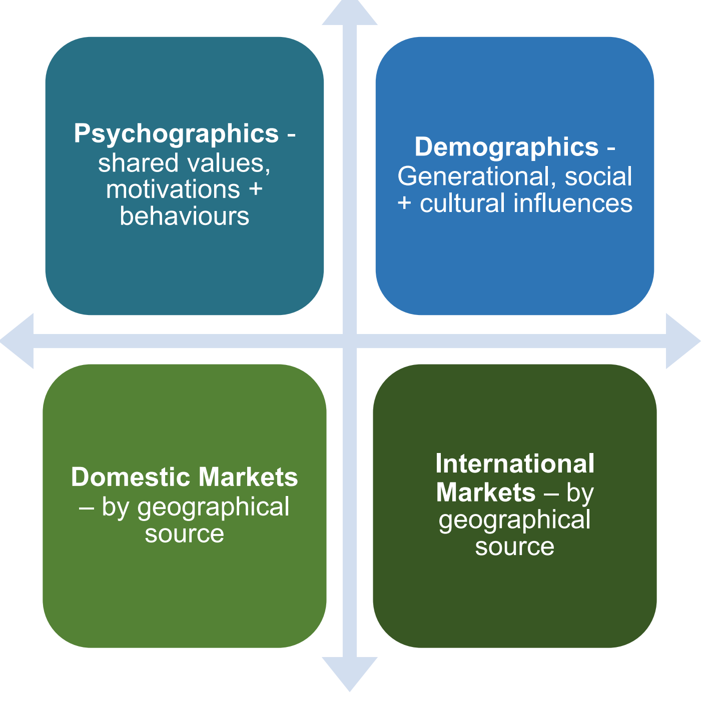
Arguably the most important consideration in developing the EDAP is determining **which audiences to focus our attention on**. The audiences who will be most interested in what we have to say and those most likely to visit. The goal being to attract the right audiences at the right time and in doing sustainably grow the visitor economy by persuading visitors to **stay longer, disperse further and spend more**.

Understanding the **motivations, preferences and interests** of your target market segments as well as **addressing barriers to travel** is critical to success as its about building an understanding of who and why people would be interested in choosing your destination for their holiday or travel.

Demographic market segments can be a useful guide. However, to really understand your target markets, it is important to consider **psychographic profiles**. This is because not everyone in a demographic market has the same motivations, interests, preferences, or budget. Even in special interest activities, such as mountain biking, we find important differences in the characteristics and behaviours of the market across various segments.

The relationship between psychographic market segments (the 'common ground') and demographic market segments as well as:

- **Generational influences** (for example, between Gen Z, Millennials, Gen X and Baby Boomers)
- **Mindset or purpose** for each travel experience – for example, are they travelling as a family, a group of close friends, as a couple or to attend an event or wedding.
- **Core source markets** – where are your visitors coming from or which markets have the greatest propensity to be interested in travel to your region.



Target Markets

Demographics & Lifecycle (who)	Psychographics (motivations & shared values)	Purpose of Travel (why)	Geographic Source (where)
Families with children	Reconnection	Visiting Friends & Relatives (VFR)	**Domestic:** - Canberra - Sydney - South Coast
Older retirees	Nature	Leisure	**International (top markets):** - UK - NZ - USA
Midlife couples	Adventure	Business	
Solo travellers	Wellness	Event	
Boomers	Exploration	Wedding	
Gen X	Groups of friends/ relatives travelling together	Hobby/Interest: - mountain biking - birdwatching	
Millennials	Free & Independent Travellers (FIT)		
Gen Z			

Of course, these segments aren't discrete. They inevitably overlap. A visitor will be a certain demographic (older retiree), with particular motivations (reconnection and exploration), and probably with a clear purpose in travelling (leisure).

The point being, the better we understand which visitor segments offer Eurobodalla the most potential to visit then the more likely we are to persuade more of them to visit, spend more, stay longer and disperse further.

As the Situation Analysis highlighted, of the nearly 1.6 million visitors to Eurobodalla in 2019, domestic overnight and day visitors represent 97.5% of that total. They are a clear priority audience moving forward. Especially given the 20% decrease in visitor numbers in 2022 from the previous year, after a good recovery in 2021.

International will be more of a *slow-burn* but with two immediate opportunities to consider:

- Marketing activity aimed at the FIT market and trade partnership opportunities
- Growing the number of international ready product

Target Markets

EUROBODALLA VISITOR SUMMARY	Domestic Overnight	Domestic Day	International	COMMENTS
VISITORS	899,000 (56.5%)	660,000 (41%)	40,000 (2.5%)	Visitor numbers fell 20% from 2021 to 2022
NIGHTS	2,746,000	N/A	122,000	Domestic overnight represents 95% of total nights
LIFECYCLE	• Families (31%) • Older retirees (22%)	• 55+ yrs (35%) • Families (29%)	• 55+ yrs (35%) • 20-30 yrs (29%)	
SOURCE	• Canberra (25%) • Sydney (23%) • South Coast (13%)	• South Coast (56%) • Canberra (25%) • ACT & Surrounds (8%)	• UK (15%) • USA (14%) • NZ (13%)	1. International visitors have decreased 81% as at August 2022 compared with 2019 (ABS data) 2. Top source markets arriving in August 2022 (ABS data): • New Zealand • India • Singapore 3. Packaged tours represent 5% of visitors to Eurobodalla indicating an opportunity to target the FIT market. 4. Backpackers make up 23% of the international market.
KEY ACTIVITIES	Dining/ VFR	Dining/ VFR	Dining/ Sightseeing	

There are four additional influences on travel choice worth considering:

- **Upping the ante on food and drink:** travellers are seeking culinary adventures, to sample authentic cuisines, ingredients, and drinks … to dive into a kaleidoscope of flavours, textures, and the stories of people, process and place that go into them.
- **Sustainability:** Sustainability is at the front and centre of the global psyche, shaping demand for low carbon footprint travel options and experiences that touch the earth and its communities lightly, leaving places and people better off than when they arrived. More than 75% of travellers are committed to sustainability in some way. Sustainability is increasingly influencing traveller

choices in terms of where to go, how to get there, where to stay, and which experiences they engage with at the destination.

- **Indigenous tourism:** Indigenous businesses and Indigenous-led partnerships will be critical to meeting demand in a way that balances respect with best-practice customer experiences. An Indigenous lens can value-add when paired with appealing experiences that play to Australia's strengths: natural environment, wildlife, coastal and agritourism.
- **Accessibility:** travellers with accessibility needs are seeking a range of experiences and are more often travelling for adventure, transformation, and to engage in passions. Accessibility goes beyond physical or visibly noticeable impairments and extends into mobility, visual, audio, or cognitive impairment. This is even more important given 2023 is the Year of Accessible Tourism.

Future Market Segment Considerations

There are several market segments where significant growth is expected to continue both within Australia and around the world, including:

- Continuing rise in the numbers of **contemporary female travellers**, who are more likely to have a higher disposable income and to travel either on their own or in small groups of friends. They are also key influencers in family travel and seek new experiences that immerse them in the destination and local culture.
- The continuing evolution of the **fifties plus market.** More people are choosing to travel earlier than retirement to enjoy the more active or immersive experiences that destinations have to offer. Globally, the 55 + market has the highest disposable income and are seeking new destinations to add to their bucket-list. They are as equally excited about an Australian holiday as they are about an overseas trip. This market is largely misunderstood; they want to engage and be part of the 'local scene'. They are also much more active and want to be perceived as being 'young at heart.' Domestically, they are also looking for short-break escapes and often choose to travel outside of peak periods to avoid the crowds.
- **Millennials and Gen Z** continue to travel more domestically than previous generations of their age. The pandemic has certainly introduced this market to the road trip and regional holidays and travel.
- **Digital nomads** and the **remote working** revolution. Even though this market is relatively small it is growing rapidly. This market is seeking places that have connectivity (for ease of remote working), opportunities for short-term rental accommodation and co-working space, as well as activities and experiences to do while they are in the region. They can also create short term VFR opportunities. The remote working market want to feel like a local for the time they are in your town, village, or region. They want to be part of the community.

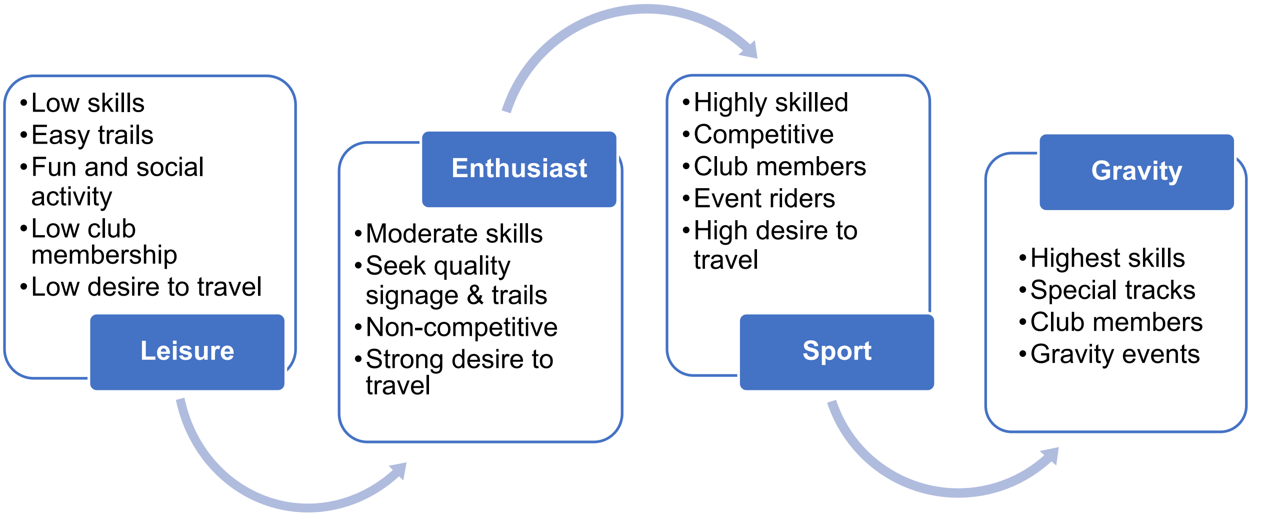
Target Markets – Mountain Biking Market

Over recent years, Eurobodalla has attracted significant investment in mountain bike trails, specifically Mogo Adventure Trails and Narooma Mountain Bike Trails. As a result, it is important to consider this special-interest market in more detail, specifically the mountain bike market segments relative to both domestic and international source markets for Eurobodalla and Australia more generally.

A significant amount of research has been undertaken by various organisations and agencies relating to this special interest market. Importantly, the findings align around the following insights:

- Not all mountain riders are the same: four primary segments have been identified.
- Both primary and secondary motives for mountain bike riders should be considered. This includes support or ancillary services.
- Psycho-social elements are important to understanding motivations, behaviours, and barriers to travel as well as the most effective channels to reach them.

The **four primary market segments** for mountain biking are:



The largest and most lucrative segment with the highest propensity to travel for the primary purpose of mountain biking are those within the **enthusiast segment**. Beyond the quality and diversity of trails, the destination's secondary experience offering, and range of support services are also critical to the decision on where they will travel to ride.

Other segments are also important to consider, specifically:

- Leisure market, who may not travel specifically to ride but are highly likely to ride in those destinations that offer mountain bike experiences, especially where they can rent bikes or equipment. This segment **overlaps with Enthusiasts**.
- Sport and Gravity markets, who will travel for events or specialist trails that align with their technical skill level and interests.
- Gravel riding market to leverage the proposed Capital to Coast Cycle Trail currently being considered.

For all segments, there is a strong social value from riding with friends and family.

Target Markets

WORKING FROM ANYWHERE: *Flexible working arrangements and the blending of business and leisure*

In her opening address at the 2022 Tourism Australia Conference - Reimagining the Future of Tourism - Phillipa Harrison, Managing Director of Tourism Australia identified a **new priority audience** for Tourism Australia: **Digital Nomads.** A lifestyle segment born from a revolution in how many people are choosing to live and work post COVID-19.

Digital nomads and working from anywhere are not a new phenomenon. Both have been around for years. However, like many things, COVID-19 has brought remote working into the spotlight. Suddenly, a significant portion of the workforce has woken up to the realisation that they can work from anywhere and an increasing number of people are starting to take that to the next level.

As the pandemic put travel on hold, it also forced a huge global shift in the fundamental way that many people worked. A shift that is looking like it will have more permanent effects as many people that had to work from home may now be allowed to do so on a more permanent basis.

A recent study from **Accenture** on the future of work found that *63% of high-growth companies have already adopted a 'productivity anywhere' workforce model.* A large share of travellers surveyed for the 2022 SKIFT Report - *Sustainability and Remote Work Shaping the Future of Travel,* state that being able to work remotely will be a major factor in their future job decisions. Work from home has been the most popular search term on job platform **Seek** for months as the unemployment rate remains at near 50-year lows and companies compete to attract talent.

Business events: smaller scale and more bespoke events are in

Even before COVID-19, there had been a significant shift in business events. This shift has been away from large-scale conferences towards more tailor-made, smaller-scale business events. Another important shift has been towards hosting these events in destinations that have more to offer than the standard conferencing facilities. Specifically, an experience offering that can be shared and enjoyed by participants.

A key consideration will be to consider how best to support smaller-scale and bespoke business events and encourage business travellers to extend their stay for leisure.

Bleisure, as the name suggests, is the blending of work and leisure trips. It's an overlapping trend that is also fuelling the growth in remote working. It's a trend that was first identified by SKIFT in 2013 and has been slowly growing year on year as remote working technology tools like Zoom and Microsoft Teams were launched.

But like many things, QR codes for example, it's really taken off as a result of COVID-19 quarantine and lock down restrictions.

See: EDAP Situation Analysis, page 13, for further details.

Target Markets

Eurobodalla Domestic Audience Focus:

<table>
<tr><th>Demographics & Lifecycle (who)</th><th>Psychographics (motivations & shared values)</th><th>Purpose of Travel (why)</th><th>Geographic Source (where)</th></tr>
<tr><td rowspan="2">Families with young children – Millennials

Families with older children – Gen X

Gen X and Millennials – couples

Older retirees (55+) - couples</td><td rowspan="2">• Reconnection Traveller: motivated to spend time with loved ones. It’s about relaxing and escaping the daily grind of their everyday lives, having fun, and enjoying themselves.
• Into Nature Traveller: they want to escape, to feel secure and comfortable, to have a sense of adventure and have a focus on mental and/or physical wellbeing.
• Exploration Traveller: is motivated to explore new destinations and to learn and experience new things. This traveller is a key target audience for Indigenous tourism experiences as well as cultural institutions and attractions.
• Adventure Traveller: travel for fun, enjoyment, and a strong sense of adventure. They're keen to meet new people, make friends and challenge themselves. They have a need for stimulation and escape. They connect with remoteness and ruggedness but are also activity oriented
• Wellness Traveller: they are looking for destinations and experiences to nourish their body, mind, and soul to stave off burn out and fatigue. They are looking to reset, to re-equilibrate and re-centre; they seek travel that relaxes the mind, slow travel; and screenless solitude.</td><td>Primary:
• Leisure
• Special interest:
  ▪ Mountain biking
  ▪ Other nature-based activities
• VFR
• Events, incl. weddings
For development:
• Business events market
• High Value Travellers</td><td>Primary (TRA data):
• Canberra
• Sydney
• South Coast

Emerging:
• Regional NSW
• Victoria</td></tr>
<tr><td colspan="2">DSNSW DMP - Visitor Focus for Eurobodalla:
• 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
• 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</td></tr>
</table>

Rationale:

- Traditional destination audience and aligns with DSNSW DMP 2022 - 2030
- Destination assets align with global trends
- Tourism Australia’s updated influences on travel (2023)

Target Markets

Eurobodalla International Audience Focus:

<table>
<tr><th>Demographics & Lifecycle (who)</th><th>Psychographics (motivations & shared values)</th><th>Purpose of Travel (why)</th><th>Geographic Source (where)</th></tr>
<tr>
<td rowspan="2">Youth market & backpackers (20 – 30 yrs)

Cruise (small ship)

55+ couples

Gen X and Millennials – couples & families</td>
<td rowspan="2">• Reconnection Traveller: motivated to spend time with loved ones. It's about relaxing and escaping the daily grind of their everyday lives, having fun, and enjoying themselves.
• Into Nature Traveller: they want to escape, to feel secure and comfortable, to have a sense of adventure and have a focus on mental and/or physical wellbeing.
• Exploration Traveller: is motivated to explore new destinations and to learn and experience new things. This traveller is a key target audience for Indigenous tourism experiences as well as cultural institutions and attractions.
• Adventure Traveller: travel for fun, enjoyment, and a strong sense of adventure. They're keen to meet new people, make friends and challenge themselves. They have a need for stimulation and escape. They connect with remoteness and ruggedness but are also activity oriented
• Wellness Traveller: they are looking for destinations and experiences to nourish their body, mind, and soul to stave off burn out and fatigue. They are looking to reset, to re-equilibrate and re-centre; they seek travel that relaxes the mind, slow travel; and screenless solitude.</td>
<td>Primary:
• Leisure – FIT market
• Special interest: Mountain biking
• International VFR
For development:
• Packaging and partnerships for wholesale/ trade marketing
• High Value Travellers</td>
<td>Primary:
• UK
• New Zealand
• USA
• Germany
Emerging:
• Asia: South Korea, Singapore
• India</td>
</tr>
<tr><td colspan="2">DSNSW DMP - Visitor Focus for Eurobodalla:
• International visitors arriving in Canberra and Sydney with the intention of attracting them to stay longer in Eurobodalla</td></tr>
</table>

Rationale

TRA data indicates (as at year-ending 2019) that over a 5-year average, 83% of international visitors to NSW are not on a packaged tour and 17% are on a packaged tour. This is further reinforced in Eurobodalla where only 5% of international visitors are on a packaged tour. While this varies by market, nearly all visitors from many of Eurobodalla's key source markets such as UK, NZ, USA, and Germany are on a **non-package tour**.

Evolving the Eurobodalla Destination Brand

Stakeholder feedback received during the EDAP consultation process reflected mixed views on Eurobodalla's destination brand - positive, indifferent, and negative - in pretty much equal measure. The main concern focused on the use of 'Eurobodalla' as a branding element, given the limited awareness and recognition of the name.

Reviewing the destination brand - *All Kinds of Natural* - is a strategic priority. However, at this stage, <u>evolving</u> the brand rather than wholesale change is recommended. Partly for reasons of cost, including opportunity cost resulting from the reallocation of budget. But mainly because, nature, which sits at the heart of the current brand, is anchored in the right territory.

It is a territory that reflects much of what the destination has to offer and provides the foundation to create stronger emotional connections with Eurobodalla's target markets **at the destination-level**.

For example, the **wellness traveller,** an aspirational target market for the region. Wellness tourism is on the rise. It has dramatically changed to a much more wholistic view of wellness, which integrates sustainability, personal health and well-being as well as the well-being of the community and the planet. See more on this below.

The brand review process is primarily about creating an emotional connection with your target markets through distinctive marketing, guided by the brand strategy and positioning. It will look at both sides of the brand. The Brand's DNA and the Brand's Identity.

The **Brand's DNA**, or to use the shorthand, the brand positioning, is the emotional essence that gives a destination meaning, beyond its functional benefits and attributes. For example, Nike isn't just sportswear. It's about *personal performance*. Apple is more than electronics, it's about *creativity*. Airbnb means more than connecting travellers with a place to stay. It's about *living like a local*.

A brand's DNA, while intangible, is at the heart of what makes the brand appealing. It's the brand's vision, it's values and it's personality. All of which shape perceptions, establish a brand's reputation in the marketplace and underpin the relationship with its audience.

It's this DNA which then informs how the brand looks, feels, and behaves. In short, the **Brand's Identity.** Its name, logo, typeface, colour palette, photographic style, messaging, and tone of voice. Unlike a brand's DNA, a brand's identity is tangible. It's those physical properties that help identify you, differentiate you, shape what people think about you and influence how they feel about you.

In our experience, it's important **<u>not</u>** to get lost in the detail of **<u>individual brand attributes</u>.** What we need to focus on is the **<u>overall impression</u>** the brand creates.

Evolving the Eurobodalla Destination Brand

Successful brands are not measured by how accurately their individual brand attributes are recalled. Successful brands are measured on the overall impression they leave with their audience and the emotional connection that impression has with their audience. An impression primarily delivered in two ways:

a. The sum of all the stories someone hears, sees, or reads about a destination.

b. The sum of all the experiences someone has with a destination.

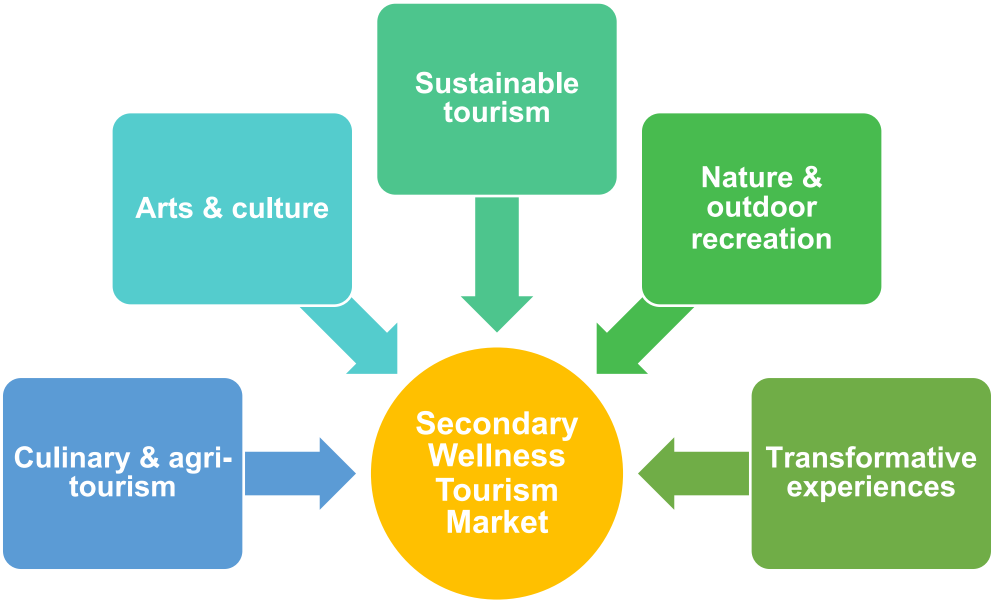
It's much less about Eurobodalla the name and much more about what you do with it. This means ensuring the destination brand positioning, its narrative and marketing efforts (among other things) align and work together to raise awareness of and preference for your destination.

The brand review process involves five core steps:

1. Create **aspirational audience personas**. This will leverage core insights into the target market segments to create a stronger emotional connection with them.
2. Evaluate how well the **brand essence or positioning** resonates with the aspirational audience personas. It's important to emphasise that we are talking about the brand essence or positioning territory (natural or unspoilt) **not** the strapline (*All Kinds Of Natural).*
3. Determine how well the **brand essence or positioning** represents and reflects the destination's key strengths and stories.
4. The fourth step will be to look at how to bring this to life in the most emotionally engaging way. **What we say and how we say it**. This can be best demonstrated using 'strategies you can see' within the brand guidelines. A key to evolving the destination brand will be to enrich the perception of the region and its experience offering.
5. The final step is determining the **broader context for presenting the destination message**. This will vary from execution to execution and relate to the purpose or story being heroed. For example, this may be as part of the NSW South Coast or more destination or experience specific, such as how it relates to Batemans Bay, Narooma, Moruya and Mogo (etc) or to regional experiences such as the food trails, events or mountain biking.

Wellness tourism is the sweet-spot for Eurobodalla's brand, *All Kinds of Natural*

A clear way to elevate the perception and preference for the destination will be to leverage its competitive advantage in wellness tourism, which comes from the inter-relationship between five primary areas:



A significant insight is that wellness travellers are High Value Travellers (HVT) who are typically more affluent, better educated, and more experienced travellers. They are also more likely to indulge in high quality food, drink and local produce as well as nature-based and cultural experiences. It bridges generations as it is about a psychographic and mindset.

Wellness tourism is a growing sector. In recent years, it has evolved to a more wholistic view, which integrates sustainability as much as it does human health and wellbeing. This emerging trend has been identified by SKIFT, Accenture, Forbes, Booking.com and other major global research studies as a primary motivator for travel in 2023 and beyond. A recent analysis by Twenty31, *Top 12 trends shaping the future of travel and destinations – an evidence-based analysis*, highlighted that the pandemic has put an emphasis on focusing on wholistic health, both mental and physical.

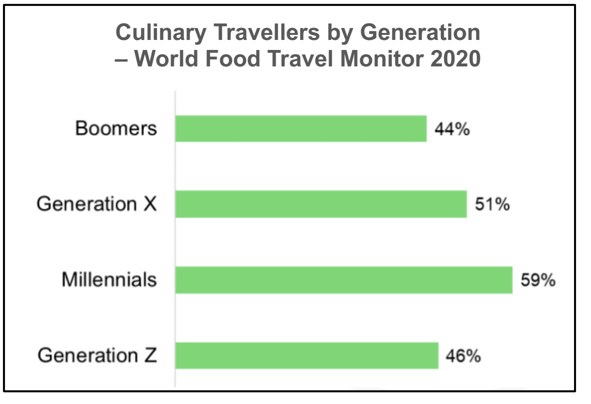
Destinations need to consider the broader experience offering, far more than simply integrating wellness experiences into hospitality. Today, the destination's food and drink offering, opportunities for nature-based experiences, immersion in local culture, arts and music and contributing to planetary health all need to be part of the mix too. Wellness travellers are also seeking new tools to sustain their mental and physical wellbeing. Success will be found in linking or laying a combination of experiences that are high on their consideration set such as day-tours that incorporate food masterclass with a local/chef, to create a **wholistic wellness experience**.

There is evidence that the wellness industry is growing with the global wellness industry worth an estimated $436 billion annually. With the overall growth of the wellness industry, there is a corresponding demand for wellness tourism. The pursuit of wellness is undertaken by travellers who have high purchasing power and are willing to pay more for products and services they consider beneficial to their health.

Culinary and agri-tourism

Food and drink (culinary) experiences are in greater demand than ever before across all markets. Like the wellness market, 'foodies' are no longer a niche market. More people are seeking authentic, good quality food and wine experiences. Curiosity and provenance of produce are important factors driving this demand. Importantly, recent research from World Food Travel Association found 88% of people visiting a destination will return in the future (repeat visitation) and tell their friends (advocacy) about the destination if they have an outstanding culinary experience.

There has also been a **generational shift** in the appeal of culinary tourism and travel, as highlighted in this graph:



As reinforced by Tourism Australia's *Future of Global Tourism Demand* report (November 2022), travellers are seeking culinary adventures, to sample local and authentic cuisines and ingredients. Agri-tourism (both agriculture and aquaculture sectors) provides an opportunity for visitors to engage more deeply with the producers and connect to where their food comes from. It is also important that local produce and products are easily accessible.

Eurobodalla's current **culinary (food and drink) and produce-related tourism offering** highlights the value of this sector to the region's visitor economy. It includes, among others:

- Significant seafood industry, including several oyster farm gates and wide range of experiences – a standout strength of the LGA is the positioning of the Eurobodalla coast as Rock Oyster Country
- Seaweed and kelp producers and experiences
- Two dairy offerings, Tilba Real Dairy and Bodalla Dairy
- Truffle farm agritourism experiences
- SAGE farmers' market and experiences
- Five established craft breweries, Tilba Valley Winery and popular coffee roasters
- Growing restaurant and hospitality scene, including significant recent investment by the Merivale Group

Extract from Big Red Group's (BRG) Report, *Seasonal Experiences Index: Autumn/Winter 2023*

BRG includes: Adrenaline, Experience Oz, and RedBalloon

A destination's biggest culinary challenge is also its biggest opportunity - making it easier for visitors to access local produce. Particularly when it comes to accessing locally grown produce in restaurants, cafes and accommodation providers. This requires an **integrated and collaborative program of activity from growing and production to distribution and consumption**.

Culinary tourism and agri-tourism are intrinsically linked. However, the motivation for travel can vary. Agri-tourism visitors are more likely to be interested in meeting the farmer and having a farm experience or farmers' market as their primary motivation for travel. However, they equally seek to find local produce (food and drink) available in local cafés, restaurants, food trucks, distilleries, wineries, and breweries as well as other outlets such as supermarkets.

Whereas the culinary traveller is more motivated to experience local produce regardless of where they are, such as restaurants, cafés, events and hospitality outlets. Moreover, they will participate in cooking schools or experiences that involve local produce but may not be the main purpose of the experience. They are also interested in farm gate experiences, but it is not their main motivation for travel.

The outtake is that culinary tourism is a component of agri-tourism and the supply of local produce and products that are available across a region through many visitor touch points (from events to local food and drink available in the hospitality sector) is as important as having farm visits (including seafood, such as oyster farms). According to the World Food Travel Monitor 2020, addressing accessibility and supply chain challenges is as important as promoting the agri-tourism/culinary tourism offer.

According to the latest available data from Tourism Research Australia (TRA), the value of the **agri-tourism industry in Australia was estimated to be $11.2 billion in 2019-2020**. This value includes the direct spending by visitors on agritourism activities, as well as the indirect spending on other trip activities such as accommodation, food, and transportation. It is predicted to continue growing.

There is also an intrinsic link between agritourism, local produce, sustainability, provenance, and wellness tourism. Wellness tourism in its broadest senses is about wellness of the planet and self. Regenerative and sustainable agritourism and sourcing local produce and products deliver on the key drivers for wellness traveller. The takeout feelings a visitor should have after their agri-tourism/ culinary experience is a sense of well-being, happiness and that they have newfound knowledge and sense of connection to the region beyond a beach holiday. This sense of well-being is a key to driving an emotional connection to the destination for the visitor.

This link would be reinforced through the proposal to nominate Tilba and surrounds as a biosphere reserve. Linking with biosphere reserves is already proving valuable to Sunshine Coast, Noosa and Gympie and their culinary and agri-tourism industry. A key feature has been the growth of regenerative agriculture as a competitive advantage that leverages the unique connection between Great Sandy, Noosa and Sunshine Coast biosphere reserves.

Likewise, as part of the broader wellness opportunity, encouraging or enabling more **sustainable tourism businesses** (see Tourism Australia's definition below) to establish and/or thrive is a high priority.

To achieve the EDAP's ambition, a number of critical areas for further developing and supporting wellness tourism (incorporating culinary and agri-tourism) have been identified in the action plan, including:

- Encouraging increased collaboration, partnerships, and packaging of experiences, products and services, including ancillary services such as transport – this is as essential for events as it is for supporting food and arts trails, itineraries and agritourism more broadly
- Continuing to evolve and amplify promotion of the trails, experiences, events and itineraries that reinforce and respond to the motivations, desires and expectations of the secondary wellness tourism market as well as the core themes that influence the appeal and preference for wellness tourism
- Supporting the continued development and promotion of bespoke, more immersive and/or 'behind-the-scenes' experiences, workshops and masterclasses
- Encouraging more tourism and hospitality businesses and operators to improve their sustainability credentials, including agritourism businesses
- Continuing to undertake high quality place activation planning, which supports the visitor economy and incorporates among other things:
    - Facilitates connectivity across the landscape and between experiences.
    - Effective design of open space for delivering events and enabling access for outdoor recreation, from passive to more active pursuits.

Defining Sustainable Tourism **Tourism Australia: Future of Global Tourism Demand, November 2022** (page 89)			
At a simplistic level, '**sustainable tourism**' today can be defined as:			
1.	Do not harm, leave destinations as found	2.	Try to take up/choose sustainable options if available or when offered
3.	Follow any local sustainable practices (related to the environment, culture and community/economy)	4.	Avoid unsustainable or harmful practices

Events

Visitors of all generations are increasingly seeking more experiences that include elements of culture, are eager to explore new places and are drawn to food and cultural experiences. Visitors want to feel a connection to place and people; what is truly unique and compelling to Eurobodalla; its point of difference and its positioning as *All Kinds of Natural*. Events offer a significant opportunity to deliver on these interests while amplifying the perception and appeal of the LGA.

A survey conducted by Tourism Research Australia in 2019 found that food and wine events were the third most popular type of event attended by domestic tourists in Australia, after music festivals and sports events. These categories directly relate to the primary themes of Eurobodalla's Hallmark Events as well as emerging event opportunities, such as those relating to sport or outdoor recreation.

Events can be planned to bring visitors outside the traditional peak periods and can contribute substantially to the local economy. This is essential to year-round business viability and contributes to the LGA's sense of vibrancy.

Events can strengthen existing markets, create awareness to attract new and emerging markets, and be the catalyst for repeat visitation and extending overnight stays. An economic boost to the LGA from an event will also have positive social impacts for the community.

For example, the **Narooma Oyster Festival** attracted over 10,000 in 2022 and contributed more than $3 million to the local economy. **River of Art Festival**, ESC's other Hallmark Event, has been showcasing the region's vibrant culture, music, visual art and theatre scene for 18 years. The 10-day program also includes creative workshops. In 2022, the Festival drew an audience of over 12,500 people and featured over 420 artists and 130 events over 10 days.

Given the highly competitive tourism event market domestically, regional destinations are increasingly adopting a more strategic approach to delivering and attracting events.

Hero events on Eurobodalla's regional calendar should embody what is a genuine point of difference and align with the *All Kinds of Natural* positioning to drive community, economic and marketing benefits.

Eurobodalla's Hallmark Events

Events

By showcasing the LGA's other strengths and unique qualities, hero regional events can also broaden Eurobodalla's identity. There is an opportunity to utilise events to reinforce and enhance awareness of the LGA's arts and culture, sport and outdoor recreation, diversity and quality of aquacultural and agricultural producers, businesses, and communities.

As highlighted above, another opportunity is to support the development of First Nations experiences. This should include events and provide opportunities set within the landscape, on Country. The inclusion of First Nation's events within both the 2023 *Narooma Oyster Festival* and *River of Art Festival* programs reinforces the value of this approach to both the local First Nations communities as well as event participants.

The LGA's events will be enhanced through collaboration across its sectors - food, agriculture, sport and outdoor recreation, hospitality and accommodation providers as well as with surrounding LGAs, such as Sapphire Coast. In turn, this will strengthen the economic return to the LGA.

A clear opportunity will be to consider how best to support smaller-scale, bespoke events like farmers markets or themed events. Not only will this style of event meet the growing visitor movement of slow travel, but they will also provide a more immersive visitor experience. Something we know is a key travel motivator.

Business events: smaller scale and more bespoke events are in

Even before COVID-19, there had been a significant shift in business events. This shift has been away from large-scale conferences towards more tailor-made, smaller-scale business events. Another important shift has been towards hosting these events in destinations that have more to offer than the standard conferencing facilities. Specifically, an experience offering that can be shared and enjoyed by participants.

A key consideration will be to consider how best to support smaller-scale and bespoke business events and encourage business travellers to extend their stay for leisure.

Bleisure, as the name suggests, is the blending of work and leisure trips. It's an overlapping trend that is also fuelling the growth in remote working. It's a trend that was first identified by SKIFT in 2013 and has been slowly growing year on year as remote working technology tools like Zoom and Microsoft Teams were launched.

But like many things, QR codes for example, it's really taken off as a result of COVID-19 quarantine and lock down restrictions.

Image: Beach, Eurobodalla Shire Council

1. ENABLERS FOR SUCCESS

ENABLERS

HIGH-LEVEL OBJECTIVES			
ENABLERS	1. Foster a broad base of support for the visitor economy	2. Lead genuine and effective industry engagement	3. Establish a pathway to genuine sustainability at the destination & business level

Underpinning the success of the EDAP is remaining informed, visitor-centric and future-focused. However, collaboration and ensuring that the visitor economy is viewed as an important contributor to a vibrant economy and liveability are critical.

Tourism is a dynamic industry, which means it's essential to know the preferences, expectations and needs of today's travellers as well as their barriers to travel. It's also important to recognise that sometimes the little things make the biggest difference.

The enablers, while inter-related, have been broadly grouped into **six primary areas**:

1. Build a broad base of support for the visitor economy with residents and local businesses as well as across all areas of Council
2. Genuine and effective industry engagement
3. Co-design of a model for Aboriginal cultural experiences
4. Collaboration within and across LGA boundaries
5. Resolve the tourism delivery model and governance arrangements
6. Foster and facilitate a strategic approach to attracting investment and talent

Strategies	Priority Actions
1.1. Build a broad base of support for the visitor economy with residents and local businesses as well as across all areas of Council	i. Implement a proactive, annual communication program with residents and businesses to facilitate a more positive understanding of the value of the visitor economy to the region ii. Involve the Business Chambers, community groups and local organisations from across the region iii. Identify local champions who can support and communicate the benefits of the visitor economy to the LGA

1. ENABLERS FOR SUCCESS

Strategies	Priority Actions
1.2. Facilitate genuine and effective industry engagement	Develop and implement a **shared engagement and capacity development program**, including: i. Dedicated **industry engagement and regular communication program**, including but not limited: • Integrates a 'fast facts' and progress updates on implementation of the EDAP. • Opportunities for networking and sharing of information, ideas and initiatives. • Sharing insights from research and trend analysis – see 1.2 (vi) below. ii. 12-month rolling **calendar of industry capability development programs, workshops, seminars**, etc in which industry can participate to build their capabilities and network with industry colleagues – address experience and event development, delivery and marketing – link to the forward program delivered by other organisations and agencies, including Destination Southern NSW and DNSW's NSW First, Get Connected and export-readiness programs – refer 2.1 below iii. Work with industry, tourism operators and event owners to identify specific issues or challenges that ESC can **advocate for or represent industry**, especially with other levels of Government ie State and Commonwealth agencies iv. Familiarisation programs, run through organisations such as the South Coast Centre of Excellence with operators and other sectors to **encourage increased collaboration, partnerships, and packaging of experiences, products and services**, including ancillary services such as transport. v. Implement a **regular visitor research program** to provide meaningful insights into the LGA's visitor economy and the dynamic and evolving nature of consumer behaviour in tourism, travel and events, including sentiment analysis and event evaluation – this can be shared with the LGA's industry to: • Increase industry awareness of consumer behavior and expectations, especially with regard to online and digital services and e-commerce • Encourage adoption of technology to promote the region and provide contemporary visitor services at all touch points along the customer journey • Better understand the value of events and utilise this information to enable future support for events

1. ENABLERS FOR SUCCESS

ENABLERS

Strategies	Priority Actions
1.3. Co-design of a model for Aboriginal cultural experiences	i. In collaboration with local First Nations organisations, host a First Nations tourism operators expo to strengthen local networks, showcase the current experience offering and inspire new market entrants • As part of this expo, create an opportunity to co-design a model for the delivery and support of Aboriginal cultural experiences, which addresses the local communities' ambitions and barriers to participation ii. Work with DNSW, NSW Aboriginal Tour Operators Council (NATOC) and Dept of Regional NSW to undertake an experience development program for Aboriginal cultural experiences
1.4. Collaboration within and across LGA boundaries	i. Continue regular communication with **surrounding LGAs** and other stakeholders involved in the **NSW South Coast**, such as Commonwealth and State Government agencies and **Destination Southern NSW** ii. Identify a **small number of projects** (for example, mountain biking and cycle tourism and well as food trails) to start building and demonstrate greater collaboration between local government areas along the NSW South Coast in line with the Regional Priorities from the Destination Southern NSW DMP. iii. Continue regular engagement with Commonwealth and State Government agencies with **program or land management responsibilities within Eurobodalla**. Involve the Industry Advisory Group or other local stakeholders (including the Business Chambers, Traditional Owners, and LALCs) to identify matters for resolution and to assist in delivering and communicating positive outcomes from the engagement process.
1.5. Resolve the tourism delivery model and governance arrangements (high priority – refer Appendix 1 for summary of core functions to assess as part of the structural arrangements)	i. As an initial step, create an **ongoing Industry Advisory Group**, which can provide advice to Council on the implementation of the EDAP as well as other matters relating to the visitor economy • Ensure a transparent process for appointing members of the IAG as well as involve the Business Chambers from across the region **ii. Commence a review of and confirm governance/ delivery structure arrangements as a high priority (within 12 weeks of EDAP adoption).** Commence by defining the objectives and outcomes required for the delivery model to determine the most **suitable, appropriate and effective model** for ESC, including roles and responsibilities and potential use of outsourced services.

1. ENABLERS FOR SUCCESS

ENABLERS

Strategies	Priority Actions
1.6. Foster and facilitate a strategic approach to **attracting investment and talent**, including grant funding Links to *Advancing Eurobodalla*	i. ESC should monitor and provide advice and support to local businesses, organisations and community or volunteer groups to apply for **visitor economy or other grants** that can assist them grow, revitalise or enhance their experience or offering, **including for events**. This involves ongoing liaison with DSNSW as the key regional partners and conduit to DNSW, Department of Regional NSW and other government agencies ii. Identify cross-boundary infrastructure projects that enhance experiences on the NSW South Coast. Ensure **customer-centric design and the costs associated with attracting investment** are built into all proposals for new major projects. This includes robust master planning, feasibility and return on investment analysis iii. As part of the industry engagement program, share insights into best practice workforce strategies with industry to **shift focus on to the quality of the employee and invest in their ability to grow** and learn to create meaningful career pathways

2. SUPPLY: EXPERIENCE OFFERING

SUPPLY

HIGH-LEVEL OBJECTIVES			
SUPPLY	1. Enhance existing experiences and events	2. Increase the number of brand-aligned visitor experiences and events, year round	3. Attract investment for infrastructure & facilities that deliver shared benefits for residents & visitors

A broad experience offering that appeals to a range of target markets would enable Eurobodalla to realise an even greater potential from its visitor economy. This involves, among other things:

- Experience-led itineraries that support and reinforce the destination's positioning
- Consider the influence of contemporary consumer behaviour on travel, including the motivations, expectations and barriers to travel as well as for events, attractions and other leisure activities
- Balance between hero and supporting experiences, including events

A detailed review of global and domestic trends in travel, which is included in the Situation Analysis, highlights the growing importance of wellness tourism, nature-based and outdoor activities (including special interests such as mountain biking), cultural tourism, sustainability, quality food and drink, events and more immersive and personalised small group experiences.

Initiatives such as new experience-led trails and itineraries that respond to these interests, expectations and motivations of the domestic market (in particular) are of value to the region along with the promotion, packaging and/or development of existing or new products and experiences. This is also important for building awareness and the appeal of Eurobodalla for international markets, especially but not exclusively the FIT market.

The priorities outlined below will contribute to enriching the experience offering, provide more reasons for visitors to extend their stay, spend more (growing yield) and encourage regional dispersal across the LGA.

Strategies	Priority Actions
2.1. Implement a **product and experience development program**	i. Implement an experience and product development program as part of a broader annual industry capability development program focused enhancing existing and developing new experiences, products, accommodation and events. Include consideration of: • Specialist program for encouraging the development of new or enhancing existing Aboriginal cultural experiences, for example linking to NATOC's programs and workshops (refer to 1.3 above)

2. SUPPLY: EXPERIENCE OFFERING

SUPPLY

Strategies	Priority Actions
2.1. Implement a **product and experience development program**	• Specialist program relating to wellness tourism and integrating core themes identified in the EDAP that support the appeal and preference of the secondary wellness tourism market, including culinary and agritourism • Specialist program relating to mountain biking, such as is being progressed in collaboration with Sapphire Coast and Destination Southern NSW and to encourage an increase in the number of bike friendly businesses (and other cycling and cycle tourism opportunities such as gravel riding) • Experience packaging, bundling and multi-day itinerary development to meet the needs of difference target market segments and to better support events • Revitalisation of existing accommodation and hospitality as well as encouraging the increased use of local produce • Addressing the needs of accessible tourism as well as more pet-friendly accommodation • Growing the listing of products on the Australian Tourism Data Warehouse (ATDW), including through linking with Destination NSW's programs such as *NSW First* and *Get Connected* as well as encouraging more operators to become export-ready ii. Encourage an increase in the supply and diversity of **sustainable tourism**, including eco-accredited accommodation, experiences and products iii. Implement a program to **connect major industry tourism operators with local tourism and hospitality providers**, including private air charters and international-ready partners or wholesale operators, including rental car companies (esp. those that specialise in RV and campervans)
2.2 **Events**	i. Continue to support the existing Hallmark events, including opportunities for collaboration with smaller and/or community events as well as the trail network, including food trails ii. Review the Eurobodalla Events Strategy to consider: • Integrating clear criteria for determining Hallmark Events • Encouraging opportunities for improving, diversifying and growing revenue sources relating to destination events (separate to community events ie those with social and community-focused objectives) • Addressing seasonality, including to avoid exacerbating unbalanced tourism during peak holiday periods • Achieving a balance between attracting new markets and maintaining or growing existing ones • Integrating mountain bike events, especially to help activate the recent investment and ongoing work around both Mogo and Narooma Mountain Bike Trail Networks

2. SUPPLY: EXPERIENCE OFFERING

SUPPLY

Strategies	Priority Actions
2.3 Attract investment for infrastructure and facilities that deliver shared benefits for residents and visitors	i. Attract investment for and implement priorities identified within the **Nature Based Tourism Study** and the **Wayfinding Strategy** • This may include support for new or emerging nature-based experiences such as the Capital to Coast project, which connects Canberra to Batemans Bay, among others ii. Focus on infrastructure and facilities planned but as yet unfunded for significant experiences such as the Mogo Adventure Trails iii. Identify and prioritise connectivity with core features of the destination, including towns and villages, waterways and all elements of the experience - from accommodation to tours, attractions, retail and hospitality through to amenities and services such as parking, toilets and bike hire • This should consider initiatives to facilitate waterway access both on to and from the water, including to support water-based tours and activities, small ship cruising and seaplane docking
2.4. Attract funding or investment to realise priorities identified within ESC's Place or Master Plans	i. Attract investment for and implement priorities identified within ESC's Place Activation Plans or Masterplans, including but not limited to: • Batemans Bay Waterfront Masterplan and Activation Strategy • Mogo Village Place Activation Plan • Moruya Airport Master Plan (currently being reviewed by ESC)
2.5. Establish a pathway to genuine sustainability at the destination & business level	i. Commence the sustainable destination accreditation process (Sustainable Tourism Destination Certification or green destination program – both Ecotourism Australia and EarthCheck provide destination and business-level programs) ii. Encouraging more operators to achieve ecotourism accreditation, potentially by starting with the Strive 4 Sustainability – a joint Tourism Australia and Ecotourism Australia program iii. Investigate support for the Biosphere Reserve nomination for the Tilba sub-region
2.6 Enhanced focus on culinary and agri-tourism	i. Develop a strategic approach to supporting culinary and agritourism across the LGA • Ensure both the aquacultural and agricultural industry are involved along with the hospitality sector • Identify priorities for place activation planning, experience development, events, packaging and marketing, etc

2. SUPPLY: EXPERIENCE OFFERING

SUPPLY

Strategies	Priority Actions
2.7 **Game changer projects for the region** – subject to available resources, completing business cases and feasibility studies and **attracting investment from public or private sources and/or public-private partnership (PPP) opportunities** *The NSW Government's **cost benefit analysis framework** outlines effective business case development and feasibility assessment, essential to progress these projects – See: Destination Southern NSW DMP 2022 – 2030* *Consider opportunities for grant programs such as the Commonwealth Government's* **Regional Precincts and Partnerships Program**	Subject to available resources, **longer-term game-changer projects** for the LGA include: i. Progress concepts, feasibility analysis and place master-planning for the **Narooma Rocks' Rock Oyster Country precinct proposal -** this initiative would also contribute to the sense of vibrancy of Narooma (for residents and visitors alike) as well as support efforts to attract investment into other businesses and attractions within this area. • The precinct would be home to the proposed **Rock Oyster Country Gateway Centre**, which would offer immersive visitor experiences (on and off-water) and provide a hub for education and retailing of South Coast produce, among other things. A detailed proposal has been developed by Narooma Rocks and is designed to enable ongoing support and promotion of the LGA's signature or Hallmark event, Narooma Oyster Festival. ii. Prioritise **place activation planning** for Narooma and Tilba to facilitate linkages with existing businesses and encourage the development and growth of new or emerging nature-based, agritourism and culinary experiences, events and the arts sector. • Review existing precinct master plans involving **Quota Park and Fosters Bay** as a high priority – it will need to involve key stakeholders, including existing lessees, operators and tour/activity providers, NSW Fisheries, Crown Lands NSW and Traditional Owners (among others), consider existing structures and uses, as well as enabling appropriate design to meet the operational needs and customer expectations of facilities, including for outdoor events and functions – see Action 2.7 (iii) below. iii. Identify and progress **waterway access points** – this would support increased access for nature-based activities and tours (paid experiences as well as access for recreation). This would involve Marine Parks, in particular relating to Batemans Marine Park, including Barunguba, as well as Traditional Owners. It should also support popular activities within marine parks, such as swimming, surfing, canoeing and kayaking. iv. Progress the development, maintenance and ongoing enhancement of the mountain bike trail network and facilities at **Mogo and Narooma** – include connectivity of trails across the LGA and to enable or improve access for other forms of **cycle tourism**, including gravel bikes v. Support other **significant visitor-related projects on lands managed by NSW Government agencies**, including NPWS, Forestry Corporation and Crown Lands NSW, especially to enable connectivity at a landscape-scale.

3. DEMAND: MARKETING & VISITOR SERVICES

DEMAND

HIGH-LEVEL OBJECTIVES			
DEMAND	1. Increase awareness and appeal of Eurobodalla in the marketplace	2. Increase overnight visitor yield	3. Increase regional dispersal

Marketing competes in the ‘attention economy’, a place where people ignore the ordinary. Job number one is getting noticed. To do this, marketing needs to tell a story. A story that makes a destination outstanding at standing-out.

It is critical to ensure that the approach involves:

- First and foremost, ensuring that the **destination brand and positioning resonate** with your target markets and your local community and industry.
- **Focus on your target markets** - Too often, destinations try to be everything to everybody, which is ineffective and costly. Narrow the focus on your target markets and ensure that you use the right channels to reach them.
    - Commence by creating **target market personas** based on motivations, expectations, pain points and barriers to travel as well as channels to reach them
- **Remarkable content,** including videos, images, copy and inspiring itineraries that:
    - Bring Eurobodalla’s stories, characters and landscape to life by ‘pulling on the heart strings’ (inspirational content)
    - Provide high quality information to assist visitors plan and enjoy their trip (informational or rational content)
    - Enable multichannel distribution, including through third-party channels such as DNSW, NPWS and Tourism Australia and to support public relations (PR)
- **Leverage and cross-promote marketing activities** undertaken for the NSW South Coast, including by Destination NSW.

Strategies	Priority Actions
3.1. Evolve the destination brand	i. Review and **evolve Eurobodalla’s destination brand**, *All Kinds of Natural*. This should leverage core insights into the target market segments to create a stronger emotional connection with them – create a brand implementation roadmap and toolkit, which is accessible for use by the industry

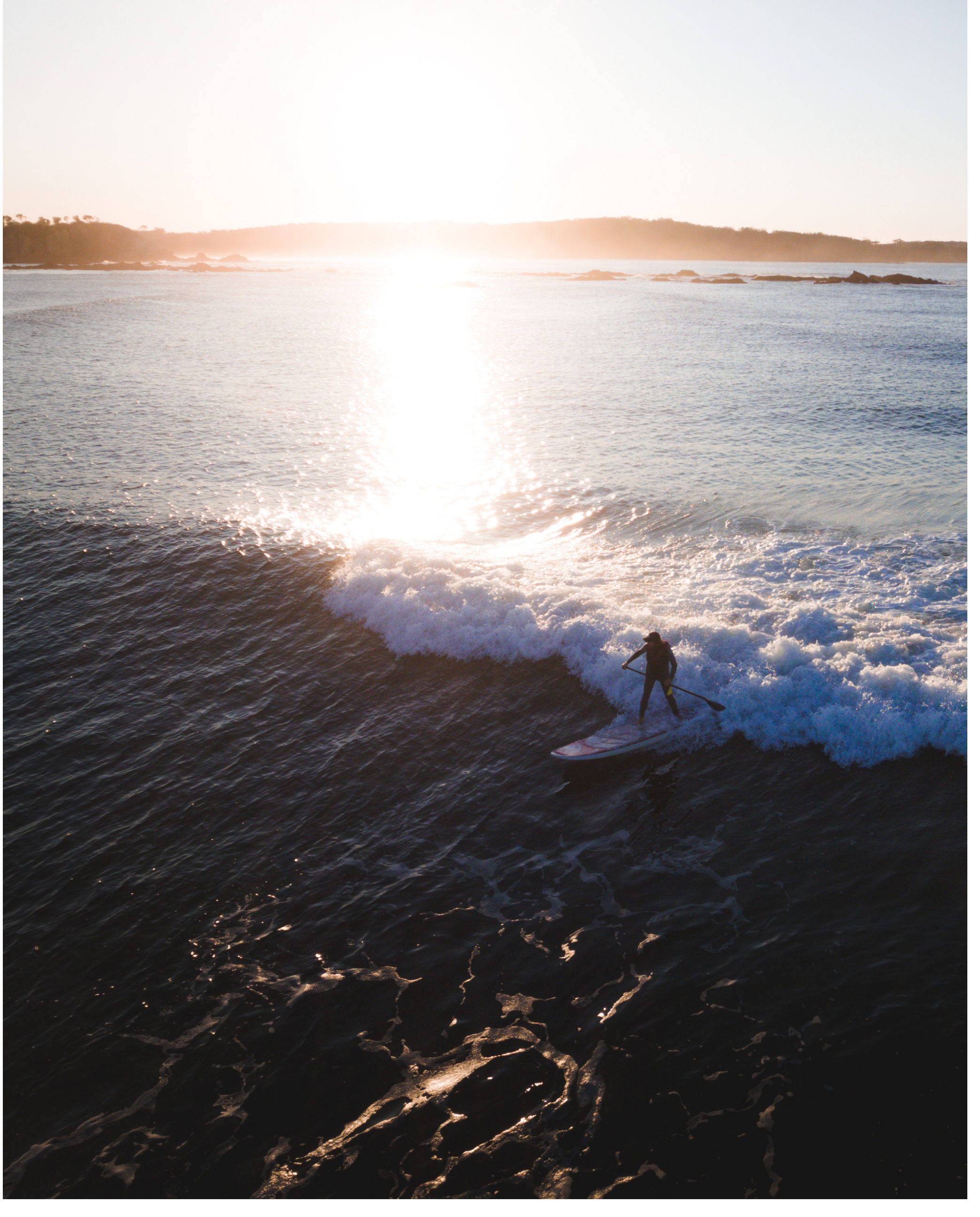
3. DEMAND: MARKETING & VISITOR SERVICES

Strategies	Priority Actions
3.2. Create a **destination marketing plan** to guide all marketing and marketing-communication activities	i. Develop a **multi-year marketing plan (three-year)** to guide marketing campaigns, content creation, and other activities across owned, earned, and paid channels to reach the target market segments. It should specifically (but not exclusively) include: • Elevating the destination brand in a way that strongly resonates with and appeals to the target audience. • Experiences, events and itineraries that reinforce and respond to the motivations, desires and expectations of the secondary wellness tourism market as well as the core themes that influence the appeal and preference for wellness tourism. • Raising awareness and appeal of the extensive trails network of the region, from nature-based trails to arts, heritage and food trails. • Profile major projects, such as the Mogo Adventure Trails, Coastal Headlands Walking Trail, and Narooma Mountain Bike Trails (see action 3 below). • Elevate the LGA's culinary and local produce experiences – a core strength of the LGA is its aquacultural offering, including the home of Rock Oyster Country, which offers a wide range of compelling experiences among other outstanding agritourism offerings of the LGA • Hallmark Events as well as other events in the annual events calendar • Other experience themes, including the arts, heritage, culture, attractions and motor sports ii. Identify and focus on **priority target markets**, including special-interest markets, such as for mountain biking and culinary/agritourism • Create target market personas based on motivations, expectations, pain points and barriers to travel as well as channels to reach them • Identify domestic and international market segments with the highest propensity to travel to the LGA • International market segmentation should focus on the FIT (Free & Independent Traveller) market as well as partnership opportunities, recognising the dynamic environment relating to attracting and servicing international markets globally

3. DEMAND: MARKETING & VISITOR SERVICES

DEMAND

Strategies	Priority Actions
3.2. Create a **destination marketing plan** to guide all marketing and marketing-communication activities	iii. Identify a **balance between owned, earned and paid channels** - leverage industry (including local industry) and third party channels through cross-referencing and sharing content • Integrate a proactive PR program in collaboration with DNSW • Guide a program of 'always on' or evergreen content iv. Integrate consideration of a **multi-year marketing campaign**, underpinned by the brand and guided by a campaign strategy and idea that resonates with the target market for Eurobodalla, which can be activated across all channels and touch points in the customer journey and guide content creation v. Integrate opportunities for **collaboration with surrounding LGAs and experiences**, such as road trip itineraries and trails vi. Align with the **evolving experience offering of the LGA**, including celebrating the opening of new visitor-related infrastructure or the revitalisation of existing attractions. These should also be a focus for public relations (PR)
3.3. Develop an identity and marketing action plan for Mogo Adventure Trails	i. Review and refresh the identity and brand guidelines for Mogo Adventure Trails ii. Develop a marketing plan to promote Mogo Adventure Trails and other signature trail experiences across the LGA, including: • Narooma Mountain Bike Trails • Coastal Headlands Walking Trail • Collaboration with Sapphire Coast and other LGAs involved in South Coast trail experiences, including the South Coast Walks
3.4. Elevate visitor servicing in line with ESC's Visitor Services Strategy	i. Consider the visitor servicing needs and optimise channels to best reach target market audiences at the right stages along the customer or visitor journey and maximise visitor yield. This should include creating remarkable content for multichannel distribution, including but not limited to compelling itinerary packaging tailored to audience desires
3.5. Targeted approach to attracting the VFR market	i. Implement a hyper-local campaign to activate residents to invite their friends and relatives (VFR market) to visit. The VFR market is already important to the LGA. It is also more likely to visit outside of peak season and contribute to a more sustainable visitor economy, year-round



Eurobodalla's Destination Action Plan (EDAP) was prepared by Destination Marketing Store with significant input gratefully provided by the Council, communities and businesses of Eurobodalla.

Appendix 1: ESC's delivery model for tourism

As highlighted in **Action 1.5**, a high priority for Council is to resolve the tourism delivery model and governance arrangements. Specifically, the EDAP includes the following core action (1.5(ii)):

Commence a review of and confirm governance/ delivery structure arrangements as a high priority (within 12 weeks of EDAP adoption).
Commence by defining the objectives and outcomes required for the delivery model to determine the most ***suitable, appropriate and effective model*** *for ESC, including roles and responsibilities and potential use of outsourced services.*

Importantly, an effective delivery model should be based on:

Overarching vision based on values, destination brand, positioning & competitive advantage: ***A world-class destination of choice***

Appropriate levels of resources, good governance and collaboration

Primary considerations for an effective delivery model:

- A model – either internal, external (outsourced) or hybrid – is not the panacea: the culture, experience and expertise of the team and their relationships with all those involved in the visitor economy are critical to success.
- Its complex and needs to address all aspects of the visitor economy - avoid 'half-baked' solutions and ensure an integrated approach to growing and managing the visitor economy.
- A core risk of change is losing corporate knowledge albeit that change can also be a tool for growth if done well and through a staged approach to any transition.
- Any model requires an appropriate level of resourcing from Council and other sources (eg industry) as well as their essential involvement in core decision-making relating to demand, supply and place activation planning, and stakeholder relations (including inter/ intra-government), among other enablers.

Recommended principles to inform and guide the model:

- Representative of the entire industry and stakeholders involved in the visitor economy.
- Genuine collaboration, communication and trust between Council and the local tourism industry.
- Clear lines of responsibility and accountability linked to milestones and Key Performance Indicators (KPIs).
- Appropriately resourced to achieve a vision of becoming a world-class destination.
- Adopt a strategic approach across the functions to guide all activities/ actions, planning, destination marketing and experience development (including events).

Appendix 1: ESC's delivery model for tourism

To commence this review process, it is important to understand the depth and breadth of the functions that should be considered. The primary functions are outlined in the table below.

Demand	Enablers	Supply-side
Eurobodalla Destination Action Plan – development and implementation		
Marketing: • Rolling 3-year Marketing Strategy, inclusive of: ▪ Public relations (PR) ▪ Content & Channel Strategy and distribution • Marketing campaigns and activities Visitor servicing: • Implementing recommendations of the Visitor Services Strategy • Managing omnichannel operations, across online, digital and in-destination face-to-face	• Destination development, including implementing EDAP • Destination brand – evolving the brand • Design-thinking to influence visitor-related infrastructure, precincts, open space and the visitor experience • Investment attraction	Sustainable destination management, including: • Place activation planning and infrastructure to support the visitor economy, including site and precinct development, management, and maintenance • Visitor economy-friendly policy and regulation • Investment attraction • Consider Eco-destination certification with Ecotourism Australia or the similar program offered by EarthCheck
Industry & stakeholder engagement, including capability development		
• Local industry – engagement, involvement and ongoing communication • Lead engagement with key tourism stakeholders including DNS, DNSW and TA	• Product and experience development • Industry capability (workforce development) • Facilitate grant applications • Fostering collaboration with other sectors and industries, including involvement of the LGA's Business Chambers • Fostering collaboration with neighbouring LGAs on the visitor economy	• Community engagement • Fostering partnerships across all levels of government, including with DNS, JO, neighbouring LGAs, NSW NPWS, FCNSW, Dept of Regional NSW
Events		
• Events strategy • Delivery (operations) and promotion • Includes business events	• Design-thinking to support event operations and customer experience • Consideration of ancillary facilities and services to support events	• Site and precinct development, management, and maintenance

Eurobodalla Destination Action Plan (EDAP) identifies and details the strategies and actions included in the table below. The table only provides a brief outline of the strategies and action and should be read in conjunction with the EDAP for context and rationale.

The **Prioritised Action Plan** prioritises the strategies and action in line with the three phases of the **NSW Visitor Economy Plan 2030**, which also aligns with the **Destination Southern NSW Destination Management Plan (DMP)**. It identifies an indicative timeframe for achieving core deliverables, assigns high-level responsibilities and highlights primary linkages to facilitate implementation. **It is subject to availability of resources** (both human and financial) and an **appropriate governance model**.

EDAP is a **whole-of-Council plan** with significant opportunities to engage and actively involve stakeholders, industry, and the community.

Phases aligned to the NSW Visitor Economy Strategy 2030 (except for phase 4, Game Changer projects)**:**

1. **Recovery: 2024** (High priority) – this phase includes those actions that are **ongoing** throughout the duration of the DMP as well as those that aren't time specific
2. **Momentum: 2025 – 2026** (Medium-term priority)
3. **Accelerate: 2027 – 2030** (Longer-term priority) - Subject to an annual review and evaluation of EDAP – Priority Action Plan to be updated in the context of available resources and emerging or incomplete priorities over the previous phases (2024 – 2026 inclusive)
4. **Game-changer projects**: these projects require more detailed planning and resources, as a result they aren't allocated a specific timeframe for implementation.

Key to the table below:

- E – Enablers for Success (shaded green)
- S – Supply: Quality Experiences (shaded orange)
- D – Demand: Marketing & Visitor Services (shaded blue)

Acronyms used:

- CLNSW – Crown Lands NSW
- DSNSW – Destination Network Southern NSW
- DNSW – Destination NSW
- DRNSW – Department of Regional NSW
- ESC – Eurobodalla Shire Council
- FCNSW – Forestry Corporation NSW (State Forests)
- FY – Financial Year
- LALCs – Local Aboriginal Land Councils
- NPWS – NSW National Parks & Wildlife Service
- VES – NSW Visitor Economy Strategy 2030

REF	STRATEGIES	ACTIONS	INDICATIVE TIMEFRAME	PRIMARY RESPONSIBILITIES, PROGRAM PARTNERS & LINKAGES
VES PHASE: RECOVERY 2024 (High priority) - includes ongoing actions				
1.1	Build a broad base of support for the visitor economy with residents and local businesses as well as across all areas of Council	i. Implement a **proactive, annual communication program** with residents and businesses to facilitate a more positive understanding of the value of the visitor economy to the region	– 2024 then ongoing	– ESC-Lead subject to & in collaboration with ongoing governance arrangements (per 1.5 below) – Involve the Business Chambers, community groups and local organisations – Identify local champions who can support and communicate the benefits of the visitor economy to the LGA
1.2	Facilitate genuine and effective industry engagement	i. Develop and implement a **shared engagement and capacity development program**, including a **regular visitor research program** to provide meaningful insights into the LGA's visitor economy and the dynamic and evolving nature of consumer behaviour in tourism, travel and events (Refer EDAP for detailed Actions i. – v. inclusive)	– 2024 then ongoing	– ESC-lead subject to & in collaboration with ongoing governance arrangements – Involve industry
1.5	**Resolve the tourism delivery model and governance arrangements**	i. As an initial step, create an **ongoing Industry Advisory Group**, which can provide advice to Council on the implementation of the EDAP as well as other matters relating to the visitor economy	– **High Priority** – 1st QTR 2024	– ESC lead – Involvement of the Industry Advisory Group

REF	STRATEGIES	ACTIONS	INDICATIVE TIMEFRAME	PRIMARY RESPONSIBILITIES, PROGRAM PARTNERS & LINKAGES
		ii. **Commence a review of and confirm governance/ delivery structure arrangements as a high priority**	– Commence governance review within 12 weeks of EDAP adoption	
2.1	Implement a **product and experience development program**	i. Implement an **experience and product development program** as part of a broader annual industry capability development program focused on enhancing existing and developing new experiences, products, accommodation and events	– 2nd half 2024 then ongoing annually	– ESC-lead subject to & in collaboration with ongoing governance arrangements – Industry Advisory Group – Ongoing liaison with DSNSW & DNSW
2.2	Events	ii. Review the **Eurobodalla Events Strategy**	– 1st half 2024 - Review and update strategy	– ESC-lead – Involvement of the Industry Advisory Group & industry stakeholders – DSNSW & DNSW
2.5	Establish a pathway to genuine sustainability at the destination & business level	i. Commence the sustainable destination accreditation process ii. Encourage more operators to achieve ecotourism accreditation or similar iii. Investigate support for the Biosphere Reserve nomination for the Tilba sub-region	– 2024 – 2025 then ongoing	– ESC-lead – Ecotourism Australia and/or EarthCheck
3.1	Evolve Eurobodalla's destination brand	i. Review and **evolve Eurobodalla's destination brand**, *All Kinds of Natural*	– High priority – *Underway - commenced in late 2023*	– ESC-lead – *Involve industry & key stakeholders through engagement & consultation*

REF	STRATEGIES	ACTIONS	INDICATIVE TIMEFRAME	PRIMARY RESPONSIBILITIES, PROGRAM PARTNERS & LINKAGES
3.2	Create a **destination marketing plan** to guide all marketing and marketing-communication activities	i. Develop a **multi-year marketing plan (three-year)** to guide marketing campaigns, content creation, and other activities across owned, earned, and paid channels to reach the target market segments (*inclusive of actions ii – vi in EDAP*)	– High priority – *Underway - commenced in late 2023*	– ESC-lead – *Involve industry & key stakeholders through engagement & consultation*
3.3	Develop an identity and marketing action plan for Mogo Adventure Trails	i. Review and refresh the identity and brand guidelines for Mogo Adventure Trails ii. Develop a marketing plan to promote Mogo Adventure Trails and other signature trail experiences across the LGA	– High priority – *Underway - commenced in late 2023*	– ESC lead – *Involve industry & key stakeholders through engagement & consultation* – Links to: • Narooma Mountain Bike Trails • Coastal Headlands Walking Trail • Collaboration with Sapphire Coast and other LGAs involved in South Coast trail experiences, including the South Coast Walks
ONGOING & NON-TIME SPECIFIC ACTIONS				
1.4	Collaboration within and across LGA boundaries	i. Continue regular communication with **surrounding LGAs** and other stakeholders involved in the **NSW South Coast**, including **Destination Southern NSW** ii. Identify a small number of projects (for example, mountain biking and cycle tourism and well as food trails) to demonstrate	– Ongoing	– ESC-lead – Key stakeholders identified, including surrounding LGAs, Sapphire Coast Tourism, Shoalhaven Tourism, DSNSW, DNSW,

REF	STRATEGIES	ACTIONS	INDICATIVE TIMEFRAME	PRIMARY RESPONSIBILITIES, PROGRAM PARTNERS & LINKAGES
		collaboration on the NSW South Coast in line with the Regional Priorities from the Destination Southern NSW DMP iii. Continue regular engagement with Commonwealth and State Government agencies with **program or land management responsibilities within Eurobodalla**		DRNSW, NPWS, FCNSW, CLNSW, Traditional Owners, LALCs, among others
1.6	Foster and facilitate a strategic approach to **attracting investment and talent**, including grant funding	i. ESC should monitor and provide advice and support to local businesses, organisations and community or volunteer groups to apply for **visitor economy or other grants** that can assist them grow, revitalise or enhance their experience or offering, **including for events** ii. Identify cross-boundary infrastructure projects that enhance experiences on the NSW South Coast. This includes robust master planning, feasibility and return on investment analysis iii. Share insights into best practice workforce strategies with industry to **shift focus on to the quality of the employee and invest in their ability to grow** and learn to create meaningful career pathways	– Ongoing	– ESC-lead – Involve the Industry Advisory Group – Ongoing liaison with DSNSW, DNSW, DRNSW and other government agencies – Links to *Advancing Eurobodalla*
2.1	Implement a **product and experience development program**	ii. Encourage an increase in the supply and diversity of **sustainable tourism**, including eco-accredited accommodation, experiences and products	– Ongoing	– ESC-lead subject to & in collaboration with ongoing governance arrangements – Involve industry

REF	STRATEGIES	ACTIONS	INDICATIVE TIMEFRAME	PRIMARY RESPONSIBILITIES, PROGRAM PARTNERS & LINKAGES
				– Ecotourism Australia & similar organisations such as EarthCheck
2.2	**Events**	i. Continue to **support the existing Hallmark events**, including opportunities for collaboration with smaller and/or community events as well as the trail network, including food trails	– Ongoing support for Hallmark Events while review of Events Strategy undertaken	– ESC-lead
2.3	Attract investment for infrastructure and facilities that deliver shared benefits for residents and visitors	i. Attract investment for and implement priorities identified within the *Nature Based Tourism Study* and the *Wayfinding Strategy* ii. Focus on infrastructure and facilities planned but as yet unfunded for significant experiences such as the Mogo Adventure Trails iii. Identify and prioritise connectivity with core features of the destination, including towns and villages, waterways and all elements of the experience	– Ongoing	– ESC-lead – Links to: • Nature Based Tourism Study • Wayfinding Strategy
2.4	Attract funding or investment to realise priorities identified within ESC's Place or Master Plans	i. Attract investment for and implement priorities identified within ESC's Place Activation Plans or Masterplans	– Ongoing	– ESC-lead – Links to ESC's Place or Master Plans, including: • Batemans Bay Waterfront Masterplan and Activation Strategy

REF	STRATEGIES	ACTIONS	INDICATIVE TIMEFRAME	PRIMARY RESPONSIBILITIES, PROGRAM PARTNERS & LINKAGES
				• Mogo Village Place Activation Plan • Moruya Airport Master Plan (currently being reviewed by ESC)
3.4	Elevate visitor servicing in line with ESC's Visitor Services Strategy	i. Consider the visitor servicing needs and optimise channels to best reach target market audiences at the right stages along the customer or visitor journey and maximise visitor yield	– Ongoing	– ESC-lead – Industry Advisory Group – Involve industry
3.5	Targeted approach to attracting the VFR market	i. Implement a hyper-local campaign to activate residents to invite their friends and relatives (VFR market) to visit	– Timing TBD then Ongoing	– ESC-lead
VES PHASE: MOMENTUM 2025 – 2026 (Medium-term priority)				
1.3	Co-design of a model for Aboriginal cultural experiences *Commence planning 2nd half of 2024*	i. In collaboration with local First Nations organisations, host a First Nations tourism operators expo to strengthen local networks, showcase the current experience offering and inspire new market entrants ii. Work with DNSW, NSW Aboriginal Tour Operators Council (NATOC) and Dept of Regional NSW to undertake an experience development program for Aboriginal cultural experiences	– **Commence planning in 2024** – Potentially host forum in 2025	– ESC to facilitate – Local First Nations businesses & community reps, including LALCs – NATOC – DNSW – DSNSW – Potential to involve Welcome to Country
2.1	Implement a **product and experience development program**	iii. Implement a program to **connect major industry tourism operators with local tourism and hospitality providers**	– 2025	– ESC-lead

REF	STRATEGIES	ACTIONS	INDICATIVE TIMEFRAME	PRIMARY RESPONSIBILITIES, PROGRAM PARTNERS & LINKAGES
				– Involve the Industry Advisory Group and broader industry – DSNSW & DNSW
2.6	Enhanced focus on **culinary and agri-tourism**	i. Develop a **strategic approach** to supporting culinary and agritourism across the LGA	– Early 2025	– ESC-lead – Involve the Industry Advisory Group and broader industry – DSNSW & DNSW
VES PHASE: ACCELERATE: 2027 – 2030 (Longer-term priority)				
Subject to an annual review and evaluation of EDAP – Priority Action Plan to be updated in the context of available resources and emerging or incomplete priorities over the previous phases (2024 – 2026 inclusive)				

REF	STRATEGIES	ACTIONS	INDICATIVE TIMEFRAME	PRIMARY RESPONSIBILITIES, PROGRAM PARTNERS & LINKAGES
GAME CHANGER PROJECTS – Timing subject to availability of resources (human & financial), attracting investment as well as robust and credible planning processes & feasibility assessments				
2.7	**Game changer projects for the region** *Subject to available resources, completing business cases and feasibility studies and attracting investment from public or private sources and/or public-private partnership (PPP) opportunities* ***Consider opportunities for grant programs such as the Commonwealth Government's Regional Precincts and Partnerships Program***	i. Progress concepts, feasibility analysis and place master-planning for the **Narooma Rocks' Rock Oyster Country precinct proposal** ii. Prioritise **place activation planning** for Narooma and Tilba to facilitate linkages with existing businesses and encourage the development and growth of new or emerging nature-based, agritourism and culinary experiences, events and the arts sector. • Review existing precinct master plans involving **Quota Park and Fosters Bay** as a high priority iii. Identify and progress **waterway access points** – this would support increased access for nature-based activities and tours (paid experiences as well as access for recreation) iv. Progress the development, maintenance and ongoing enhancement of the mountain bike trail network and facilities at **Mogo and Narooma** – include connectivity of trails across the LGA and to enable or improve access for other forms of **cycle tourism**, including gravel bikes	– To be determined	– ESC-lead – Industry Advisory Group – Involve industry – incl. to identify opportunities for private sector investment or public-private partnerships (PPP) – NSW Government agencies as appropriate to each project *The NSW Government's **cost benefit analysis framework** provides an important step towards effective business case development and feasibility assessment, essential to progress these projects. Refer: Destination Southern NSW DMP 2022 – 2030*

REF	STRATEGIES	ACTIONS	INDICATIVE TIMEFRAME	PRIMARY RESPONSIBILITIES, PROGRAM PARTNERS & LINKAGES
		v. Support other **significant visitor-related projects on lands managed by NSW Government agencies**, including NPWS, Forestry Corporation and Crown Lands NSW, especially to enable connectivity at a landscape-scale		

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