EUROBODALLA DESTINATION ACTION PLAN 2023 - 2028

SITUATION ANALYSIS

MARCH 2023

eurobodalla shire council

CONTENTS

EDAP Situation Analysis Report was prepared by:
Destination Marketing Store

1. INTRODUCTION & CONTEXT

The Eurobodalla Destination Action Plan (EDAP) is about setting the direction and priorities to **sustainably grow the visitor economy** of the Eurobodalla region.

It will:

- Deliver a practical, informed and prioritised Destination Action Plan
- Support regional promotion, visitation and prosperity, including regional dispersal and visitor yield (it's not just about visitor numbers!)
- Contribute to enhancing environmental and social values of the region and deliver on the destination brand, *All Kinds of Natural*
- Address barriers and challenges to travel faced by the region
- Consider supply, demand and enablers for implementation, matched to resources (achievable)

The EDAP has been developed around eight guiding principles.

1. **Inclusive** of the whole region and all communities.
2. **Informed** - evidence-based.
3. **Recognising** 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 to provide a clear baseline.

The **Desktop Review and Situation Analysis** is designed to inform the EDAP by providing insights from which we can determine the most effective strategies to evolve and elevate the Eurobodalla region as a destination of choice and sustainably grow its visitor economy.

The information is drawn from multiple sources as well as through consultation with the community and industry, including but not limited to:

- Review of existing strategies and plans at the national, State, regional and local levels, including:
    - ESC's Community Strategic Plan, Events Strategy 2019 – 2024, and Advancing Eurobodalla: Integrated Economic Growth & Development Strategy 2019 - 2028
    - Destination Southern NSW Destination Management Plan 2022 – 2030

- NSW Visitor Economy Strategy 2030 & Commonwealth Government’s THRIVE 2030

- Visitor research and data, including from Tourism Research Australia (TRA), Spendmapp, Localis and the Australian Bureau of Statistics (ABS)
- Relevant and credible global and domestic trends, including from SKIFT Research, Phocuswright and Euromonitor International, among others
- Economic outlook from leading financial institutions and organisations in Australia.

In summary, it highlights:

What we know about the LGA's visitor economy

What's new and what's planned - recent developments in progress

Competitive opportunities

What the future could look like - influence of domestic and global trends

What we heard - consultation and engagement insights

2. DESTINATION FAST FACTS

Domestic Snapshot

- Domestic overnight visitors represent 56%* of all visitors
  - 25% of overnight visitors from ACT
  - 23% of overnight visitors from Sydney
  - 13% of overnight visitors from South Coast
- Average length of stay is 3.5 nights. This is ***on par*** with regional NSW and South Coast
- Average spend is $130. This is ***well below*** regional NSW average of $155 & South Coast average of $182
- Domestic day visitors represent 41%* of all visitors of which 90% are from the ACT and South Coast

* **Source:** Tourism Research Australia & Destination NSW - Average over 8 years: 2014 - 2021

International Snapshot

- International visitors represent around 2.5%* of all visitors. The top source markets up to 2019 are:
  - UK (15%)
  - USA (14%)
  - Germany (12%)
- The top source markets arriving in August 2022 (ABS data):
  - New Zealand
  - India
  - Singapore
- International visitors have decreased 81% as at August 2022 compared with 2019 (ABS data)
- The International Air Transport Association (IATA) forecasts that passenger international numbers are unlikely to return to pre-COVID levels until 2025

Change in visitor expenditure and overnight stays 2018-2021

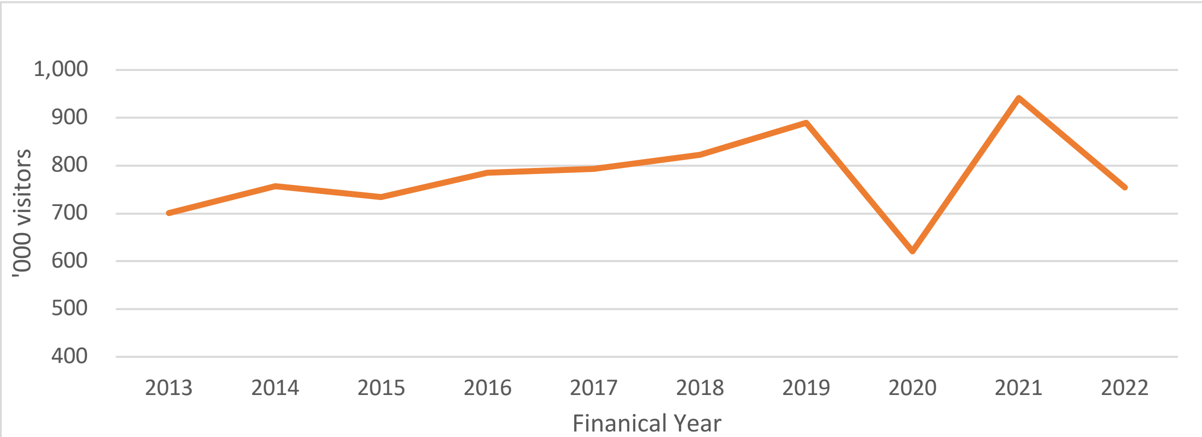
Visitor numbers

The chart below shows the trend for visitation for Eurobodalla over the past ten years for overnight visitors. Overnight stays were increasing at a steady rate of 4% per year between 2013 and 2019 until the dramatic impacts to visitor numbers resulting from COVID-19 in 2020-2022. Between the years 2018 and 2021 there was an overall increase of 14% and an average yearly increase of 8%.

TRA data for the 2021-22 financial year[1] demonstrates the number of *overnight visitors to regional areas in NSW* decreased by 24% from the 2021 financial year,

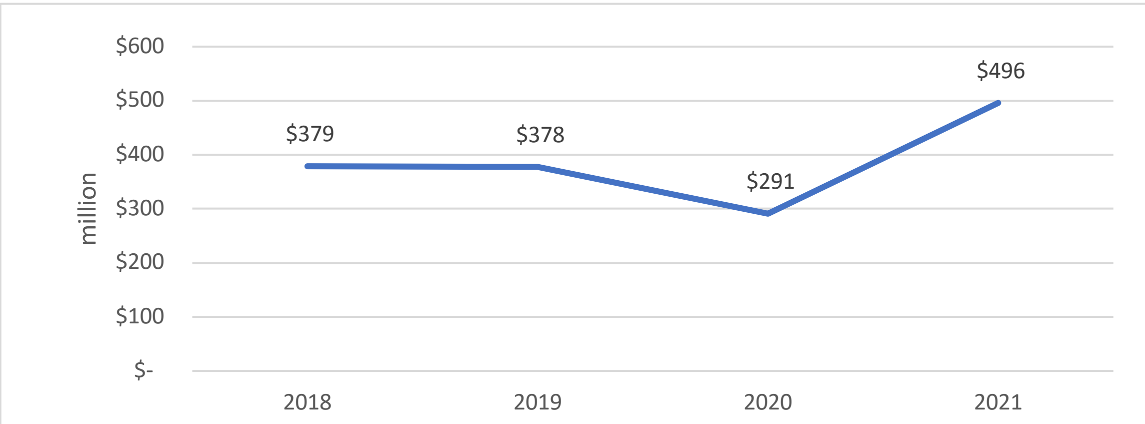
[1] https://www.tra.gov.au/data-and-research/reports/national-visitor-survey-results/national-visitor-survey-results

and **Eurobodalla LGA shows a similar trend with a 20% decrease on the previous year, after a good recovery in 2021.**



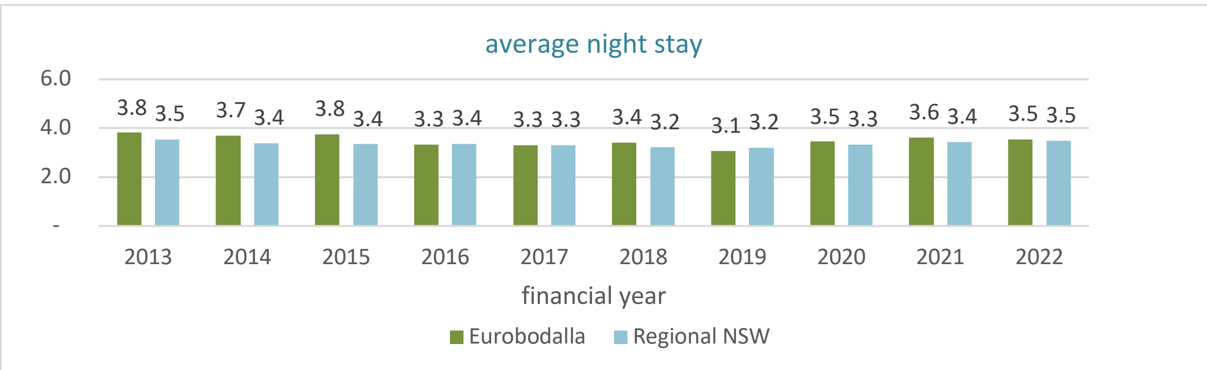
Visitor expenditure (2018-2021)

Between the years 2018 and 2021 there was an **overall increase of 31%** in overnight visitor expenditure and an average yearly increase in visitor expenditure of 15% to reach $496 million[2] in 2021.



Average length of stay compared to NSW regional average

Over the past 10 years average length of stay has been 3.50 nights for Eurobodalla and 3.36 nights for Regional NSW. As shown the average night stay has been higher than Regional NSW for 6 out of the past 10 years.



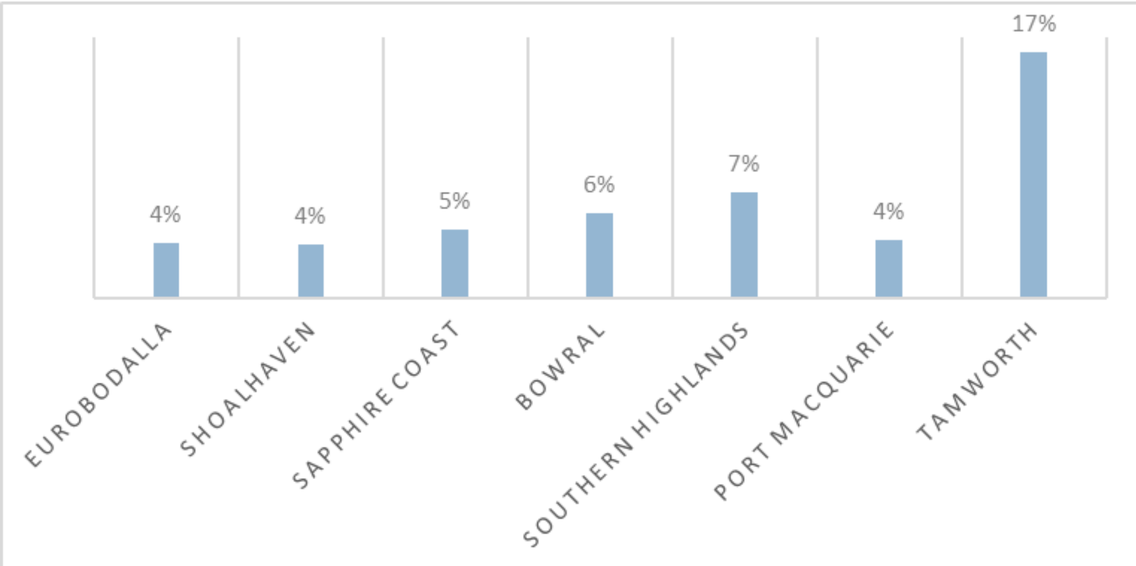
[2] TRA expenditure data uses a four year average e.g 2018 is average 2015-2018, and a 2 year average during Covid 2021-22.

Average overnight spend compared to NSW regional average

Over the past 8 years (2014-2021) average overnight spend has been $130 per night for Eurobodalla and $155 for Regional NSW. The average growth of this expenditure over that time is 16%, which is slightly lower than Regional NSW (23%).

Event attendance comparison

Holiday markets and VFR segments include visitors coming for events and festivals. Eurobodalla attracts a similar ratio of visitors specifically for festivals, concerts, and sporting events than other neighbouring regional areas.



Recent Infrastructure Initiatives and Investment

Over recent years, the Eurobodalla region has received significant investment, mostly although not exclusively through grant funding programs (both Commonwealth and NSW Government). Both the Council as well as community groups have been the recipients of the funding grants.

The range of projects have primarily related to shared infrastructure projects that enable greater access to the region's natural assets as well as in cultural projects, including First Nation's cultural centres as well as the arts.

Major projects include:

- **Mountain Bike**
  - Mogo Adventure Trails Hub
  - Narooma Mountain Bike Trails
- **Walking**
  - **Batemans Bay Coastal Headlands Walking Trail and Observation Point upgrade -** coastal walking trail linking the headlands and beaches between Batehaven and McKenzies Beach

  - **Murramurang South Coast Walk -** 35 km, multiday trail. (Project funded through Restart NSW's Regional Growth – Environment and Tourism Fund)
- **Eurobodalla Food Trail -** Experience development, events and campaigns, including participating in The Gourmet Coast Trail
- **Merivale Group** investment in Narooma (five premises)
- **Bay Pavilions**
- **Batemans Bay Waterfront Redevelopment** - master planning and some upgrades and revitalisation projects
- **Narooma Arts and Community Centre**
- **Wagonga Living Shoreline Project**
- **Mogo LALC –** Redevelopment of Mogo offices including cultural and business space
- **Accessible beaches project** (Regional Tourism Activation Fund (RTAF) funded)
- **Wagonga LALC –** BLER funded Cultural Centre

3. RELEVANT INSIGHTS FROM GLOBAL AND DOMESTIC TRENDS

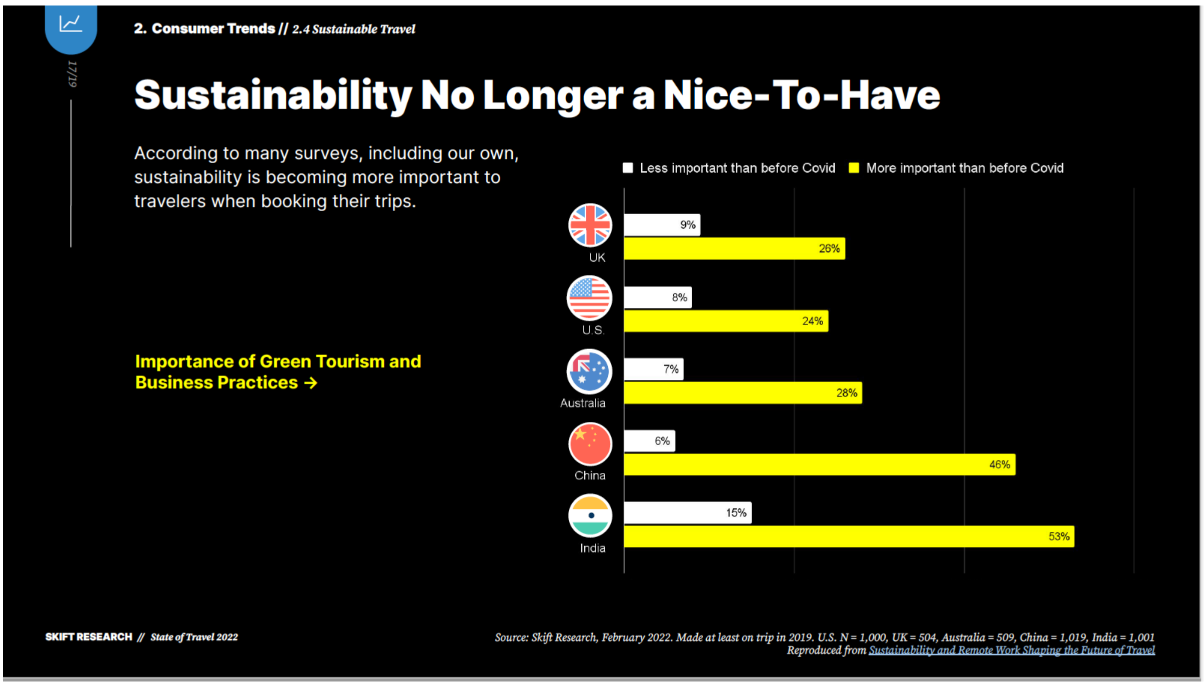
An understanding of consumer preferences, motivations and barriers to travel is essential to inform a visitor-centric and future-focused Destination Action Plan.

These trends have been drawn from a wide range of sources, including but not limited to SKIFT Research, Euromonitor International, Booking.com, Deloitte Access Economics and Tourism Australia's Consumer Demand Project (CDP**)**

- **Sustainability & green travel**
- **Transformative experiences, including wellness**
- **Working from Anywhere (flexible work arrangements)**
- **Digital transformation**
- **Value of events**
- **Culinary tourism (food & drink)**
- **Growing importance of local communities**

1 SUSTAINABILITY - the *greening of travel*

SKIFT's 2022 Research Report - *Megatrends Defining Travel in 2022* – highlighted that *climate resilience is the new Return on Investment* in travel and tourism. A point that was further reinforced in their 2023 Megatrends Report.



Globally, there is an increasing concern for the health of our environment. This has been heightened in Australia by recent and significant natural events, such as drought, fires and floods. It is resulting in an increased awareness of sustainability and the impact of climate change. Both in general but also in terms of tourism and travel.

While nature tourism has been on an upward trend for many years now; COVID-19 has amplified interest in this area. Nature-based and eco-tourism offer a clear direction for both accommodation and experience development. More specifically, people are seeking:

- Accommodation that more directly connects people with nature
- Activities and opportunities to spend time together in nature

However *green tourism* is not homogenous. It comprises a variety of movements and causes ranging from sustainable and regenerative tourism through to 'unbalanced' tourism and the slow travel movement.

It's a trend has been reinforced by Tourism Australia's Consumer Demand Project, which identified travel for unplugging and sustainable & regenerative travel as two of its top seven trends for Australia heading into 2022.

These trends reinforce the conclusion of the 2019 SKIFT Global Forum on The Greening of Travel: '*The travel and tourism industry need to accept that green business practices will be the next major competitive advantage for brands* (and destinations) *selling to leisure and business travellers alike*.'

Importantly, it will be critical to future success. In 2021, Euromonitor International identified only five global trends that will influences how travel would rebound post COVID-19, one of which was that: '*Responsible and sustainable tourism would be the key in redesigning travel.'*

Considerations & Implications: Thinking beyond 'relaxing in nature' is essential for tomorrow's destinations – both as a disrupter to your competitors but also to strengthen your appeal as a destination.

2 TRANSFORMATIVE EXPERIENCES - *the shift from transactional travel to slow travel and wellness tourism.*

Another key finding from Tourism Australia's CDP is that people are craving *unforgettable experiences.* This builds on the shift over several years, to *transformative travel experiences* becoming a key motivation for picking one destination over another', first identified by SKIFT in their 2018 Report, *The Rise of Transformative Travel*. Transformative experiences are *less about looking at things and more about experiencing something new*. Something that engages and connects visitors, in a meaningful way, to the place, its history and heritage and its people.

Transformative Travel often reflects two characteristics.

a. **A shift from static to immersive**: Events are a classic example of an immersive experience. The Tamworth Country Music Festival, the Parkes Elvis Festival and the Narooma Oyster Festival are good examples. Virtual or augmented reality, arguably the hottest technology trend happening with many of the leading museums of the world, is another way of achieving this. The National Museum of Finland uses this technology to help people step inside the museum's paintings and take a virtual tour.

b. **A shift from curation to creation**: In Canowindra, simple projection transformed grain silos into giant aquariums and created the illusion that some of the town's earliest residents such as the *Grossi* - fish who lived in the area 360 million years ago - were alive and well and swimming in the river.

The market is seeking more intimate experiences that tell a story beyond the attributes and involves *personalising* the experience. This is further demonstrated by:

- Increasing interest in workshops and masterclasses, especially in the culture and nature sector. Signature events where people can spend time finding out, in a fun and exciting way, about a specific interest or are able to share that experience with their friends or family (this includes experiences for children and families).
- An increasing preference for small group and bespoke tours where visitors can engage with locals and/or experts.
- Developing cultural experiences that are more hands on and engage all (or more of) the senses.

The overlay between sustainability, green tourism and transformative travel underpins the ***slow travel* movement** and is driving ***wellness* tourism.** As the **twenty 31 report** - the top 12 trends shaping the future of travel and destinations, observed, *the pandemic has put an emphasis on focusing on holistic health, both mental and physical. Wellness tourism is no longer a niche sector and is expected to grow 21% annually through to 2025.*

In short, travellers are looking to immerse themselves within destinations: reducing their carbon footprint while enjoying genuine connection with the place, its characters and culture.

Considerations & Implications: Destinations need to review how they can move beyond the functional and personalise the experience; offering their visitors a way to better immerse themselves in the destination and enjoy a genuine connection with the place, its characters and culture. And as part of this evolution there is an opportunity to tap directly into the market's desire to maintain their well-being while travelling, through access to supporting activities and facilities. This is particularly important to support business travel and events. It relies on open space, physical connectivity, directional signage and itinerary development. SKIFT research estimates that wellness travellers will spend 53% more than non-wellness travellers.[3]

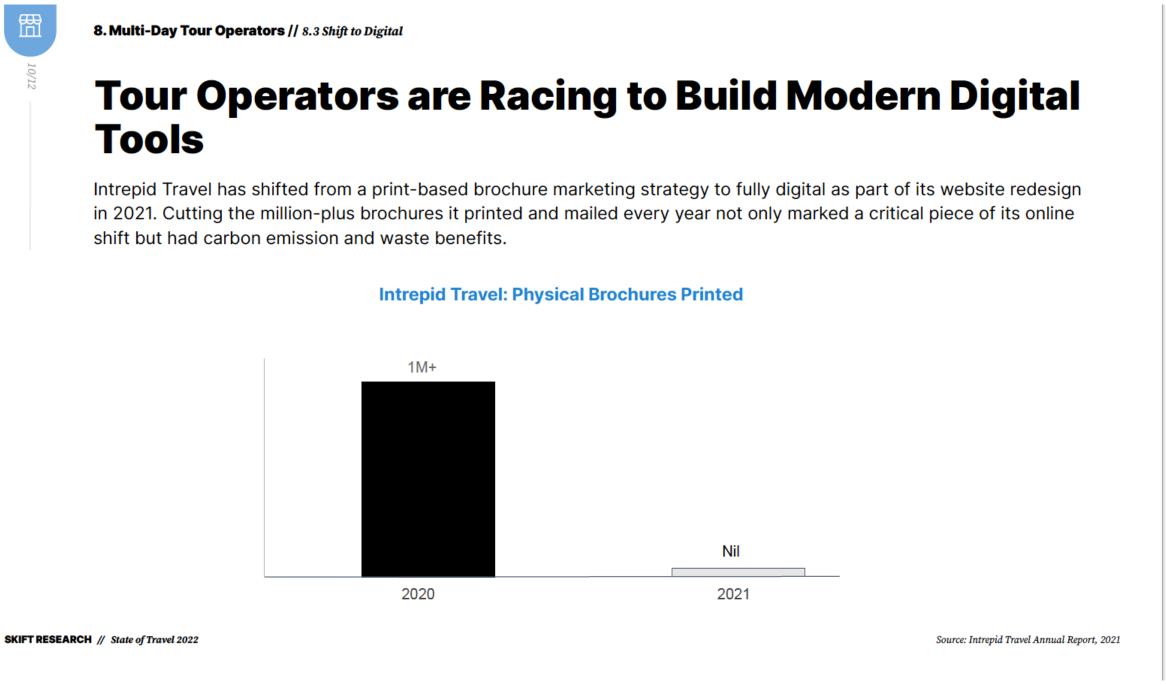
As highlighted by SKIFT Research, '*even though it's gained new found attention, wellness has long been a key motivator for travel and an important part of the travel experience. Today, however, wellness travel is manifesting in new and different ways than in the past, driven by the demands of increasingly well-being minded travellers.*'[4]

[3] Skift Report, *How Travel Brands are Getting Wellness Right*, June 2019
[4] Skift Report, *Defining the New Era of Wellness Tourism: Trends and Best Practices for Stakeholders*, October 2019

3 TECHNOLOGY, TOURISM AND DIGITAL TRANSFORMATION

All markets and demographics are now online and much more familiar with digital platforms and tools such as QR codes. The use of mobile devices (smart phones and tablets) and e-commerce is at an all-time high!

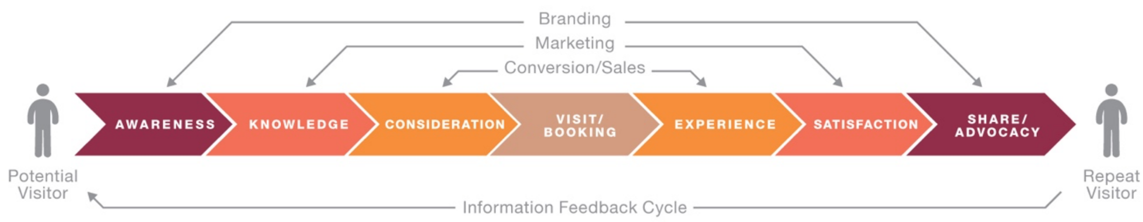
Being mobile optimised and providing e-commerce functionality is no longer a value add. It’s an essential. Essential because it addresses the **expectations** of today’s travel markets.



The future implications for **visitor servicing,** for example, are significant. Best practice visitor servicing is now omnichannel and includes effective partnerships with local businesses. This will need to be supported by high-quality online and digital systems to enhance engagement and distribution of information; at all touchpoints along the customer journey – including e-commerce functionality.

While people will continue to play an important role in visitor servicing, the new model will need to consider how to take information out of the VIC, including through mobile VIC services, and deliver it directly to the visitor. Wherever they are.

This reinforces the importance of understanding the customer journey and the value of addressing all touchpoints along it.



A great opportunity, for example, and one that is mostly ignored, or at least undervalued, is the gap between people booking and people arriving in-destination. This is an ideal time to ‘arm’ your visitor with the information that could persuade them to see more, travel further and in the process, spend more.

Beyond the use of online and digital platforms to search, plan, book or share travel experiences, technology is playing a critical role in the visitor economy. For example, charging stations to support the rapid growth in e-vehicles and e-bikes, mobile connectivity for in-destination visitor services and high-speed internet connectivity to support remote working or co-working opportunities.

Considerations & Implications: The destinations that will succeed in the future are those that seamlessly integrate the human side’ of visitor servicing with the ‘technology side’. Particularly being mobile optimised. Only then will destinations be able to meet current visitor expectations, deliver a positive visitor experience and attract new, high yield, markets.

4 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.

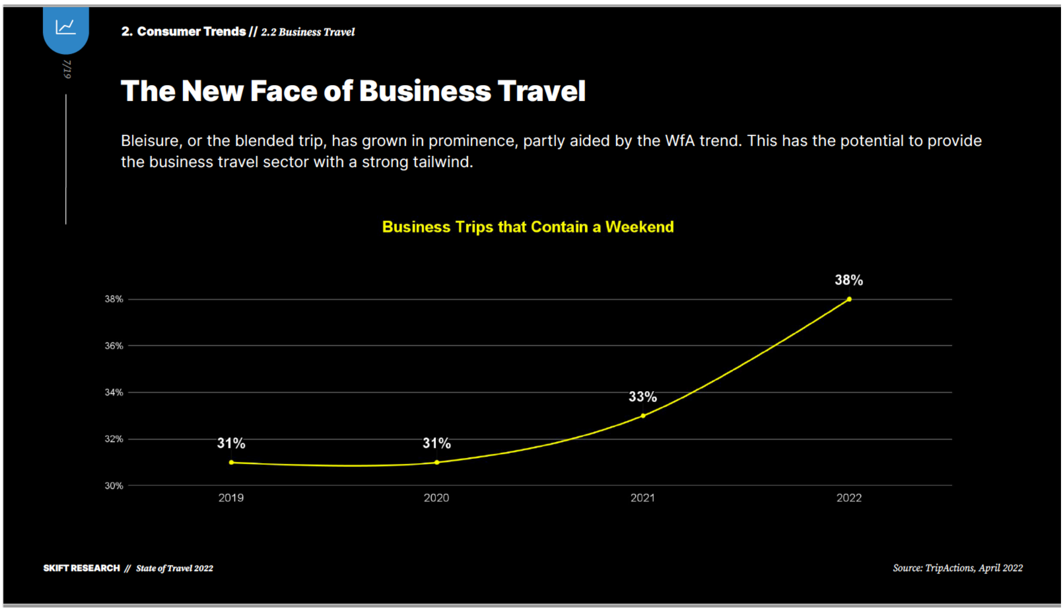
Digital nomads and working remotely are not a new phenomenon. Both have been around for years. However, like many things, COVID has brought remote working into the spotlight. Suddenly, a significant portion of the workforce has woken up to the realisation that they can work from anywhere and an increasing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

Bleisure, as the name suggests, is the blending of work & 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.

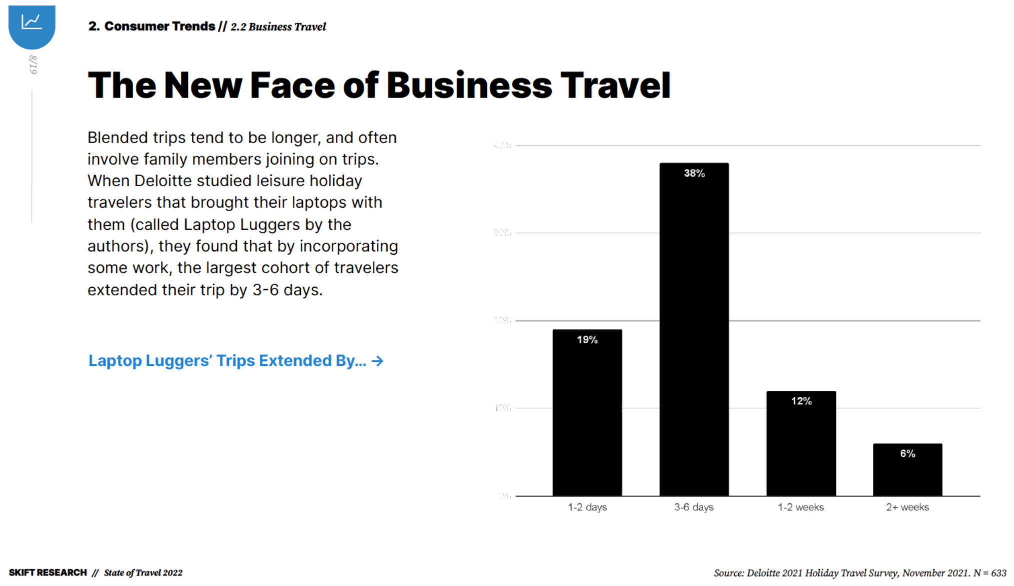
But like many things, QR codes for example, it's really taken off as a result of COVID quarantine and lock down restrictions.



Considerations & Implications:

The Remote Working trend is driven by the growth in flexible work arrangements post COVID; allowing people to work from anywhere. As the Australian Trade and Investment Commission (ATEC) identified in their 2022 Visitor Economy Megatrends Report, ***workcations are the new holiday!***

It is estimated that up to 40% of employees nationally are likely to have more flexible working arrangements into the future, expanding opportunities for people to take their laptop and travel for short breaks through to longer-term stays. When coupled with the evolving nature of business travel and the desire for well-being, access to nature and outdoor recreation, there are significant opportunities to grow year-round visitation. ***This will require rethinking and a strong commitment to the way we design, operate, and promote accommodation and other services and facilities in regional areas.***



5 INCREASING VALUE OF EVENTS

The popularity of outdoor events as well as small-scale, bespoke events and farmers markets is a clear value-add to any destination.

Travel to participate in or watch sporting events is also on the rise and is now a fast-growing segment in tourism. In a recent review, it was identified that 'participatory sport tourists play a dual role in the sport tourism industry. As visiting sport competitors, they require transportation, accommodation, and other tourist services, while simultaneously serving as the attraction for event-based sport tourists.'[5]

While this finding is highly relevant to major sporting events, it highlights the opportunity for competitive sports and attracting sporting events, including those that reinforce the destination's appeal for health and well-being or special-interest activities.

Music and culture are also gaining popularity as tourists look for new experiences. This global trend is particularly strong among Millennials. Importantly, the trend doesn't only relate to large-scale music festivals. Smaller events and those that bring together different elements, genres, or styles of music, sometimes across multiple sites over multiple days are becoming more popular.

The ABC's Triple J has developed an Unearthed Small Festival Guide, which leverages this trend across Australia. Music events also encourage group travel.

'*There's no denying that boutique music festivals in Australia are on the up and up. Boutique events offer an alternative, more niche experience to large scale festival options …, and because of that, they've seen a real increase in popularity over the past few years. Whether it's fancy dress, all-Australian line-ups, secret farm locations, these smaller festivals appeal to punters who seek a more individual experience.*'[6]

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[5] Ryan Parker, *The Remarkable Growth of Sports Tourism*, April 2019
[6] Triple J Unearthed, Australian Broadcasting Commission (ABC): https://www.triplejunearthed.com/article/triple-j-uneartheds-small-festival-guide

A third area that is attracting growing interest, particularly in the context of sustainability, is local produce. There is a growing interest amongst visitors about the provenance of their food and drink (see point six below).

Even before COVID-19, there had been a significant shift in business events. This shift has been away from large-scale conferences towards more bespoke, 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.

Considerations & Implications:

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

6 CULINARY TOURISM (food and drink)

Food and drink 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.[7] Importantly, recent research found 88% of people visiting a destination will return in the future (repeat visitation) and tell their friends (advocacy) about the destination it if they have an outstanding culinary and/or wine experience[8].

Considerations & Implications:

A three-year, culinary initiative that helps realise the latent potential of NSW's culinary tourism economy and grows both the food economy and visitor economy of the Eurobodalla region. In short, an integrated and collaborative program of activity from growing and production to distribution and consumption.

The initiative could be implemented as a staged 'pilot study' linking agriculture and tourism and involving the full spectrum of culinary assets. From accessing producers (agri-tourism and farmgate) through to food and drink experiences, world-class dining (including direct supply of local produce to hospitality and event providers/ organisers) and events, for example that leverage and/or link with the region's signature event, Narooma Oyster Festival.

7 GROWING IMPORTANCE OF LOCAL COMMUNITIES TO THE VISITOR ECONOMY

In their 2020 Megatrends Report, SKIFT Research identified '*The Holy Grail of a sustainable tourism industry is one that residents feel good about too.*'

[7] Skift Report, *The New Era of Food Tourism: Trends and Best Practices for Stakeholders*, February 2019
[8] World Food Travel Association, *Importance of the Food Tourism Industry*, 2019

There is little doubt that this sentiment has continued to strengthen, with the importance of putting your community at the heart of your visitor economy further reinforced in SKIFT's 2022 Megatrends Report:

"Tourism boards embracing a "locals first" approach post-pandemic is here to stay, as is the imperative of having residents' input on tourism management to ensure the industry's future success. That's because locals will become increasingly engaged in the future of their home, just as travellers will continue to seek sustainable, inclusive options."

More and more destinations - from Copenhagen to New Zealand - are realising that a strong and sustainable visitor economy requires the support and involvement of their residents.

Considerations & Implications:

To thrive rather than just survive destinations will need to develop year-round strategies that actively encourage their resident's participation in building a strong and sustainable visitor economy. From being part of a wholistic visitor services strategy to helping grow the Visiting Friends and Relatives (VFR) market and playing a more *active* role in the visitor experience i.e local ambassadors and storytellers.

ADDITIONAL INSIGHTS RELEVANT TO EUROBODALLA REGION

TOURISM AUSTRALIA'S FUTURE OF GLOBAL TOURISM DEMAND

In November 2022, Tourism Australia released the *Future of Global Tourism Demand* report. It is a comprehensive study that:

- Identifies contemporary traveller market segments (by psychographic)
- Highlights the motivations and behaviours of core international markets
- Outlines several themes that will influence the future of travel to and within Australia.

The report can be downloaded at: https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

Importantly, many of the insights are **directly relevant to or reflect domestic trends in tourism and travel**. The insights outlined below also reflect many of the trends and insights highlighted above.

Contemporary traveller market segments (by psychographic):

- **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.

Underpinning themes and important influences on travellers:

- **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. There is a strong focus on enjoyment via good food and drink, sightseeing and culture. Dining out, food and drink festivals, Indigenous food experiences and tasting trails are also of interest.

- **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 tourism can provide authenticity and first-hand experiences from a destination's First Nations people, whose timeless connection to Country offers rich repositories of culture, language, and philosophy. It offers a chance to learn new ways of experiencing a destination, culture, and community. 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/hobbies. Accessibility goes beyond physical or visibly noticeable impairments and extends into mobility, visual, audio, or cognitive impairment.
- **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

OVERVIEW OF MOUNTAIN BIKING MARKET SEGMENTS

An emerging signature experience of the Eurobodalla region relates to the development of cycle tourism, specifically focused on mountain bike trail networks in Mogo and Narooma. As a result, it is worthwhile reflecting on the motivations, behaviours, and characteristics of these segments.

The table below shows the four key segments and their behaviours and characteristics. While these are useful segments for product and marketing development, it is also useful to view them as part of the leisure continuum to recognise the possible progression (and regression) along the spectrum.

These segments, behaviours and characteristics are drawn from several research and industry sources, including the Eungella-Finch Hatton MTB Trail Feasibility Study (2020) from Mackay in Queensland and the Western Australian Bike Strategy (2022), among others.

Table: Primary Mountain Bike Market Segments

Segment on the continuum	Behaviours & characteristics
Leisure	Cyclists of all ages and abilities Ride infrequently Limited technical skills and require very accessible trails Possess limited outdoors experience Prefer trail facilities with amenities and services e.g. bike hire, cafes & toilets No travel for MTB, but will ride during holiday Not generally members of clubs Not event participants
Enthusiast	Recreational riders with moderate skills and variable fitness Ride weekly on familiar routes Typically aged 29-49 Possess limited outdoors experience Prefer trails with good trail signage Seek technical but not too challenging trails Travel for short breaks to different areas. Don't compete in events. Some membership of clubs.
Sport	Competitive riders with high skills Ride regular routes multiple times a week Small but influential market who seek less accessible trails have a high fitness level and are technically proficient Seek wide variety of trails and generally prefer higher classifications Enjoy MTB sport events frequently Strong membership of clubs Compete in several events per year Include elite sport riders for World Cup and Olympic events
Gravity	Highly skilled technical riders who seek very challenging trails Ride at least once a week Small market that requires purpose-built trails Seek specific trails with the highest classifications Enjoy Gravity Enduro events frequently Strong membership of clubs

Sources: Adapted from Eungella-Finch Hatton MTB Trail Town-Feasibility Study (2020) [3].
Perth and Peel MTB Master Plan (2016) [19]
Queensland MTB Strategy (2016) [5]
Western Australian Bike Strategy (2022) [28].

4. KEY CHALLENGES

Challenge #1: RISING UNCERTAINTY

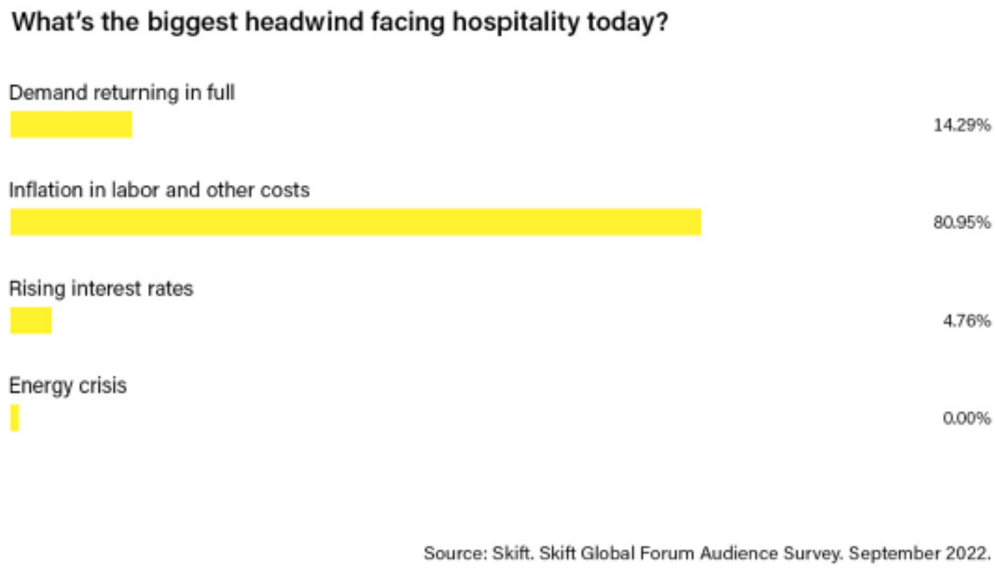
Rising Uncertainty is a key trend identified by the NSW Government in its ***20-Year Economic Vision for Regional NSW****.* Global investment and trade are now set in an environment of rising geopolitical tensions, unknown epidemiological impacts of COVID-19, and ongoing risks to supply chains. Changing climate conditions have also highlighted the vulnerability of communities' water and energy supply as well as regions' ecosystems and biodiversity.

As the global economic outlook is highly uncertain, so too is the most effective economic response. Mirroring global trends, Australians are increasingly aware that the way they live, work and do business is subject to rapid and frequent change.

This has implications for regional NSW. In uncertain times businesses will typically invest less and consumers will typically spend less. Given the cost to Government - local, State and Federal – of drought, bushfires, floods and COVID, public investment and funding is also likely to shrink.

These economic challenges are also likely to impact tourism. For many people higher cost of living will shape their travel choices over the coming years.

The ***SKIFT 2022 global forum industry survey*** also echoed this sentiment where a poll highlighted that *rising costs was seen as the industry's most significant challenge by an overwhelming margin.* Almost 81 percent of respondents said that inflation in labour and other costs is the biggest headwind facing hospitality right now. Fewer than 5 percent chose rising interest rates as the largest problem.



Key Considerations

Facilitating new opportunities and removing unnecessary barriers to investment can broaden local economies and mitigate the effects of uncertainty on investment. In a tourism sense this could be as simple as focussing on areas less susceptible to uncertainty. For example, investing more in targeting current visitors, as opposed to new visitors, with strategies that encourage greater yield, dispersal and repeat visitation.

Challenge #2: UNBALANCED TOURISM

*The ongoing urge for nature and for rural escapes post-pandemic has created a **new kind of overcrowding**. As the travel industry taps into this huge business opportunity, the need to craft innovative solutions to manage the impact on communities and the environment is now urgent.*

Source: SKIFT Research, *Megatrends Defining Travel in 2022*

Unbalanced tourism occurs when there are too many visitors to a particular site or location within a destination, resulting in negative impacts on the environment, local communities, and the quality of life for residents.

Put simply, some popular destinations are being loved to death.

Unfortunately, the negative media coverage and images of overcrowding, is fuelling a backlash against tourism from locals. Think Venice, Barcelona and closer to home, Byron Bay and Jervis Bay (Hyams beach).

And it's not just residents that are objecting. It's likely to be visitors too. Particularly the growing segment of visitors that value sustainability. As the SKIFT report - The Greening of Travel – identified "*The travel and tourism industry need to accept that green business practices will be the next major competitive advantage for brands* (and destinations) *selling to leisure and business travellers alike*"

It's an issue that needs to be managed carefully. Not just to maintain local support for the industry, but also to ensure the destination delivers a positive experience to its existing visitors. An outcome that is likely to result in higher visitor yield, wider visitor dispersal, greater visitor advocacy and more repeat visits.

Managing unbalanced tourism also requires a coordinated effort from multiple stakeholders, including Council, industry, local communities, and visitors.

Key Considerations

As is illustrated in trend # 7 above "*The Holy Grail of a sustainable tourism industry is one that residents feel good about too".* To maintain a resilient and healthy visitor economy, a destination needs support of its residents.

i. Focus on market segments that are more willing to travel outside of peak periods, like the Visiting Friends & Relatives (VFR) market. VFR also provides opportunities to engage local residents in the visitor economy as well as further grow the visitor economy. Destination NSW's most recent research into VFR 'hosts' quantifies the value of the combined host and visitor spend. The report found that in terms of value to the NSW economy, adding the VFR host expenditure to host domestic and international visitors, increases the total NSW VFR market expenditure by a **staggering 69% to $7.7billion per year.**

ii. Develop a range of engaging itineraries that encourage **greater dispersal of visitors across the region**, potentially reducing impacts on specific sites or locations at specific times of the year. This has the added bonus of sharing the benefits of the visitor economy with the smaller towns and villages across the region.

Importantly, **proactive management of the social and environmental impacts of unbalanced tourism will underpin sustainability**.

Initiatives such as ecotourism and sustainable destination accreditation can also contribute to mitigating the impacts of unbalanced tourism over the medium to longer-term. Other management solutions include implementing site capacity limits, improved infrastructure and facilities (e.g. to manage the flow of visitors) as well as utilising technology or smart destination management systems to predict visitor numbers and optimise services such as waste and wastewater management, among other things.

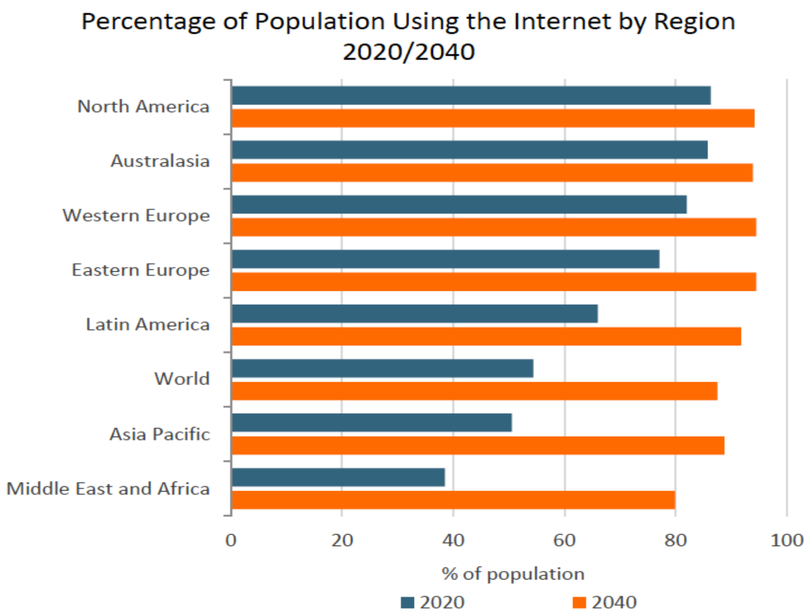
Challenge #3: DIGITAL TRANSFORMATION

As has already been touched on, digital technology is driving change in the global economy. The response to COVID-19 has seen a major acceleration in the adoption and implementation of digital technology, as evidenced in public health strategies, online shopping and the rapid adoption of technology by business and consumers to facilitate working from home.

For regional NSW, this is and will continue to transform the future of education, healthcare, doing business and of course tourism.

As highlighted under the section above on global and domestic trends, all markets and demographics are now online and much more familiar with digital platforms and tools such as QR codes. The use of mobile devices (smart phones and tablets) and e-commerce is at an all-time high!

For tourism businesses being mobile optimised is no longer a *value add* or a *nice to have*. It's essential! Essential because it addresses the expectations of today's travel markets.



Source: Euromonitor International from International Telecommunications Union/OECD/ national statistics

Key Considerations

A sustainable visitor economy will require an acceleration in digital transformation across the region. This will include strategic investment in digital networks and giving people and businesses the tools and environment, they need to meet expectations and seize the opportunities that arise.

This doesn't have to be quite as daunting as it might seem. It can start with smaller scale transformation in a particular area, **visitor servicing** for example. Best practice visitor servicing needs to be supported by high-quality online and digital systems to enhance engagement and distribution of information; at all touchpoints along the customer journey – including e-commerce functionality.

While people will continue to play an important role in visitor servicing, the new model will need to consider how to take information out of the VIC, including through mobile VIC services, and deliver it directly to the visitor. Wherever they are.

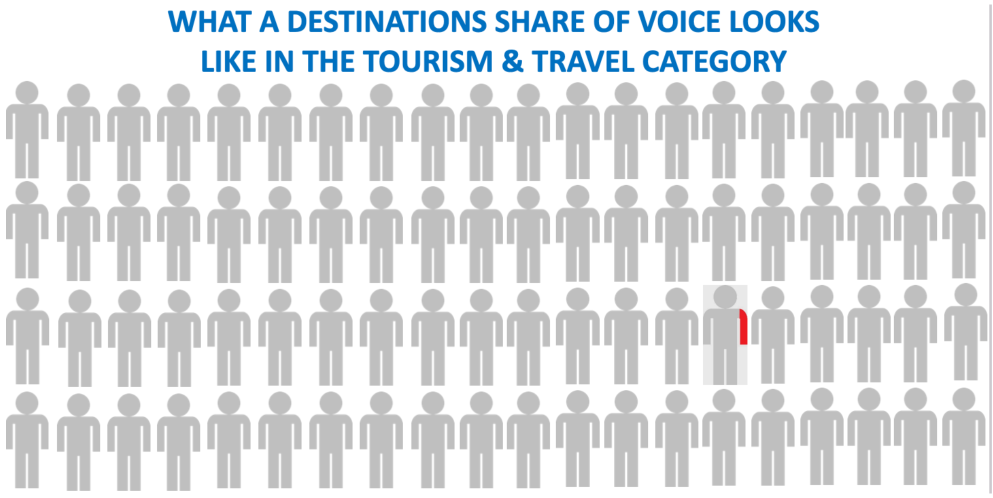
This reinforces the importance of understanding the customer journey and the value of addressing all touchpoints along it.

Challenge #3: INCREASED COMPETITION

Attracting visitors to your destination starts with capturing their attention. A task that is much easier said than done. Particularly in the age of *social*, where the business model has been explicitly designed to distract.

Total travel & tourism related spend across all media in NSW for 2021/22 was around **$53 million.**

With a marketing budget of $500,000 that represents a 1% share of voice. With a budget of $250,000 that falls to 0.5%. Difficult to get noticed, yet alone remembered.



Key Considerations

Low-cost carriers have effectively shrunk the world and Eurobodalla faces competition from many more destinations in New South Wales, Australia and around the world. Many of which offer similar things to see and do.

In short there is often minimal differentiation between destinations.

A distinctive brand identity that connects to the target market on an emotional level, will not only be a key differentiator. It will be a key motivator.

5. KEY OUTTAKES FROM EXISTING PLANS & STRATEGIES

A comprehensive review of a large range of relevant domestic strategies, plans, and programs has been completed to inform the development of the EDAP.

Key outtakes have been incorporated into **Appendix B, Review of Existing Strategies, Plans & Programs**.

The review included but is not limited to:

- **National:**
  - Commonwealth Government's THRIVE 2030
  - Tourism Australia - *Future of Global Tourism Demand*, November 2022
- **State:**
  - NSW Visitor Economy Strategy 2030
  - NSW Government - *20-Year Economic Vision for Regional NSW*
- **Region:**
  - Far South Coast Regional Economic Development Strategy (REDS) 2018 - 2022
  - Destination Southern NSW Destination Management Plan 2022 – 2030
- **Local:**
  - ESC's Community Strategic Plan,
  - Events Strategy 2019 – 2024,
  - Advancing Eurobodalla: Integrated Economic Growth & Development Strategy 2019 – 2028

Many of these strategies and plans contained several common themes.

i. The importance and need for **collaboration -** across all levels of Government, industry and within stakeholder groups - to grow a stronger and more resilient visitor economy.

ii. A greater need for both **product/experience development and infrastructure investment** that can support competitiveness and help meet the changing needs and expectations of visitors.

iii. A greater understanding of **visitors' evolving needs and expectations** was also a common theme when it came to creating demand, by enabling better targeted marketing. For example, the growing appeal of culinary and Indigenous experiences. Or the growing interest in *adventure cycling* - mountain biking, BMX and gravel riding for recreation, leisure, or competition.

iv. The growing influence of **sustainability** in all its iterations - reducing carbon footprints and ecotourism through to slow travel and wellness as influencers in the visitor decision making process.

v. The importance of **technology and digital connectivity**. It has never been easier to plan, book and share travel experiences in a digital age. Visitors have heightened expectations for the delivery of simpler, more cost-effective, and higher quality tourism services and products.

6. CONSULTATION & ENGAGEMENT INSIGHTS

Over 25 stakeholder sessions (face to face workshops, small group and one-on-one meetings and video-conferencing sessions) were conducted across Eurobodalla in late 2022 (November/ December) and early 2023 (February). It also involved representatives of State and regional stakeholders.

Overall, the workshops reinforced the value of adopting a whole-of-region approach that was future-focused.

There were many challenges, opportunities and potential actions raised by stakeholders. We have grouped these into fourteen broad themes; recognising that many suggestions are relevant to multiple themes.

A further three themes represent the primary insights shared during engagement with First Nations' communities, businesses, and organisations across the region.

While the summary below is by no means exhaustive, it does reflect the critical areas that need to be addressed if the EDAP is to deliver a more sustainable Return on Investment (ROI) for the Eurobodalla visitor economy.

Developing a framework that helps prioritise the challenges and opportunities raised in the stakeholder consultation and outlines how these priorities will be managed and measured will also be important for stakeholder alignment and support and as such, the EDAP's short and long-term success.

The primary themes identified are:

1. Value vs volume: target markets and yield for Eurobodalla

Many participants highlighted the need to focus on value over volume. Growing the value of each visitor - for example, through packages and bundling of product to attract new, higher value market segments or increase yield from existing visitors - not just growing the volume of visitors, was seen as an important step to building a more resilient and sustainable visitor economy.

Another key point of discussion was the perceived value of the international market for Eurobodalla. Significant discussion related to the type of international market (for example, Free & Independent Travellers (FIT) vs international packaged product) as well as a strong desire by some to elevate efforts to attract more international travellers to the region, including through greater collaboration with DNSW and Tourism Australia as well as the participation of more operators in export ready programs. Many others expressed a clear view that efforts should be (in the short to medium term) focused on maintaining or growing domestic overnight market share.

2. Unbalanced Tourism

Managing the challenges of unbalanced tourism - including seasonality and regional dispersal – was also seen as an important part of building a more resilient and sustainable visitor economy. It was also considered important in delivering a better experience for both visitors and locals.

Two specific areas for focus were raised:

- Ensuring sustainable and appropriate development, including master and place planning with an emphasis on maintaining or enhancing sense of place and protecting critical environmental values. A specific comment made related to development that is 'sympathetic to nature.'

- Pursuing ecotourism accreditation programs, including at both the destination and individual business levels as an opportunity to create a pathway to better position ESC as a sustainable, green destination in the future.
    - The opportunity to nominate the region or part thereof, as a UNESCO Biosphere Reserve was also discussed, particularly in relation to the Tilba area.

3. Collaboration, cooperation, and coordination

Stakeholders raised a range of collaboration opportunities. Both within and across the LGA as well as between LGAs. At both a South Coast level - Sapphire Coast, Shoalhaven, and Eurobodalla as well as Destination Southern NSW – and further afield; Snowy Mountains and mountain biking, for example.

It was also felt that, where relevant, there should also be greater collaboration, cooperation, and coordination with state-wide organisations such as Destination NSW, National Parks and Wildlife Service (NPWS), NSW Forestry Corporation (State Forests), Department of Regional NSW, Crown Lands NSW, Transport for NSW, NSW Department of Primary Industries (including the Marine Estate Management Authority), as well as the private sector, among others.

This collaboration, cooperation and coordination could range from something as simple as leveraging research and insights or streamlining the region's events calendar, through to participating in DNSW's cooperative marketing opportunities or their *international ready* program.

In addition, collaborating with other land managers, specifically NPWS, State Forests and Crown Lands was identified as critical to enriching and enabling access to the region's significant nature and cultural-based assets, including enhanced access for local Aboriginal communities and Traditional Owners to Country.

It could also involve collaborating with industry to create fly/drive packages or more accessible and richer touring experiences for visitors.

Discussion also centred on opportunities for greater collaboration with Sapphire Coast and Shoalhaven to elevate the **awareness of and appeal of the NSW South Coast**. This relates to more than simply marketing Eurobodalla as part of the NSW South Coast or promoting the Sydney to Melbourne coastal touring route. It also includes close collaboration on the cycle tourism opportunities of the region, leveraging one of the Regional Priorities identified in the Destination Southern NSW DMP 2022 – 2030. Likewise, opportunities for strengthening arts and food trails (culinary tourism) at a landscape-scale, across LGA boundaries was also highlighted. In addition, encouraging more tourism operators and accommodation providers to become international or export-ready was a priority for some participants. All these initiatives would involve Destination Southern NSW and DNSW.

In short, collaboration was seen as a strategy with the potential to not only raise the profile of the region but to address key issues and challenges such as seasonality, visitor dispersal and delivering a more positive visitor experience.

4. Evolving the Eurobodalla destination brand

Many stakeholders felt the **Eurobodalla destination brand** lacked real relevance for visitors or enough strategic focus to guide and enhance tactical activity. Significant discussion focused on the use of the name Eurobodalla. However, a critical point made related to evolving the brand to make it more relevant and engaging to target audiences while maintaining the personality of the individual areas, places, towns, villages, and experiences that are part of the Eurobodalla region.

An opportunity identified to evolve and reinforce Eurobodalla's destination brand in a relevant and engaging way is to design and implement a multi-year destination marketing campaign.

5. Evolving the tourism delivery model

Many participants spoke of the need to continue strengthening industry engagement, involvement, and communication as well as ensuring a best practice structure for tourism and events into the future. A critical point was to facilitate greater industry involvement in any future structure or delivery model.

A related issue raised was that of visitor servicing. In-destination visitor servicing was raised as a gap in both Narooma and Mogo. Collateral to support visitors while in destination was also discussed, with maps identified as the most popular collateral. Several participants expressed concern that the recommendations of the Visitor Services Strategy weren't fully implemented by Council, with many having not been implemented. However, it was also noted that decisions on resourcing largely coincided with major natural events, such as catastrophic bushfires, damaging floods, and the COVID-19 pandemic. Other participants highlighted a desire for greater resourcing for industry engagement and development, rather than simply reinstating the previous visitor information centre model.

9. Value of the visitor economy to the economic stability, viability, and vibrancy of Eurobodalla Shire Council

A primary insight raised was the importance of the visitor economy to the local economy. This included ensuring alignment between priorities of ESC's Economic Development Strategy (EDS) and the EDAP.

A core issue to address is that many felt the broader community may not understand the importance and value of the visitor economy to the local economy as well as the sense of vibrancy of the region. Several challenges to this were noted, including the influence of peak season (unbalanced tourism impacts) on the views of residents. Many participants agreed that a proactive approach of communication with residents and businesses was required to facilitate a more positive understanding of the value of the visitor economy to the region, including to encourage relocation of younger people and families to the region.

10. Encourage experience development and enhancement that leverages the region's cultural, natural, and produce strengths

There is a clear preference to encourage experience development that leverages the region's natural and cultural assets and makes them more accessible for both self-guided and commercial/guided activities. This includes through the development of more experiential itineraries, trails, and maps (traversing both land and waterways).

Strengthening support for existing and encouraging the development of new Aboriginal cultural experiences was seen as a high priority.

Special interest markets, from outdoor recreation enthusiasts (for example, mountain biking, kayaking, hiking) to bird watching and the arts were all identified as opportunities to grow visitation, especially during low and shoulder seasons.

Importantly, the region's waterways, including rivers, lakes, and ocean were highlighted as a primary natural asset. Activation of and access to waterways as well as infrastructure and facilities such as wharf access, boardwalks, cycleways, and walking trails were considered a high priority. A more proactive and supportive approach by Crown Lands was specifically raised in relation to waterfront enhancement and access in Narooma.

Many participants reflected on the significant investment that has been attracted to the region in shared infrastructure projects (those that deliver benefits to both residents and visitors). This includes but is not limited to the Mogo mountain bike trails (Mogo Adventure Trails Hub), Coastal Headlands Walking Trail, Narooma mountain bike trails, and Murramurang South Coast Walk.

It was noted that these and other initiatives would be strengthened through greater collaboration with NPWS, State Forests, Crown Lands as well as further interpretative content.

Other themes discussed included:

- Aboriginal cultural tourism experiences
- Art and culture tourism, including associated events and arts trails
- Agritourism and improving the region's culinary tourism offering through greater produce placement within local restaurants (etc) was considered a high priority
- Growing the secondary wellness tourism market, which is typically high value travellers and related to slow and sustainable tourism

11. Events, including attracting business events and investment in event infrastructure, facilities, and accommodation

Many participants wanted to see stronger support for the events industry. This included business events. The region's Hallmark events, Narooma Oyster Festival and River of Art were highlighted as examples of successful events that have attracted new audiences outside of peak season.

Greater connectivity and collaboration to support events between Council, event organisers and industry, including accommodation and transport, was seen as a primary opportunity to grow the appeal of the region as well as to facilitate access.

Smaller and more boutique events, especially those that link to the Hallmark events, were identified as an opportunity to support year-round visitation as well as encourage repeat visitation. However, several challenges were highlighted in relation to the delivery and management of events, including volunteer fatigue, resource limitations and addressing regulatory requirements.

12. Access to and within the region

Several participants raised the issues of ongoing road maintenance and poor intra-region transport options. These issues are considered to impact on the appeal of the region. It was noted that the maintenance needs have largely been caused by challenging and/or severe natural events, from wildfire to floods and extensive rains.

Four other opportunities for access to the region were also raised:

- Moruya Airport to facilitate increased commercial flight access. This would also support increased private charter flight access for high value travellers. It was noted that the existing airport location has significant constraints that would impact on the commercial viability of any proposed expansion.
- Sea planes from Sydney (and possible Canberra) to Moruya and Batemans Bay, which would also encourage high value travellers
- Cruise ship (expedition or small ship cruises) access to Batemans Bay. While this is already operating, greater efforts to promote the opportunity and leverage the region's experience offering was highlighted
- Strengthening the appeal and promotion of the Sydney to Melbourne coastal touring route. It is currently promoted. However, it was discussed that growing the appeal of this touring route offers significant opportunity to attract the International FIT market as well as the domestic drive tourism market.

13. Growing adventure cycling and activating the trails of Eurobodalla and the South Coast

As highlighted above, there has been significant investment in mountain biking and walking trails over recent years. The two most significant mountain biking trail projects (Mogo and Narooma) are nearing completion of the first phases of construction. As a result, two dedicated workshops were held with mountain bike stakeholders, including one with participants from State, regional and local stakeholder organisations/groups.

A core issue was that it was unclear as to the preferred target market segment for mountain biking in the region, despite the different characteristics of the segments.

There is a more immediate-term opportunity to develop and implement a marketing campaign, which would hero the signature trail experiences of the region. In its early stages, this could commence with Mogo trails and the Coastal Headland Walking Trail as well as Narooma trails as they come online. Over the medium to longer term, this could integrate other trails, include those on or in the region's waterways, such as the snorkelling trail in the Batemans Marine Park.

A key issue discussed was about bringing a stronger South Coast focus to the mountain bike trail network. More specifically, this involved promoting, cross-promoting, and sharing of information as well as encouraging industry and experience development in line with the evolving needs, expectations, and preferences of the mountain biking markets. Longer-term, it was felt that a model of collaboration could be extended to include the Snowy Mountains region.

Collaboration on the cycle tourism opportunities of the South Coast would leverage the Regional Priority relating to Cycle Tourism (all forms) identified in the Destination Southern NSW DMP 2022 – 2030. It was also noted that progress towards strengthening collaboration has already commenced, with ESC participating in an industry and experience development program being led by Sapphire Coast and supported with funding from Destination Southern NSW.

14. Attracting and retaining staff and addressing housing supply

Attracting and retaining staff was raised as a significant issue in all sessions. Primary impacts involved capacity limitations, including on opening hours, as well as customer service standards. A related issue is housing supply and the difficulty of attracting staff with poor housing availability and affordability.

Leveraging the visitor economy to encourage relocation (attracting staff) as well as new accommodation facilities, such as a quality backpackers' hostel (youth market) or cabins were potential solutions offered. It was also raised that an accommodation strategy for Eurobodalla, which addresses accommodation in the context of the region's overall housing supply should be developed.

Insights from engagement with First Nations and Traditional Owners

Several engagement sessions were held with First Nations and Traditional Owners from across the Eurobodalla region. Insights from these sessions included:

1. Opportunity of cultural centres as a hub for Aboriginal cultural experiences

A major opportunity highlighted in discussions was that cultural centres could provide a hub to encourage and support Aboriginal cultural experience development, including cultural awareness programs as well as servicing school groups and the leisure market.

As part of this approach, the cultural centres would also play an important role in creating and supporting meaningful employment pathways, involving training and back-office support to new and existing Aboriginal owned and operated businesses, including artists, artisans, and tourism operators, among others. In addition, they would be able to promote and profile local artists and tourism businesses, etc. Opportunities for collaboration with organisations such as South West Arts were also identified during discussions.

Umbarra cultural centre near Wallaga Lake was highlighted along with the new centres proposed/being developed by Wagonga and Mogo LALCs.

Importantly, the cultural centres were also highlighted as playing a significant role in building community confidence, pride, and self-esteem as well as health and well-being. Aligned to this was that the centres could provide a hub for local Aboriginal communities to showcase and share the rich stories of their culture and enduring connection to Country. The inherent link between Caring for Country programs and cultural centres was also highlighted.

2. Cultural programs can inspire business opportunities for the leisure market

The delivery of cultural programs across the region were discussed as a first step towards inspiring business opportunities that provide tours and programs for the leisure market.

New areas for experience development that linked to cultural programs included the development of a Sea Country plan and cultural fishing with cultural awareness tours by boat, such as recently commenced by the Traditional Owners of the Narooma area.

However, it was noted that there are several challenges to the establishment of Aboriginal owned and operated businesses. This is addressed further below.

3. Barriers to the establishment and operation of Aboriginal owned and operated businesses

A number of barriers were identified to the establishment, management and operations of Aboriginal owned and operated businesses, including but not limited to:

- Attracting and managing grant funding
- Business start-up processes and generally ‘navigating the business world’
- Back-end business operations, including determining pricing models, managing online booking, distribution networks and promotion as well as business administration and planning
- Costs such as insurance for delivering programs on Country
- Longer-term training and mentoring programs that better suit the needs of the participants, including meaningful employment pathways or matching the mentoring to the relevant stage in the business cycle.
- Model of delivery of Aboriginal cultural experiences doesn’t always match the expectations of the wider tourism industry. This is impacted by a range of issues, including level of frequency or timing of activities as well as the need for alternative arrangements when cultural activities (such as Sorry Business) take precedence over conducting a tourism activity.
- Access to Country, including administrative processes relating to NPWS’ Park Eco Pass program. A specific issue raised was the need to access multiple parks on Country, including to provide alternatives for program or tour itineraries due to seasonality, poor weather or unexpected road closures, among other reasons. The two-year fee-free grace period was also seen as too short for new businesses or sole traders.
- Access to, utilisation or adaptive reuse of existing structures by Traditional Owners or other members of the local Aboriginal communities, such as over-water buildings, wharves, and foreshore access, which are currently managed by Crown Lands NSW

Opportunities such as industry familiarisation tours for non-Indigenous business operators as well as a local tourism expo were identified as ways to increase awareness of the experience and product offering as well as the people and characters who can share their culture on Country. This would create more opportunities for packaging and bundling of experiences where Aboriginal people or businesses can deliver a component of an overall itinerary.

Likewise, the NSW Aboriginal Tour Operators Council (NATOC) workshops, which are supported by DNSW, were identified as a way to build capabilities and encourage people to establish or grow their business.

Organisations such as the Commonwealth Government's National Indigenous Australians Agency (NIAA), Yarpa and Many Rivers were all highlighted as providing programs and expertise to assist address many of the barriers identified above.

An important insight shared was that a core learning for cultural businesses is to 'separate culture from business.' Having a mentor to assist in the early stages of establishing and operating a business was also highlighted.

7. COMPETITIVE OPPORTUNITIES

Reimagining the Eurobodalla brand

Most of your competitors spend too much time talking about themselves (the destination attributes) and not enough time talking about their visitors and what they are looking for (the visitor benefit). There are of course exceptions. Barrington Coast and Sunshine Coast are two of those. But most places focus on themselves. Either their key destination asset, for example, nature, or the fact that there is something for everyone. Here are some examples:

- Shoalhaven: ***Many experiences. One destination.***
- The Tweed: No clearly stated focus though the website talks about ***endless holiday experiences***
- Coffs Coast: ***Place of Plenty***
- Port Stephens: ***Incredible by Nature***
- Eurobodalla: ***All Kinds of Natural***
- Sapphire Coast: ***Wild (unspoilt coastal wilderness)***

Unfortunately, this approach leads to minimal differentiation and even less customer engagement. At least in terms of the destination's positioning and marketing.

Creating an **emotional connection** with an **aspirational target market** rather than just describing your destination attributes or everything your destination has to offer is critical to creating a distinctive brand. Attributes support the brand promise and may be essential proof points to your brand. However, attributes rarely provide a sustainable point of difference from most, if not all, competitor destinations.

The marketing opportunity for Eurobodalla is to evolve its current brand expression - ***All Kinds of Natural –*** into a marketing message or messages that focus on a visitor benefit (rather than a destination attribute – *natural)* that builds a more ***emotional connection*** with your audience.

Improving the visitor experience

The COVID-19 pandemic has created a **fiercely** competitive environment for destinations operating in the *visitor economy.*

- Inbound has shrunk and is not forecast to recover for a couple of years
- Outbound is growing as international restrictions continue to ease and flights get back to normal
- More marketing noise is being directed at the domestic visitor as destinations look to recover
- More competition for a reducing amount of grant funding. Government budgets are likely to significantly reduce because of the costs associated with recent natural disasters – drought, bushfires, floods and COVID. For example, Blue Mountains Mayor Mark Greenhill recently introduced parking fees to help cover *a $400 million damage bill from bushfires and unprecedented rains in the past three years.*

As a result, it is going to be harder to attract new visitors. More expensive to stand-out from the crowd (increased competitive advertising noise). More difficult to secure Government funding to develop and support local initiatives, be they experience development projects or tactical marketing initiatives.

There is however a relatively low-cost opportunity. One that many of your competitors appear to ignore. Your existing visitors.

As the proverb goes *A bird in the hand is better than two in the bush.* Or put another way, under current market conditions, ***existing visitors are more valuable than new visitors***. They present an immediate opportunity to:

- Increase visitor yield
- Widen visitor dispersal
- Build visitor advocacy
- Grow repeat visitation

As guiding principle # 1 in the NSW Visitor Economy Strategy 2030 suggests ***'Every visit should be an unforgettable one that inspires and encourages visitors to keep exploring and returning to NSW.'***

Your current visitors are arguably where Eurobodalla can get the *most bang for its buck* when it comes to growing the destination's visitor economy.

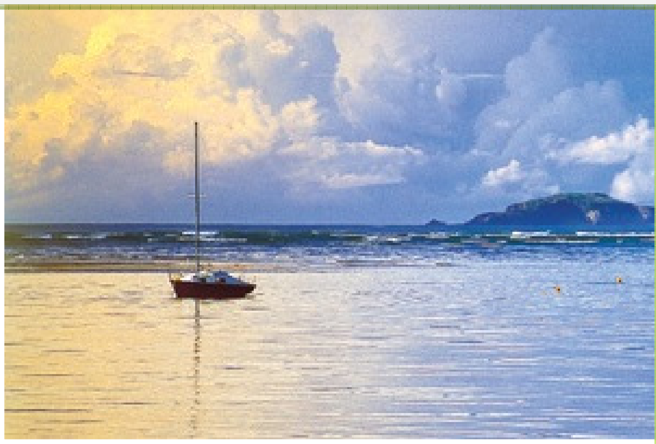
8. CONCLUDING COMMENTS

Overall, the Situation Analysis reinforces that:

- After many years of natural disasters - drought, fires, floods and the COVID-19 pandemic – Government funding and grant opportunities will be significantly reduced. Future ROI for the visitor economy will require destinations to adopt a laser like focus when it comes to prioritising destination activities.
- A distinctive brand and positioning statement that connects to the target market on an emotional level and responds to their motivations, preferences and behaviours will be critical to success.
- Connecting all elements of the experience – from accommodation to tours, attractions, villages, towns, retail and hospitality and other industries – will set the context for delivering on your brand promise in a more meaningful way. The region's natural and cultural assets and investment in shared infrastructure, such as the network of walking and cycling trails, can be a core part of the experiential tourism focus of the future.
- People's understanding and desire for wellness has evolved. Today, it is a much more holistic context, that inherently connects health and well-being to sustainability, nature, and quality food and drink. Places and activities that people can rest and relax, practice well-being and embrace sustainability as a core value will see a boom.
- By considering opportunities across the landscape, destinations can encourage greater dispersal of visitors, reducing impacts on specific sites or locations. This will facilitate the sharing of the benefits of the visitor economy with the smaller towns and villages of the region while being part of a proactive approach to managing the impacts of unbalanced tourism.

Fin Year 2018/19

Eurobodalla Tourism Monitor



DESTINATION RESEARCH

know your potential

November 2019

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Introduction

The purpose of this report is to provide analysis of visitor data provided by Tourism Research Australia (TRA) regarding domestic and international visitors. The report provides analysis of data provided by TRA that is relevant to the Eurobodalla destination, and organising it into simplified reports. The data to be analysed includes the following 10 variables across domestic and international data:

1. Visitor numbers
2. Visitor nights and average length of stay
3. Purpose of trip
4. Age groups
5. Source markets
6. Key activities
7. Accommodation – B & B, hotel, camping
8. Lifecycle groups - families, couples, singles
9. Transport and/or place of arrival
10. Travel party type (package, backpackers).

TRA conducts statistically reliable surveys of domestic travellers over the phone asking for details of travel undertaken throughout Australia, and asking for the destination and activities of travellers. This provides a pattern of where visitors are travelling and how much that travel is worth to the economy. The data is reported quarterly, however it is not released to the industry until a few months later. In a separate survey, international travellers are surveyed at airports and cruise terminals to discover their visitation patterns while they are in Australia.

However, the TRA data has known issues particularly when analysing smaller segments of visitors coming to regional areas - where the sample size is small the results can be unreliable. For example the numbers of international heritage tourists in Eurobodalla is a tiny percentage of all international tourists to Australia, and is therefore hard to accurately capture in a large survey. In these cases the research is therefore considered an indication of visitor trends rather than actual performance measures.

Despite the slight variations in smaller segments of data the TRA data is the most reliable source of visitor data available, showing historical data over the past 10 years. The best indicator of the reliability of TRA data is the consistency of the results over time. As shown in this report, the ratios of tourists, their activities and accommodation etc remains fairly constant over both five and ten year timeframes. It is important however to seek further research into specific market segments before basing planning, development or investment decisions on TRA data alone.

Methodology

Data is downloaded from TRA National Visitor Survey and International Visitor Survey and reanalysed by staff at Destination Research. Where possible this is cross-checked with published statistics, and data compiled by DNSW, TRA and other tourism organisations.

I. The analysis utilises TRA subscription data, with most analysis using a five year average.

II. All analysis in this report is undertaken using a financial year (2016/7) however where needed a ten year time series is also shown to examine trends over time. Other analysis by the TRA is undertaken using year-end in September, December and March, providing slightly different reporting of "yearly" results.

III. TRA data is analysed in statistical areas (SA2) which when combined make up the total LGA of Eurobodalla the report is based on:

   a. 101041017 - Batemans Bay
   b. 101041018 - Batemans Bay - South
   c. 101041021 - Broulee - Tomakin
   d. 101041022 - Deua - Wadbilliga
   e. 101041024 - Eurobodalla Hinterland
   f. 101041024 - Moruya - Tuross Head
   g. 101041027 - Narooma (this SA2 also includes Bermagui).

IV. Sample sizes for each data set are shown in this report and it is acknowledged that the data derived from TRA surveys and subject to sample error. The likelihood of sample error is explained by TRA and should be read before drawing any conclusions or inferences, or taking any action, based on the data. Further information on the methodology used by TRA and the extent of sample error can be sourced at http://www.tra.gov.au/aboutus/international-visitor-survey-methodology.html

V. Visitor expenditure data for individual local government areas (LGA), or statistical areas (SA2) is provided yearly by the TRA based on the average of the previous four years.

VI. In 2014, TRA adopted a modified methodology to collect data from domestic visitors which includes accessing Australian residents using mobile phones as well as home phones which caused some small changes to previously published data. The TRA revised estimates for 2014 and 2015 data HAS BEEN included in this report.

VII. In 2018, TRA revised methods for collecting and analyzing international data. This caused some small changes to previously published data. Revised estimates for data prior to 2018 HAS BEEN included in this report.

VIII. Further information on the methodology used by TRA and the extent of sample error can be sourced at https://www.tra.gov.au/International/ivs-methodology.

EUROBODALLA VISITOR PROFILE (2018/19)

The following is a brief profile of visitors to Eurobodalla for the financial year 2018/19. Further analysis of the key markets are found in the sections following.

- *Domestic overnight* markets provided an estimated **899,000** visitors for 2.74 million nights.
- *Domestic day trips* provided an estimated **660,000** visitors per year.
- *International markets* provided an estimated **40,000** visitors per year for 122,000 nights.
- The three markets totalled **1.6 million** visitors to Eurobodalla for 2.86 million nights.

Domestic overnight visitors

- Key markets Canberra (25%), Sydney (23%), the South Coast (13%).
- Lifecycle segments include families (31%) and older retired persons (22%).
- Key activities include social activities (39%) and outdoor nature activities (31%).

Domestic day visitors

- Key markets are South Coast (56%), Canberra (25%), Capital Country (8%)
- Lifecycle segments include older retired couples (35%) and families (29%).
- Key activities include social activities (55%) and outdoor/nature activities (25%).

International visitors

- International visitors are mainly from UK (15%), USA (14%), Germany (12%).
- Key activities include social activities (22%) and outdoor/nature activities (21%).
- Backpackers make up 23% of the international market.
- Package tours 5%.

TABLE 1: VISITOR SUMMARY: 2018/19

	Domestic overnight	International	Domestic day trip	Total
Visitors	899,000	40,000	660,000	**1,599,000**
Nights	2,746,000	122,000	^	**2,868,000**
Av night stay	3.1	3.1	^	
Lifecycle	Families with children (31%) Older retired persons (22%)	Older people 55+ (35%) Young people, 20-30yrs (29%)	Older people 55+ (42%) Families with children (29%)	
Activities	1. Social (dining, VFR) 2. Outdoor/nature 3. Active sports	1. Social (dining, sights) 2. Outdoor/nature 3. Local attractions	1. Social (dining, VFR) 2. Outdoor/nature 3. Active sports	
Source markets	Canberra (25%) Sydney (23%) South Coast (13%)	UK/Europe (55%) Nth America (22%) Asia (13%)	South Coast (56%) Canberra (25%) Capital Country (8%)	

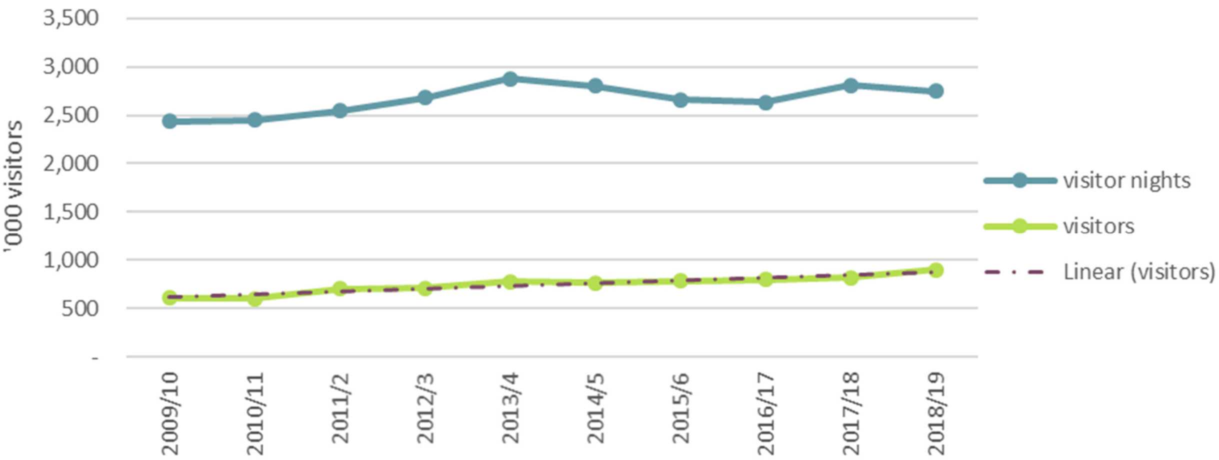
DOMESTIC OVERNIGHT VISITORS

The past financial year has seen a rise in the numbers of domestic overnight visitors of 10% to an estimated 899,000 visitors, making this the largest visitor segment. Visitors spent an estimated 2.74 million nights in the LGA at an average of 3.1 nights. As illustrated below, this segment shows a gradual increase over the past ten years which represents an average growth of 2% per year, and average growth of 3% over the past 5 years.

TABLE 2: DOMESTIC OVERNIGHT VISITORS

Domestic Overnight	2014/15	2015/16	2016/17	**2017/8**	**2018/9**	5 yr average[1]
# of visitors	764	785	793	**818**	**899**	812
% increase on yr	*-2%*	*3%*	1%	**3%**	**10%**	3%
Nights	2,950	2,719	2,630	**2,812**	**2,746**	2,730
Av night	3.9	3.5	3.3	**3.4**	**3.1**	3.4
Sample	*359*	*337*	333	**355**	**353**	
Spend per trip						$445[2]
Spend per night						$135
Lifecycle	Families (31%), Older retired persons (22%)					
Activities*	1. Social activities, 2. Outdoor nature, 3. Active sports					
Source*	59% NSW, 25% ACT and 16% OTHER INTERSTATE. 1. Canberra (25%) 2. Sydney (23%) 3. South Coast (13%)					

FIGURE 1: DOMESTIC OVERNIGHT: VISITORS AND NIGHTS 2013/4 TO 2018/19



Visitor Expenditure (DON)

The average expenditure for domestic overnight visitors reported by TRA in 2018, is $445 per trip. The average per night is $135 for all visitors, which is lower than the $158 per night estimated for Regional NSW[3]. The average for visitors using commercial accommodation is $176 per night[1].

[1] Previous 4 year average 2013/14 to 2018/19.

[2] TRA (2018) LGA report for Eurobodalla – expenditure is based on a 4 year average

[3] DNSW (2018) Travel to Regional NSW

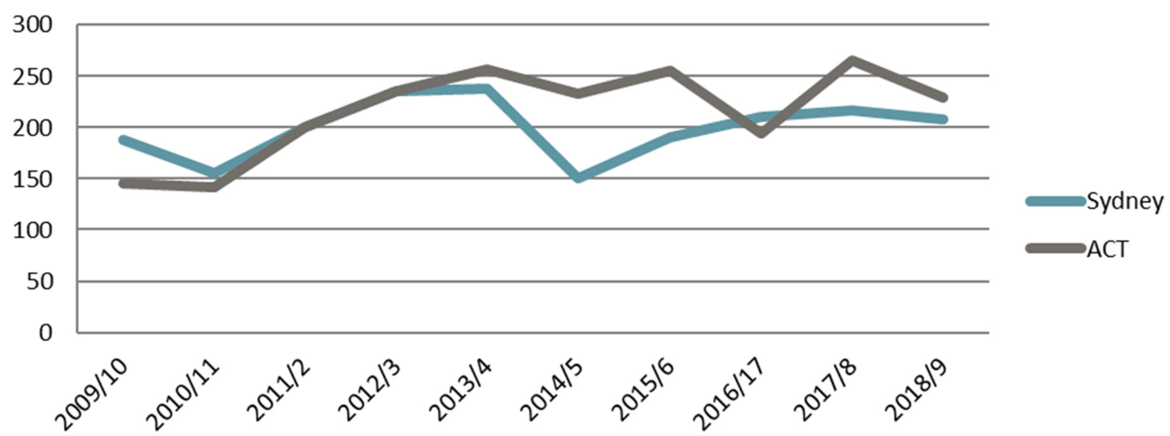
Visitor Residence (DON)

TABLE 3: VISITOR RESIDENCE: 2018/19

		% AUST 2018/19	% AUST 5 Yr average
NSW (59%)	Sydney	23.1%	25.0%
	South Coast	13.1%	12.1%
	Capital Country	7.6%	9.7%
	Central NSW	1.9%	3.0%
	Riverina	5.6%	2.9%
	Blue Mountains	0.7%	1.0%
	North Coast NSW	0.4%	1.2%
	Snowy Mountains	2.1%	1.4%
	Central Coast	0.7%	1.3%
	Hunter	2.1%	1.5%
	The Murray	0.1%	0.4%
	Outback NSW	0.0%	0.3%
	New England	1.7%	0.4%
ACT		25.5%	29.3%
VIC		9.9%	9.8%
QLD		3.7%	1.8%
SA		0.9%	0.7%
WA		0.6%	0.6%
TAS		0.4%	0.5%
NT		0.0%	0.1%

In 2018/19 the vast majority of domestic overnight visitors came from within NSW, with just under half of those come from Sydney (23%). Nearby regions such as the South Coast (13%) and the Capital Country (8%) also provide good visitation. Visitors from Canberra/ACT decreased this year to 25%, however as shown in Figure 3 below, visitation from Canberra remains higher than Sydney while together they make half of the domestic overnight market.

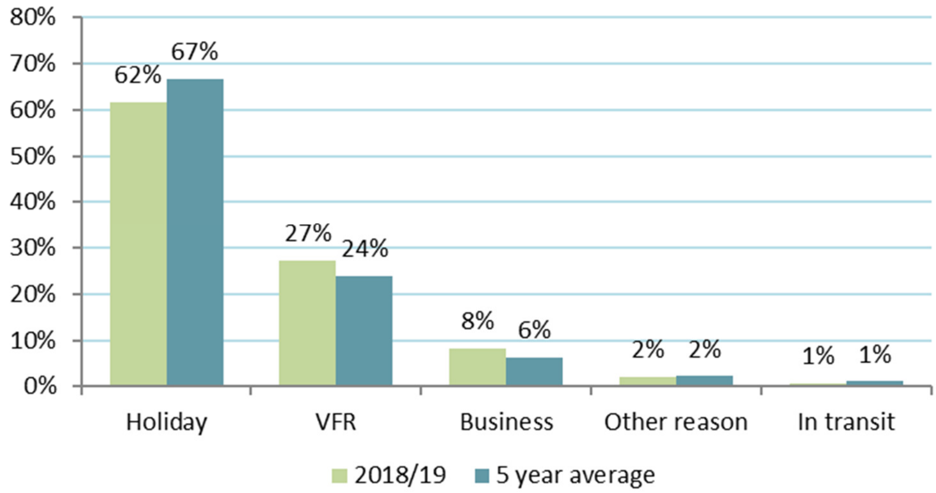
FIGURE 3: DOMESTIC OVERNIGHT VISITORS FROM CANBERRA AND SYDNEY



Reason for Visit (DON)

The main purpose of the visit has remained consistent over the past 5 years, with holiday being the primary reason to visit (62% of visits). Visiting friends or relatives makes up 27% of domestic overnight visits in 2018/19, slightly more than previous years.

TABLE 4: DOMESTIC REASON FOR VISIT



Accommodation (DON)

The importance of the VFR market is also highlighted with VFR being the highest type of accommodation used (32%). Non-commercial accommodation accounts for 54% of visitors and includes weekenders (10%), friends and relatives homes (32%) and other private dwellings such as AirBNB (3%). Commercial accommodation (shaded section in Table 5) accounts for 46% of accommodation used by domestic overnight visitors, including hotels and resorts (17%), commercial caravan parks (18%) and rented houses and apartments (11%).

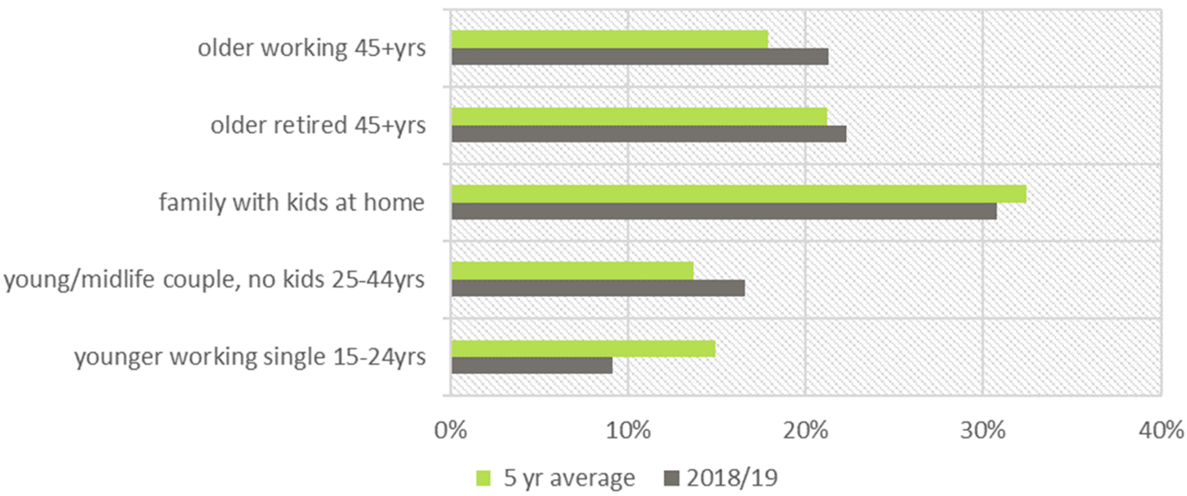
TABLE 5: ACCOMMODATION OF DOMESTIC OVERNIGHT VISITORS

	2014/5	2015/6	2016/17	2017/18	2018/19	% of 2018/19	5 yr av
Guest house or Bed & Breakfast	9	12	1	16	1	0%	1%
Rented house/apt/flat	79	98	90	109	100	11%	12%
Caravan park or commercial camping	175	170	183	157	161	18%	21%
Hotels/resorts	147	144	154	130	148	17%	18%
Non commercial camp	43	32	36	73	85	9%	7%
Own property	51	106	74	69	86	10%	9%
Private accomm (VFR)	266	223	245	243	286	32%	31%
Other private (incl AirBNB)	25	21	8	21	29	3%	3%
Totals	795	806	791	818	895	100%	100%

Lifecycle/travel party (DON)

Analysis of this year's lifecycle segments suggests older segments are becoming stronger for both working (21%) and retired visitors (22%). Families with children at home (1 – 18 years) are not quite as strong as they have been (31%) but still remain the highest segment.

FIGURE 4: DOMESTIC OVERNIGHT: LIFECYCLE (2018/19)



Age (DON)

Previous analysis had shown that visitors over 55 years comprised the largest segment at 40% of all overnight visitors. However, further analysis over the past 5 years shows each 4 year segment is quite even at 10% or less, and each 'group of 20 years' is also even at around 30% (excluding 75+).

TABLE 6: AGE GROUPS OF DOMESTIC OVERNIGHT VISITORS

	2014/5	2015/6	2016/7	2017/8	2018/19	5 YR AV	5 year av 20 yr group
15-19 yrs	4%	6%	6%	5%	3%	5%	15-34 yrs 29%
20-24 yrs	4%	7%	8%	10%	10%	8%	
25-29 yrs	9%	6%	7%	6%	8%	7%	
30-34 yrs	5%	7%	9%	13%	10%	9%	
35-39 yrs	8%	9%	8%	8%	7%	8%	35 -54 yrs 35%
40-44 yrs	10%	16%	12%	7%	9%	11%	
45-49 yrs	9%	7%	8%	8%	6%	8%	
50-54 yrs	14%	7%	7%	7%	8%	8%	
55-59 yrs	7%	8%	13%	10%	11%	10%	55-74 yrs 34%
60-64 yrs	10%	10%	7%	7%	10%	9%	
65-69 yrs	11%	13%	9%	9%	7%	10%	
70-74 yrs	6%	3%	4%	6%	8%	5%	
75-79 yrs	3%	1%	2%	4%	2%	3%	

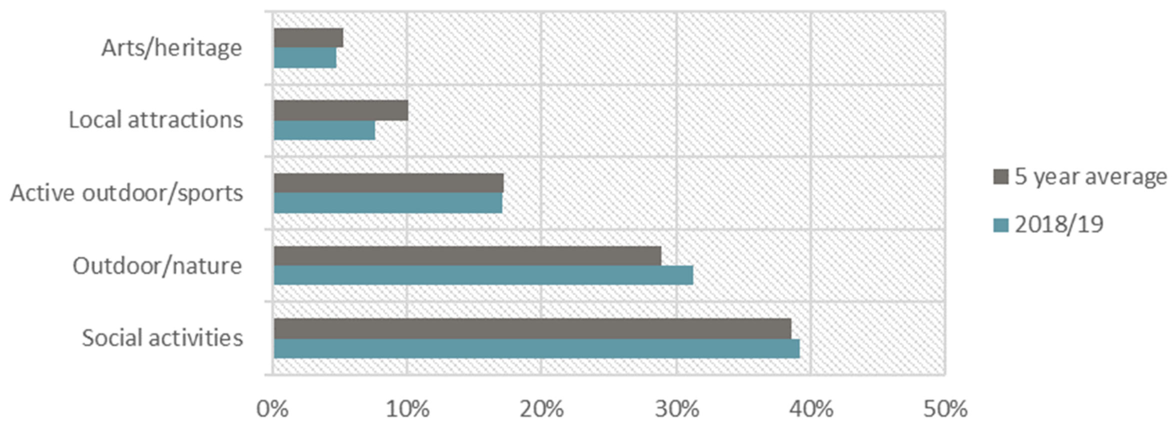
Transport (DON)

The most popular transport option is for self drive 97% with 3% choosing bus/coach/aircraft.

Activities (DON)

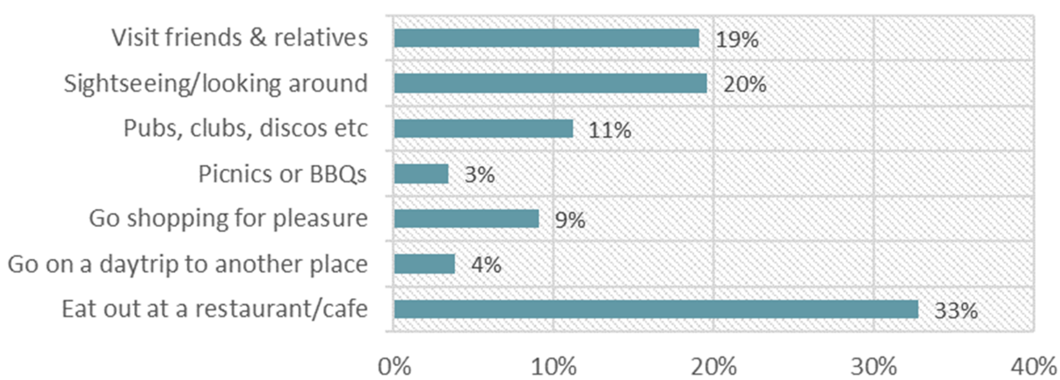
In 2018/19, social activities (39%) and outdoor/nature activities (31%) continued to be the main activities undertaken in Eurobodalla. Survey respondents could choose more than one response, so it is possible that these activities were both undertaken in the same trip.

FIGURE 6: DOMESTIC OVERNIGHT ACTIVITIES



Further analysis of "social activities" below suggests that eating out (33% of social activities) and visiting friends/relatives (19%), sightseeing (20%) and shopping (9%) are the key activities in this segment.

FIGURE 7: OVERNIGHT: SOCIAL ACTIVITIES



Analysis of the **outdoor/nature segment** showed that going to the beach is the main outdoor activity (60% of all outdoor activities) along with bushwalking (18%) and visiting national parks (14%).

DOMESTIC DAY VISITORS

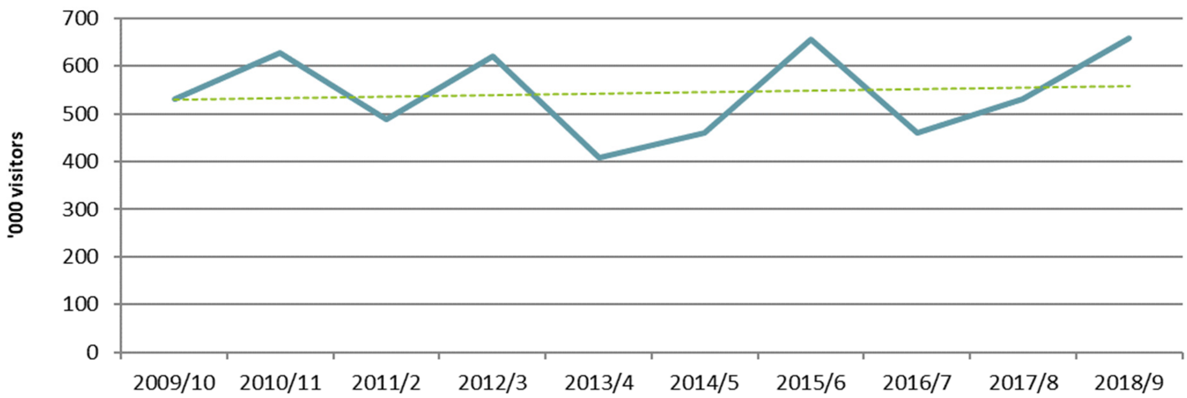
The numbers of domestic day visitors has increased in the past financial year to a record 660,000 visitors. However, it should be noted that day visitation is often quite variable where factors such as weather and other events can deter or encourage day visits, as shown below.

TABLE 7: DOMESTIC DAY VISITORS: SUMMARY

Domestic Day Visitors '000	2014/5	2015/6	2016/17	2017/8	2018/19	5 yr average
# of visitors	461	656	461	532	660	554
% increase/decrease	*13%*	*42%*	-30%	15%	24%	13%
Spend per trip						$102
Sample size	*58*	*73*	56	79	74	68
Lifecycle	Older retired couples 35% Families with children 29%					
Main activities	1. Social 2. Outdoor/nature 3. Active sports					
Source markets	1. South Coast (56%), 2. Canberra (25%) 3. Capital country 8%					

In the 5 years previous to 2018/19 there was an average of 554,000 domestic day visitors per year, however Figure 7 illustrates the volatility of this market over the past ten years. As shown, the last two years demonstrate good growth after the dip in 2016/17. It should be noted that the sample size for this segment is quite limited, which could also account for the annual increases and decreases, which can be expected to be up to 11.5%[4].

FIGURE 7: DOMESTIC DAY VISITORS: 2009/10 – 2018/19



Visitor Expenditure (DDV)

Visitor expenditure data for 2018/19 suggests that day visitors to Eurobodalla LGA spend an average of **$102 per trip**[5] a little lower than the average for regional NSW ($112 per trip 2018)[6].

[4] approx. 11.5% at the 95% confidence level.

[5] TRA (2018) LGA report for Eurobodalla (based on previous 4 year average)

[6] Destination NSW (2018) Travel to Regional NSW Year end June 2018

Visitor Residence (DDV)

TABLE 8: DOMESTIC DAY VISITORS: RESIDENCE

In 2018/19 the vast majority of domestic day visitors came from within the South Coast region comprising 56% of day visitors.

A significant number of day visitors also come from Canberra and other parts of the Capital Country (33% total), and 8% from Sydney.

		2018/19	5 yr av
NSW (75%)	Sydney	8%	7%
	South Coast	56%	59%
	Capital Country	8%	10%
	Other NSW	3%	1%
ACT (25%)		25%	23%
VIC (<1%)		-	-
		100%	100%

Main destination (DDV)

Using the SA2 categories, the main destination for day visitors and overnight visitors is Batemans Bay[7] with 58% of day visitors and 43% of overnight visitors. The second highest visitation is in Narooma[8] which receives 20% of day visitors and 28% of domestic overnight visitors.

TABLE 10: MAIN DESTINATION IN EUROBODALLA

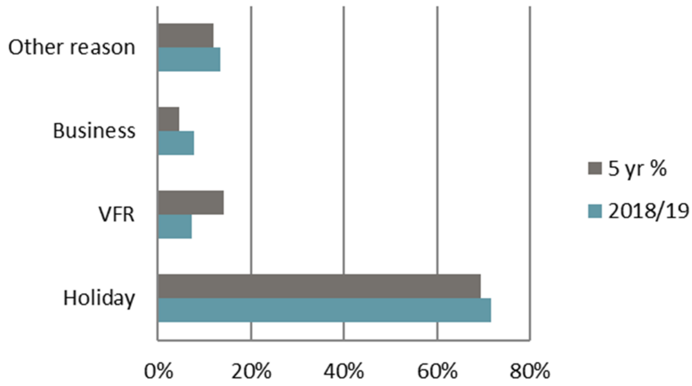
	2014/5	2015/6	2016/7	2017/8	2018/9	5 yr average	2018/19 day trip av %*	2018/19 overnight av %
Batemans Bay	262	447	306	328	385	336	58%	43%
Broulee - Tomakin	18	12	24	12	24	18	4%	8%
Eurobodalla Hint	29	20	15	11	27	20	4%	10%
Moruya - Tuross Head	44	92	75	63	94	72	14%	12%
Narooma	106	128	41	117	129	107	20%	28%
Total	470	706	461	531	660	554	100%	100%

[7] includes Batemans Bay South

[8] SA2 for Narooma includes Bermagui

Reason for Visit (DDV)

FIGURE 9: DOMESTIC DAY VISITORS: REASON



In 2018/19, there were more day visitors **on holiday (72%)** and on business (8%) or in the area for "other reasons" (13%) - including medical reasons (6%).

As shown in Figure 9 there were less visiting friends or relatives (7%) than the 5 year average would suggest.

Transport (DDV)

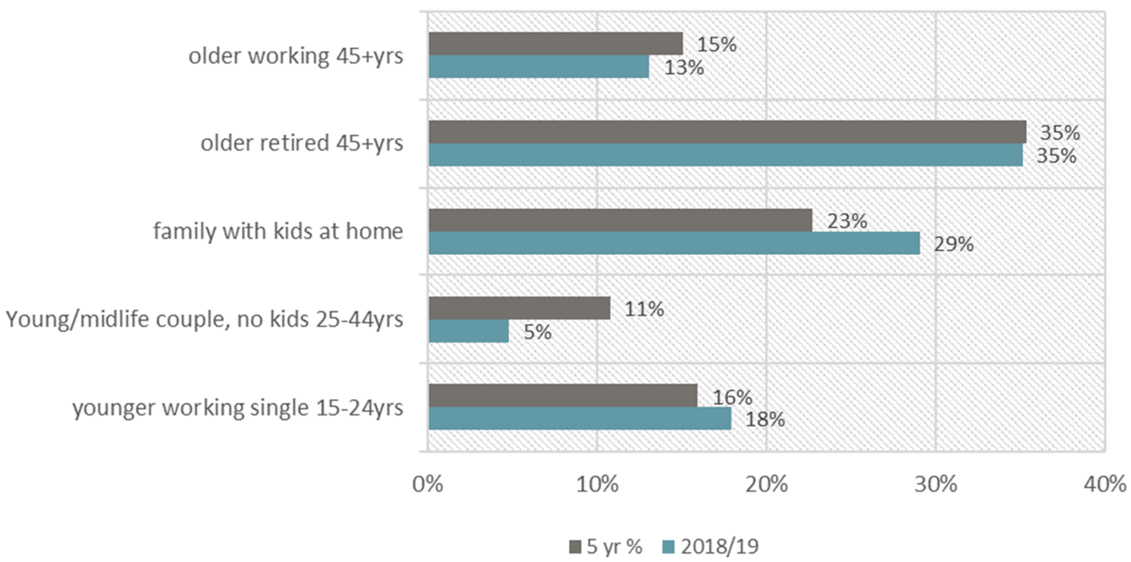
The most popular transport option is for self-drive (99%) with 1% choosing the bus/coach.

Lifecycle (DDV)

There are two clear groups which remain as prominent lifecycle segments for day visitors for 2018/9:

- Older retired people (single or married aged 45+ yrs) are the largest group (35%).
- Families with children of any age are the second main group at an average of **29%** of all day visitors, increased from 23% over the past 5 years.

FIGURE 10: DOMESTIC DAY VISITORS: LIFECYCLE 2018/19



Age and marital status (DDV)

As suggested in the lifestyle groups above, there remains a larger proportion of visitor age groups 55+ (48%) and a substantial increase in those 35-39 years (19%) which corresponds with the increase in families with children at home.

Age (DDV)

Previous analysis in 2017/18 had shown that day visitors over 55 years comprised the largest segment at 61% of all day visitors. However, further analysis over the previous five years shows 55+ to be 48%.

It was also noted from the extended analysis that most 4 year segments are quite even at 10% or less, yet there was a greater presence of 35-39 years (19%) this year.

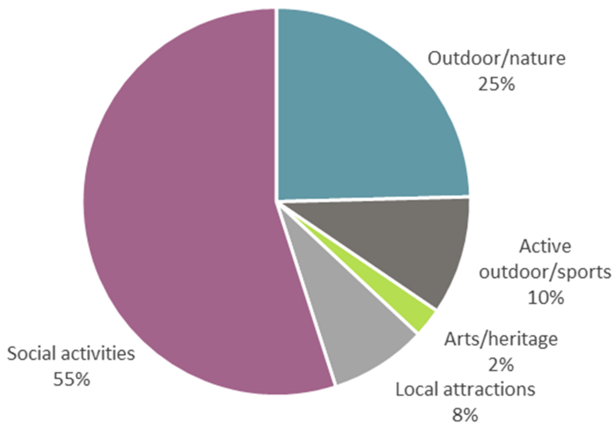
TABLE 11: AGE GROUPS OF DOMESTIC OVERNIGHT VISITORS

	2014/5	2015/6	2016/7	2017/8	2018/19	5 YR AV	5 year av 20 yr group
15-19 yrs	6%	11%	6%	5%	3%	6%	15-34 yrs 21%
20-24 yrs	3%	2%	8%	3%	3%	4%	
25-29 yrs	12%	11%	10%	3%	4%	8%	
30-34 yrs	2%	7%	0%	2%	5%	3%	
35-39 yrs	7%	1%	1%	4%	19%	6%	35 -54 yrs 30%
40-44 yrs	7%	13%	13%	11%	7%	10%	
45-49 yrs	6%	5%	2%	8%	5%	5%	
50-54 yrs	12%	12%	8%	4%	11%	9%	
55-59 yrs	9%	12%	14%	13%	7%	11%	55-74 yrs 41%
60-64 yrs	15%	8%	9%	9%	11%	11%	
65-69 yrs	10%	11%	11%	21%	13%	13%	
70-74 yrs	4%	3%	10%	8%	7%	6%	
75-79 yrs	2%	2%	6%	4%	4%	4%	75+ yrs 7%
80+yrs	4%	2%	2%	6%	0%	3%	

The ratio of those who are part of a couple (60%) is higher than those who are single (40%). Females are slightly more prevalent (53%) than females (47%).

Activities (DDV)

FIGURE 11: DOMESTIC DAY VISITORS: ACTIVITIES



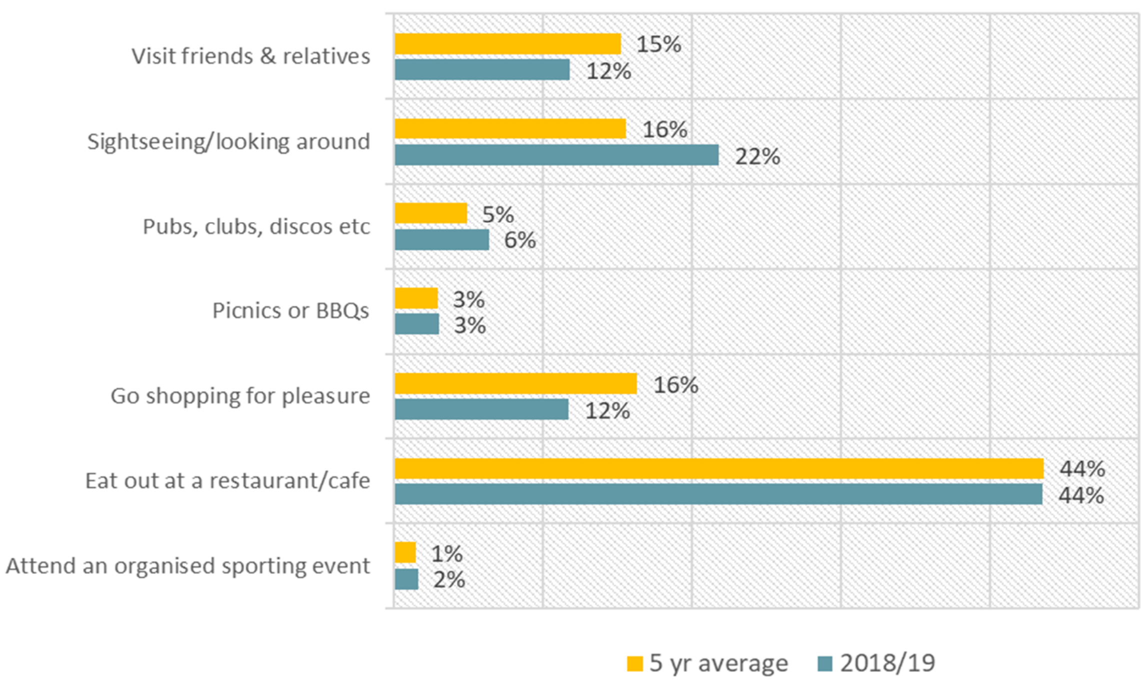
In 2018/19, social activities clearly dominated the activities of day visitors, with over half of activities (55%) involving social activities illustrated below such as dining, shopping or visiting friends and relatives.

Around a quarter of day visitors also undertook outdoor and nature activities which mainly included going to the beach (64% of outdoor activities).

Respondents can choose more than one activity so it is possible that more than one activity is undertaken in the same trip.

Further analysis shows the breakdown of social activities shows a high proportion of visitors eating out (44% of social visitors) as well as sightseeing (22%).These patterns remain similar to the previous 5 years, with a rise in general sightseeing.

FIGURE 12: DOMESTIC DAY VISITORS: SOCIAL ACTIVITIES 2018/19



INTERNATIONAL VISITORS

The number of international travellers has increased in the past five years to approximately 40,000.

TABLE 11: INTERNATIONAL VISITORS: SUMMARY

INTERNATIONAL '000	2014/15	2015/16	2016/17	2017/18	2018/19	5 yr average
# of visitors	25	29	37	38	40	24
% change on year	-3%	17%	25%	3%	5%	13%
Nights	144	91	191	151	122	140
Av night stay	5.8	3.1	5.2	4.0	3.1	4.5
Sample size	*173*	*184*	*190*	*183*	*197*	
Spend per trip	^	^	^			$368
Spend per night						$88
Activities	1. Social, 2. Outdoor/nature, 3. Local attractions					
Source	All Europe incl UK (55%) Nth America (22%) All Asia (13%) UK (15%) Germany (12%) USA(14%)					

Visitor Residence (INT)

The Eurobodalla continues to attract a very consistent mix of international markets, with the main generating countries being the UK (15% of visitors), USA (14%) and Germany (12%). Table 12 shows the wide variety of geographical markets which comprise the total international market.

TABLE 12: INTERNATIONAL MARKETS

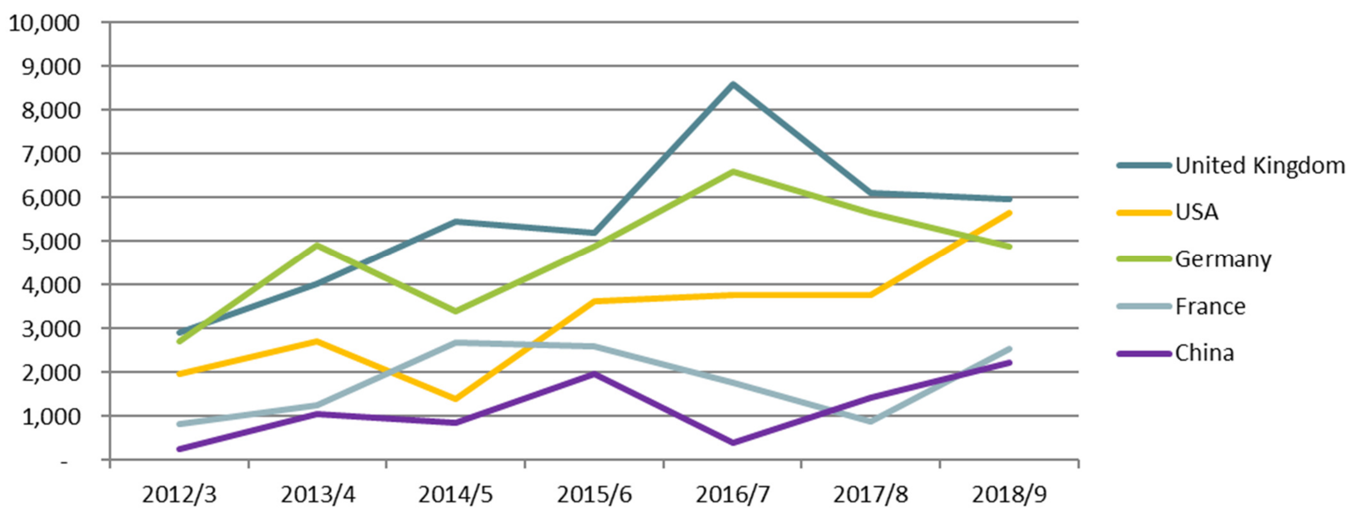
	2014/5	2015/6	2016/7	2017/8	2018/19	AVERAGE
UK	22%	18%	23%	17%	15%	19%
USA	6%	12%	10%	10%	14%	11%
Germany*	14%	17%	18%	15%	12%	15%
Other Europe*	5%	5%	4%	8%	11%	7%
Canada	8%	7%	6%	7%	8%	7%
New Zealand	4%	5%	7%	4%	7%	6%
China	3%	7%	1%	4%	6%	4%
France*	11%	9%	5%	2%	6%	6%
Scandinavia*	3%	5%	4%	2%	4%	4%
Switzerland*	5%	2%	2%	2%	4%	1%
Netherlands*	4%	3%	4%	0%	4%	4%
Other	5%	3%	2%	4%	3%	3%
Malaysia	0%	0%	4%	0%	2%	2%
Other Asia	0%	1%	2%	6%	1%	1%
Italy*	1%	0%	2%	1%	1%	1%
Japan	0%	0%	1%	1%	1%	0%
Korea	0%	1%	1%	0%	1%	1%

When grouped further into international regions;

- countries in **Europe & UK** (marked with *) are the highest generating region (55%)
- countries in **North America** combine to 22%
- countries in **Asia** equal 13%
- New Zealand 7%
- all other countries - including South America, UAE and Pacific (3%).

Over the past 5 years many key international markets continue to grow and provide the bulk of international visitation. In particular, the USA shows positive gains, with some decreases in the UK and Germany. Other Asian markets have increased slightly, including China, however they remain as smaller segments.

FIGURE 13: KEY INTERNATIONAL MARKETS



Visitor Expenditure (INT)

International visitors to Eurobodalla spent an average $88 per night[9] which is slightly higher than Regional NSW at $68 per night.[10] The average expenditure per trip was $368 in 2018.

[9] TRA (2018) LGA profile Port Macquarie
[10] DNSW (2018) Travel to Regional NSW YE Dec 2018

Transport (INT)

The most popular transport option for international markets is self drive (90%), with 6% choosing the bus/coach and 4% aircraft.

Age (INT)

Previous analysis had shown that visitors over 55 years comprised the largest segment at 39% of all international visitors. Further analysis shows each 4 year segment is quite even at around 10% or less, and each 'group of 20 years' is also even at around 30%. The highest age segment could be considered as 'young travellers' 20-30yrs (26%).

TABLE 13: AGE GROUPS OF INTERNATIONAL VISITORS

	2014/5	2015/6	2016/7	2017/8	2018/19	5 YR AV	20 yr group
15-19 yrs	4%	3%	3%	3%	2%	3%	15-34 yrs 35%
20-24 yrs	10%	12%	15%	12%	11%	12%	
25-29 yrs	14%	18%	12%	14%	15%	14%	
30-34 yrs	12%	6%	5%	7%	4%	6%	
35-39 yrs	4%	9%	4%	7%	10%	7%	35 -54 yrs 26%
40-44 yrs	7%	4%	5%	4%	6%	5%	
45-49 yrs	4%	6%	11%	9%	3%	7%	
50-54 yrs	7%	7%	6%	6%	10%	7%	
55-59 yrs	12%	10%	12%	10%	7%	10%	55-70+yrs 39%
60-64 yrs	10%	9%	11%	17%	12%	12%	
65-69 yrs	11%	10%	13%	9%	11%	10%	
70 + yrs	5%	8%	6%	5%	10%	7%	

Lifecycle and parents

The lifecycle group of international visitors is changing to be similar to the domestic traveller. Over the previous 5 years (2014-19), families with a parent of children under 15 yrs have increased from a low of 2%, to 19% of international visitors, more in line with 29% day and 31% domestic overnight visitors.

TABLE 14: PARENTS OF CHILDREN UNDER 15

PARENTS OF CHILDREN	2014/5	2015/6	2016/7	2017/8	2018/9	5 YR AVERAGE
International	2%	11%	16%	17%	19%	13%
Domestic Day	13%	19%	23%	23%	29%	21%
Domestic Overnight	40%	33%	30%	31%	31%	34%

^ data not collected by TRA in that year

Travel Party (INT)

Both singles (32%) and couples (38%) are the major international travel groups in 2018/9, with families (16%) making an increase of the total. Other features of the travel parties in 2018/19;

- males comprise 48% and females **52%**
- 23% of international visitors are **backpackers**
- a decreasing number are on package tours 5% (down from 11% in 2011/2)
- most are independent travellers (99% are **not** on a group tour).

TABLE 15: TRAVEL PARTY FOR INTERNATIONAL VISITORS

	2014/5	2015/6	2016/7	2017/8	2018/9	5 yr average
Single traveller	42%	42%	40%	42%	32%	39%
Adult couple	46%	40%	35%	34%	38%	38%
Family group	3%	10%	11%	8%	16%	10%
Friends/relatives together	8%	9%	13%	16%	14%	12%

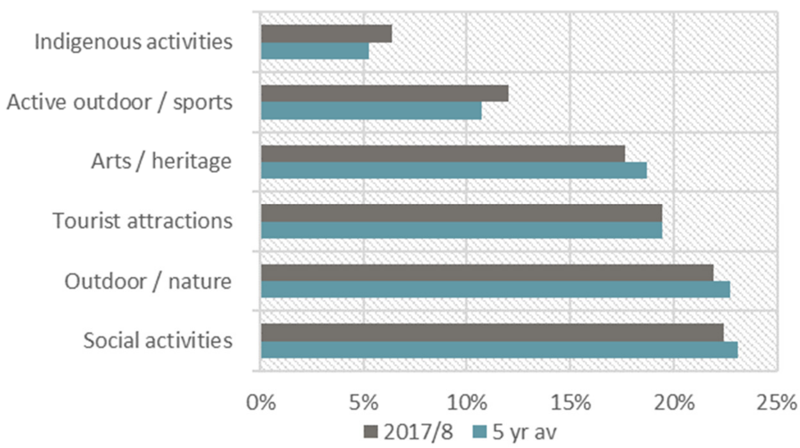
Reason for Visit (INT)

Data collected by TRA for the last 2 years for international reason to visit has known issues and is not consistent with past trends[11]. It is therefore not reported this year for this year. Before this issue arose (2014/5 to 2016/7) there had been a clear pattern that most overnight international visitors are **on a holiday (85%)**, while others are visiting friends or relatives (12%), and a smaller ratio are here on business (2%) or other reasons including education (1%) or being in transit (1%).

Activities (INT)

Activities on the trip in 2018/9 are consistent with previous years, with social activities (22%) and outdoor/nature (21%) being the two major activities undertaken by International visitors along with local tourists attractions (19%).

FIGURE 14: INTERNATIONAL ACTIVITIES



[11] https://www.tra.gov.au/International/International-Visitor-Survey-Methodology/ivs-methodology

Place of arrival (INT)

In 2018/19 most international visitors arrived at Sydney airport (58%) with the other 42% arriving in a variety of places in Australia, including Melbourne (22%) and in Canberra (0.3%).

TABLE 16: PLACE OF ARRIVAL FOR INTERNATIONAL VISITORS

	2014/5	2015/6	2016/7	2017/9	2018/9	% current	5 yr average	% of average
Sydney	14.4	17.0	18.9	19.8	23.9	58%	18.7	56.7%
Melbourne	6.3	8.5	10.5	10.4	9.8	24%	8.9	26.9%
Brisbane	1.8	1.6	2.3	2.6	2.7	7%	2.1	6.6%
Perth	1.1	0.8	2.8	0.5	0.7	2%	1.1	3.5%
Adelaide	1.2	0.1	1.2	1.8	2.6	7%	1.3	4.2%
Darwin	-	0.5	0.2	0.9	0.0	0%	0.3	0.9%
Cairns	0.2	0.8	0.1	0.1	0.0	1%	0.8	1.0%
Canberra	-	-	0.0	0.2	0.3	1%	0.3	0.3%
Total	25.0	29.4	36.6	36.6	40.4	100%	30.7	100%

Accommodation (INT)

Commercial accommodation (shaded section in Table 17) accounted for 65% of accommodation in 2018/9, including hotels and resorts (27%) and commercial caravan parks (27%).

Non-commercial accommodation accounted for 35% and includes friends and relatives homes (17%), non-commercial camping (9%) and other private (9%).

TABLE 17: ACCOMMODATION FOR INTERNATIONAL TRAVELLERS

	2014/5	2015/6	2016/7	2017/8	2018/9	% of 2018/19	5 yr average
Guest house or Bed & Breakfast	1,368	955	768	2,219	1,079	3%	4%
Rented house/apt/flat	691	1,329	1,166	733	2,015	5%	3%
Caravan park or commercial camping ground	5,469	6,973	12,425	10,035	10,738	27%	26%
Backpacker or hostel	1,820	1,831	1,936	1,204	1,157	3%	5%
Hotels/resorts	7,392	9,655	10,300	9,199	10,699	27%	27%
Non commercial camping	2,827	3,172	3,198	3,453	3,353	9%	9%
Private accomm (VFR)	8,737	9,955	6,912	6,797	6,740	17%	19%
Other private	722	1,405	2,434	2,801	3,541	9%	6%

2018/19 Comparisons to other regions

Comparisons have been made to the following local government areas which are of similar size and in regional coastal locations.

Table 18: Comparison regions

		2017/8 visitors	2018/19 visitors	2018/19 nights	*% increase on previous year visitors*
Eurobodalla 13% of South Coast	Domestic day	532	660	^	24%
	Domestic overnight	818	900	*2746*	10%
	International	38	40	*122*	5%
	Total	***1388***	***1600***	*2868*	15%
Shoalhaven 30% of South Coast	Domestic day	1763	1751	^	-1%
	Domestic overnight	1544	1754	*5679*	14%
	International	64	58	*358*	-9%
	Total	***3371***	***3563***	***6037***	6%
Sapphire Coast 10% of South Coast	Domestic day	450	508	^	13%
	Domestic overnight	612	674	*2722*	10%
	International	40	47	*237*	18%
	Total	***933***	***997***	***2959***	7%
South Coast	Domestic day	6790	7418	^	9%
	Domestic overnight	3849	4450	*13903*	16%
	International	184	192	*2597*	4%
	Total	***10823***	***12060***	***16500***	11%
Port Stephens	Domestic day	820	***917***	^	12%
	Domestic overnight	703	810	*2512*	15%
	International	48	43	*180*	-10%
	Total	***1571***	1770	***2692***	13%

^ not applicable

SITUATION ANALYSIS - APPENDIX B

The following table provides a summary of relevant strategies, plans and programs at the national, state, regional and local levels. Primary insights have been identified to inform the development of the Eurobodalla Destination Action Plan (EDAP) 2023 - 2028.

ORGANISATIONS & STRATEGIES	OVERVIEW
NATIONAL	
Australian Trade & Investment Commission (AUSTRADE) **THRIVE 2030 strategy - *The Re-imagined Visitor Economy*** *THRIVE 2030* is Australia's national strategy for the long-term sustainable growth of the visitor economy. See: https://www.austrade.gov.au/news/publications/thrive-2030-strategy	**Phase one (2022 – 2024) of the plan highlights seven priority actions.** **Priority 1.** Comprehensive collaboration. Governments (at all levels) and industry collaborate across and within stakeholder groups to deliver the strategy and grow a stronger and more resilient visitor economy. **Priority 2.** Improve data and insights. Produce relevant, robust and timely data and insights that underpin business improvement, industry growth and investor confidence. **Priority 3.** Grow a secure and resilient workforce. The sector has a world-class workforce with the right skills to address visitor needs and grow the sector's competitiveness, while maintaining a stable supply pipeline that can withstand changing market forces. **Priority 4.** Embrace leading edge business practices. Improve business capability to create competitive, resilient, and sustainable businesses which deliver high-quality products and services. **Priority 5**. Enhance visitor infrastructure. Deliver the right amount and quality of infrastructure to satisfy visitor needs, including accessibility requirements, and ensure it is developed and managed sustainably. **Priority 6.** Build markets and attract visitors. Attract high-value visitors through coordinated, innovative, focussed, and personalised visitor attraction strategies that are targeted at a re-balanced mix of domestic and international markets. **Priority 7.** Unique and quality products. Provide high-quality products and services that leverage Australia's competitive advantages such as our natural, built, and cultural attributes, including our Aboriginal and Torres Strait Islander cultures, vibrant cities, and authentic regions.

ORGANISATIONS & STRATEGIES	OVERVIEW
Tourism Australia ***Future of Global Tourism Demand*, **November 2022 https://www.tourism.australia.com/content/dam/digital/corporate/documents/future-of-demand/tourism-australia-global-future-of-tourism-demand-research-public-report.pdf	Global tourism research into the experiences that will drive Australia's tourism demand now and into the future. It identifies contemporary traveller market segments (by psychographic); and highlights the motivations and behaviours of core international markets: • **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. Underpinning themes and important influences on travellers: • **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. There is a strong focus on enjoyment via good food and drink, sightseeing and culture. Dining out, food and drink festivals, Indigenous food experiences and tasting trails are also of interest. • **Sustainability:** Sustainability is at the front and centre of the global psyche, shaping demand for low carbon footprint travel options and

ORGANISATIONS & STRATEGIES	OVERVIEW
	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 tourism can provide authenticity and first-hand experiences from a destination's First Nations people, whose timeless connection to Country offers rich repositories of culture, language, and philosophy. It offers a chance to learn new ways of experience a destination, culture, and community. 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/hobbies. Accessibility goes beyond physical or visibly noticeable impairments and extends into mobility, visual, audio, or cognitive impairment. • **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.
Ecotourism Australia **Certification Programs** https://www.ecotourism.org.au/	Ecotourism Australia recently launched its new program in partnership with Tourism Australia: **Strive 4 Sustainability Scorecard** Launched by Ecotourism Australia in 2022, the Strive 4 Sustainability Scorecard is a pathway program for any tourism business to start their sustainability journey. Tourism Australia is the founding partner of the Strive 4 Sustainability Scorecard. Tourism Australia, as the marketing partner, is supporting this

ORGANISATIONS & STRATEGIES	OVERVIEW
	new program to encourage more tourism businesses to embark on the pathway to sustainability. The scorecard measures where a business or tourism operator is at on their sustainability journey at a point in time and assesses the following four pillars of sustainability: • Environmental impacts • Socio-economic impacts • Cultural impacts • Sustainable management Any tourism business or operator can be assessed, with the scorecard provided annually by Ecotourism Australia. Such businesses can include cafes, restaurants, bars, breweries, tour providers, activity/attraction providers, accommodation providers, events and festivals, tourism organisations, travel agents, visitor centres and tourism consultants. See: https://www.ecotourism.org.au/strive-4-sustainability **ECO Certification programs** The ECO Certification program certifies tourism products (tours, accommodations, attractions) with a primary focus on nature. It assures travellers that certified products are backed by a strong, well-managed commitment to sustainable practices and provides high-quality nature-based tourism experiences. The ECO Certification program is a world first and it has been developed to address the need to identify genuine nature and ecotourism operators. ECO Certification is product-specific— this means that you will need to answer the criteria as it applies specifically to each of your products. This also means that you can apply for ECO Certification even if not all of your products are nature-based. The ECO Certification Program is divided into three levels: **Nature Tourism** Tourism in natural areas that leaves minimal impact on the environment **Ecotourism** Tourism in a natural area that focuses on optimal resources use, leaves minimal impact on the

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	environment and offers interesting ways to learn about the environment with operators that use resources wisely, contribute to conserving the environment and help local communities **Advanced Ecotourism** Australia's leading and most innovative ecotourism products that operate with minimal impact on the environment and provide opportunities to learn about the environment with operators who are committed to achieving best practice, using resources wisely, contributing to conserving the environment and helping local communities **Destination certification programs** **ECO Destination Certification** The ECO Destination Certification program assures travellers that certified destinations are backed by a strong, well-managed commitment to ongoing improvement of sustainable practices and provide high-quality nature-based tourism experiences within the region. The certification is for a region or destination with a clearly defined boundary. It requires one organisation, like the local council or local tourism organisation, to be responsible for the management of the certification, however, it assesses the entire region's tourism destination management practices community-wide. See: https://www.ecotourism.org.au/our-certification-programs/eco-certification-4 **Sustainable Tourism Destination Certification** Sustainable Tourism Destination Certification is available to destinations that want to be recognised for their sustainability practices and meet global best practice standards. It links directly with the **Green Destinations** program. Following similar criteria used in Ecotourism Australia's ECO Destination Certification program, the Sustainable Tourism Destination Certification program is available to all destinations and focuses on sustainability through a regional commitment to sustainable and responsible tourism practices. See: https://www.ecotourism.org.au/sustainable-tourism-destination-certification
UNESCO Biosphere Reserves	Biosphere Reserves are areas of terrestrial, marine and coastal ecosystems that are managed with the aim of balancing biodiversity conservation and the

ORGANISATIONS & STRATEGIES	OVERVIEW
https://www.dcceew.gov.au/environment/biodiversity/conservation/australias-biosphere-reserves	sustainable use of natural resources. The planning and management of Biosphere Reserves relies on the participation of the local community and interested stakeholders. Biosphere Reserves are an international designation made by the UNESCO on the basis of nominations submitted by countries participating in the Man and the Biosphere Programme. In Australia, this process is led by the Commonwealth Government through the Department of Climate Change, Energy, the Environment and Water (DCCEEW). The process of designating an area as a Biosphere Reserve is a complex process. The World Network of Biosphere Reserves includes 714 Biosphere Reserves in 129 countries. There are five in Australia, including the recently announced Sunshine Coast Biosphere Reserve (June 2022). It links the existing Noosa and Great Sandy biosphere reserves along the southern Queensland coast. The Sunshine Coast Biosphere Reserve aligns with the boundaries of the Sunshine Coast Council and covers a total area of 258,500 hectares and features protected marine and terrestrial areas, rural lifestyles, as well as urban areas where people live and work. The region encompasses both biological and cultural diversity with a rich Indigenous and multicultural history that provides for a range of lifestyles and includes historical places that are valued by the community Each Biosphere Reserve consists of three zones: a core area, buffer zone and a transition area: 1. The core area is a strictly protected zone that contributes to the conservation of landscapes, ecosystems, species and genetic variation. 2. The buffer zone surrounds or adjoins the core area(s) and is used for activities compatible with sound ecological practices that can reinforce scientific research, monitoring, training and education. 3. The transition area is where community's foster socio-culturally and ecologically sustainable economic and human activities.
STATE	
NSW Government	Released in 2018, the vision sets out the Government's priorities and plans to achieve long-

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20-Year Economic Vision for Regional NSW https://www.nsw.gov.au/sites/default/files/2021-02/20%20Year%20Vision%20for%20RNSW_0.pdf	term social and economic success for regional communities across the state. The 2018 Vision has been refreshed in response to the changed economic landscape and opportunities that have emerged in regional NSW following the drought, bushfires, flood and COVID-19 pandemic. A key finding in the *Vision Refresh* is that all economies – international, national and local – need to be ready to respond to greater levels of economic and social uncertainty. Future industries identified include Ecotourism. New investment areas include Visitor economy infrastructure and priority projects include the Regional Digital Connectivity program, where the NSW Government has committed over $400 million to bring a faster and more reliable digital network to regional NSW.
Destination NSW ***NSW Visitor Economy Strategy 2030*** https://www.destinationnsw.com.au/wp-content/uploads/2020/12/nsw-ves-2030.pdf	The 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, including: **Strategic Pillar 3** is about showcasing NSW strengths – both our existing strengths and emerging ones and **Strategic Pillar 4** is about investing in world class events. Key result areas include: • Growing visitor expenditure • Increasing length of stay & yield • Higher levels of repeat visitation It identifies five guiding principles (including putting the visitor first) as well as three core phases: Recovery (to 2024); Momentum (to 2026); and Accelerate (to 2030).

ORGANISATIONS & STRATEGIES	OVERVIEW
	GUIDING PRINCIPLE 1: PUT THE VISITOR FIRST Putting visitors front and centre to enable better targeted marketing, experience design and industry support through a greater understanding of potential visitors. **GUIDING PRINCIPLE 2:** Accelerate digital innovation **GUIDING PRINCIPLE 3:** Lead with our strengths **GUIDING PRINCIPLE 4:** Move fast **GUIDING PRINCIPLE 5:** Collaborate
Destination NSW **Aboriginal Tourism Action Plan 2017-2020** https://www.destinationnsw.com.au/wp-content/uploads/2017/11/aboriginal-tourism-action-plan-2017-2020.pdf	The goal is to further develop the sector in a manner that is endorsed by Aboriginal people, respects their cultural identity, and creates a greater understanding of, and engagement with Aboriginal culture in NSW as well as delivering economic and social benefits for Aboriginal people, both as operators and employees**.** The Aboriginal Tourism Action Plan 2017-2020 recognises that Aboriginal cultural tourism is playing an increasingly significant role in motivating visitors to travel to destinations across NSW and has a strong focus on trade and consumer promotion of NSW as a destination where Aboriginal culture is strong, vibrant and diverse.
Destination NSW **Food & Wine Strategy and Action Plan 2018-2022** https://www.destinationnsw.com.au/wp-content/uploads/2018/11/nsw-food-and-wine-tourism-strategy-and-action-plan-2018-2022.pdf	Food and wine tourism is one of the priorities of the NSW Visitor Economy Industry Action Plan and promoting NSW's food and wine offering is a key focus for Destination NSW. The role of the 2018-2022 Food & Wine Tourism Strategy & Action Plan is to ***accelerate Destination NSW's efforts to support the further development of the sector*** and to contribute to the Visitor Economy Industry Action Plan 2030's goal of tripling overnight visitor expenditure by 2030. Collaboration within and between regions was identified as one of the most important priorities.
Destination NSW **New visitor brand: Feel New** **'Feel New' NSW Brand Co-operative Marketing Opportunities** https://www.destinationnsw.com.au/tourism/marketing-opportunities/feel-new-visitor-brand	**Applying the Brand** 1. Maintain the unique point of difference of each destination, but at the same time unify our message to drive preference for NSW as a whole. 2. Identify the key brand ingredients that will create a connection to our master brand in consumers' minds but allow this layer of comms to have its own unique approach, look and feel.

<table>
<tr><th>ORGANISATIONS & STRATEGIES</th><th>OVERVIEW</th></tr>
<tr><td></td><td>3. Ensure the destination name stands out first and foremost. But at the same time help people understand that the destination is a place in NSW.
4. Identify channels to reach the key audiences
5. Stagger campaign activity to avoid different destination activity ‘clashing’.

South Coast Priority: Make the South Coast an appealing Winter and Early Spring short break destination to Working Couples.

Core Traveller Segments:
• The recharging traveller:
o Opportunity: Targeting NSW residents are not about the destination itself, but the emotion and rejuvenation one can achieve by being there.
o Message: Highly emotional messaging that promises to provide physical and mental distance from their everyday life.
• The liberating traveller

Applying the DNSW Brief:
1. Target Audience: Busy working couples
2. Need a weekend away
3. So they can recharge
4. Helping them thrive
5. Which makes them feel balanced</td></tr>
<tr><td>NSW Agritourism Changes</td><td>The NSW Government has proposed changes to the Local Environmental Plans to encourage agritourism. The changes commenced on 1 December 2022.

The NSW Department of Planning and Environment has introduced clear planning definitions for agritourism in NSW. Simplifying these planning terms is intended to make it easier for farmers to know how they can use their land for new income streams.

Five core areas of reform focus on:
• Camping on your farm
• Fast track new buildings on your farm
• Give visitors a rural experience, including events
• Run a small farm gate business</td></tr>
</table>

ORGANISATIONS & STRATEGIES	OVERVIEW
	• Build a roadside stall The new and amended terms include: • **Farm experience premises** – where visitors can experience life on a farm including tours, horse riding, weddings, functions and retreats. • **Farm gate premises** – where visitors interact with produce from the farm, such as fruit picking, sales, tastings, workshops and cafes. • **Farm stay accommodation** – including camping The new planning pathways have been made by the NSW Department of Planning to allow Farm experience premises, Farm gate premises and Farm stay accommodation activities to happen with either fast-track (complying development) or no planning approval (exempt development) with development standards that will minimise impacts on neighbours, rural roads and the community.
Department of Regional NSW https://www.regional.nsw.gov.au	The Department of Regional NSW has been set up to support regional communities and businesses, and drive government investment to future-proof regional economies by building strong and resilient regional cities and towns. Regional NSW have offices and teams across the state.
Department of Regional NSW **Adventure Cycling Strategy, January 2023** https://www.nsw.gov.au/regional-nsw/resources/adventure-cycling-strategy	The Adventure Cycling Strategy outlines the Government's priorities to support the industry to grow in collaboration with local government, clubs, businesses, and the broader community. Adventure cycling encompasses several different styles of cycling using infrastructure other than roads and bike paths. Adventure cycling includes mountain biking, BMX and gravel riding for recreation, leisure, or competition. Over the last decade, there has been increased participation in adventure cycling by riders of all ages and abilities, and this has created a significant opportunity for investment in the industry to stimulate local economies and bring communities together. The NSW Government is committed to making NSW the home of Australia's premier adventure cycling destinations, capitalising on the diverse natural beauty across the state to strengthen our visitor economies and support community health, connection, and wellbeing. The strategy aims to strengthen the visitor economy at adventure cycling destinations across our regions

ORGANISATIONS & STRATEGIES	OVERVIEW
	while also increasing access to tracks and trails for local communities. **Vision:** NSW will be the home of Australia's premier adventure cycling destinations capitalising on the diverse natural beauty across our State to strengthen our visitor economies and support community health, connection, and well-being. **Objectives:** 1. Strengthen the visitor economy at nationally and regionally significant adventure cycling destinations 2. Increase access so local communities can enjoy quality adventure cycling experiences in green and public spaces 3. Streamline coordination, planning and delivery of adventure cycling experiences **Actions:** 1.1 Undertake an adventure cycling trends, supply and demand study to inform prioritisation of a pipeline of regionally significant investment opportunities. 1.2 Partner with proponents to promote regionally significant tracks, trails, tour and experience providers, events and competitions. 1.3 Facilitate commercial partnerships and promotion of the Snowy Mountains Adventure Park to maximise the year-round visitor economy in the Snowy Mountains. 2.1 Publicly release best-practice design guidelines to inform, inspire and improve development of safe and accessible adventure cycling infrastructure and facilities. 2.2 Establish funding opportunities with eligibility for adventure cycling experiences in regional NSW. 2.3 Support opportunities for adaptive adventure cycling in the design of trails and tracks to provide access to all riders including people with a disability. 3.1 Facilitate advice and information exchange to support councils and the community plan adventure cycling experiences, including access to Government funding. 3.2 Publicly release a 'how to' guide to advise community stakeholders (eg clubs), the cycling

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<tr><td></td><td>industry, and councils on how to work with the NSW Government to plan adventure cycling experiences.

Best practice approach to planning: The Strategy highlights the value of careful planning to provide the complete experience for users (page 17), which addresses:
• An appealing destination
• Easy access
• A quality experience
• A reason to stay

It also highlights investment in adventure cycling over the last five years, which specifically includes (among a list of 31 sites – see page 18 for a map of all sites listed):
• Mogo Adventure Trails Hub (ESC) - $5M
• Narooma MTB Trails Hub (ESC) - $3.9M
• Eden Mountain Bike Hub (Bega Valley Shire Council) - $4.5M</td></tr>
<tr><td>NSW National Parks and Wildlife Service, Department of Planning and Environment

NSW Great Walks

https://www.environment.nsw.gov.au/topics/parks-reserves-and-protected-areas/park-management/nsw-great-walks</td><td>The NSW Government recently announced its NSW Great Walks program (February 2023).

NSW National Parks and Wildlife Service is developing a network of Great Walks across New South Wales to deliver world-class bushwalking experiences for visitors.

These spectacular multi-day walks will traverse some of the state’s most breathtaking and diverse landscapes.

Walks are being designed for varying levels of fitness and experience with a range of distances, grades and accommodation options to cater for as many walkers as possible.

The NSW Great Walks will deliver important economic benefits across New South Wales, especially to regional communities, and help build a strong legacy of support for conservation.

One of the NSW Great Walks identified specifically is the Murramurang South Coast Walk, which traverses the northern coastal part of ESC and the southern coastal part of Shoalhaven City Council. It is 34 kms in distance and has a duration of 3 days/2 nights.</td></tr>
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	It has been previously announced and in development for some time. However, the new announcement aims to position the collection of Great Walks in NSW as world-class.
TAFE NSW **Strategic Plan 2016 - 2022** https://www.tafensw.edu.au/documents/60140/76288/Strategic-Plan-FINAL-12-pager%20(1).pdf	The NSW Government has provided a vision for TAFE NSW to grow the NSW economy through strengthening the skills base of the NSW workforce by increasing training that leads to jobs, including upskilling and reskilling to improve career prospects. The **TAFE NSW Strategic Plan 2016-22** reiterates the need to be collaborative and commercially astute and establish industry focused TAFE NSW Skills Points that provide a single point of contact with an identified industry sector to ensure courses are designed to meet contemporary requirements that are valued by employers. TAFE also offer facilities and infrastructure that extend beyond physical campuses into online training centres and mobile training units. The new vision may present opportunities for certain sectors to develop industry-led training partnerships that create meaningful employment pathways and address some of the skills and staff retention issues identified by many regions.
REGION	
Far South Coast Regional Economic Development Strategy (REDS) 2018 - 2022 https://www.nsw.gov.au/sites/default/files/2020-06/Far%20South%20Coast%20REDS.pdf	The Far South Coast Regional Economic Development Strategy 2018-2022 (the Strategy) sets out a long term economic vision and associated strategy for the two local government areas (LGAs) of Bega Valley and Eurobodalla (the Region). The Strategy is the culmination of collaboration between the Bega Valley Shire and Eurobodalla Shire Councils, their respective communities and the SW Government's CERD. There are four core elements of the strategy, one of which focuses on the tourism sector; namely to ***"Support the development, diversification and growth of the Region's tourism sector and the Region's overall lifestyle appeal".*** Early-stage priority actions include: a. Develop key product tourism offerings based around major attractions in the Region. b. Undertake planning and implementation of revitalisation plans for Eurobodalla's main town centres of Batemans Bay, Moruya and Narooma.

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	Identify and develop tourism products based on National Parks and State Forests. c. Develop food, culture and artisan products, experiences and trails, along with a Regional Food Brand. Develop and capitalise on Australia's Oyster Tourism Trail. d. Develop key product tourism offerings based around major attractions in the Region. e. Undertake Eurobodalla Product and Experience audit to inform future product development projects. Tourism Infrastructure Priorities include: • **Improved coastal access and inclusive infrastructure**: deliver an integrated and comprehensive network of roads and trails that provide access and inclusion to the Region's major coastal assets for as many people as possible, particularly people with disabilities. • **Digital connectivity:** provide fast and reliable internet access (NBN rollout), as well as improved mobile reception in parts of the Region (not included under tourism but critical for tourism)
Canberra Region Joint Organisation: **Strategic Roadmap** https://crjo.nsw.gov.au	The CRJO region is located in South-Eastern NSW and surrounds the ACT. The region is predominantly rural with major towns being Batemans Bay, Bega, Bowral, Cooma, Crookwell Goulburn, Mittagong, Moruya, Moss Vale, Narooma, Queanbeyan, Tumut, Yass and Young. It also includes many smaller townships and villages and growing residential and rural-residential areas, particularly close to Canberra and along the coast. The total population of the CRJO region including the ACT is 750,000 and the total area is 48,000km. The CRJO provides a forum for councils, State agencies and other stakeholders to work together at a regional level to identify shared priorities, develop plans for delivering these priorities and deliver important regional projects and better outcomes for communities. **CRJO Statement of Strategic Priorities** Tourism is mentioned as a strength of the region - but only briefly. ***Tourism:*** *The region boasts diverse tourism experiences including abundant recreation opportunities and a vibrant art and cultural offering that are unique and accessible to visitors.*

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	And makes reference to building *a vibrant and resilient visitor economy* and *participating in regional tourism and visitor economy forums including Destination NSW and Visit Canberra.* The primary focus for CRJO would appear to be Queanbeyan Palerang.
ACT 2030 Tourism Strategy Discussion Paper	The paper identifies a number of key challenges and priority focus areas. These are: **Key Challenges** **1. Labour and skills**. Including capacity to manage COVID-related staff shortages/ absences and difficulty attracting, retaining and upskilling workers. **2. Competition for travellers** - All Australian states and territories are competing hard for a share of the domestic market. Global competition for international source markets is also high. **3. Consumer confidence** - COVID-19 has affected consumer habits when it comes to planning and booking travel. Lead times for bookings have shortened. **4. Aviation access -** The absence of direct international flight services to Canberra currently limits our capacity to influence overseas visitors. Airlines are managing a gradual return to pre-COVID international capacity, affected by labour availability and supply side constraints. **5. Climate change and sustainability considerations -** Extreme weather events are impacting tourism activity, while consumers are also more conscious of making travel choices that include sustainable tourism products and experiences. Sustainability needs to be embedded into business practices in a way that is more than a gesture. **6. Technology uptake -** It has never been easier to plan, book and share travel experiences in a digital age. Consumers have heightened expectations for the delivery of simpler, more cost-effective, and higher quality tourism services and products. **7. Data and insights.** In a rapidly changing tourism environment, real-time information is required to assist business decisions and to help the sector respond to new opportunities, trends, or visitor expectations. **8. Product development and infrastructure investment** There is a greater need for evaluating

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	opportunities and barriers for new tourism investment that can support competitiveness and help meet the changing needs and expectations of visitors. **9. Cost of living/travel -** Key economic factors (e.g. interest rates, rising fuel prices) have the potential to deter or limit the frequency or length of leisure travel in the future. Short-trip business travel has also reduced as companies seek to cut travel costs or use technology to conduct business. **10. Potential for future shocks (e.g. health, weather, financial).** These factors require further thought on how the tourism industry can better prepare to minimise their impact on the visitor economy. **Priority Focus Areas** **a. Targeted destination marketing efforts:** • Identifying and supporting opportunities for cooperative marketing projects and partnerships to amplify our tourism message and drive visitation. • Unlocking the potential of local community advocacy for the Canberra region as a tourism destination. • Evolution of our whole of city brand to ensure clear messaging and consistency in how we promote Canberra as a place to visit, invest, study, and do business. **b. Technology and sustainability solutions:** Utilising technology and sustainability initiatives to better support tourism promotion and enhance the visitor experience. **c. Research data and insights:** • Identifying and sharing tourism data and consumer insights that are already being captured across our local tourism industry and that can be used for collective benefit. • Better understanding the gaps in our tourism data knowledge that are impacting industry's capacity to make informed and evidence-led business decisions.
Destination Southern NSW **Destination Management Plan 2022 – 2030**	This Plan sets out **five strategic objectives** and an associated plan of action for the region from 2022 to 2030, reflecting current market trends and local

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https://dsnsw.com.au/download/southern-nsw-destination-management-plan-2022-2030/	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. **Regional Priorities specifically relevant to Eurobodalla:** • **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

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	◦ 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. **Specific Actions relevant to Eurobodalla:** • Create coordinated experience trails and itineraries related to positioning strengths of the region and link Southern NSW with Canberra, Sydney, Victoria and Regional NSW source markets (2.2) • Work with the DNPMG, NPWS and FCNSW and private landowners to identify opportunities for adventure and nature-based product and experience development (3.2)

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	• Support operators to further develop agritourism and produce product development opportunities (3.4) • Advocate and support the development of new heritage and First Nations products and experiences including tailored industry development and support to help bring forward new cultural tourism product development opportunities (3.6) • Identify key events that have the potential to be amplified to attract increased or new audience segments and work with event organisers to develop next growth stage (4.2) • Attract new events that have the potential to attract new and repeat visitors to the region, including business events (4.3) • Grow the quantity, diversity, and quality of accommodation across the region (5.2)
South Coast Tourism Marine Strategy https://www.nsw.gov.au/regional-nsw/20-year-vision-for-nsw-south-coast-marine-tourism	The NSW South Coast Marine Tourism Strategy outlines a 20-year vision to realise the economic benefits of marine tourism in the region. It describes how government and industry can work together to develop, market and leverage marine tourism opportunities. The strategy aims to grow tourism yield through the delivery of its action plan. Actions contained within the strategy include regional marketing campaigns, online information resources, targeted harbour activation, and the development of marine-based tourism experiences along the NSW South Coast. The strategy responds to priority actions identified in the South East and Tablelands, and Illawarra-Shoalhaven regional plans. It builds on opportunities created by Shell Cove's new 270-berth Shellharbour Marina development and the NSW Government's $44 million investment to extend the Port of Eden wharf. The strategy was developed by the NSW Government in partnership with the Illawarra Shoalhaven Joint Organisation and the local councils of Wollongong, Shellharbour, Kiama, Shoalhaven, Eurobodalla and Bega Valley. **Vision:** Attract and deliver a compelling range of visitor experiences which maximise sustainable economic

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	benefits and position the South Coast as a premier marine tourism destination. **Strategic directions** **1.** Strongly position the NSW South Coast's coastline and complementary culture and heritage, nature-based, food and drink experiences. **2.** Foreshore, precinct and harbour activation, focusing on growing yield from visitor trips. **3**. Establish a network approach to delivering on the economic potential of the NSW South Coast. **4.** Activate the coastal environment by encouraging the sustainable development of fishing, adventure nature-based food and drink, and culture and heritage experiences as a means of addressing seasonality challenges. Through the Cruise Development Plan, the NSW Government will investigate opportunities to remove regulatory barriers to entry for emerging cruise markets, including the expedition cruise market, and will seek an inter-jurisdictional policy position with other governments to support market growth.
LOCAL	
Eurobodalla Destination Action Plan (EDAP) 2018 to 2021	EDAP identified a number of important challenges that must be overcome in order to achieve the goal of increasing visitor expenditure and overnight stays by 25% by 2021. These include: • Establishing an effective and collaborative working relationship between Council and tourism industry stakeholders • Fostering improved engagement with tourism businesses as part of a ‘whole of destination’ approach • Addressing relatively flat visitation performance since 2011 • Revitalising Batemans Bay as an appealing gateway for the community and visitors to Eurobodalla • Overcoming aging accommodation infrastructure • Attract new public and private sector investment for infrastructure and tourism product experience development • Identifying and promoting Eurobodalla’s unique experiences to attract repeat and new visitors and

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	cut-through the cluttered coastal visitor marketplace • Effectively packaging and promoting innovative tourism products and experiences to create a 'total destination experience' to generate more overnight stays, increase expenditure, overcome seasonality and differentiate Eurobodalla from its competitors • Support new and existing festivals and events that are key drivers of visitation to help overcome seasonality and generate increased visitor awareness of Eurobodalla and its experiences • Overcoming message confusion amongst visitors, tourism stakeholders and the community (e.g.'Eurobodalla – a Land of Many Waters', 'Batemans Bay – Take it Easy', DNSW 'Unspoilt' marketing campaign) The Plan identifies **eight priority areas** and associated actions to be implemented over the next four years to 2021 by Council, in partnership with industry: 1. Establish a Destination Management Framework within Council to lead and foster a strategic and cooperative approach to tourism, events and tourism business development for Eurobodalla that involves the business sector, and other important regional and state government stakeholders 2. Establish industry engagement and business development initiatives to support tourism and event operators to achieve best practice and sustainable operations 3. Determine a realistic destination research system to regularly track visitation, visitor expenditure, satisfaction and perceptions 4. Encourage and facilitate private and public sector investment for infrastructure and facilities development to position Eurobodalla as a great place to live, visit and do business 5. Develop a strategic and coordinated approach to tourism product and experience development to position Eurobodalla as an iconic nature- based tourism and regional food destination on the South Coast 6. Adopt a pro-active and strategic approach to event procurement and development to increase

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	visitation expenditure across the year for Eurobodalla and its towns and villages 7. Establish strategic and tactical marketing campaigns to reach key visitor markets and promote Eurobodalla's distinct points of difference from coastal competitors 8. Continue to manage the operation and delivery of visitor information services for the Eurobodalla destination region to ensure economic viability of Visitor Information Centres, exceptional service, and delivery of visitor information that aligns with changing visitor information search behaviours and visitor information technologies. **NB.** EDAP outlines the detailed actions related to each priority areas **The focus for Eurobodalla promotional initiatives should be concentrated on the following key visitor markets:** 1. Domestic overnight visitors from Canberra/ACT and Sydney (primary), Regional NSW and Victoria (secondary) targeting families, retirees, VFR with the intention of attracting them to stay longer 2. Domestic daytrip visitors from the South Coast and Canberra targeting families and friends, retirees and VFR with the intention of converting them to overnight stays EDAP also recognises the importance of the **Visiting Friends and Relatives (VFR)** market in providing opportunities for Eurobodalla to further promote its tourism experiences to residents and their visitors. Recent research undertaken by DNSW shows that the VFR market is of considerable importance to NSW. It is the second largest purpose of visit segment amongst visitors to NSW, after the Holiday market. It is also a segment that has seen considerable growth over the last few years. Since year ended March 2011, the number of domestic overnight VFR visitors and expenditure to NSW has grown by 22% and 23% - nearly twice the rate of 'holiday' visitor growth expenditure. According to the report, domestic VFR visitation accounted for 37% of NSW domestic overnight visitors that spent over $3.3 billion in the State (YE March 2016). The report further determined that hosts are well placed to be ambassadors for

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	driving tourism in NW and are receptive to encouraging visitation from family and friends, and their willingness to spend to provide their visitors a memorable experience. However, hosts need further inspiration and incentivisation to maximise their ambassador status and drive greater value from the VFR segment.
Destination Research Eurobodalla Tourism Monitor (2018-19 Financial Year)	• **Average overnight stay** declined y.o.y from 2014 to 2019 • **Average per night expenditure** is $135 for all visitors, which is lower than the $158 per night estimated for Regional NSW
Advancing Eurobodalla: Integrated Economic Growth & Development Strategy (2019-2028)	Tourism alone supports 1,881 total jobs (13% of total) in the community and represents 14% of Gross Regional Product, which is double the proportion of tourism jobs at a state level and two-and-a-half times tourism's economic contribution to the State. Tourism is and will continue to be the driving force of the Eurobodalla economy. **Key Challenges:** 1. Eurobodalla has the highest aged dependency ratio in NSW (Age dependency ratio is the *ratio of dependents--people younger than 15 or older than 64--to the working-age population--those* ages 15-64). 2. Eurobodalla's workforce and training participation rate is one of the lowest in the country. 3. Eurobodalla has one of the lowest skilled workforces in the country. 4. Eurobodalla has one of the highest unemployment rates in Australia. It also has one of the highest welfare dependencies in the country. **Key Job Growth Opportunities:** • Support diversification in tourism to offer new experiences to our growing visitor markets outside of peak tourist seasons • Help our local producers grow the food industry including food tourism, regional food branding and promotion and distribution **Priorities:** 1. Industry engagement & business development 2. Investment attraction 3. Workforce development

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	4. Infrastructure & Place enhancement **Stakeholder Consultation Outcomes - actions needed?** 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
Eurobodalla Community Strategic Plan (CSP) – Our Eurobodalla 2042 https://www.esc.nsw.gov.au/__data/assets/pdf_file/0003/214599/Eurobodalla-Community-Strategic-Plan.pdf	**Community Strategic Plan.** The plan is the highest-level plan that identifies the community's priorities and aspirations for the future. The Community Strategic Plan (CSP) is used by Council to inform decisions and set the agenda for long-term planning of projects, infrastructure and services. This updated plan builds on the 2017 Community Strategic Plan, and takes on board the information gathered from consultation activities that took place in 2021. This Plan emphasises the importance of fostering a thriving economy while protecting and enhancing our natural environment. **GOALS** **1. Sustainable practices to protect our natural environment and outdoor lifestyles** Move together for a sustainable future **2. Welcomes, celebrate, and supports everyone** Embrace and celebrate local history, cultural heritage and diversity. **3. Vibrant places and spaces** Embrace and value our creative arts. Support diversified industry and thriving businesses **4. Connected community through reliable and safe infrastructure networks** Provide integrated and active transport networks to enable a connected and accessible Eurobodalla. Enhance connectivity through improved telecommunications.

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<tr><td></td><td>5. Engaged community with progressive leadership
Acknowledge our shared responsibility through an informed community.

Measurement:
The Integrated Planning and Reporting framework requires progress in implementing
the Community Strategic Plan to be measured and reported to the community. Community
indicators and performance measures will help assess progress toward achieving the
long-term vision and goals. They are not measures of Council's performance, but a
gauge for stakeholders to determine whether the community is moving closer to, or further
away from, the vision.
Partnership:
Aligning relevant strategies will create synergy that contributes to successful outcomes. Many of the goals outlined in the CSP align with the:
• South East and Tablelands Regional Plan 2036
• Canberra Region Joint Organisation Strategic Priorities 2021-2024
• Tilba District Strategic Plan</td></tr>
<tr><td>2022 – 2026 Delivery Program & 2022 - 2023 Operational Plan (related to CSP)</td><td>The Delivery Program translates community aspirations, detailed in the Community Strategic Plan, into activities. It is Council's response and commitment to the community, outlining what it intends to deliver during its term of office to achieve the Community Strategic goals. It is the point of reference for the functions of Council and all principal plans, strategies, and major projects.
The Operational Plan further breaks down the activities into more specific annual actions. It identifies individual projects and programs that will be undertaken in the year to achieve the Activities in the Delivery Program and has a strong focus on sustainability and resilience. The Operational Plan is supported by a detailed budget, capital program and revenue policy which sets out rates, fees and charges</td></tr>
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	for the year. **Key visitor economy related strategies & measures** **Strategy 2.1: Strengthen community spirit through community development initiatives** • Provide volunteering opportunities through various programs and promotion of the Eurobodalla Volunteer Guide **Strategy 3.2 Support diversified industry and thriving businesses** • Work in partnership with chambers of commerce and other industry leaders • Provide support, promotion and networking opportunities to local tourism operators • Support the local tourism industry to be viable year-round and encourage development of sustainable visitor experiences as guided by the Destination Action Plan, Nature Based Tourism study, Wayfinding and Tourism Signage Strategy and Events Strategy • Develop the Mogo Adventure Trail Hub guided by the Nature Based Tourism study • Develop the Bateman Bay Coastal Headlands Walking Trail and Observation Point guided by the Masterplan • Encourage a variety of quality events to drive economic development as guided by the Events Strategy • Develop new event 'stay and play' experiences and encourage off-peak and shoulder season events • Facilitate and promote a sustainable events calendar
Eurobodalla Destination Brand (related documents)	**2022 BRAND STYLE GUIDE** **Positioning:** *Freedom to unleash your natural spirit* **Tone of voice and Imagery** **Immersive:** We're not spectators, we're participants, driven by a passion to dive in and get involved with nature.

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	Authentic: We're all about real experiences, interacting with the environment and making the most out of life. **Youthful and energetic:** We will make you feel young again, yet fulfilled and enriched at the same time **MOGO TRAILS STYLE GUIDE** **Positioning:** *THE PERFECT BIKE & BEACH GETAWAY LOCATION* **OPERATIONAL MARKETING PLAN 2022 -2023** The operational marketing plan facilitates the overarching objectives stated in the current Eurobodalla Destination Action Plan (EDAP)...*"The aim of the Eurobodalla Destination Action Plan is to strengthen the Eurobodalla visitor economy by increasing visitor expenditure and overnight visitor stays and encouraging visitor dispersal throughout the year and across the Shire."* The primary objective is to grow the visitor economy of Eurobodalla in a sustainable way. **In the wake of bushfires, floods and pandemic, the tourism industry has experienced record growth in visitation, spend and occupancy since 2020. In 2022 - 23 it is likely that the industry will experience some decline** as domestic and international travellers see a return to pre 2020 conditions and previously restricted destinations become available to the market. The **key objective**, therefore, is for our marketing activities to minimise this expected decline in growth. This can be achieved by attracting a higher yielding visitor, increasing length of stay, encouraging greater visitor dispersal, and making visitors aware of a broader range of tourism attractions, products, and services. This will be actioned by focusing our marketing activities on the established target markets nominated in the EDAP, and by seeking opportunities to engage new markets and specific lifestyle segments of existing markets. **Geographic Markets:** • Canberra/ACT • Sydney and surrounds • Regional NSW

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	• Regional Victoria • South Coast NSW **Demographic Markets:** • Families with children • Over 55's • Younger couples & singles, no children **Experience Sectors:** • Nature, leisure, and recreation experience seekers • Food lovers • Events **Campaigns:** The plan will be actioned through seasonal and "always on" campaigns that focus on: • Creating and building awareness for Eurobodalla as a holiday destination • Visitor dispersal within the destination • Creating awareness of tourism attractions, products, and services • Targeting lifestyle segments within and across the target markets • Major Events • Increasing length of stay and visitor spend **Marketing Channels** Digital marketing through Eurobodalla Coast Tourism owned and paid media channels has become the preferred marketing method mainly due to: • Ability to have total and immediate **control** over advertising and messaging. This is an approach adopted in the wake of marketing challenges faced through 2019-20 bushfires and subsequent years of pandemic lockdowns, restrictions, and related impacts, and a prolonged period of detrimental weather patterns impacting domestic travel in general. • **Access to primary data** and insights to more effectively and accurately analyse and measure results. • **Cost effectiveness.** Ability to target market sectors more accurately with far greater reach than traditional media channels. Travel consumer

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	trends toward online research, planning and buying behaviours ○ **Owned:** Social platforms - Instagram (@eurobodalla), Facebook (@eurobdalla),YouTube (eurobodallatv) eurobodalla.com.au and its sub domains (Explore Eurobodalla and What's On), Newsletters ○ **Paid:** Social and other paid digital display ads ○ Influencers and paid PR Google Ads Print and other traditional media ○ **Budget:** $180,000 has been allocated from the tourism marketing budget to execute the operational plan and associated activities. The budget will be shared across three seasonal campaigns and will cover the costs of: • Content creation and acquisition • Paid advertising • PR opportunities • Competitions and prizes • Co-op and grant opportunities (if available) **Measuring results and reporting** Primary data accessed through Spendmapp and Localis will be used to review the effectiveness of campaigns and enable real time insights into marketing activities. These platforms will help identify opportunities to engage consumers based on behavioural evidence from spending and location data. The tools will also be instrumental in gauging the actual impact and effectiveness of campaigns across multiple metrics. **Primary data tools:** • **Localis** (behavioural tracking of source markets, dispersal, booking trends) • **Spendmapp** (visitor spend activity) • **Google Analytics** (analysis of traffic sources and user behaviours on web assets)

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Google Ads (results of paid search ads)
Social platform insights (impressions, reach, engagement, shares, click through rate etc)

2022-23 Marketing Campaigns
The operational plan will focus on three major seasonal campaigns and supported by ongoing "Always On" promotional activity. The 3 seasonal major campaign pieces are:
1. Our Little Secret (Winter/Spring - May to September)
2. Our Happy Place (Spring/ Summer - October to Jan)
3. Saved You A... (Late Summer/Autumn - Feb to April)

Always On campaigns:
Baseline marketing activity will be integrated into the above campaigns as an ‘Always On' component. Always on campaigns also provide a source of marketing messages during campaign "down-time" (e.g., during summer school holidays or conditions where conversion marketing may be perceived as detrimental to the Eurobodalla brand).
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<tr><td>2019 Visitor Servicing Review</td><td>
The context for change
Visitor information is the bridge between creating visitor demand and delivering a positive visitor experience.

Priority action from 2017 DMP
Tourism Research Australia data indicates that less than 5% of visitors go to VICs in the region (and nationally)
New opportunities offered through technology

Key Objectives:

Community: Sharing the visitor servicing responsibilities with local business - tourism is everyone’s business
Visitors: Getting the right information to the right people, in the right format, at the right time.

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	• **Commercial:** Increasing visitor yield. Persuading our visitors to stay longer and disperse further. **Strategic Overview:** Develop new ways to reach more visitors, more effectively, more often. Instead of making visitors go to the information (VIC's), bring the information to the visitors. **Drive New Business:** • Remarkable content • Multichannel distribution • VFR program – engage and involve your community • Destination campaign **Reach More Visitors** • Business Partnership Model • In-Destination Specialists (MCC) • In-Destination Experts (local ambassadors) • Integrate digital technology (eg QR & AR) & services (eg WiFi)
Eurobodalla Events Strategy 2019 – 2024	**Background** Eurobodalla events calendar currently comprises a suite of tourism and community events that celebrate the unique attributes of Eurobodalla and create a sense of fun and vibrancy for residents and visitors. These events are organised by professional and experienced private sector event managers through to local community organisations, and passionate individuals. A growing reputation for oysters and other local harvests, a diverse arts scene, fishing, and adventure sports such as mountain biking have been the impetus for the growth of significant events such as the Narooma Oyster Festival and River of Art, and many home-grown tourism and community events. Proximity to Canberra and Sydney also make Eurobodalla attractive for state and national sporting organisations and events seeking affordable destinations that offer quality infrastructure in a stunning location. **Vision:** To establish a balanced and sustainable portfolio of vibrant tourism and community events that celebrate and generate awareness of the unique

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	attributes of Eurobodalla, creating compelling reasons for visitors and residents to visit, explore and return to the area. **Goals:** a. Create a sustainable calendar of events across the year. b. Grow and support two Hallmark Events that showcase Eurobodalla's unique qualities. c. Activate Eurobodalla as a Shire-wide event experience d. Establish a robust and consistent event evaluation framework (refer details pp19 & 20). *The Strategy will be reviewed annually. The review will include the event assessment process, strategies, and actions, with updates made as required to ensure the Strategy remains on target in pursuit of the vision and goals.* (Refer Appendix 2 – Event assessment framework) **Event Categories** **Tier 1: Hallmark Events** Drive economic development of Eurobodalla, have the potential to be nationally significant events which attract interstate visitation, and generate awareness for Eurobodalla in line with the destination brand positioning. **These events:** - are distinctly Eurobodalla and celebrate the Shire's competitive advantages - are usually recurring and multiple days - are Shire wide - have a well-structured and organised event management committee or company with access to operational and marketing expertise - take place outside the peak tourism period - draw at least 60% of attendees from outside the Shire - generate triple bottom line benefits

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	- attract national and international media coverage - create partnerships with local businesses to ensure maximum spend locally - generate significant value and add to local businesses - engage with the local tourism industry with a view to building partnerships that drive visitation - generate or self-fund a considerable portion of the event - build Eurobodalla brand awareness and deliver enormous value as destination marketing tools - have strategies for measuring visitation and the visitor experience - have a sound environmental policy - foster community pride - have a robust post event review and analysis process. **Tier 2: Destination Events** Drive economic development of Eurobodalla through a significant leisure event. Visitation is primarily from outside the Shire. **Tier 3: Sporting Events** **Tier 4: Community Events**
FOOD TRAILS	**1. THE EUROBODALLA SOUTH COAST FOOD TRAIL** Eurobodalla has attracted a diverse and growing community of food producers. Built on the back of agri and aquaculture, the region has well evolved, but still authentically artisan, dairy and oyster growing industries **2. The Gourmet Coast Trail** Stretching from Batemans Bay in the north to Eden in the south. Tail itineraries https://gourmetcoasttrail.com.au **3. South Coast Oyster Trail** Eurobodalla area is part of Australia's Oyster Coast with the world's finest oysters available fresh from the farm gate.

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	Australia's Oyster Coast is home to three species of premium oysters, each with its own texture and palate: • From the deep, fast-flowing **Clyde** • From the shallower **Narooma**, • From **Tuross Lake**, they're "super creamy and fruity https://www.southcoasttravelguide.com.au/oyster-trail **4. South Coast Foodie Trail (Shoalhaven)** https://www.shoalhaven.com/foodie/
Batemans Bay Waterfront Master Plan and Activation Strategy	The Batemans Bav Waterfront Master Plan and Activation Strategy is a flagship project for the Council that seeks to awaken the community to the opportunities of an activated waterfront. Shared drivers for change include healthy living, residential and commercial development, improved environmental quality, active transport and climate hazard adaptation, all within the framework of a sustainable economy in support of improved lifestyles for residents. It will provide a framework for on-going decision making. Having an agreed Master Plan will enable Council to: **a.** assess proposals for development and/or kev management decisions about the waterfront **b.** formulate a long-term budget and funding strategy to upgrade and activate the waterfront **c**. seek resource and funding assistance to instigate he recommended actions **d.** consult with key stakeholders and the community about the planning, development and management of the waterfront The Action Plan is a guide for the long-term staging and implementation of the Batemans Bay Waterfront Master Plan and Activation Strategies. Recommended actions are listed under three stages: **Stage 1** Gain Approval and Initiate Support Mechanisms **Stage 2** Design, Cost and Feasibility Assessments **Stage** 3 Source Funding

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	The Action Plan lists the recommended actions for each of these stages and indicates the responsibilities and indicative frame for their implementation based on short-term, medium-term and long-term.
Eurobodalla Nature-based Tourism Feasibility Study May 2019	This Plan delivers on an Action prioritised in the Eurobodalla Destination Action Plan 2018-2021, ‘***to develop a strategic and coordinated approach to tourism product and experience development to position Eurobodalla as an iconic nature-based tourism and regional food destination on the South Coast.’*** Other State and regional plans and studies have also noted the potential for Eurobodalla to become a stronger nature-based tourism destination. Whilst Eurobodalla has the natural assets to become an outstanding nature-based tourism destination, there is also significant competition up and down the Eastern seaboard of Australia and coordinated work is essential if nature-based tourism is to deliver on desired economic, social and environmental outcomes. The overall desired outcome from this project is to identify catalyst and shovel-ready nature-based tourism projects that can help to grow and diversify the economy and create sustainable operations. **Category 1 Market Ready Projects** There is one leading market- ready project with the potential to be a significant visitor experience with the capacity to attract new people to Eurobodalla and also help re-position visitor's perception of the area - Murramarang South Coast Walk - ensuring the Shire can grow overnight visitation and visitor expenditure, as well as help reposition the Shire in the visitor's mindset through this multi-dav walk. **Category 2 Mid to Long Term Sustainability Projects** There are **three** projects with the potential to strengthen the long-term sustainability of the local tourism industry, to ensure diversity and resilience: **1. Micro-infrastructure projects** include defining the best range of walk experiences, upgrading the best lookouts and improving access to the waterways – highlights the many and diverse smaller scale

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	infrastructure needs of the Shire that will be enablers for visitors (and operators) to engage in nature-based tourism. A considerable number of these require cross-agency decisions in terms of needs and priorities. **2. Maintain Montague Island's Appeal** a well-known and appealing visitor location that has many experiences, both natural and cultural. However, the long term sustainability of environmental and cultural aspects, new aboriginal opportunities and multiple agency permit processes means a holistic analysis of sustainable development as a contemporary visitor experience is needed. **3. Mogo Adventure Hub** an ideal central location for many formal and informal trails and tracks, for bike riding, walking, trail riding etc., but some prioritised improvement would substantively increase their visitor appeal. **Category 3 Mid Term** Leveraging Projects. There are two projects where nature-based tourism can be leveraged as an explicit desired outcome to existing budgeted projects to lift the profile of nature-based tourism across Eurobodalla: **1. Reimagine and Activate the Town Waterfronts** Helping refocus Batemans Bay around the highly appealing natural feature of its waterway as well as enabling small businesses to grow. The benefits arising from activation of the waterfront precinct are also relevant for the towns of Narooma and Moruva. **2. Drive Visitation Growth with the Batemans Bay Coastal Headlands Walking Trail** ensuring this recreational trail will also be appealing for visitors and improve the interpretation of the area encouraging visitors to stav longer and explore. Recent Funding approval for the design and construction of Observation Point Lookout allows this component of the overall project to be considered market ready. **Category 4 Longer Term Positioning Projects.** There are two proiects with the potential to strengthen the key points of difference distinguishing Eurobodalla from other coastal destinations in the longer term:

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	1. Harness the Potential of the Hinterland the potential to harness the eco-tourism development opportunities at selected locations within the State Forest and National Parks in the longer term. **2. Grow Demand for Aboriginal Cultural Tourism Products.** There is potential for significant growth and unrealised demand in tourism interest for Aboriginal stories of the world's oldest surviving ancient culture that lived sustainably with nature for over 50.000 years. **Support Strategies:** **1. Supporting Existing Tourism Industry Development** A series of actions have been recommended to support the growth of the existing tourism industry as well as new investment. Capacity building of the industry will help 'fast track' private investment. It will assist existing and potential operators to better develop products and experiences that meet existing and future markets. In doing so, it will be aligned with the community aspirations, creating positive social and environmental outcomes as well as economic. From an investor point of view, it will help minimize public perception of red tape and encourage job growth. Key actions are: • a mentoring program • annual nature-based tourism forum • seasonality issues program; and • improved collateral. **2. Building Cooperative Arrangements with Partner Agencies.** This recommendation highlights the cross-agency support and work needed to activate and oversee the implementation of this Plan as well as support broader nature-based tourism projects in the area. Key actions are to develop a Cross-Agency Nature Based Tourism Working Group; and develop High Level Cross-Agency Agreements.
Interpretation Plan: Batemans Bay & Observation Point (V2 July 2021)	WolfPeak Environment and Heritage (WolfPeak) has been engaged by Eurobodalla Shire Council to prepare an Interpretation Plan (IP) for the Bateman Bay Waterfront and Observation Point. The Batemans Bay and Observation Point Interpretation Plan has been developed to support and guide the development and implementation of interpretation within this vibrant coastal destination.

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	The report includes recommendations for the interpretation of the area's varied and significant heritage and cultural values at the Waterfront and Observation Point. It has been developed as an interactive, community-focused process for the communication of commonly shared ideas and values. Ultimately, this includes engaging with visitors, businesses, community groups and community itself. The purpose of this IP is to articulate the natural and cultural heritage values of the area, provide themes and identify interpretation opportunities, both existing and new and provide an opportunity for visitors and local community to form connections, and engage with, the place through the purposeful delivery of stories directly relevant to the area. **Provide** an opportunity for visitors and local community to form connections, and engage with, the place through the purposeful delivery of stories directly relevant to the area **Provide** opportunities for reflection of the site's past using interpretive elements embedded into spaces and landscapes without overwhelming areas visually or physically **Showcase** the place's natural, historical and cultural values to encourage tourism and commercial partners to interact with the core of the business district. **BATEMANS BAY WATERFRONT RECOMMENDATIONS INCLUDE:** **Install** new signage **Activate** the walkway by creating the "Living places, connecting people" art project to revitalise the area. This will be the ongoing, and focus, of the collaboration between all aspects of community to complete. **OBSERVATION POINT RECOMMENDATIONS INCLUDE:** **Landscaping** - use appropriate native plants, together with a limited number of seating blocks. Incorporate **place names** in Durga language throughout the site, such as arrow indicators on signage to identify key landforms within the view corridors.

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	Retro fit artwork, sculptural designs or panels into the landscape to capture the cultural elements of the interpretation. **Signage** - implement new signage at the entrance, western viewing area, pathway intersection, and eastern viewing area balustrades. **Update website** resources to showcase new works and destination experiences. **Interpreting for visitors** It is reasonable to assume that visitors to the Batemans Bay area, including the Waterfront and Observation Point, will engage with a mixture of experiences. These visitors may be seeking nature and the environment, retail, recreation, history, heritage, or cultural experiences. The interpretation provided should allow the flexibility of visitor engagement at a range of levels and should not assume that heritage-based information is the only type being sort.
Eurobodalla Shire Council Aboriginal Action Plan 2020-2024	**Focus Area 2:** Respect **Objectives:** • Promote and celebrate Aboriginal Community and Culture • Programs that showcase and develop Aboriginal art and artists • Work in partnership with local Aboriginal community to develop cultural tourism • Council priorities the application of Aboriginal names and words for naming new roads, services, or places • Provide opportunities for Aboriginal employment, education, and engagement • Work with local community members to build Aboriginal and cultural businesses
Eurobodalla Wayfinding Strategy (2018)	Eurobodalla Shire Council (Council) commissioned tourism signage consultancy Wayfound to develop a whole of destination integrated tourism wayfinding and signage strategy. The purpose of the Strategy is to ensure that current and future signage facilitates safe and positive journeys and enhances the dispersal of visitors and their connection with the people, the place and the stories of Eurobodalla.

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	The Strategy forms part of a suite of initiatives by Council to encourage visitors to stop, extend their length of stay and increase expenditure in the Eurobodalla. The Eurobodalla Destination Action Plan 2018-2021 (EDAP), set an aim of increasing visitor expenditure and overnight visitor stays by **25% by 2021,** and contains several priority actions relevant to the development of this Strategy. **Priority 4. Destination Investment and Development-** Work with relevant Council departments to improve the visual appeal of towns and villages through ongoing beautification works (e.g. Streetscapes, gateway entrances, wayfinding signage). **Priority 7. Destination Marketing - Action 7.5.** Develop a Destination Eurobodalla Brand Style Guide for local operators and businesses to ensure the consistent delivery of the brand marketing a materials,(electronic, print-based, signage) that aligns with findings of the Brand Review process. **Priority 8. Visitor Information Services Action 8.4** Prepare a Destination Eurobodalla Visitor Signage Strategy that aligns with findings of the Brand Review (Action 7.3) to create distinctive and innovative signage and visitor information displays at key tourism attractions; key transport hubs & gateway locations; and promotes diversity of experiences within the destination.
Mogo Trails Master Plan https://www.esc.nsw.gov.au/council/major-projects/current-projects/planning-recreation-business/mogo-adventure-trail-hub-strategy	Nature-based tourism, such as adventure trail experiences, is a rapidly growing industry in NSW. The 2017 Eurobodalla Destination Action Plan highlighted the fact that for the year ending September 2017, NSW received nearly 28.3 million international and domestic overnight nature-based visitors who spent almost 129 million nights in NSW. Nature-based visitors accounted for 84% of international visitors to NSW, 37% of domestic overnight visitors and 23% of day trip visitors.Eurobodalla is renowned for its natural environment. The region has a number of trails that weave through bushland, creeks, wetlands and rainforests. These informal trails offer potential to develop adventure trail tourism The master plan builds upon the draft trail's strategy prepared by TRC, which provided a high-level strategy for developing an adventure trails network in the Mogo area. The project will be land managed by Forestry Corporation of New South Wales (FCNSW), the agency manages

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	the vast majority of the land in the region. Trail heads are planned across the network at four locations: • Curtis Road • Mogo • Maulbrooks Road • Botanic Gardens The goal of the new trail developments proposed is to achieve the following high-level strategic objectives; • Maximise visitation potential across a range of rider markets • Cater to the wants and needs of local riders • Maximise economic development and business opportunities • Minimise implementation costs and complexity • Minimise operational costs and complexity • Consider and allow for development staging opportunities There are a number of new trail and infrastructure developments proposed, including 125.6km of new trails and a major entry hub. The project also proposes to formalise and improve a network of approximately 30km of existing trails. **Benefits to the community:** • increase in tourism-related business opportunities, particularly in off peak times • increase in overnight stays • improved reputation for Mogo (and the Eurobodalla) as a tourist destination with many diverse experiences • increased opportunity for tourists and locals alike to immerse themselves in nature. The Mogo project will have a significant impact on the local and regional economy, with an anticipated year-one total ride days/visitors of 45,000, and a year-one indirect economic impact of over $11.8m. The project will create approximately 10 jobs during construction and is expected to create 20FTE new jobs once

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	operational, across an anticipated 6+ new businesses. **Funding:** The project will be built using a $5 million grant from the NSW and Australian governments' Bushfire Local Economic Recovery Fund and a $3 million grant from the NSW Government's Growing Local Economies Fund. **Timeframe:** April 2019 - June 2023 **Project Updates (January 2023)** • A major project milestone has been reached allowing construction crews to get started. The Review of Environmental Factors was approved this week by Forestry Corporation NSW. • The Next Level MTB team are arriving to begin construction from mid-January. Council asks interested community members to respect all safety signage and keep clear of work crews. Please stay off all freshly built trails until officially opened. All project enquires should be directed to Council. • Mogo Trails is due for completion mid-2024
Mogo Village Place Activation https://www.esc.nsw.gov.au/__data/assets/pdf_file/0008/219077/Mogo-Village-Place-Activation-Plan.pdf	Mogo was devastated by bushfires in January 2020, resulting in significant impacts to property with the loss of homes and businesses in the town and surrounding area. Following on from the bushfire recovery efforts, the Mogo Village Place Activation Plan (the Plan) was developed. The Plan focuses on the opportunities to further activate the local economy, strengthen community resilience and reinforce Mogo as a key destination after the 2019/20 bushfires. Council and Ethos Urban have undertaken an extensive consultation process with the local Mogo community to ensure the Plan is informed by community aspirations and priorities. The Plan is intended to be a dynamic document that can be adjusted over time in tandem with the community. Through aligning multiple projects underway and building upon the opportunities of transformative projects such as the Mogo Trails, the Plan establishes clear actions and projects that will activate the local economy, strengthen community resilience and reinforce Mogo as a key destination. The region has a strong bushland and coastal heritage and Aboriginal culture. Protecting and

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	enhancing the natural environment to ensure ecosystems remain resilient as well as continuing to provide cultural experiences that attract residents and visitors will be vital to the success of Mogo. Key objectives include: • Bushfire recovery resilience • Tourism generation and diversifying the economy • Unlocking investment
The Tilba District	**The Tilba District Strategic Plan** This project will develop a dedicated strategy specifically for Tilba Tilba, Central Tilba and Mystery Bay. The plan includes the community living within the Tilba District between the three bridges at Akolele. Dianams Creek and Corunna - including Mystery Bay and out to Artmitage Road on Gulaga Mountain. The community identified the need for a comprehensive strategic to ensure that our communities remain attractive to live in, work in, and visit for many years to come. The project will create a strategic plan or roadmap for the Tilba District, tailored to the unique needs of the area, as well as responsive to the growing threat of climate change. The strategic plan includes in-depth research into what makes the Tilba District unique, in order to ensure the charming and intrinsic community character is preserved and amplified. The project will be led by Tilba District Chamber of Commerce on behalf of the community. This is a Bushfire Community Recovery and Resilience Project, funded through the joint Commonwealth/State Disaster Recovery Funding Arrangements. **Biosphere Reserve nomination** When the Tilba District Chamber of Commerce undertook community consultation last year as part of a Strategic Plan for the area, there was strong community concern for the protection and enhancement of the natural environment of the Tilba District. One key idea is to explore having the area declared as a Biosphere Reserve. Biosphere Reserves are UNESCO-endorsed areas of terrestrial, marine and coastal ecosystems managed with the aim of balancing biodiversity, conservation and the sustainable use of natural resources.

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	The aim of a Biosphere Reserve is to safeguard natural ecosystems and biodiversity, as well as to improve human livelihoods and protect ecosystems managed for human use. The reserves promote environmentally sustainable economic development which is socially and culturally appropriate. Refer above to National programs for more information on Biosphere Reserves in Australia.