Shoalhaven
SOUTH COAST - NSW

MANY EXPERIENCES - ONE DESTINATION

2018 - 2023

Destination Management Plan

prepared July 2018

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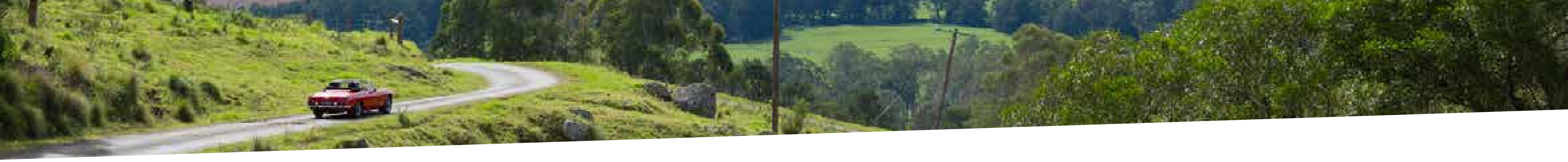
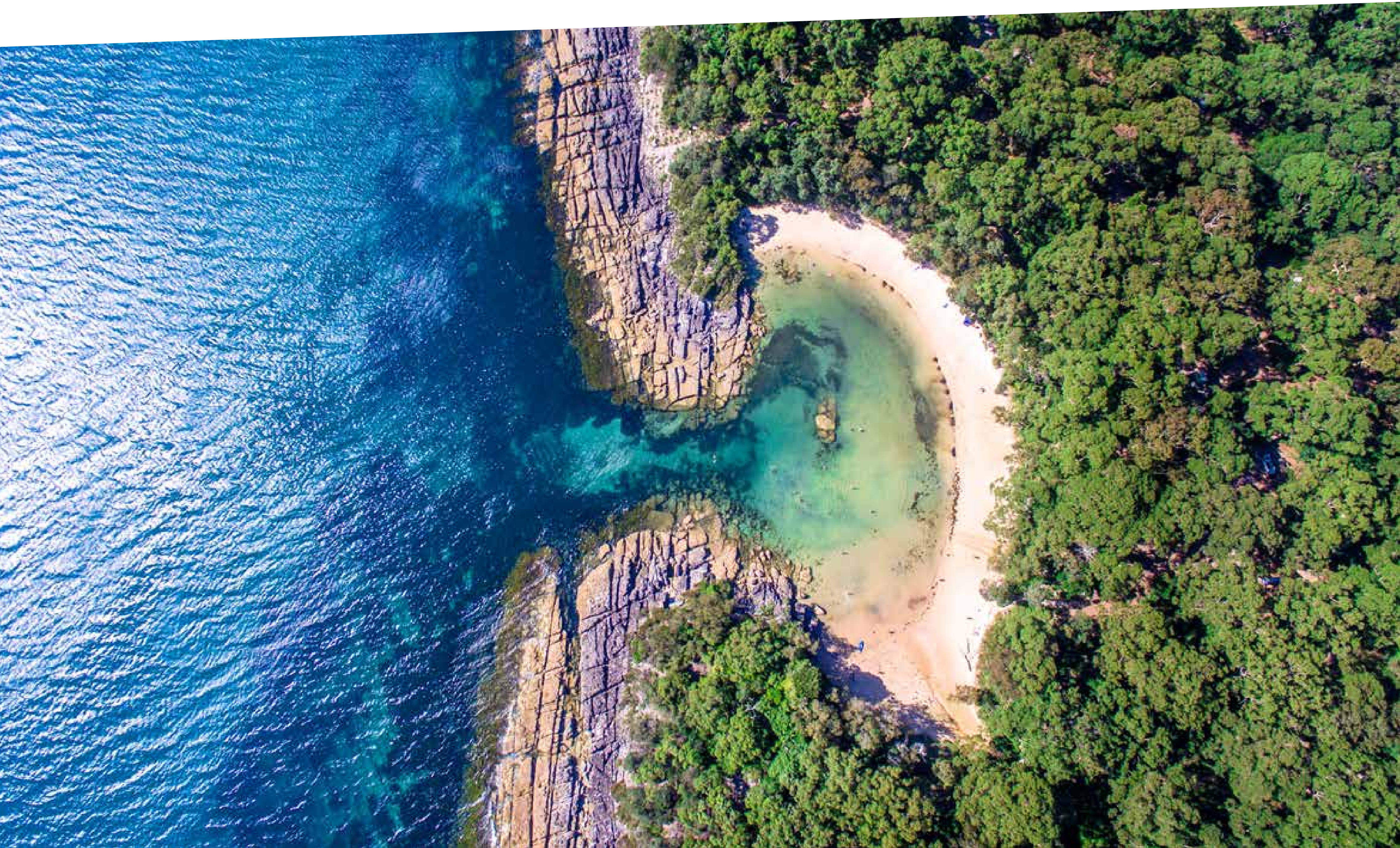
Contents

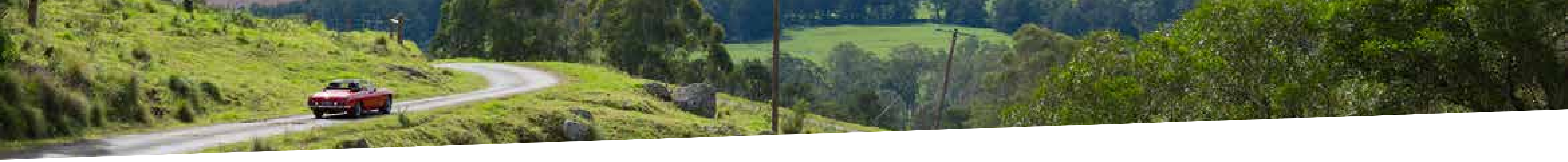


Shoalhaven

SOUTH COAST - NSW

Executive Summary





The Shoalhaven Destination Management Plan (DMP) is a strategic document that prioritises key focus areas and actions.

The Shoalhaven region is famous for white sand beaches, world class scenery and friendly villages. The region is only two hours from Sydney and Canberra.

The Shoalhaven region is well placed to continue to experience strong tourism growth. It is currently the most visited Local Government Area outside of the Sydney CBD. Visitors are a significant contributor to the local economy, adding $852 million annually and supporting an estimated 5,000+ jobs across the region.

Tourism is considered one of the key industries in the Shoalhaven economy and a continued commitment to the strategic focus areas will be critical to ensure sustainable visitation growth continues in the coming years.

The vision for tourism in the Shoalhaven region is;

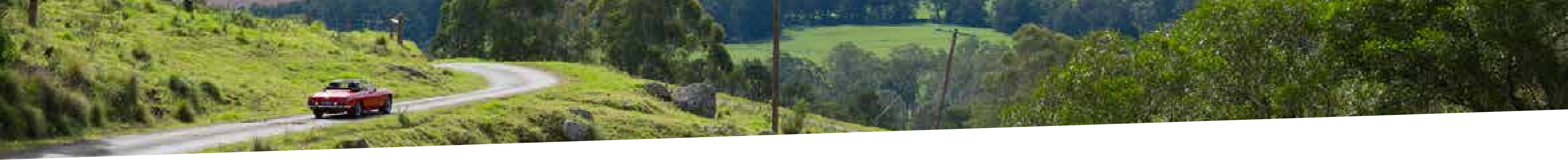
> "To be recognised as a year-round destination, valued for its quality environment and visitor experiences. A strong and vibrant tourism industry will be built on a diverse asset base that contributes to employment, economic benefit and the protection and enhancement of Shoalhaven's natural environment."

There are five key strategic focus areas identified in the DMP, they include;

1. Destination management
2. Destination marketing
3. Events
4. Local industry and advocacy
5. Infrastructure and investment
6. Visitor services

Each of the focus areas take into consideration current and future visitor demands as well as the role tourism plays in the development of the Shoalhaven.

A key feature of the Destination Management focus area is a recently developed model to monitor and adaptively manage tourism to be more sustainable. The Shoalhaven 360 Model will be a key element in planning for the continued success of the industry, ensuring that the four pillars of successful tourism (Community, Visitor Experience, Economy and Environment) are across all focus areas. The model will be in place for the lifetime of this DMP and beyond, creating a living, constantly adapting plan that keeps the health of tourism in Shoalhaven in check.



1.1. Key Destination Footprint

This DMP applies to the Shoalhaven Local Government Area, which is presented in Figure 1.1.

The LGA is broken up into seven tourism precincts. Table 1.1 presents the seven precincts and the key townships and tourism areas within them. The region has 49 towns and villages, 109 beaches and approximately 75% of the LGA is National parks and State forests.

Figure 1.1 This DMP applies to the Shoalhaven Local Government Area (area represented in white)

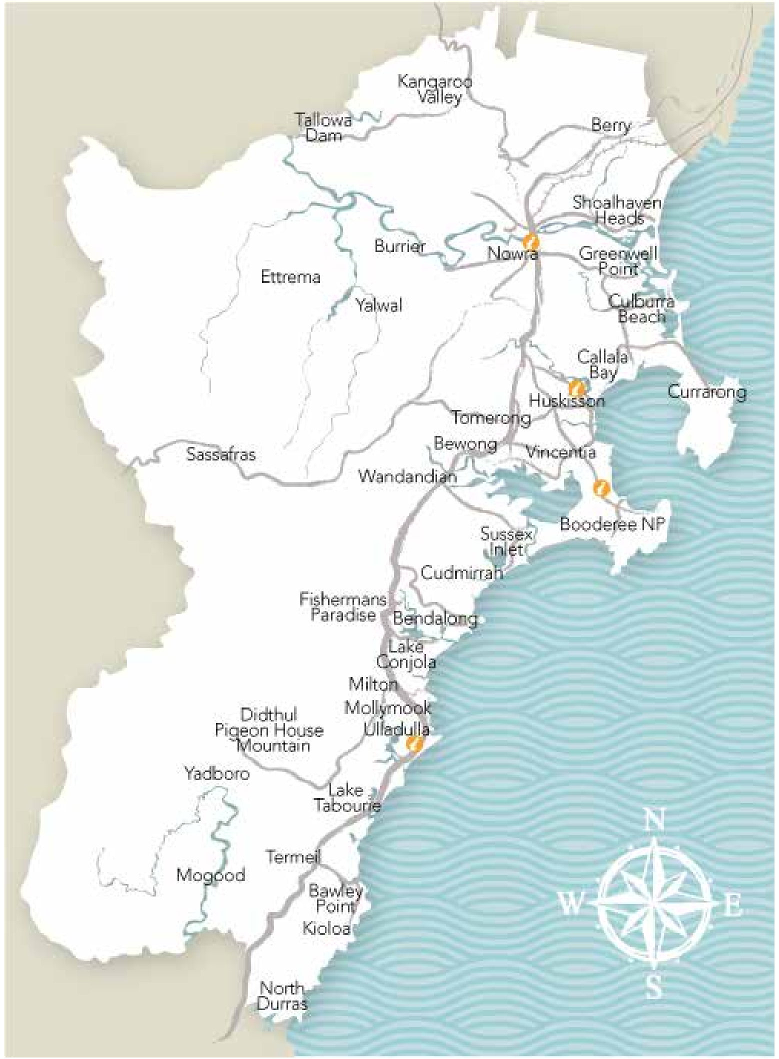


Table 1.1 Seven precincts and the key townships and tourism areas within them

Tourism Precincts	Sub-areas	Townships and tourism areas
North		Berry, Kangaroo Valley, Shoalhaven Heads & Coolangatta
Nowra & Surrounds		Nowra, Bomaderry, Cambewarra Village, Terara & Numbaa, Yerriyong & Burrier & Yalwal
Central		Greenwell Point, Orient Point, Culburra Beach, Currarong, Callala Bay, Callala Beach & Myola
Bay & Basin	Jervis Bay	Booderee National Park, Huskisson, Woollamia, Vincentia & Hyams Beach
	Basin	Erowal Bay, Sanctuary Point, St Georges Basin & Basin View
	Rural	Tomerong, Bewong & Wandandian
Sussex Inlet		Sussex Inlet, Swanhaven, Cudmirrah & Berrara
Ulladulla & District	Bendalong Area	Bendalong, Manyana, Cunjurong & Berringer Lake
	Conjola Area	Fishermans Paradise, Yatte Yattah & Lake Conjola
	Milton & surrounds	Milton, Mollymook, Narrawallee & Ulladulla
	Southern District	Kings Point, Burrill Lake, Dolphin Point & Lake Tabourie
Bawley Coast		Bawley Point, Kioloa, Durras North, Depot Beach, Meroo & Murramarang National Parks, Upper Clyde River and surrounding State Forests

1.2. Key Stakeholders

Day to day destination management planning is undertaken by Shoalhaven Tourism, which is a service unit within the Shoalhaven City Council's Finance, Corporate and Community Services Group (see Figure 1.2).

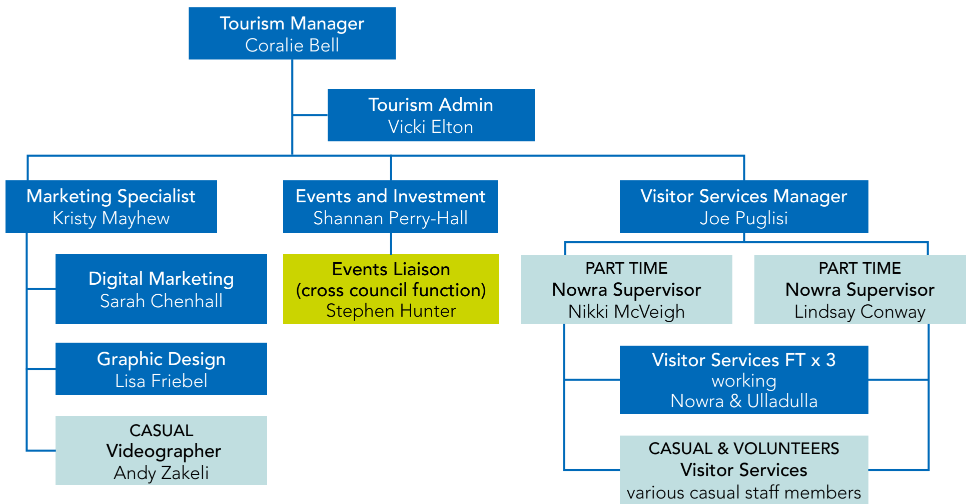
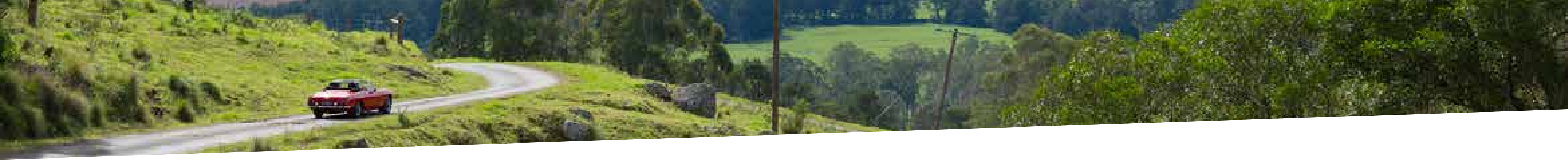


Figure 1.2 Structure of Shoalhaven Tourism, the day to day unit responsible for destination management in the Shoalhaven LGA



Critical to helping Shoalhaven Tourism review performance, set direction and interact with tourism stakeholders, is the Sustainable Tourism Advisory Group (STAG). The STAG was established and is administered by Shoalhaven Tourism, and contains representatives from the local tourism sector. The STAG is fundamental to reviewing, refining and approving the Destination Management Plan and the ongoing management and development of the 360 Model.

Key stakeholders involved in destination management can be segmented into external (Figure 1.3) and internal (Figure 1.4).

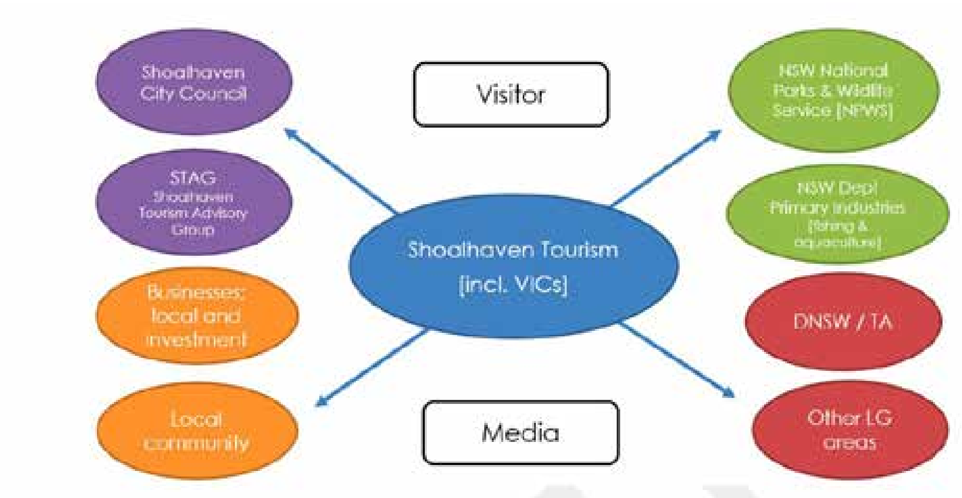


Figure 1.3 External stakeholders involved in destination management for Shoalhaven

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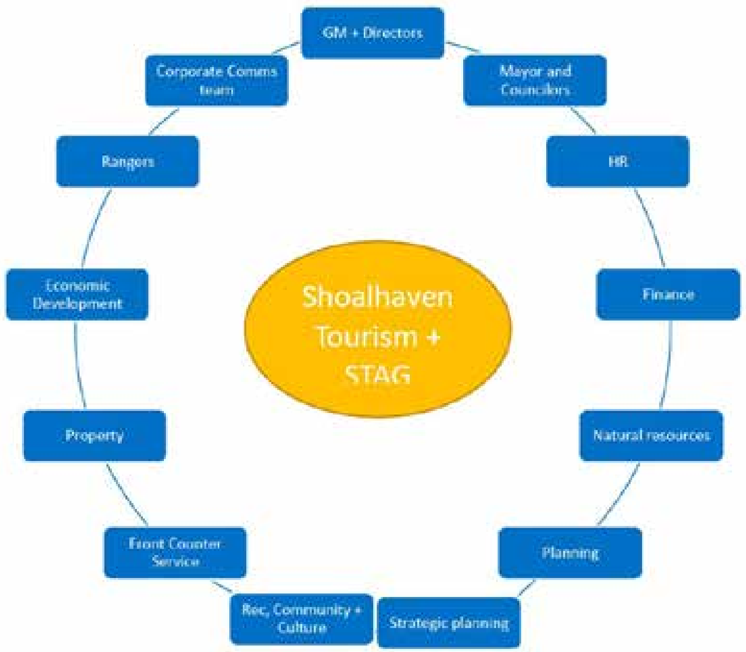


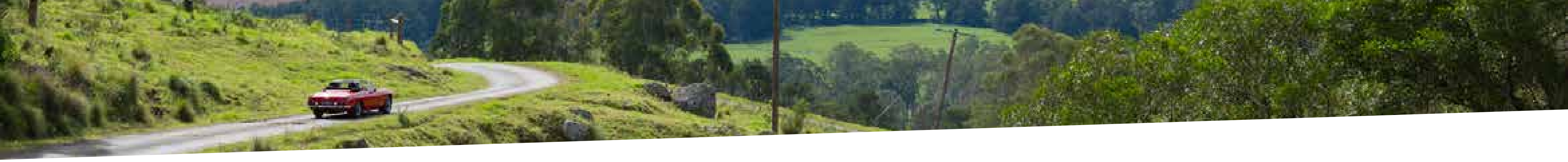
Figure 1.4 Internal stakeholders (work with Shoalhaven City Council) involved in destination management for Shoalhaven

1.3. Key Data and Documents

Table 1.2 presents a list of research used to develop this Destination Management Plan. There was a shortage of tourism research of specific psychographic markets visiting the region, and the unmet needs and wants of visitors to the region. There is insufficient budget for this research to be conducted as frequently as needed. Shoalhaven Tourism uses some of its annual budget to further analyse NVS and IVS data down to the LGA level, which provides more useful insights than the regional data. Additionally, collaboration with other LGAs, both locally and throughout regional Australia provides critical insight, opportunities for skills sharing, and plays an important part in developing ongoing best practice.

Table 1.2 Research used to develop this Destination Management Plan

Organisation	Research and monitoring data
Tourism Research Australia	https://www.tra.gov.au/
Australia Coastal Councils	Survey of impacts of Airbnb and similar online platforms
Australian Tourism Regional Network	Local Government Spend on Tourism 2016
Australian Bureau of Statistics	2016 Census NSW
Destination NSW	Erowal Bay, Sanctuary Point, St Georges Basin & Basin View
Economic Contribution of Tourism to NSW	Tomerong, Bewong & Wandandian
	Travel to South Coast NSW Snapshot March 2018
	Travel to South Coast Sub-Region Snapshot March 2016
	Shoalhaven Local Government Area Tourist Accommodation Profile Year End June 2016
Deloitte Australia	Tourism and hotel market outlook - Executive summary– for public release – 2017
Caravan and campervan data report 2015 – BDO	Caravan Industry Association of Australia
Ed Steiner	Share Economy Data
Freedom Camping Australia	The camping habits & economic value to 'free camping" travellers – freedom campers – 2017
Omni poll	Shoalhaven brand research data 2015
Roy Morgan Research	Discover your edge, State of the Nation, Spotlight on Tourism, Aug 2015
Shoalhaven City Council	Tourism Operator Survey and report 2015 + 2017
	Various estuary and entrance management plans
Industry provided data	Stayz - Shoalhaven specific data 2016 and 2017; Air BNB regional insights 2018; inside Airbnb report, Shoalhaven specific data provided by Murray Cox
Tourism Research Australia (TRA)	Shoalhaven Visitor Profile and Satisfaction Report 2006
	Domestic Overnight Visitors by origin LGA, five years ending December 2016 (compiled by Peter Valerio)
Shoalhaven Tourism Operators Survey	Industry bi-annual survey, 2015 + 2017
Tourism Strategy Development Services	Shoalhaven Tourism Monitor Year Ending June 2017



Organisation	Research and monitoring data
Social insights and digital data insights	Insights from Shoalhaven.com; Facebook, Instagram and email database engagement.
ID Community Profile	Community statistics, Shoalhaven https://profile.id.com.au/shoalhaven/home
Tourism 10-year forecasts	Prepared by Peter Valerio
IRIS Research 2017	Illawarra Profile
Research insights Visit Canberra	https://tourism.act.gov.au/insights/research/

Table 1.3 presents a list of plans and reports used to develop this Destination Management Plan. It is noted that the visitor economy Industry Action Plan for NSW is currently under review and is expected to be updated and released in late 2018.

Table 1.3 Existing Plans used to develop this Destination Management Plan

Organisation	Strategies/Plans/Research
Australian Government Director of National Parks	Booderee National Park Management Plan 2015 - 2025
Destination NSW	Visitor Economy Industry Action Plan 2012 (currently under review)
	NSW Regional Conferencing Strategy & Action Plan 2017 – 2021
Destination Network Sydney Surrounds South	Sydney Surrounds South Destination Management Plan

Organisation	Strategies/Plans/Research
Marine Parks Authority NSW	Jervis Bay Marine Park: Zoning Plan Review Report 2009
Max and Buddy Consulting	Shoalhaven Walking Study
NSW Environment, Climate Change & Water	Jervis Bay National Park & Woollamia Nature Reserve Plan of Management 2011
Regional Development Australia	Strategic Regional Plan 2013 – 2018 Far South Coast
Shoalhaven City Council	Community Strategic Plan (CSP; 10-year document)
	Delivery Operational Plan (DPOP; yearly plan)
	Shoalhaven Economic Development Strategy 2017 – 2026
	Shoalhaven Tourism Master Plan 2012 – 2017
	Events capacity and capability review
	Digital strategy
South Coast Regional Tourism Organisation	South Coast, NSW – Destination Management Plan (prepared by Jenny Rand and Associates)
SMA Tourism	Audit of implementation of Shoalhaven Tourism Master Plan 2012 – 2017 (Unpublished)
	Shoalhaven 360 – A model to help tourism in the Shoalhaven region be more sustainable
	Final Report 9th July 2018
Visit Canberra	Marketing strategy 2016/17/18
Western Sydney Visitor Economy Strategy	https://www.destinationnsw.com.au/wp-content/uploads/2017/08/Western-Sydney-Executive-Summary.pdf

1.4. Destination Management Planning for Shoalhaven

The previous plan governing destination management planning for Shoalhaven was a Tourism Masterplan for Shoalhaven 2012 – 2017. The Masterplan identified 15 key areas to focus a range of actions on to build and support Shoalhaven over a five-year period. Key areas of focus included:

- Waterways and wharfs
- Walking tracks and trails
- Cycleways and mountain biking
- Roads and traffic
- Economic development
- Vegetation
- Community LED Strategic plans
- VIC's and information access
- Events
- Facilities and amenities
- Recreational activities
- Signage
- DCP's and LEPs
- Marketing
- Relationship building

The Master Plan presented 310 actions across 15 key areas. Shoalhaven Tourism conducted a review across relevant council departments, to identify what should be done with the key priority areas, determining for each key area, whether to identify it as:

- a low priority;
- completed or still a current priority;
- no longer relevant/out of scope;
- no longer able to source funding actions.

The implementation audit and review across council departments were key initial inputs into this Destination Management Plan. Table 1.4 presents an audit of the implementation status of these key areas, many responsibilities sitting with the Asset Management Sections. Table 1.4 indicates that:

- 19 of 310 actions yet to be started;
- 108 of 310 action are currently being implemented or are ongoing;
- 48 of 310 actions are completed; and
- 135 of 310 are classified as low priority, no longer relevant or out of tourism scope and have no budget or funding.

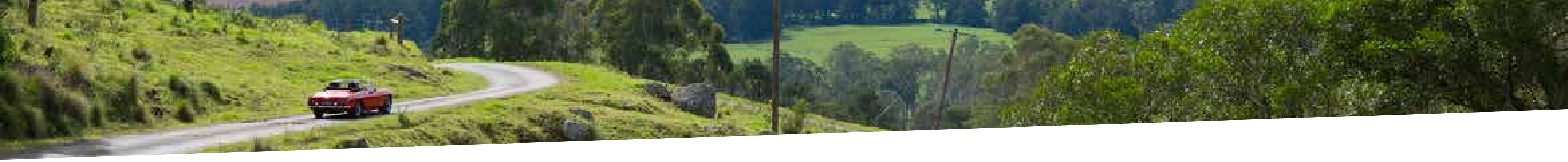


Table 1.4 Implementation status of key recommendations from previous DMP (Master Plan)

	Not started	In progress	Completed	Low priority	No longer relevant	No Budget/ Funding	Total strategies
Waterways & wharfs	3	7	7	3	4	3	27
Walking tracks / trails	0	13	5	4	10	1	33
Cycleway & mountain biking	5	6	0	1	11	1	24
Roads & traffic	0	3	0	0	6	1	10
Economic development	1	5	0	0	1	0	7
Vegetation	1	2	0	0	2	1	6
Community-led strategic plans	1	3	4	0	7	0	15
VIC/ access to information	0	24	16	1	5	1	47
Events	0	11	0	5	2	0	18
Facilities & amenities	0	7	5	6	14	10	42
Recreational activities	3	3	1	1	6	0	14
Signage	0	2	2	0	2	21	27
DCPs and LEPs	0	3	0	0	1	0	4
Marketing	5	11	7	0	3	0	26
Relationship building	0	8	1	0	1	0	10
Total	19	108	48	21	75	39	310

As a response to the Master Plan Audit, the tourism team worked in partnership with STAG to create a Destination Management Operational Plan 2017/18. Created as an interim document, DMOP prioritised any outstanding key actions that were considered still relevant from the Master Plan, with some new identified opportunities. A high-level assessment of the Destination Management Operational Plan was undertaken and found that,

- 80 actions were completed;
- 15 actions were started but not yet completed; and
- three actions have not yet been started.

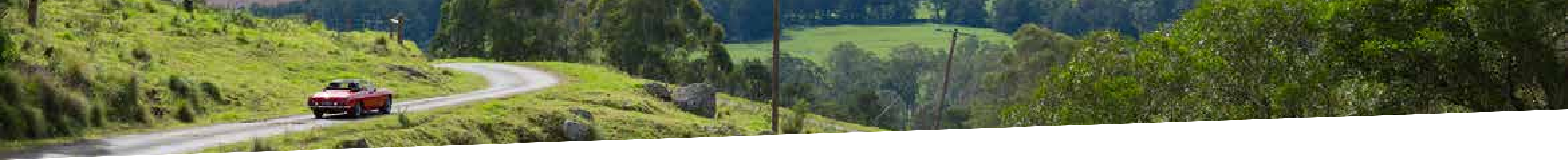
Importantly, there were no priority listing or short, medium and long-term strategies remaining to be commenced.

Consequently, the Destination Management Operational Plan has reached its final stages of usefulness. Further to this, during our consultation we did not detect a desire among stakeholders for another Masterplan. This left the region's tourism stakeholders with the question of what sort of document should be used to capture the tourism planning framework, the remaining initiatives not yet implemented from the Masterplan, and the ongoing initiatives that were day to day destination management.

1.5. Key Assets

Table 1.5 Key assets supporting tourism in Shoalhaven represented in the Australian Tourism Database (ATDW)

Current Situation Audit	Product issues / Demand	Opportunities
Food and Wine: **Registered Business numbers indicate** 253 Cafes and Restaurants 172 Takeaway 72 Catering 37 Taverns and Bars 16 Licenced clubs **Listed on ATDW** 81 listings total 41 Restaurants and Cafes 22 Wineries, Bars, Breweries 18 Cooking schools and produce	Very busy and passionate business operators have little time to network and engage with the broader tourism sector. Food and wine product is difficult to transition across to the ATDW database Food and wine product is disparate across the region and opening hours are an issue in off-season as many close for large timeframes for downtime.	Food and wine is an important pillar for off-season marketing. A growing sector there is a significant number of new and developing businesses gaining profile in the region. A more significant number of food and wine operators engaging with Visit Shoalhaven and ATDW would provide opportunity for greater regional exposure. Provide publicity opportunities to showcase food and wine. Advocate for industry via events and showcases.
Arts and Culture: **Registered Businesses** 447 Musicians, Artists, Performers 7 Performing Arts Venues **- Listed on ATDW** 74 listings total 17 Galleries 27 Tours, schools, workshops 17 Hire	Arts and Culture is a growing sector and a huge driver for tourism world-wide. According to TRA research, cultural tourists are likely to spend more and stay longer. The Shoalhaven has a great selection of product, but it is disparate and not well represented on ATDW or in tourism promotions. Opening hours are varied.	Development of Arts and Culture trails, and associated campaign PR, brochure. Storytelling for cultural product and define unique selling points.



Current Situation Audit	Product issues / Demand	Opportunities
Nature-Based Activity: **- Listed on ATDW** 237 listings total 193 Natural Attractions 27 Tours, schools, workshops 17 Hire	Nature is a huge part of the attraction to the unspoilt Shoalhaven, yet very low yield. Linking nature experiences to other high yield opportunities is critical. There are very few nature-based experience operators that offer engagement with adventure and wildlife.	Product development within National Parks and State Forests. Partner with source market-based tour operators to create higher yield products. Diversify tour operations / communications. Assist in product development. Stimulate demand in adventure category with PR and partnerships.
Aboriginal Product: **26 ATDW listings total** 8 Culture and Tours 3 Art and Galleries 15 Natural Attractions	Aboriginal product and experiences are in high demand for a large array of visitors, especially international. There are operators that need assistance to get to the next level. ATDW has a poor representation of Aboriginal product.	Business development for Aboriginal operators, especially in tours and experiences. Assistance with Digital marketing including ATDW listings. Publicity and content opportunities for well-developed operators to showcase diversity. Collaboration with community to identify ongoing opportunities.
Accommodation: **Registered Businesses** 348 assorted types **Active Airbnb listings** 2,500 **Listed on ATDW** 665 ATDW listings total 320 Holiday House 166 Apartments 28 Hotels / Motel 70 Cabin or Cottage 35 Bed and Breakfast 35 Caravan / Camping Accommodation 10 Resorts / Retreat / Farm Stay 2 Hostel	Without appropriate infrastructure to service visitor accommodation needs there will be a significant negative impact on visitation, reputation and desire to visit. The Shoalhaven is made up of many non-traditional short-term rental properties (Holiday Houses) which currently meet demand during all but peak times however ongoing issues with regulation and compliance both at local and state level are a challenge Varied regulation within accommodation segments is commonly reported as a challenge for the sector as traditional hotel and traditional B&B businesses feel the logistical and financial pressures of additional compliance regulations. Traditional hotel / motel accommodation is, in some cases, tired and run down with several operators struggling to compete in the market and to meet visitor's needs. Availability of suitable development sites and investors as well as the community's appetite for development all have an impact on new accommodation opportunities.	Demand and improved road infrastructure now allows for one or more large scale visitor accommodation developments to be commercially viable. Demand for high end eco style accommodation (including resorts, cabins and retreats) is growing and the Shoalhaven's brand and visitation is well placed to support such developments, the challenge is finding appropriate development sites and investors to fill this gap. Significant increase in interest from international visitors increases the demand for a large hotel development in the region as accommodation shortages fail to meet customer demands and limit the regions capacity to grow. Review of tourism land use permissibility in the LEP and alignment with strategic planning policies provides opportunities for greater investment.

Table 1.6 Audit of Businesses impacted by tourism in the Shoalhaven

ANZSIC	Bawley Coast	Bay & Basin	Central	North	Nowra + Surrounds	Sussex Inlet	Ulladulla + District	Grand Total
Accommodation & Food Services	19	171	82	146	235	55	187	895
Administrative & Support Services	43	436	161	190	587	84	446	1947
Agriculture, Forestry & Fishing	15	103	55	263	229	17	148	830
Arts & Recreation Services	14	109	63	102	252	19	147	706
Construction	96	921	378	404	1136	206	1054	4195
Electricity, Gas, Water & Waste Services		7	2	1	17	2	13	42
Health Care & Social Assistance	12	186	52	149	438	23	210	1070
Information Media & Telecommunications	3	31	16	34	52	4	36	176
Rental, Hiring & Real Estate Services	25	257	111	241	557	58	371	1620
Retail Trade	15	249	78	154	438	38	295	1267
Transport, Postal & Warehousing	7	157	54	45	298	21	124	706
Wholesale Trade	9	68	22	51	92	10	88	340
Grand Total	258	2695	1074	1780	4331	537	3119	13794

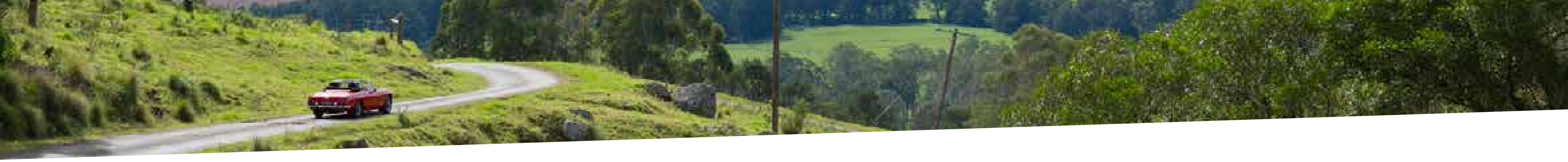
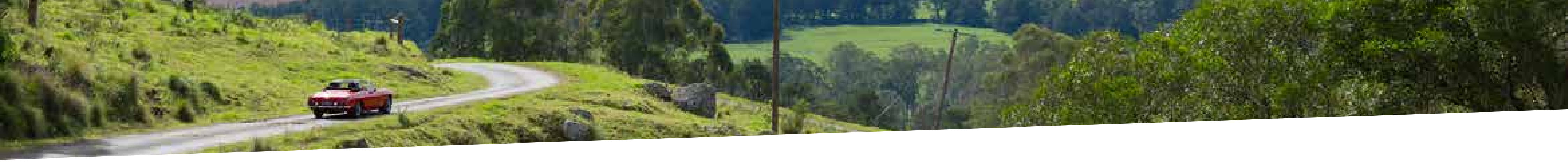


Table 1.7 Top experiences to drive off season visitation

Experience	Description	Consumer Appeal	Market position	Unique selling proposition
Greenwell Point Oysters featured in Australia Oyster Coast	Oyster growers direct to public from oyster leases. Enjoy the rustic river to plate experience with Jim Wild, King Tide and Goodnight Oysters.	Cleanest waters and high quality and freshest produce. Experience with the grower and locals.	General Appeal, rustic.	The characters of the salt-of-the-earth oyster growers, plus the experience of seeing the process and eating fresh.
Shoalhaven Wine Coast	Cooperative of wineries with cellar doors and restaurants. Highlights and international Ready – Coolangatta Estate and Cupitt's Kitchen, Winery, Brewery and Fromagerie.	Award-winning locally grown Semillon (Coolangatta) and award-winning tourism wineries (Cupitt).	Competitive, General Appeal.	Wineries so close to the coast, special varieties – Semillon and Chambourcin, friendly locals, not too busy. Award-winning wines and restaurants.
Flagship Events eg: Fairgrounds and Huskisson Triathlon	Large annual events that draw people from out of region to experience the brand essence of the region.	Idyllic lifestyle, heath and wellbeing in a spectacular environment	High end, General Appeal.	Beautiful landscape, laidback lifestyle and community, experience professional events in unspoilt surroundings.
Booderee National Park	White sand and surf beaches run by local Wreck Bay Aboriginal Community, Bushwalks and wildlife.	Aboriginal cultural experiences, unspoilt white sand and surf beaches, wildlife, adventures.	General appeal, unique	Unique piece of paradise with camping experiences on the beach, white sand and friendly wildlife, unspoilt.
Whale and Dolphins in Jervis Bay	Dolphin and whale watching tours with Dolphin Watch and Jervis Bay Wild. Ex Huskisson, see dolphins, whales and seals up close and personal in the pristine Jervis Bay Marine Park. Private boat charters, sea kayak tours.	Whales, Dolphins, penguins, turtles and seals close to shore. Unique marine environment.	Competitive, General Appeal.	Bay is so sheltered, the cruises are easy, see the white sand beaches as well as the epic cliffs as you adventure to dolphin, whales and seals.
100 Beach Challenge	100 beaches across 165k coastline with white sand beaches of Jervis Bay and world class surf beaches. The challenge is an ongoing activity driving visitation to lesser know beaches and offering an interactive game option.	Get away, family activities, rejuvenate and breath in nature, summer destination	General Appeal, unique	16 white sand beaches, aqua blue water, where the bush meets the beach, quiet and unspoilt.

Experience	Description	Consumer Appeal	Market position	Unique selling proposition
National Parks and iconic walking tracks	Famous walks include Murramarang National Park Pretty to Pebbly Beach Walk which is being upgraded to multi-day walk and also beach-loving kangaroos. Many signature walks promoted in the Shoalhaven walks brochure through significant consultation. Bird walks promotion also in high demand.	Healthy lifestyle balance, iconic landscape, reconnect with family and friends, close to cities but wilderness, endangered and unique wildlife.	General Appeal, unique	Epic coastline, where National Park meets the beach, gorgeous coastal bushwalks with amazing views and famous for it's beach-loving kangaroos. Aboriginal tour experiences though natural areas.
Growing food culture and industry	Paddock to Plate Restaurants, Celebrity Chefs and fine dining, Bespoke Hampers, food tours. Cooking workshops, Slow food and produce trails.	Food / Farm / Produce experiences. Green rolling hills and chefs that have sea changed and create food experiences in picturesque locations.	High end, unique	The Shoalhaven is a food lovers paradise, with clean waters and rich catchments. Great food in picturesque locations, created and grown by passionate locals
Unique and character filled small towns and villages.	Boutique retail shopping, arts trails and café culture, rich in history and architecture. Berry, Kangaroo Valley, Milton, Huskisson, Ulladulla.	Tree-lined and waterfront towns and streets with historical buildings and unique boutiques, café culture, local artisan s, museums and galleries.	High End, unique	Growing café culture, award willing chefs, paddock to plate experiences and great coffee.
Winter-based soft adventure experiences	Nature based activities, tour, lessons and guided experiences in Surfing, bushwalking, kayaking, Stand up Paddle boarding, golfing, Rock climbing.	Connecting with nature while being close to small towns, engaging in a healthy and wilderness experience. Learning a new skill or engaging in a nature-based activity whilst being in an unspoilt, remote and beautiful landscape.	Unique, general Appeal.	70% National Parks and Forests plus 165km of coastline makes for an adventure-lovers paradise.



1.6. Key Source Markets and Consumer Segments

Domestic market – South Coast sub-region*

In 2016 (last published data on Destination NSW website) the South Coast sub-region received nearly 2.6M domestic overnight visitors - up by 6.3% on YE March 15. Visitors spent nearly 9.6M nights in the sub-region - up by 9.8% on YE March 15.

The sub-region received 12.8% of visitors and 14.0% of nights in regional NSW. Compared to YE Mar 15, the share of visitors was up by 0.1% and the share of nights was up by 0.5%.

'Holiday' (67%) was the largest purpose of visit for visitors to the sub-region, followed by 'visiting friends and relatives (VFR)' (23.5%) and 'business' (4.8%). Compared to YE Mar 15, visitors who travelled for 'holiday' grew by 11.5%* while 'VFR' declined by 6.7% and 'business' decreased by 36.6%*.

Sydney (38.7%) was the largest source of visitors to the sub-region, followed by regional NSW (28.6%) and the ACT (17.1%). Compared to YE Mar 15, the Sydney source market grew by 6.1% while regional NSW declined by 5.0%. Over the same period, the ACT grew by 15.1% and Victoria increased by 9.2% while Queensland grew by 116%*.

Sydney (32.4%) was the largest source market in terms of nights in the sub-region, followed by regional NSW (29.6%) and Victoria (17.4%). Compared to YE Mar 15, nights spent by visitors from Sydney declined by 3.9% while nights from regional NSW grew by 5.6%. Over the same period, Victorian nights grew by 31.3% and nights by visitors from the ACT increased by 23.7% while Queensland nights grew by 109%*.

'Adult couple' (28.9%) was the most common travel party amongst visitors to the sub-region. '50 to 59 years' (20.2%) was the largest age group of visitors to the sub-region, followed by '15 to 29 years' (20.0%) and '40 to 49 years' (19.5%).

'Friends or relatives property' (28.5%) was the most popular accommodation used for nights in the sub-region, followed by 'caravan park or commercial camping ground' (24.1%) and 'rented house, apartment, flat or unit' (15.1%).

'Eat out, dine at a restaurant or cafe' (57.6%) was the most popular activity undertaken by visitors to the sub-region, followed by 'go to the beach' (57.2%) and 'visit friends and relatives' (37.8%).

* South Coast sub-region covers Nowra to Eden including Jervis Bay, Ulladulla, Batemans Bay, Moruya, Narooma, Bega and Merimbula

Domestic market – Shoalhaven

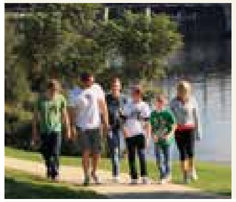
Year ending December 2017 Tourism research Australia, Domestic and International Visitor Survey data says, for the Shoalhaven region:

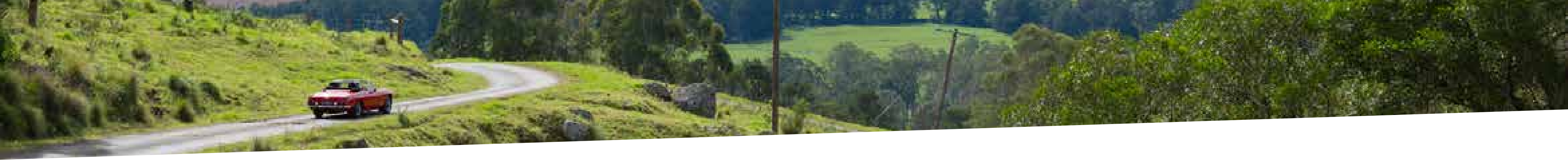
- Total visitors 3.05million. Domestic overnight 1.56m / Domestic Day 1.44m / International 59.7K
- Total Visitor Nights: 5.07 million. Domestic Nights 4.8m/International nights: 265K
- Total Visitor Spend: $852 million (on way to 2020 goal of $1billion)

Table 1.6 presents demographic characteristics of the domestic market visiting Shoalhaven specifically include:

- Middle-aged with high incomes and older kids;
- Families and older couples remain core markets, but they are increasingly being joined by small-medium size groups of women, and large groups visiting for destination weddings, including wedding parties and their guests.
- 51% are staying two (35%) or three nights (16%), and the average stay is around 3.4 nights
- We are seeing more adult couples (15% increase) and groups travelling without children (20% increase) both of which are high yield markets.
- Families travelling with children is dropping slightly, but groups travelling with children is increasing.
- Top activity is outdoor/adventure at 61% followed by outdoor sports 39%, local Attractions 18%, Arts/Culture 8%
- Visiting Friends and Relatives is strong at 39% of market
- The highly seasonal nature of the region is starting to flatten, with Jan/Feb/March quarter recently decreased in its annual share by 3% and Autumn and Spring quarters increasing by the same amount.

Table 1.8 Key demographic characteristics of the domestic markets for the Shoalhaven region

Consumer Segment (demographic)		Reason for Visit?
	Grey Nomads / Retiree Couples	Food and Wine; Caravan and Camping; visiting family and friends
	Couples no kids travelling alone or within couples	National parks and outdoor activities, food and wine, broadcasting and social media, group adventures, university holidays.
	Established Family	Come in school holidays, come for beaches and national parks; wildlife
	Young Families (kids under five)	Beaches; adventure, unwind and rewild.
	Visiting Family and Friends	Beaches; visiting family and friends; wildlife



Opportunities for sector development

It should be noted that current data is based on what accommodation and activities are available currently in the region. It does not represent what consumers may want, but are unable to get, it only represents their use of current facilities. Ongoing consideration needs to be given to identified gaps in industry sectors to remain competitive and meet the needs of the customer. 'Eat out, dine at a restaurant or cafe' (57.6%) was the most popular activity undertaken by visitors to the South Coast sub-region; followed by 'go to the beach' (57.2%) and 'visit friends and relatives' (37.8%). This reinforces the need to develop the food and wine sector and to champion beaches in promotions, ensuring visitation is spread to beaches throughout the region. Locals, as the Visiting Family and Friend champions, are a key opportunity.

Table 1.9 Key domestic source markets for the Shoalhaven region

Source Market (location)	Rationale
Sydney and surrounds	Only two hours from region, new roads and bypasses. Perfect for short breaks. Northern suburbs now growing due to M2, M7 developments. North Coast fatigue also drives demand.
Western Sydney residents and their Visiting Friends	New Badgerys Creek airport providing opportunities for international VFR. Large diverse population base of Eastern cultures. Holds 10% of Australia's total population - large source market.
Canberra and ACT	New Main Rd 92 brings a new route to the Shoalhaven and only two hours, plus two other established routes. Warmer weather and Coastal attractions drive demand.
International (various)	Europe, NZ and USA head up the FIT source markets, China, Korea, Asia for day trips. Trends toward FIT for younger generation. Huge potential via Sydney inbound, and potential for regional dispersal.
South Coast neighbours	Large coastal geographic footprint for the South Coast, proximity of neighbouring LGAs drives day trip and overnight in off-season.
Country NSW	Coastal assets attract regional NSW visitors during warmer months – especially the south west regional NSW – Wagga, Yass, Goulburn, Snowys etc
Victoria	Sydney to Melbourne touring route has brought more people Victorians to the Shoalhaven, Warmer weather and coastal attractions drives demand.

The traditional visitor to the region has been the caravan and camping market from nearby major cities, looking for a short to medium break. However, given that this market is largely limited to school holiday periods, the growth opportunities rest with visitor markets prepared to visit in shoulder and even low season, seeking experiences such as winter sports like walking and surfing, events, food, wine and luxury experiences. This growth opportunity brings higher spend potential.

Growth potential in the domestic market rests with:

- Couples (DINKS and in groups hens, bucks, weddings and group getaways)
- Young people (under 30, millennials) millennials visiting in groups, as couples or with their young families outside peak times and building nostalgic experiences with the Shoalhaven.
- Retirees – retired couples, semi-retired and singles
- There is also opportunity for growth from the Western Sydney Market, both as a source market and visiting family and friends from international markets.

International market - South Coast sub-region

The South Coast sub-region received 80,600 international overnight visitors - up by 18.1%* on YE Mar 15. Visitors spent 555,100 nights in the region - up by 12.2% on YE Mar 15.

'Holiday' (75.4%) was the largest purpose of visit for visitors to the sub-region, followed by 'visiting friends and relatives (VFR)' (19.6%) and 'business' (2.1%). Compared to YE Mar 15, visitors who travelled for 'holiday' grew by 14.5% and 'VFR' increased by 11.4%.

International visitors are much younger than domestic visitors. '15 to 29 years' (28.7%) was the largest age group of visitors to the sub-region, followed by '60 to 69 years' (21.1%) and '50 to 59 years' (15.9%).

International market - Shoalhaven

Figure 1.6 shows that the largest international market comes from the United Kingdom, followed by the USA. Table 1.7 presents which international markets currently present opportunities, a weak market presence, are well established but have limited growth potential, and a are well established with growth potential.

Table 1.7 International markets that currently present opportunities, a weak market presence, are well established but have limited growth potential, and a are well established with growth potential

Opportunities (low market share and high growth)	Rationale Well established and potential (high market share and high growth)
• Korea (191% growth, 4K/year)	New Zealand (52% growth, 35K/ year)
• India (300% growth, 2K/ year)	• Canada (150% growth, 20K/ year)
• Indonesia (536% growth, 2K/ year)	• United Kingdom (19% growth, 63K/ year)
• Hong Kong (354% growth, 7K/ year)	• Scandinavia (71% growth, 12K/ year)
• China (354% growth, 6.2K/ year)	• France (51% growth, 14K/ year)
• Malaysia (36% growth, 3.3K/ year)	
• Malaysia (36% growth, 3.3K/ year)	
Weak market presence (low market share and low growth)	**Well established but limited (high market share and low growth)**
• Italy (30% decrease, 3k/ year)	• USA (0% growth, 28K/yr year
• Japan (40% decrease, 3k/ year)	• Germany (-13% decrease, 20K/ year)
• Netherlands (18% decrease, 7K/ year)	
• Switzerland (65% decrease, 1.3K/ year)	

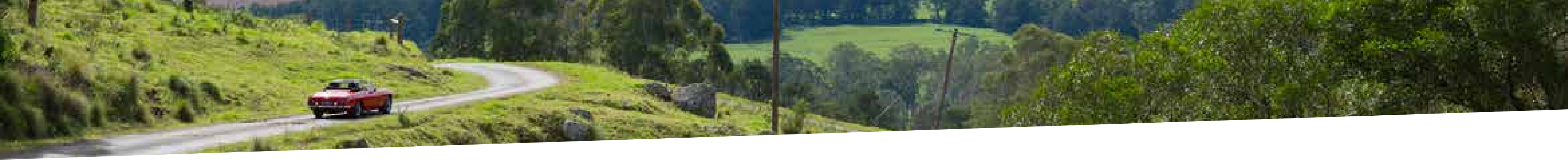
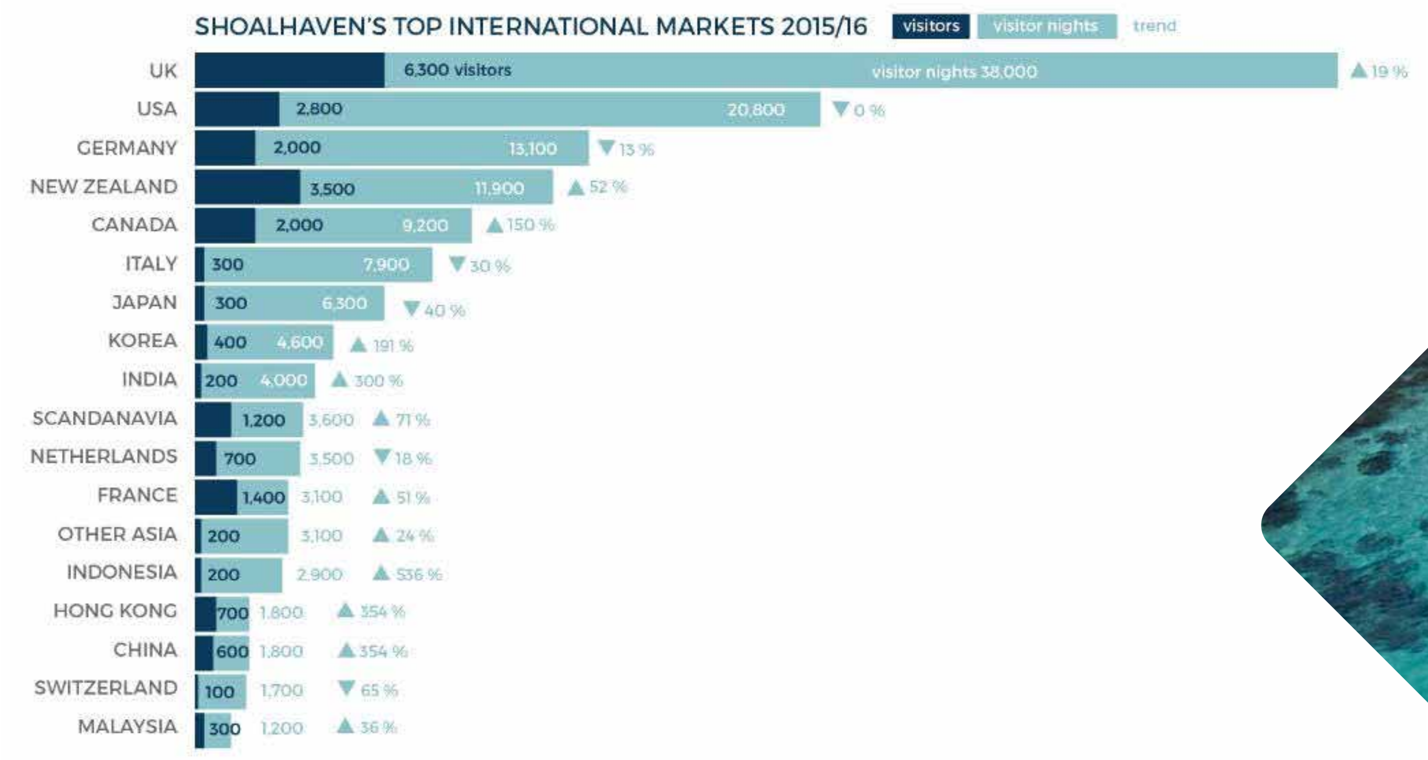


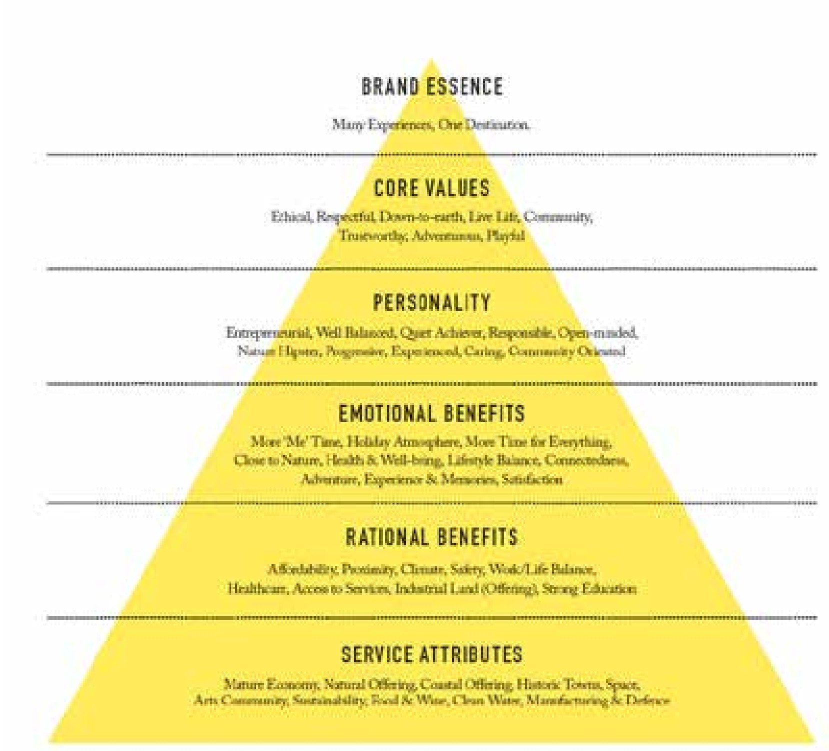
Figure 1.6 Distribution of internally sourced markets visiting Shoalhaven for 2015/16 (Tourism Research Australia, International Visitor Survey)



1.7. Shoalhaven brand

The region's unique selling point (USP) has always been related to the natural environment. More recently, the Unspoilt campaign has assisted in defining the natural assets, including activities that promote yield, such as kayaking, surfing etc. Figure 1.5 presents the Shoalhaven brand pyramid, and reveals the brand essence is: Many experiences, One destination.

Figure 1.5The Shoalhaven brand pyramid



Promotional pillars are used as a guide for marketing content and promotional calendar. They relate to both destination strengths trend or 'marketable' product segments and the pillars established by Tourism Australia and Destination NSW. Figure 1.6 presents the promotional pillars used for Shoalhaven.

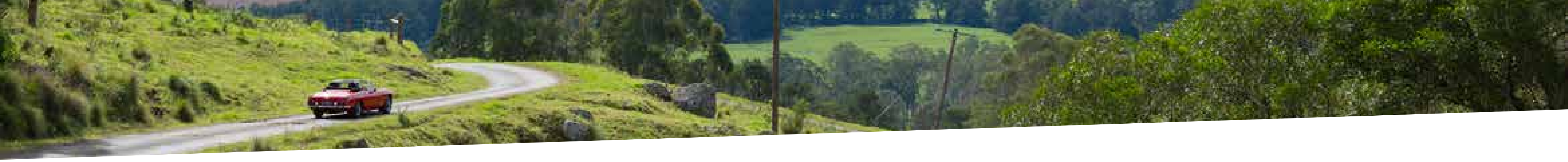
Figure 1.6 The promotional pillars used for Shoalhaven

Key Imagery and Footage

Still images

In 2016-17 a contract photographer worked with the tourism team two days per week to collect images throughout the region (destination, business and experience shots). They were provided back to business operators and used to refresh the entire library. 20,000 photos were generated during this time.

In 2017, a photoshoot with Destination NSW titled 'unspoilt' provided high quality key experience images with full license.



A number of famils and content partnerships have provided a fresh addition to the library in recent years, namely with 'We Are Explorers' and 'In the adventure' and youth sectors.

- A full day shoot with a disability group in Huskisson helped achieve inclusive imagery.
- Shoalhaven Tourism commissioned shoots from photographers and models for bushwalking, pets on holidays etc
- Over 2017 and 2018 EOFY image buy ups were undertaken to fill gap in the library from local photographers – drone, wildlife, destination more broadly.

The current library of still images is very useful, and in most instances the content taken is timeless. However, the library must be updated regularly to keep the content in publications like the Visitor Guide fresh and to capture more diverse experiences, with a greater diversity in the audience and subjects.

Video footage

In terms of video footage, in 2017-18 a contract videographer worked with Shoalhaven Tourism to create weekly videos called 'Our Stories' that feature businesses, experiences and the destination. There are approximately 50 videos and a number of terabytes of raw footage. In the 2017 Financial year end Shoalhaven Tourism bought a number of video clips from local photographers to fill the gaps in the drone library. Working with content agencies (Paste and We Are Explorers) also allowed Shoalhaven Tourism to secure video footage for campaigns, as well as a library with full licence to re-cut. The 'Unspoilt' Campaign has generated video assets for 2018 campaign and libraries, including models in a number of key experiences.

Despite this work, there are still gaps in the still and video imagery collection for Shoalhaven. Table 1.8 lists these gaps and strategy to address them.

Table 1.8 Audit of key images and footage supporting industry in Shoalhaven, and any potential gaps and how to address them

Current still imagery gaps	Strategy to address gaps
• Images with more Aboriginal and culturally diverse models	• Shoot with Indigenous model/s within group of subjects
• Images arts and culture product images	• Hire a photographer to shoot accommodation and Arts and Culture products
• Images of young families and grey nomads	
• High end accommodation, nightlife and luxury images with models	• Work on a caravanning and camping shoot / buy
• Refreshed images from key assets like Bannisters and Paperbark	• Share libraries with other businesses
Current video gaps	**Strategy to address gaps**
• Drone footage of the region – particularly towns and inland	• Buy drone images annually
• Footage of diverse models, aboriginal, inclusive, older, culturally diverse	• Work with in-house videographer to capture diverse stories
• Footage of wildlife experiences and attractions	
• Footage of adventure activities	• Work with influencers to get more authentic adventure footage.
• Diverse food and wine experiences, luxury	• Work with food and wine photographer / buy

A key opportunity is in the ongoing utilisation of the content created to maximise return on investment for both photography and videos. Libraries have been created of photos for industry and media to utilize, however ongoing focus from Shoalhaven tourism to advocate and promote the assets as a significant industry resource is key to raising the profile in the eyes of the visitor.

Key Communications Channels

Table 1.9 presents the key communication channels used in the Shoalhaven region, indicating that the channels that profile the region most widely are:

1. Google networks
2. Visitnsw.com
3. Shoalhaven.com
4. Visit Shoalhaven Vimeo and YouTube
5. Outdoor Advertising

Table 1.9 also reveals that the channels with the greatest potential to profile the region are:

1. Instagram
2. Vimeo + YouTube
3. Visitor Guide
4. Nowra and Ulladulla VICs
5. Direct Mail (EDM and mail out)

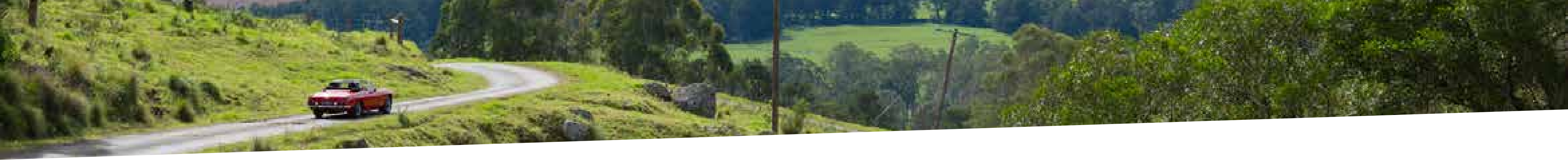


Table 1.9 Key communications channels used in the Shoalhaven region

Channel type	Coverage of Destinations Assets	Profile of this channel	Advantages	Disadvantages
Visitnsw.com	70%	700,000 unique visitors p.a.	Highly ranked in search, leads to industry.	Continue to work with DNSW keeping content up to date
Visit Shoalhaven Facebook	80%	45,000 followers	Great engagement and lead generation	Aspirational and low conversion rate, more links to bookable product will enhance
Shoalhaven.com	85%	190K unique visitors p.a.	Imagery and product is in line with brand and target markets. Site offers visitors opportunity to build their own itinerary	Need packages to make it easier for people to quickly purchase multi-night accommodation and matching experiences.
Nowra and Ulladulla VICs	100%	108K visitors p.a.	Recommendations and bookings	High cost medium, mixed business to overcome costs eg: ticket sales
Visitor EDM	30%	5,000 unique emails	Aspirational, informative, deals	Open rates and conversions, work on more deals etc, personalised
Vimeo + Youtube	40%	76K plays	Rich video content that highlights assets inspirationally	Competitive and expensive to get consumer to channel
Regional TV	5%	Approx. 60K	High impact, low conversion rate	Test market after campaign with deals?
Visitor Guide	40%	100 – 150K readership	Highly aspirational, works for many markets, easy to distribute. Great tool in high demand for local businesses and plays a critical role in relationship building with local industry as a key asset	High cost and labour intensive, advertising currently meets close to 50% of printing costs
Outdoor Advertising Sydney + Canberra	1%	500K views	High exposure to a good market	Hard to measure, consider unique URLs
Google network	40%	3.8M	Search leads to conversion, display impressions retargeting	Display is low conversion; search market is competitive
Instagram	55%	10K	Rich evergreen content that highlights best assets	Difficult to convert into the bookings

1.8. Key Communication Channel Analysis

Shoalhaven.com

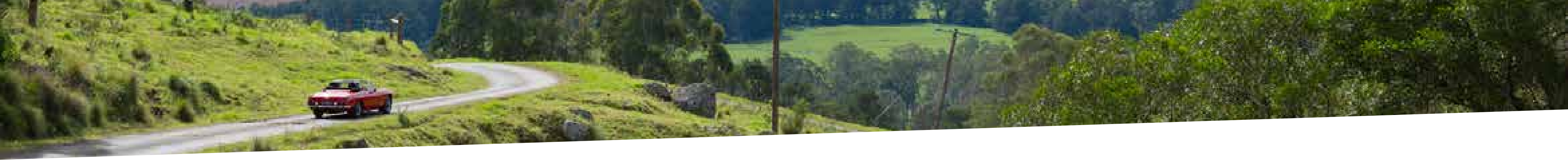
The Shoalhaven website was recently upgraded and addresses all the requirements from the previous DMP. The new website, built in October 2017 has an itinerary builder and bookable product via BookEasy but packaging is not available to service the time poor customer. Online booking competition and a lack of ability for booking engines to provide a service for product, tours and accommodation that meet the Shoalhaven region product has hampered this strategy from the last DMP. Re-analysis of the strategy of full service product packaging is necessary as it may not be viable. Blog and landing page development on the Shoalhaven website has also allowed for tangible experience-based content that appeals to all markets and assists with search engine marketing for the overall website. Continual content development and prioritising search engine optimisation will keep the shelf life of this important asset fresh and contemporary.

Owned Content and Social Media

As the target markets and technology evolves, so does the marketing channels and the need for experimentation and development. Instagram audience development has been a key focus for the under 30s market, and challenges with Facebook changes has led to new strategies on social media. Content strategies such as development of video content have allowed social media channels to grow and be more engaging for all target markets. Due to the commercialisation of social media channels, their organic effectiveness has been compromised, resulting in a lower ROI. Best efforts in Paid marketing over recent times have been in social media and search engine call to action, as well as web retargeting.

Paid and Earned Channels

In the past there has been a reliance on paid channels for marketing. However, with the size and competitiveness of paid channels rising, there is a risk that relying on outside channels to market the region will become very expensive and detrimental. Publicity and evergreen content on external channels is becoming more available as a paid avenue that has more influence over consumers than traditional advertising. Due to the commercialisation of social media channels, their organic effectiveness has been compromised, resulting in a lower ROI. Best efforts in paid marketing over recent times have been in social media and search engine call to action, as well as web retargeting. The mix of paid, earned and owned will have to be carefully assessed in effectiveness in annual marketing plans and individual campaign strategies.



1.9. Key Infrastructure

The key infrastructure supporting tourism in Shoalhaven are:

- Regional Road Network
- Roads, camping grounds and walking trails within protected areas, particularly National Parks, State Forests
- Visitor infrastructure within Council Reserves

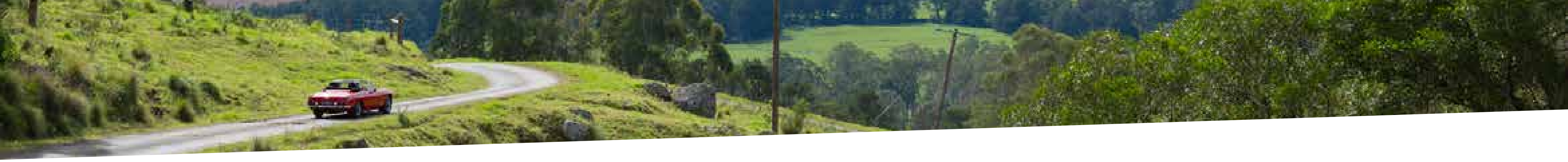
Table 1.10 provides further analysis of the critical infrastructure.

Infrastructure needs / gaps include:

- Infrastructure to support Shoalhaven River precinct activation at Nowra
- Infrastructure to support events in specific locations
- Marine tourism facilities to support commercial operators and small private vessels.
- Built Tourism – interesting CBD precincts, industrial tourism, bike and walking trails and sports facilities eg: motorsports
- Roads, camping grounds and walking trail infrastructure and signage within natural areas
- Regional transport service for visitors, specifically day-trippers; connecting with bus and train depots, towns, shopping centres, accommodation sites and popular day use areas
- Caravanning infrastructure eg: dump points, day use facilities
- Hygiene infrastructure eg: toilets, bines etc
- Future proofing infrastructure eg: electric car chargers

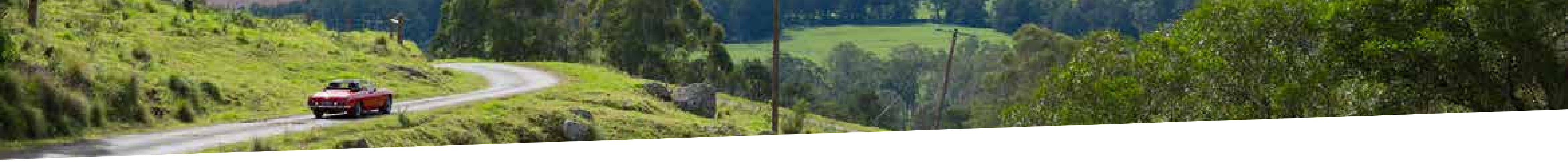
Table 1.10 Key existing infrastructure in the Shoalhaven

Infrastructure	Description	Why is it key?	Status	Potential to meet forecast growth
Regional road network	Roads linking key towns and services	Shoalhaven relies on the self-drive market, without adequate road infrastructure tourism would be negatively impacted in a considerable way.	With recent major upgrades on the North / South route current infrastructure meets demands. There is however pressure on these networks in peak tourism periods.	The characters of the salt-of-the-earth oyster growers, plus the experience of seeing the process and eating fresh.
East / West road networks do not currently meet demand or expectations and limit the ability to drive visitation from the west.	Planned upgrades during the next 5 years will help address remaining North / South congestion.	Award-winning locally grown Semillon (Coolangatta) and award-winning tourism wineries (Cupitt).	Competitive, General Appeal.	Wineries so close to the coast, special varieties – Semillon and Chambourcin, friendly locals, not too busy. Award-winning wines and restaurants.
East / West upgrades are not seen as a high priority at this stage.	Large annual events that draw people from out of region to experience the brand essence of the region.	Idyllic lifestyle, heath and wellbeing in a spectacular environment	High end, General Appeal.	Beautiful landscape, laidback lifestyle and community, experience professional events in unspoilt surroundings.
Roads, camping grounds, walking trails and bike trails within protected areas	Shoalhaven National Parks, State Forests, Natural Areas and associated visitor infrastructure	With approximately 75% of the region classed as natural or protected areas a large majority of tourism product is reliant on this natural asset.	Some areas have tired, run down facilities, however road access to most of these areas is of high quality and meets visitor needs. There is high satisfaction amongst visitors regarding Shoalhaven's natural assets.	Improved infrastructure and sustainable development in association with NSW National Parks would help facilitate future access and meet visitor demands. There is also pressure to develop more free or low cost camping options within the region. Improved accessibility to conservation areas and facilitate tourism ventures based on nature appreciation and wildlife observation.



Infrastructure	Description	Why is it key?	Status	Potential to meet forecast growth
Rail Stations	Railway Stations located in Berry and Bomaderry	Only rail link from Sydney to the Shoalhaven - railway linking our main domestic tourism area to the Shoalhaven	Currently meets residential needs, however facilities do not meet the standard expected by visitors from larger metropolitan areas.	Greater capacity will be required within the existing time table as population grows. A coordinated approach to linked bus services to the South of the region will be important as well as signage and linkages to accommodation and other transport options.
Recreational Boating and Fishing facilities	Harbor, wharf and fishing and boating infrastructure throughout the region e.g. Huskisson boat harbor and wharf, Greenwell point, Sussex Inlet	Currently supports several tourism operators who use the facility year-round. Huskisson supports one of the key tourism products in Jervis Bay - whale and dolphin watching. Product that drives significant international visitation to the region.	Facilities do not currently meet demand from the commercial sector.	Better facilities for commercial boat operators – Shoalhaven River and Jervis Bay.
Commercial Boating Facilities	Ulladulla Harbor and wharf, Huskisson	Currently supports several tourism operators who use the facility Ulladulla also supports the region's seafood industry with approximately 12 commercial fishing boats currently using the infrastructure. Recreational fishing boats also use the facility year-round as it is a well-known fishing destination. Boat maintenance is also conducted at Ulladulla as it is home to the only large slip way in the region.	Facilities are currently sub-standard and require upgrades to meet expectations and demand.	Without significant upgrades and/ or supplementation there will be lost opportunities in the commercial boating sector.
Council Reserves	Open spaces used for public outdoor recreation	Many of these reserves are in key visitor precincts and include facilities such as barbeques, toilets, parks and seating which all add to the amenity of the region.	Icon parks are well maintained, others could do with improved or additional facilities.	Additional facilities and improvements to existing infrastructure in Reserves are required to meet future visitor demand. Parking in association with reserves, toilet facilities and supporting facilities do not currently meet peak season demand in several locations.

Infrastructure	Description	Why is it key?	Status	Potential to meet forecast growth
Recreation facilities	Pools, gyms, sporting facilities located throughout the Shoalhaven	Key assets for events that drive tourism throughout the year. Although the main user of these facilities are residents, during peak tourism times visitors to the region also utilise these spaces.	Some newer facilities are well maintained, other could do with improvements and additional facilities.	Additional facilities and improvements to existing infrastructure are required to meet future visitor demand.
Convention/Exhibition Space	Shoalhaven Entertainment Centre and Ulladulla Civic Centre	These spaces can cater for large group of people and are key to our promotion of the region as a business events and conference location. The Shoalhaven's proximity to Sydney and Canberra positions us as an ideal location for these events.	Both Nowra and Ulladulla facilities are well maintained and functioning at a high standard. These facilities currently meet demand due to the limited accommodation available nearby.	If more large-scale accommodation was developed there would be a need for upgraded convention and exhibition space. The Dunn Lewis Centre will offer another large venue once complete, but again there is limited nearby large accommodation facilities to meet conference needs.
Telecommunications	Mobile phone towers and internet connectivity	High demand visitor requires on the ground information and the ability to "share" experiences on social media. Growing demand for visitors to work away from home. Perceived "safety" whilst experiencing outdoors with demand for phone access while exploring bush and sea.	There is a large variation in services available depending on which area of the region visitors are located. Main business and visitor hubs are well serviced in all but peak times, when strain on infrastructure results in problems with connectivity.	Upgrades are required to meet current and future demand.



1.10. Accommodation Audit

The ATDW listings (as at July 2018) suggest that Shoalhaven has approximately 665 accommodation venues. The largest number of venues in any category is Holiday Houses. However, the largest number of bed spaces provided by any sector would be Caravan / Camping accommodation. There are relatively few hostels or resort / retreat / farm stay accommodation in the region. Table 1.11 provides a breakdown of the short term accommodation mix across the region as listed on the website Shoalhaven.com.

The greatest concentration of accommodation in the region is located in the Ulladulla/Mollymook area and the Bay and Basin area (which includes the South West side of Jervis Bay).

Many non-traditional short-term rental properties are available and currently meet demand during all but peak times. Traditional hotel / motel accommodation is in some cases tired and run down and does not currently meet visitor's needs. There is also a large proportion of business tourism that utilises the higher quality / recently upgraded facilities, taking inventory away from recreational visitors.

34 Caravan Parks (as per ATDW) are located across the Shoalhaven offering holiday cabin, caravan or camping experience on beachfront, riverfront or lakefront sites. Parks are in key tourism areas with significant infrastructure that supports large numbers of visitors and offers a range of accommodation options. Facilities vary dependent on location – currently meeting demand except for in peak tourism season.

An audit of businesses who identified accommodation as their main business

Table 1.11Breakdown of short term accommodation listings on our website Shoalhaven.com

Locality	Holiday Houses	Apartments	Hotels / Motels	Cabin / Cottages	Bed and Breakfast	Caravan / Camping	Resort / Retreat / Farm Stay	Hostels
Northern Shoalhaven	18	9	7	9	5	3	1	0
Kangaroo Valley and Surrounds	25	13	0	13	7	1	4	0
Nowra and Surrounds	8	10	5	8	6	3	2	0
Culburra Beach and Surrounds	113	37	1	5	3	3	0	0
Bay and Basin	144	71	1	14	8	5	3	1
Sussex Inlet and Surrounds	3	4	1	8	0	4	0	0
Ulladulla / Mollymook and Surrounds	7	20	13	9	6	11	0	1
Bowley Point and Surrounds	2	2	0	4	0	4	0	0
Total	320	166	28	70	35	34	10	2

activity for tax purposes (The Australian and New Zealand Standard Industrial Classification - ANZSIC) includes 348 accommodation businesses in the region, this count is reflected in table 1.12 below.

Table 1.11Breakdown of short term accommodation listings on our website Shoalhaven.com

Locality	Number of businesses	Townships Included
North	78	Berry, Kangaroo Valley, Shoalhaven Heads and Coolangatta
Nowra + Surrounds	50	Nowra, Bomaderry, Cambewarra Village, Terara & Numbaa, Yerriyong and Burrier
Central	29	Greenwell Point, Orient Point, Culburra Beach, Currarong, Callala Bay, Callala Beach and Myola
Bay & Basin	73	Booderee National Park, Huskisson, Woollamia, Vincentia and Hyams Beach, Erowal Bay, Sanctuary Point, St Georges Basin and Basin View, Tomerong, Bewong and Wandandian
Sussex Inlet	30	Sussex Inlet, Swanhaven, Cudmirrah and Berrara
Ulladulla + District	77	Bendalong, Manyana, Cunjurong and Berringer Lake, Fishermans Paradise, Yatte Yattah and Lake Conjola, Milton, Mollymook, Narrawallee and Ulladulla, Kings Point, Burrill Lake, Dolphin Point and Lake Tabourie
Bawley Coast	11	Bawley Point, Kioloa, Durras North, Depot Beach, Meroo & Murramarang National Parks, Upper Clyde River and surrounding and State Forests
Total	348	

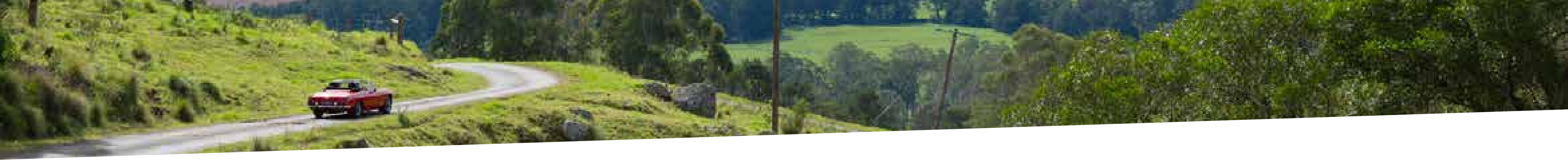
Current needs / gaps in the region's accommodation supply are:

- high end boutique / eco / farmstay visitor accommodation of varying size;
- large scale visitor accommodation (50 – 150 rooms) – particularly needed in Berry, Nowra, Bay and Basin;
- resort style accommodation that has the flexibility to cater for large groups or traditional peak season couple and family market;
- quality low cost short-stay accommodation such as backpackers, small dormitories (4–6 persons); and
- low cost camping options to address summer overflow e.g. dump points and legal camping areas.

1.11. Events

The Shoalhaven hosts more than 1,000 events annually, with events including the long established, well recognised Blessing of the Fleet in Ulladulla, major sporting events (Regional, State and National level), markets and contemporary entertainment events such as Fairgrounds Festival, Burradise Festival, Kangaroo Valley Folk Festival and The River Festival. Events are important drivers of regional tourism and are considered important to the Shoalhaven region because they:

- provide tourists with a reason to visit the region;
- promote and enhance a regions image;
- result in year-round (and at times mid-week) visitation and therefore year-round jobs; and
- deliver direct economic benefit to the region.



1.13.1 Event Audit

A Shoalhaven.com events listing audit (as at July 2018) shows that shoalhaven.com has approximately 531 events listed during a 12-month period. Some of these events are annual and some (predominantly Markets) occur on a more regular basis. Table 1.12 provides a breakdown of events in the region by type.

Table 1.13Breakdown of events across the Shoalhaven region

Shoalhaven	Festivals
Festivals	57
Sporting	39
Business Event	6
Exhibitions	66
Concert / Performance	130
Workshops / Talks	93
Community Event	85
Food and Wine	17
Markets	38
Total	531

1.13.2 Event Support

Events and event organisers are currently supported in several ways. Firstly, through advice, links to external funding opportunities and permits for event on Council land. Secondly, financial support is provided through the Event Support Program which is a competitive bi-annual process. The financial support is designed to provide seed money to help attract and stage events that are drivers of visitation, for example, event that generate overnight stays rather opposed to local / community events which are targeted at Shoalhaven residents.

To be eligible for funding through the Event Support Program the event is subject to a rigorous application process and must meet the below criteria:

- ability to increase tourist visitation to the Shoalhaven including intra and interstate visitors;
- demonstrate the ability to deliver significant and measurable economic benefit to the Shoalhaven;
- ability to facilitate business and community involvement in the event;
- ability for the event to add to the diversity of the regions event calendar;
- incorporate strategic and targeted marketing practices in its planning and implementation;
- capacity to be an ongoing event;
- involvement of and consultation with local business, community and tourism groups; and
- acknowledgement of Shoalhaven Tourism sponsorship via all advertising and marketing undertaken.

The economic impact of the event is assessed using REMPLAN, an economic modelling tool used by many local government areas. Supported events are also required to submit a post event report that assists with evaluation and ensures the event organiser is collecting data that meets the requirements to gain future funding from sources other than Council.

1.13.3 Event sites and infrastructure

Being such a large region there are numerous event sites available. Given that one of the core strengths of the region is its natural beauty and a haven for residents, it is important that the staging of events is controlled and restricted to key prescribed sites and that Council invests in quality infrastructure and servicing. By focusing events into selected venues, it will also improve the opportunity to develop and support businesses.

There have been several key venue sites identified that could become the focus of larger event planning (i.e. beyond local community events), including:

- Berry Showgrounds;
- Nowra River Precinct;
- Shoalhaven Entertainment Centre;
- Nowra Showgrounds;
- Bay & Basin Beaches and Foreshore Reserves;
- Nowra Racecourse Precinct; and
- Ulladulla Civic Centre.

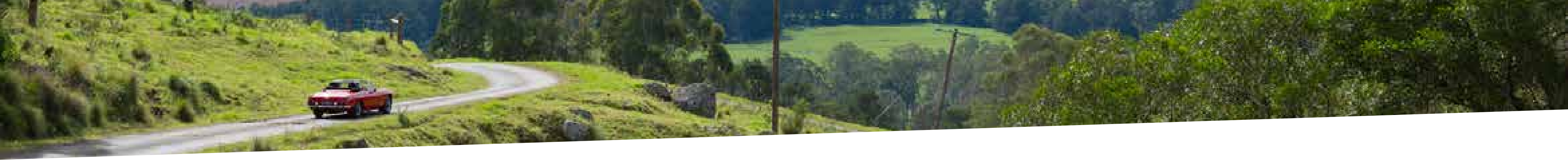
Furthermore, the proposed Nowra Motor Sport precinct, Bomaderry Sports & Community Complex, Dunn Lewis Centre and Willinga Park Equestrian Centre, may provide excellent event opportunities in the future.

While there are many other venues throughout the region, the most appropriate approach is to focus on those venues that are scalable to host substantive events. Regarding many other venues, these are most likely to be utilized by the community for the development of local events. It is felt that the locals are best placed to understand their requirements and identify appropriate venues.

1.12. SWOT Analysis for the destination as a whole

A SWOT analysis of Shoalhaven as a visitor destination suggests that some of the challenges for destination management include:

- seasonality;
- managing dispersed tourism destinations and the fragmentation this can cause;
- lack of appropriate tourism infrastructure; and
- professionalising the predominant mass of small tourism operators.



Situation Analysis, internal

Strengths

1. Strong links with government e.g. DNSW, Visit Canberra, South Coast LGAs. DNSW relationship including access to grants / funds
2. New improved website and itinerary builder that supports yield
3. Growing reputation – brand, online presence, media
4. STAG – highly motivated group with extensive marketing experience
5. Diverse product offering in the region - unspoilt area, safe beaches, iconic hero product, country towns, iconic and world quality natural assets
6. Collaboration between operators targeting same market e.g. Discover JB, Shoalhaven Wine Coast, Milton Food Trail, Oyster Coast
7. Signage with Shoalhaven branding and regional billboards
8. Supportive council with commitment to tourism growth in the region
9. Strong strategic planning including a digital strategy
10. Growing brand loyalty in new and traditional markets
11. Photo library with over 20,000 images
12. Proximity to high density populations, Sydney and Canberra, with ongoing improvements in road infrastructure
13. Growing food and wine sector with engaged operators
14. Strong relationships with media and growing interest
15. Growing trust between Shoalhaven Tourism and local industry including upskilling and support
16. Significant funding given on improved road infrastructure from major population centres

Weaknesses

1. Growing but not thriving Shoalhaven brand challenged at times by conflicting priorities of 49 towns & villages
2. Lack of transport within the region (tours, buses, cabs, uber etc), limits to self-drive market
3. Lack of international ready operators
4. Lack of tourism infrastructure across the region
5. Operators with varying skills and ability to market themselves effectively or be campaign ready to work with tourism
6. Lack of phone reception and internet access
7. Huge area with large number of stakeholders makes choosing priorities and meeting demand of community difficult
8. Seasonality and crowding in hot spots during peak times impacting customer and resident experience
9. Large growth in day trippers impacting community, infrastructure and visitor experiences
10. Mixed feelings by local community toward tourism
11. Expectation of large number of stakeholders with varying skill level and expectations complicates strategic outcomes
12. Political nature of local government makes budgets and strategies at times unstable
13. Perception of tourism by locals and impact of visitation on the local residence lifestyle
14. Ongoing funding of visitor management and infrastructure with Local Government unable to meet the financial burden long term

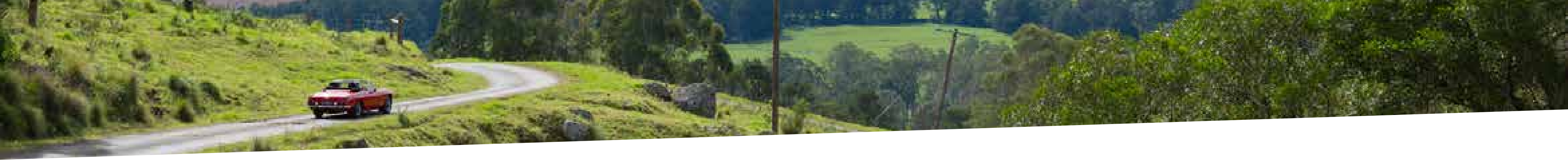
Situation Analysis, external

Opportunities

1. Access to state and federal government grant opportunities
2. Online developments in social media and digital marketing provide opportunity to be ahead of competitors
3. Tourist desire for customised experience = opportunity to tailor product to showcase the Shoalhaven identity
4. Significant forecast growth in international visitation into regional areas
5. Touring routes and self-drive opportunities, – cross LGA collaboration e.g. Grand Pacific Drive
6. Close drive to capital cities, growing Western Sydney and airport links
7. Forecast high growth in international markets with many opportunities to partner with government and industry
8. Canberra's international airport provides access to key markets and additional resources promoting the South Coast internationally
9. Sydney to Melbourne Touring very active in promoting the self-drive experience though the Shoalhaven and proactively marketing internationally with strong industry partnerships
10. DNSW has a proactive 'international ready' program to develop small business for the market
11. DNSW marketing regional areas in various international markets Support from Destination Network Sydney Surrounds South in product development etc

Threats

1. Similar domestic destinations e.g. Central Coast, QLD, Adelaide, Blue Mountains
2. Overseas destinations offering similar experiences often for less cost e.g. Bali, Fiji, NZ
3. Competitor LGAs vying for contestable grant e.g. DNSW grants
4. Keeping up with the changing environment eg: share economy such as transport and accommodation, internet access
5. Day visitation exceeding region and operator's ability to deliver services
6. Disproportionate spread of visitors, many visitors in popular small towns which are at maximum capacity
7. Day visitation impacting visitor spend overall
8. New millennial traveller not reliant on brand equity and have a different set of expectations to traditional visitor



Challenge - domestic visitor marketing

In a competitive and ever-changing tourism market, cut-through and clear unique selling propositions will be key for the Shoalhaven over the next 5 years. Digital audiences are ever-changing and the creation of relevant content, a time-consuming and expensive. The Shoalhaven brand position "many experiences – one destination" will need to be carefully considered ensuring the region does not becomes everything to everyone and not really known for anything. A continued test and measure approach ensuring Jervis Bay and the White Sands Coast is leveraged as an iconic bucket list experience is critical. A strong sense of brand will be essential going forward. The following challenges must be used as a touch stone for decisions:

- do not try and be everything to everyone;
- as emerging markets become evident, ensure the segment is in line with the brand;
- maintain commitment to the strategies developed and avoid reactive campaigns; and
- remain loyal to the market position.

Challenge - International visitor marketing

The Shoalhaven region is relatively young in the international market place. With such huge opportunities across the world and the convenient location out of Sydney and Canberra airports, remaining true to the region band and identity and finding key international markets that match that proposition will be critical to sustainable growth in the next 10 – 20 years. Partnership, with commercial operators or neighbouring LGA's, will be essential to gain the market cut through needed to make significant impact long term.

Consideration will need to be given on the region's ability to meet the needs of the international visitor and the ability to deliver on the brand promise and meet expectations of the visitor in region, noting that appropriate infrastructure will be critical factor.

The general lack of traditional "international ready" tourism businesses over the region will need to be addressed over the next 5 years with many 'Mum and Dad' operators happy to work with the domestic market, the region has limits on capacity growth unless the opportunity for international visitors is embraced and the regions businesses work collaboratively to create cut through market share.

Challenge – Events Investment

Shoalhaven event priority area is required to manage the resources that assist in decision making of event applications – go/no go matrix, funding level, shoulder vs peak season event balance

- ensuring events support the essence of the destination;
- ensure events deliver on a promise that can be gained in the destination 365 days a year;
- maintain a strong mix of events that are relevant to the destination;
- discourage events that either reposition the destination or tell a story that is not achievable; and
- balance the needs of large events against impact on the community for long term sustainability and community support for the industry.

Challenge – Infrastructure and investment

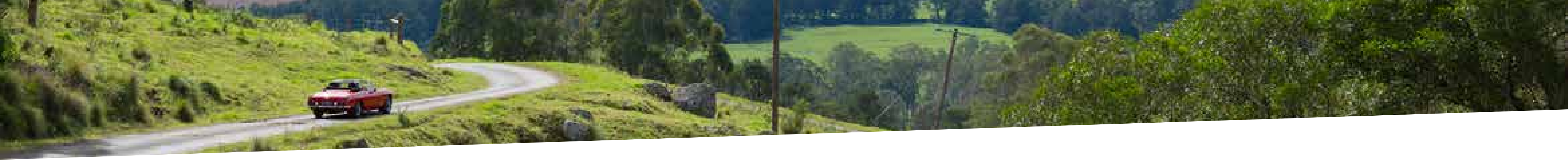
Inadequate infrastructure will potentially be the single largest challenge for the Shoalhaven region over the next 5 years.

Attracting investment has long been difficult with planning controls and environmentally sensitive areas making commercial development difficult to prove appropriate return on investment numbers. Ensuring the region attracts the investor who understands the essence of the region and will work sympathetically with both the environment and the residents will be critical.

Inadequate long-term planning for increased visitor numbers will continue to cause issues both logistically and socially with residents unless addressed as a matter of priority.

Understanding the actual needs and impacts of the visitor vs the perceived needs and impacts from residents will be a challenge to balance and the investment needed in basic hygiene infrastructure to meet the needs of the international visitor will need consideration plan.

From a Local Government perspective, the associated costs to deliver infrastructure and services to support visitors will be a significant challenge that will need to be addressed.



Challenge – relevant visitor information services

Finally, the visitor centre will experience a variety of challenges but in particular will include:

- remaining loyal to the brand;
- not reacting to visitor spikes of interest and therefore miss informing long term planning;
- the ability to utilise the face to face opportunity to test product relevance in a controlled manor;
- as a service to community and visitors, sustainability of the VIC is an ongoing challenge with cost of wages high and Return on Investment (ROI) difficult to measure. Continual improvement and best practice will need to be adopted to take advantage of any opportunity to leverage commercial opportunities and / or lesson costs.
- another challenge is to report relevant and measurable issues, not intangible statements with little fact.

Challenge – industry business sustainability

Local industry is growing quickly in some sectors, however small traditional "Mum and Dad" operators are often anecdotally reporting they are at a workload capacity. With shoulder and peak seasons pushing out many operators report an inability to have a break or significant downtime. Operator fatigue in the long term is a risk, but in addition, the inability to be able to plan and grow their businesses outside of the operational everyday demands of visitors results in businesses unable to strategically expand and grow. There are many restrictions to a small business expanding that are outside of the reach of tourism. Partnership with training providers and Business Chambers or other similar industry groups will assist in understanding industry needs, supporting growth and creating opportunities for collaboration and skills sharing.

Stakeholders report some emerging issues that may, in the future, challenge the sustainability of tourism in the Shoalhaven region. These issues could pose risks to the natural and cultural heritage, reducing the quality of the visitor experience and subsequent economic opportunities for the local communities.

Table 1.14 documents these issues.

Table 1.14 Current issues that might pose a risk to healthy tourism in Shoalhaven

Environment	Community (socio-cultural)
Accessibility to and in the destination (traffic), especially during the tourism peak season	Subtle conflict in peak season between some residents and visitors (particularly traffic, parking and sense of serenity)
Excess of garbage in peak season at some attractions (Jervis Bay, Bendalong, Berry, Ulladulla, Booderee National Park)	Subtle conflict for disturbance, garbage and toilet in the peak seasons
Hygiene problems: shortage of toilets in some destinations in peak season (Jervis Bay, Bendalong, Berry, Ulladulla, Booderee National Park) and during some events	Reducing access for low income residents in some visitor destinations (Jervis Bay) to rent/buy houses, forcing them to move out of their local area
Disturbance to wildlife and serenity in peak season (eg. noise in natural areas)	Lack of knowledge / misunderstanding of the value / importance of tourism in some communities
Congestion in peak season causing visual impact of traffic and parked cars in natural and cultural settings, and compaction of some natural ground areas	Disadvantaged communities (such as Aboriginal communities) are not fully involved in the tourism value chain
Economic	**Visitor experience**
Lack of employment opportunities in low and shoulder season	Some emerging conflict between some target markets (eg. between families' and ecotourist in national and marine parks)
High price of housing	Insufficient nature-based accommodation – especially ecotourism accommodation
Lack of awareness of the contribution of tourism to the local economy	

Analysing the severity of the issues identified, it was concluded that tourism across Shoalhaven appears to be in a relatively healthy state, particularly in comparison with many coastal destinations worldwide that are experiencing greater impacts and conflict between visitor groups, or between residents and visitors.

It was subsequently concluded that this is a perfect moment for a Sustainable Tourism Model, to complement the Destination Management Plan, because:

- much of the tourism development work has been undertaken – there is still work to do but it is not fundamental, rather value adding;
- stakeholders are prepared to work together for a common good; and
- the region is not yet at serious risk of any impacts causing irreversible consequences.

Section 2 outlines the model and how it is integrated with this Destination Management Plan.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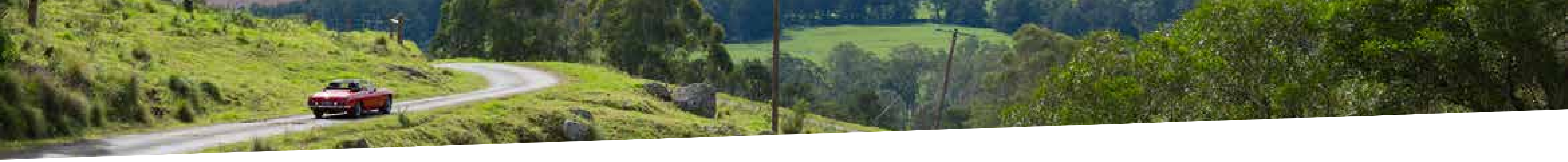


2.1. Focus:

The primary visitor economy business in Shoalhaven is leisure.

2.2. Vision

The vision for Shoalhaven as a visitor destination is:

To be recognised as a year-round destination, valued for its quality environment and visitor experiences.

2.3. Mission

The Mission of Shoalhaven Tourism is:

> To drive tourism visitation and spend throughout the Shoalhaven ensuring long term sustainability of the industry in partnership with the local community.

2.4. What healthy tourism should look like – Optimal Conditions

This DMP defines what long term healthy tourism in Shoalhaven should look like, as optimal conditions. Following extensive consultation, research and testing against State of the Environment reporting, a set of optimal conditions were established, and are listed in Table 2.1.

Table 2.1 Optimal conditions for healthy tourism in Shoalhaven

Environment	Community (socio-cultural)
Natural habitats are healthy	Shoalhaven is a safe place to live and work
Wildlife populations are healthy	Special places are healthy for local residents to use
Waste management facilities and services meets peak period demands	Amenity and access to villages is protected
Local beaches are clean of rubbish	Local residents value the visitor economy and its benefits to them
Economic	**Visitor experience**
Visitation is consistent throughout the year	Overnight visitors experience the essence of the region
Visitor yield is increasing at a greater rate than visitation	Overnight visitors experience the essence of the region
Businesses demonstrate vitality and resilience	Overnight visitors are very satisfied with their experience
Year round employment opportunities exist for local residents	Shoalhaven is an inclusive tourism region
Destination marketing is effective	

2.5. Shoalhaven 360 – a model to keep tourism in Shoalhaven healthy

This Destination Management Plan can only be written in one moment of time. The more time passes, the more chance that the DMP can become out of date. Models are designed not to go out of date. Destination 360 is a sustainable tourism model designed for the Shoalhaven region. Shoalhaven 360 is like a living, constantly adapting plan – it keeps the health of tourism in Shoalhaven in check throughout the lifetime of a DMP, and the next DMP, and the one after that.

The aim of Shoalhaven 360 is to help create and keep sustainable tourism in Shoalhaven. A model can help achieve this by:

1. Writing down what we think a healthy community, economy, visitor experience and environment should be;
2. Continuously monitoring how close we are to a healthy community, economy, visitor experience and environment, so we know what parts are healthy and what parts might need help;
3. Making changes when the monitoring says they are needed, so we can fix problems and make the most of opportunities, as they happen.

Figure 2.1 presents the three parts of Shoalhaven 360 as being:

1. Simple statements of what healthy tourism in Shoalhaven should be based on (which we call optimal conditions)
2. A way to measure how close reality is to the desired optimal conditions (which we call monitoring)
3. What could be done if reality is outside the desired situation (adaptive management)

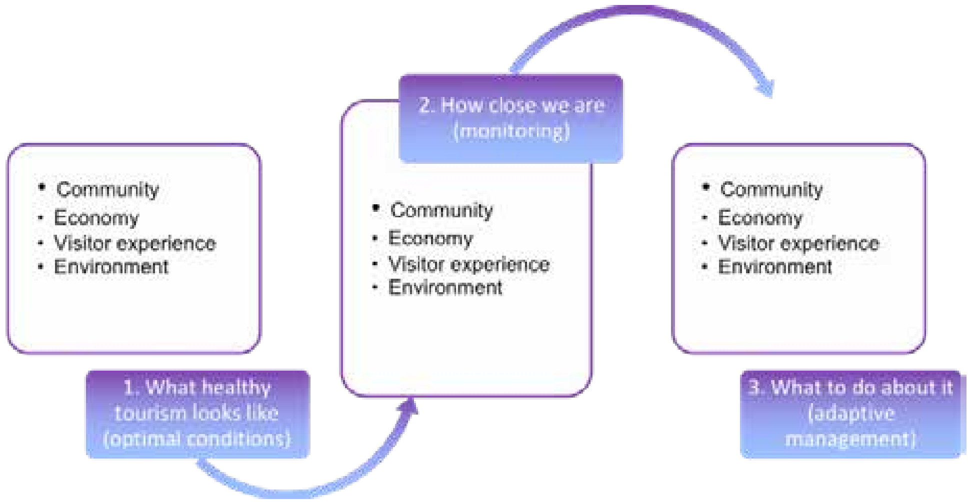
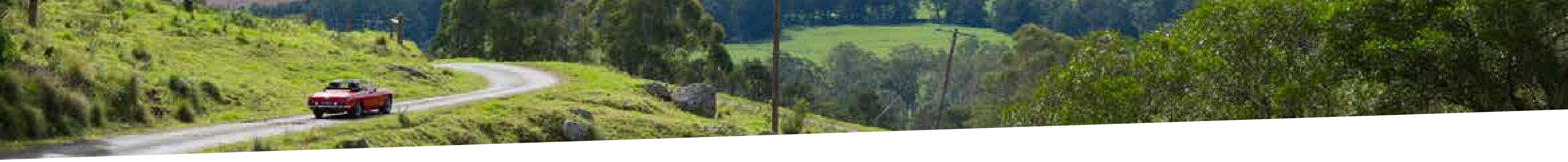


Figure 2.1 The three parts of Shoalhaven 360 – emphasising the staged role of each of the three components

Shoalhaven 360 operates on a web platform, so that all stakeholders can view it and understand how tourism in Shoalhaven is performing against the optimal conditions. Any adaptive management introduced will also be acknowledged in the website. The addition of Shoalhaven 360 is a fundamental difference to other DMP's in Australia.



2.6. Strategies

Five key strategic focus areas for this DMP are:

1. Destination management (4)
2. Destination marketing (6)
3. Events (3)
4. Local industry and advocacy (3)
5. Infrastructure and investment (2)
6. Visitor services (3)

Sections 2.7 to 2.12 provide tables for the strategies and their actions to address each focus area.

2.7. Action Plan to support Destination Management

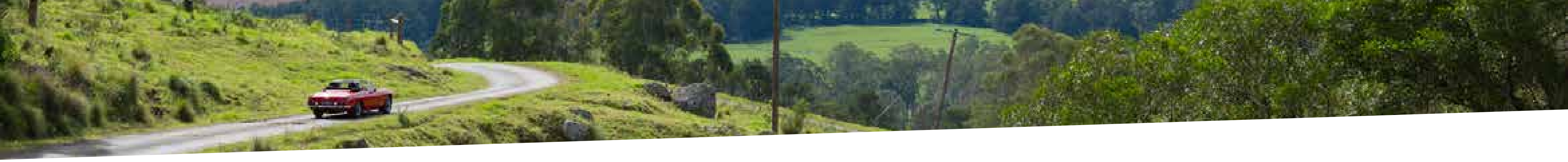
Table

Strategy – Create, implement and operate a sustainable tourism model for Shoalhaven (Shoalhaven 360)	Person responsible	Priority
Review Shoalhaven 360 and refresh	Consultant	Year 5
Strategy – Maintain strong relationships with STAG and associated working groups	**Person responsible**	**Priority**
Conduct quarterly meetings with STAG that include reporting, joint analysis and decision making	Tourism Manager	Ongoing
Create and maintain a strategic plan for STAG to ensure clear objectives and outcomes are in place	Tourism Manager	Annually
Strategy – Identify and work with key stakeholders, e.g. Destination Networks, DNSW, NPWS, Business Groups	**Person responsible**	**Priority**
Strategy – Create, implement and operate a sustainable tourism model for Shoalhaven (Shoalhaven 360)	**Person responsible**	**Priority**
Meet regularly with DNSSS and DNSW representatives and actively look for opportunities to leverage partnership opportunities	Tourism Manager	Ongoing high priority
Strategy – Create, implement and operate a sustainable tourism model for Shoalhaven (Shoalhaven 360)	**Person responsible**	**Priority**
Support collaboration opportunities between South Coast LGAs	All Tourism Team	Ongoing high priority
Work with Visit Canberra on domestic and international visitor opportunities	Tourism Manager and Marketing Specialist	Year 2-3
Develop and maintain professional and working relationships with key agencies to optimise and leverage opportunities.	All Tourism Team	Ongoing
Be responsive to market and opportunities for partnerships.	All tourism team	Ongoing
Be the facilitator of conversations, actively bringing key stakeholders together to work for the industry and the region.	All tourism team	Ongoing high priority
Strategy – Continue to shine a light on inclusive tourism opportunities, supported by inclusive infrastructure	**Person responsible**	**Priority**
Continue to keep inclusive tourism integrated in best practice	All tourism team	Ongoing
Advocate for inclusive tourism in the region and more broadly	Tourism Manager	Ongoing

2.8. Action Plan to Support Destination Marketing

Table

Strategy – Create and execute marketing campaigns that drive visitation and spend will consideration to the 360 model adaptive management approach and ensuring best practice	Person responsible	Timing / Priority
Creation of a yearly marketing plan in partnership with STAG working group including PR, and ongoing local, domestic and international media strategies	Marketing Specialist	Annually
Maintain strong Shoalhaven brand identity in market	Marketing Specialist	Ongoing
Strategy – Industry Sector/Product Development	**Person responsible**	**Timing / Priority**
Marketing support and mentoring for precincts e.g. towns and villages and business sectors	Marketing Specialist	Ongoing
Grow consumer product offering on website by targeting identified sectors for promotion and development	Marketing Specialist	Ongoing
Be recognised as an industry leader in Tourism Marketing	Marketing Specialist	Ongoing
Strategy – Develop content, owned and digital strategies to meet customer demand	Person responsible	**Timing / Priority**
Develop and grow customer database and direct marketing schedule	Marketing Specialist	Ongoing, Year 2
Evolve digital strategies in line with key source markets and travel trends	Marketing Specialist	Ongoing
Maintain strategic focus on creating new, rich content assets to promote the region	Marketing Specialist	Ongoing
Strategy – Partner with other LGA's and Government agencies to leverage campaign exposure	**Person responsible**	**Timing / Priority**
Create and implement one major cooperative campaign	Marketing Specialist	Annually
Collaborate with and capitalise on, state and nation-wide marketing campaigns	Marketing Specialist	ongoing
Strategy – Proactive research and consumer trends insights	**Person responsible**	**Timing / Priority**
Source and analyse domestic and international tourism research	Marketing Specialist	Ongoing
Utilise research in development of source markets and campaigns, and for local media advocacy	Marketing Specialist	Ongoing
Strategy – Support tourism business units with strategic marketing	**Person responsible**	**Timing / Priority**
Event and Visitor Centre marketing support	Marketing Specialist	Ongoing



2.9. Action Plan to Support Events

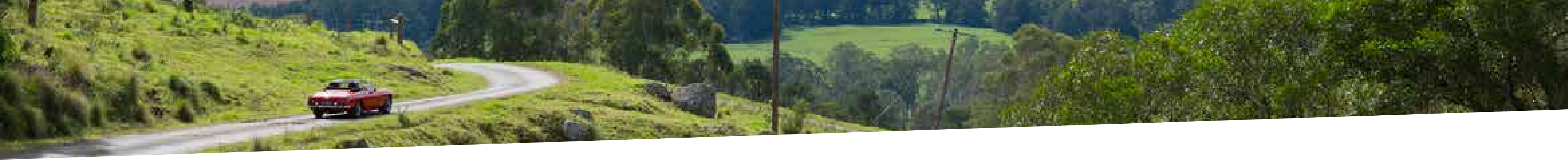
Table

Strategy – Facilitate and support the delivery of community and tourism events striving to achieve engaged, activated and liveable communities	Person responsible	Priority Level
Assist in the successful delivery of strategic supported events and conferences through the Events Support Program	Events and Investment Specialist	Annually
Strategy – Support events with advice, links to relevant stakeholders and approvals	**Person responsible**	
Process event permits and work closely with event organisers to help facilitate successful events	Event Liaison Officer	Ongoing
Review, maintain and manage the Events Policy	Events and Investment Specialist, Event Liaison Officer	With term of Council or as needed
Establish collaborative networks, exchange best practice and share industry information and insights	Events and Investment Specialist, Event Liaison Officer	Ongoing
Administer Filming permits for Council	Events Liaison Officer	Ongoing
Strategy – Work with industry to identify gaps and develop, support and grow events to meet customer demand opportunities	**Person responsible**	**Priority Level**
Develop relationships with State and National professional event partners	Event and Investment Specialist	Ongoing, high priority
Work with key event locations to maximise tourism impacts eg: Willinga Park, Bomaderry Sports and Community Complex, SEC	Events and Investment Specialist, Event Liaison	Ongoing high priority
Work with Council departments advocating for investment in facilities that attract major events and conferences	Events and Investment Specialist	Ongoing high priority

2.10. Action Plan to local industry and advocacy

Table

Strategy – Establish collaborative networking activities, exchange best practice and share industry information and insights with the goal of supporting local operators in delivering high quality tourism product	Person responsible	Priority / timings
Regular communications with industry regarding opportunities, including training and opportunities	Marketing Specialist, Events and Investment Specialist	Ongoing, min 4 times per year
Host Tourism Operator 'After Hours' face-to-face networking events	Marketing Specialist	Ongoing, min 2 times per year
Offer supported training courses for operators in business and marketing development.	Marketing Specialist	Ongoing
Strategy – Support local businesses by maintaining a network approach to business assistance	**Person responsible**	**Priority / timings**
Attend local business chamber and association meetings, advocating for the role of tourism in the region and opportunities for partnerships	Tourism Team	Ongoing
Strategy – Industry advocacy and reporting	**Person responsible**	**Priority / timings**
Work wherever possible to advocate for the jobs and growth opportunities for the region in tourism	Tourism Manager	Ongoing, high priority
Conduct operator surveys and respective reporting	Tourism Manager	Bi-annually, next due 2019
Develop and maintain professional and working relationships with key agencies to optimise and leverage opportunities including, but not limited to, Tourism Australia, Destination New South Wales, strategic media agencies and outlets, event promoters and investors, local business chambers and tourism groups.	All tourism team	Ongoing high priority



2.11. Action Plan to support infrastructure and investment

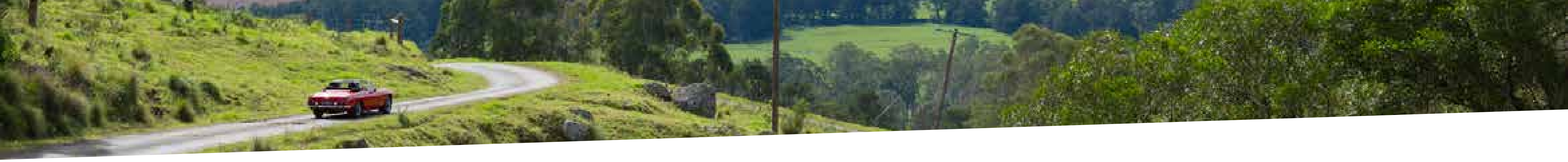
Table

Strategy – Work collaboratively to encourage tourism investment to the region, with emphasis on identified major projects and product development opportunities	Person responsible	Priority / Timings
Educate the industry on grant opportunities available and provide support where possible in the form of letters of support and supporting documentation	Events and Investment Specialist	Ongoing as available
Assist in catalytic investment projects to establish viable concepts, engage with investors and deliver tourism projects through a whole of council approach.	Events and Investment Specialist	Ongoing, high priority
Actively participate in and facilitate, where needed opportunities for greater collaboration.	Tourism Team	Ongoing
Financial assistance to local community organisations improving local visitor facilities through the Infrastructure Support Program	Tourism Manager, Events and Investment Specialist	Ongoing, annual program
Strategy – Work across Council to ensure local hygiene infrastructure needs of the visitor and local community are met now and into the future	**Person responsible**	
Work with council and relevant organisations and community groups to identify tourism infrastructure gaps and create short term and long-term priority goals. With aim to improve parking facilities, amenities, services and facilities (e.g. public toilets, safe playgrounds, accessible public spaces, picnic tables and youth facilities, town beautification	Project Officer	High priority
Conduct annual infrastructure audits to assist in ongoing identification of gaps. Assist, support and advocate for works and maintenance plans to provide priority to facilities in peak visitation times	Project Officer	Annual
Facilitate the development of more shovel ready projects that benefit both community and tourism objectives	Project Officer and Tourism Manager	High priority
Assist Council in preparation of grants for key infrastructure gaps	Project Officer	High priority

2.12. Action Plan to Support Visitor services

Table

Strategy – Deliver high quality visitor services and maintain accreditation of VIS and work with DNSW where possible to ensure best practice	Person responsible	Priority / timings
Creation of a yearly VIS Action Plan to drive tourism visitation in key source markets	Visitors Services Manager	Annual
Present plans to STAG for endorsement yearly	Visitors Services Manager	Annually
Provide access to training for all VIS staff to ensure best practices and high customer service levels met	**Visitors Services Manager**	**Ongoing**
Ongoing test and measure including conducting regular Mystery Shopping on VIS centres to monitor and improve customer experience	Visitors Services Manager	Ongoing
Strategy – Drive sales and bookings in region	**Person responsible**	**Priority / timings**
Investigate and implement opportunities for increased mobile services throughout the region	Visitors Services Manager	Ongoing as budget permits
Review function of Bookeasy including opportunities for growing business partnerships and long term sustainability of the service	Visitors Services Manager and VIS team	High priority
Develop and maintain strong relationships business partners; SEC, Library, local suppliers and operators	Visitors Services Manager and VIS team	Ongoing
Stock high quality merchandise including local products with stock taking and merchandising procedures in place. Create appealing visual displays of merchandise in VIS centres	Visitors Services Manager and VIS team	Ongoing
Provide VIS staff with access to sales and merchandise training	Visitors Services Manager	Ongoing
Maintain and grow active number of Volunteers	**Person responsible**	**Priority / timings**
Maintain established ambassadors and expand numbers of new recruits	Visitors Services Manager	High Priority
Provide training and ongoing support with opportunities for in region famil trips	Visitors Services Manager	Ongoing
Investigate and identify opportunities for volunteers to work with VIS staff out in region	Visitors Services Manager	Ongoing as resources permit
Strategy – Develop a network of supplementary centres to provide accurate and relevant VIS services in the region	**Person responsible**	**Priority / timings**
Maintain active supplementary centre business partnerships including roles, responsibilities, training and key measures of success	Visitors Services Manager	Ongoing



3.1. Human Resources

As identified in Section 1.2, the principal day to day resource for implementing this DMP is Shoalhaven Tourism (see Figure 1.2). This is made up of seven full time staff and nine part time / casual staff. However, implementation of most of the actions rests with the full-time staff, as the others are service providers within the Visitor Information Centres, tied to specific visitor servicing roles with minimal time for other tasks.

Shoalhaven Tourism also has budget to engage contractors and consultants on an as needed basis. This is sometimes used for further analysis of market data, conducting market research and providing tourism planning and development advice.

The role of STAG is critical in assisting to implement actions and being the 'eyes and ears' between tourism operators and stakeholders, and the Shoalhaven Tourism team.

The Manager of Shoalhaven Tourism has briefed each staff member on their roles in implementing this DMP, as identified in the Action Plans.

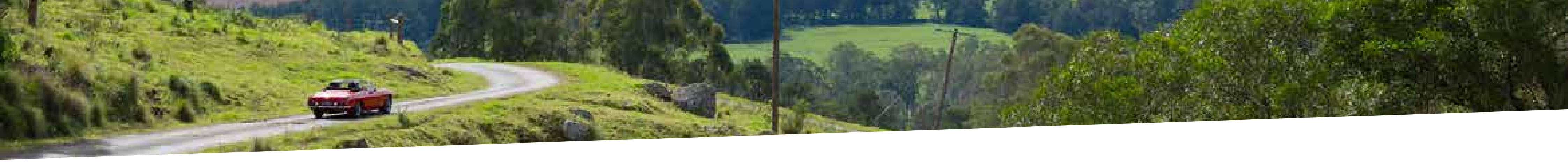
3.2. Financial Resources

Overall, the region suffers a financial shortfall to deliver significant improvements to the infrastructure required to meet the needs of the visitor. Significant research and work will need to be completed into opportunities for Council to raise some revenue to support the ongoing costs.

3.3. Key Risks

Figure 3.1 Potential risks (in order of likelihood) that could impact Shoalhaven as a visitor destination

Risk	Likelihood	Impact	Strategy
Limited forecast growth in the domestic travel market	Likely	High	Diversify marketing into international markets
State legislation and cross government responsibilities can prevent some strategic desirable outcomes, e.g. potential regulation of holiday homes.	Likely	Medium / High	Work with all departments of council to provide comment to relevant legislation. Strategic partnerships e.g. DNSSS and Australian Regional Tourism Network to strengthen regional tourism voice at a state and national level; work with council to impact legislation and regulation where appropriate.
Strong competition both domestic and internationally, impacting visitation	Possible	High	Focus on brand promotion reaffirming identity and brand loyalty across multiple generations and markets
Weather (including Climate Change) and Natural Disasters impacting visitation	Possible	Medium	Continue to shine a light on cross seasonal activities and responsive marketing on social media to target activities that drive visitation all year round and not reliant on weather conditions
Health of the environment and community impacting customer and community satisfaction	Possible	Medium	Creation and ongoing maintenance of Sustainable Tourism Model. Continued communication with the community
Economic downturn Fluctuating $AU	Possible	High	Build brand loyalty and focus on proximity to high population areas Sydney and Canberra, diversify marketing into key international markets. Build diversity in product offering
New millennial traveller not reliant on brand equity and have a different set of expectations to traditional visitor	Possible	Medium	Keep up to date on research and trends Work to target % or marketing directly to the new consumer Operator training and product development



Risk	Likelihood	Impact	Strategy
Significant interest in investment and development in the region has the perceived potential to significantly change our product offering, potentially "losing" our character, unique position and competitive advantage. Key learnings can be gained by many other destinations both Nationally (e.g. Byron Bay, North Coast) and Internationally (e.g. Venice, Barcelona) In addition, community mindset in relation to development can be negative, potentially impacting investment. vocal minority	Possible	Medium	Interdepartmental collaboration to advocate for tourism growth and investment in long term sustainable ways. Advocacy for sustainable tourism objectives in plans of management. Development and ongoing maintenance of the Sustainable Tourism Model. Continued communication with the local community about the importance of tourism.
Change of direction and/or legislation from external Government agencies eg: National Parks	Possible	High	Continue close working relationships with external Government agencies, advocating for tourism on a broad level
Lack of supporting infrastructure to support growth	Possible	High	Creation of a Tourism Infrastructure plan to identify specific needs and opportunities for revenue raising Advocate at all levels of Government for appropriate infrastructure development Assist in the development of funding applications for strategic tourism infrastructure projects