Shoalhaven Tourism Master Plan

* 2016 Strategy & Action Plan *

Date prepared | December 2015

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Purpose

Distillation Process

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Vision

To achieve tourism revenue of $1 billion by 2020

- Shoalhaven City is the most visited, day trip and overnight, Local Government Area in NSW, outside of the Sydney region
- The Tourism Master Plan vision is for Shoalhaven City to retain this position and by 2017, to be recognised as a year-round destination, valued for its quality environment and visitor experiences.

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Mission

"To provide visitors to the Shoalhaven LGA with a world class experience that encourages them to do more, stay longer and come back time and time again."

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Linking Vision & Mission

ACCESS to information in formats appropriate to our target audiences

BUILD infrastructure and events that will attract more visitors to do more and stay longer

COLLABORATE with tourism stakeholder universe to maximise opportunities, amplify synergies and create a larger share of voice nationally [and internationally]

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Background

Snapshot | market trends

- Tourism is important economy driver to the South Coast of NSW largely due to the geographical location, placed in close proximity to major population cities; Sydney and Canberra. This has been boosted by increasing upgrades to major roads.
- The Shoalhaven LGA is perfectly placed – both in tourism product diversity and geographical positioning.
- For the **DOMESTIC MARKET**, life is hectic and fast-paced, and a “staycation” is a great option to get away from it all in a way that is easily accessible and stress-free. Increasing demand from the consumer for tailored niche markets; food and wine experiences, pet friendly; active holidays; family friendly and more.
- For the **OVERSEAS MARKET**, the Shoalhaven represents the quintessential “Aussie experience” – pristine beaches, natural wonders, aboriginal cultural experiences, iconic Australian wildlife and a fast-growing food and wine scene that has achieved recognition both nationally and internationally
- **INCLUSIVE TOURISM** is also gaining increasing prominence domestically, and the Shoalhaven has a number of motivated tourism business operators who are championing this movement in the region.

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Snapshot | tourism product

- The most visited NSW LGA outside Sydney for day and overnight visits
- The vast majority of visitors are from Sydney (37.5%), followed by regional NSW (22.4%), Canberra (18.1%) and Victoria (15.1%)
- 49 diverse towns and villages, and 109 magnificent beaches
- The area is rich in natural assets including a picturesque coastline, and diverse National Parks and Forests (75% total land area).
- History is prominent in towns such as Berry, Kangaroo Valley and Milton
- Specific tourism product areas are gaining greater prominence:
  - The activity-based sector focused on Jervis Bay, where dolphin and whale watching is a major drawcard for tourists
  - The bourgeoning food and wine scene is gaining increased attention both domestically and internationally.

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Tourist Profiles

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Snapshot | the “new” tourist

Domestic

Demographics

- Visitors to our region are currently generally middle-aged with high incomes and older kids
- Families and older couples remain core market but they are increasingly being joined by small-medium size groups of women and wedding parties.

Expectations

- The new tourist is far more educated, sophisticated and demanding than previous generations
- Tourists are less loyal to a destination, and less tolerant of mediocre product/customer service

Information sources

- The internet now being the primary tool used to research and purchase travel, the use of social media to communicate and the emergence and rapid take-up of smart phones and tablets and ‘tools’ such as Apps and QR Codes

Behaviour

- Day trips and weekend stays are prominent outside of traditional peak holiday seasons; tourists need reasons to stay longer and spend more.

Emerging Trend

Independent travellers from China, Korea and to a lesser extent India, as well as larger groups from the Middle East.

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* Shoalhaven City Framing Report, April 2014 - ZOO

Snapshot | customer mosaic

CURRENT DOMESTIC CUSTOMERS

- Margaret + Robert
- 50+
- Working full time
- Married
- Travelling as part of a couple or with kids
- On a holiday
- Earning on average between $100,000 and $150,000 pa.
- Likes; cafes, spending time with family, good customer service, easy access to information.
- Influenced by family and friends.
- Enjoy eating and drinking; like to balance life with activity based experiences.

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Snapshot | customer mosaic

CURRENT DOMESTIC CUSTOMERS

- Jackie
- 55+
- Retired, on a pension or working part time;
- Traveling alone or with a friend or relative;
- Visiting family or friends;
- Earning on average between $25,000 - $85,000 pa;
- Likes; special deals, value for money, vouchers, cafes, spending time with family, soft and safe active experiences;
- Influenced by family and friends;
- Largely risk adverse.

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Snapshot | customer mosaic

FUTURE DOMESTIC CUSTOMERS

- Matt and Alison
- 35+
- Both working full-time, children in school or day care
- Travel as a family and with friends
- Visiting family or friends
- Earning on average between $90,000-$150,000 pa.
- Likes - special offers, holiday deals, vouchers, family and couples activities, finer things in life (if travelling without children)
- Influenced by social media, traditional media, family and friends.
- High demand for childcare and children's holiday activities that involve childcare.
- Love going to the snow and on a cruise ship where adults can spend time with kids but also have kids in school holiday fun activities while adults spend time together.

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Stakeholder Universe

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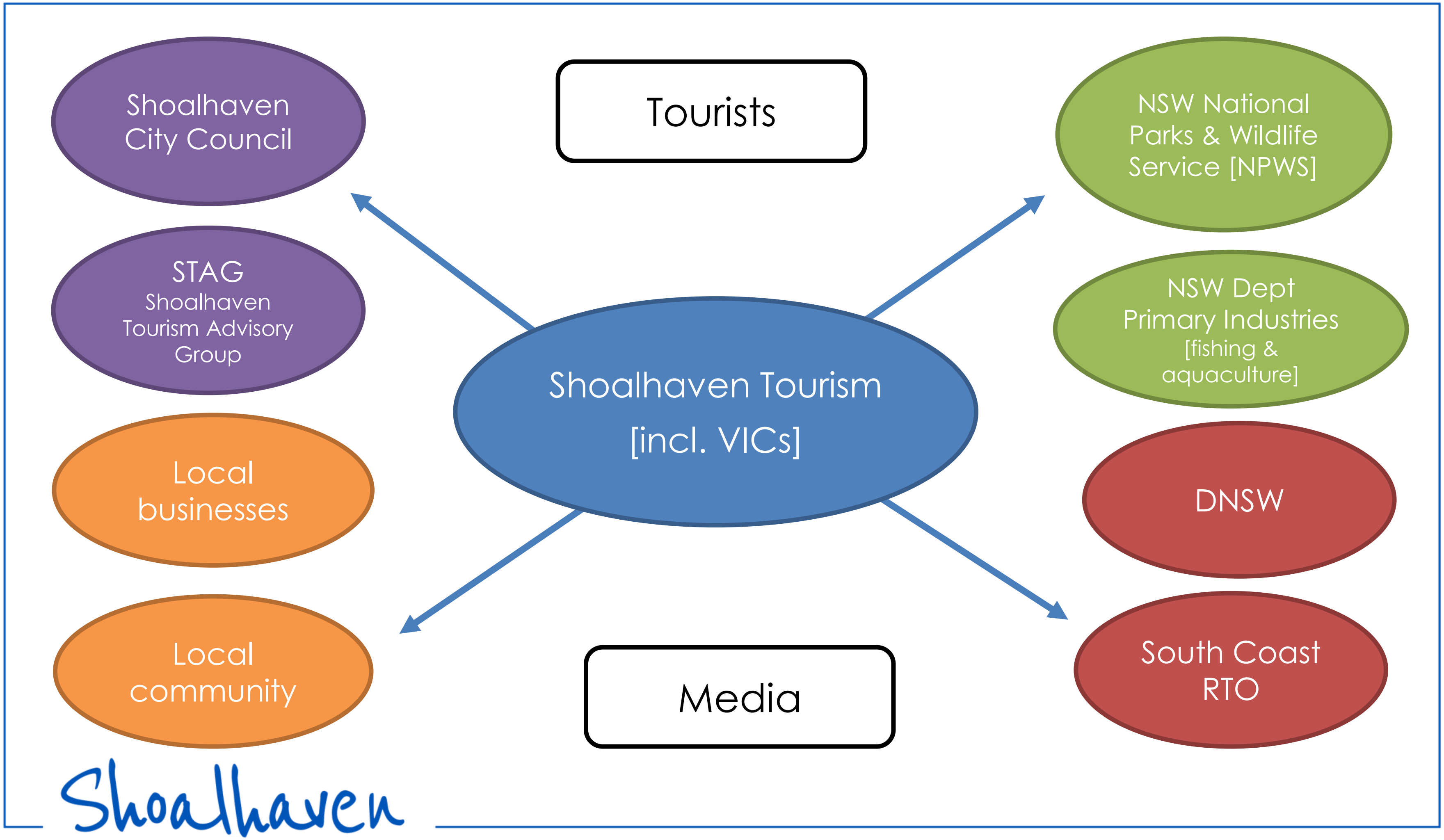
External



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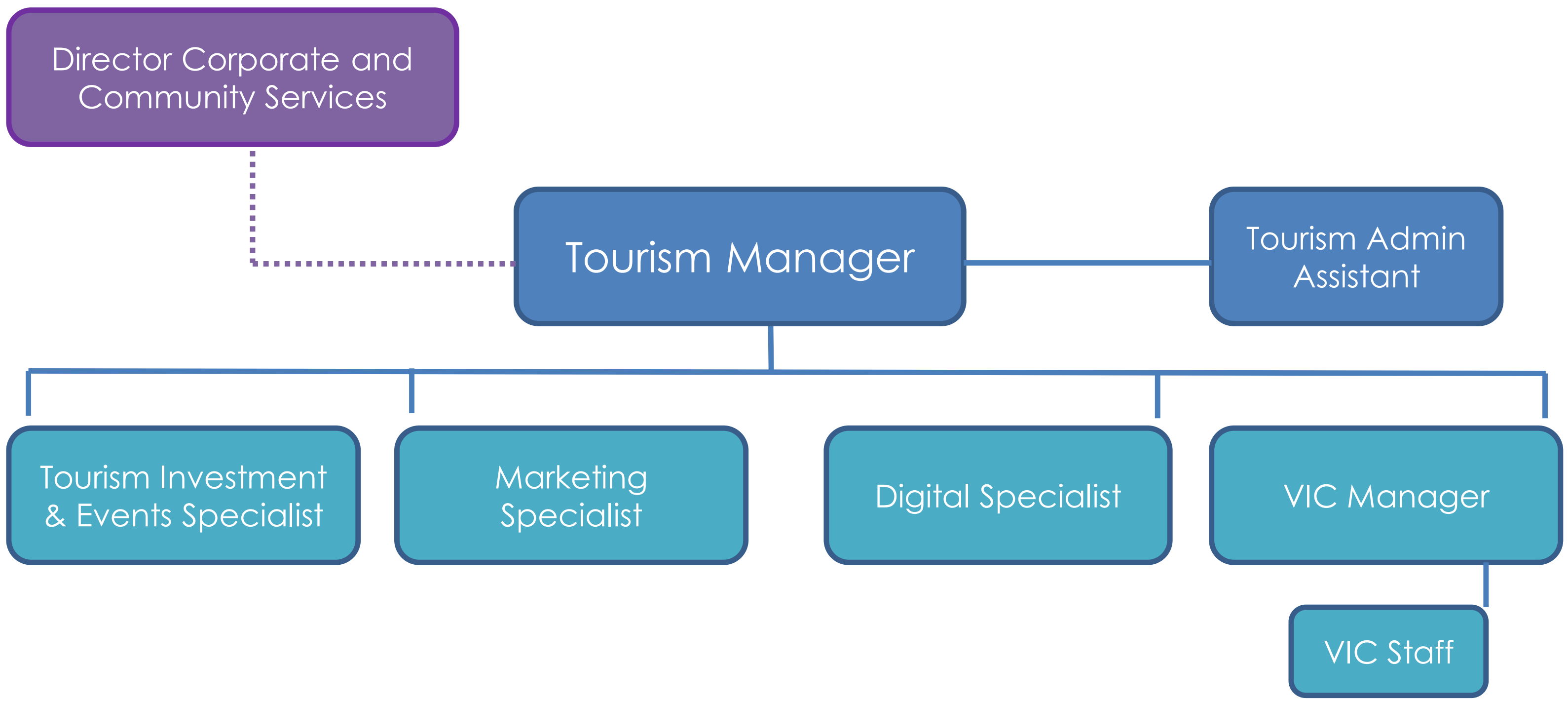
Internal



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2016 Tourism Plan

Situation Analysis | Internal

Strengths	Weaknesses
• Strong equity in traditional Shoalhaven • Diversity of tourism product • Strong internal team led by Tourism Manager • Strong links with industry e.g. DNSW, SCRTO • Iconic and unique experiences e.g. Hyams Beach, Rick Stein, Jervis Bay, South Coast Oysters. • Council support/backing, recognition of importance of tourism to the economy • VIS staff dedicated and knowledgeable • STAG – highly motivated group championing tourism, facilitating positive relationships • Strong sports events program and established relationships • New staffing positions have increased resources • Committed/engaged community members • Unspoilt area, not overly developed in an inappropriate way. • Lots of safe beaches that are not surf beaches, perceived safer for people not confident in swimming • Collaboration between operators targeting same market e.g.: Discover JB, Shoalhaven Wine Coast, Milton Food Trail, Aust. Oyster Coast.	• Low recognition of broader Shoalhaven brand/49 towns & villages • Lack of tourism infrastructure limits some market local groups operating in isolation • Lack of perceived communication between Tourism HQ and local community • Quality and accessibility of tourism information • Broad Master Plan; difficult to implement. • Poor telecommunication connectivity throughout the region • Lack of accommodation, particularly apartment style and serviced, which inhibits growth of international and high yield conference /business and events markets. • 49 towns and villages all competing for the same tourist and tourism dollar. • Lack of appropriate quality product • Lack of online presence and packaging. • Lack of international ready operators • High number of holiday properties which are difficult to engage. • Aged and long term residents not supporting tourism as an industry and see the population increase as an inconvenience.

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Situation Analysis | External

Opportunities	Threats
• DNSW relationship including access to grants / funds Media interest – on the increase both in terms of tourism product and location, especially with bloggers • Major tourism activities in area (fishing, waling tracks, rock climbing, kayaking, cycling) • Digital/social media including website development • New thinking on Visitor Information Services, as indicated with move to SEC • Consumer sentiment • Growth in food & wine movement • Recognised Wedding Destination • Tourist desire for customised experience = opportunity to tailor product to show case the Shoalhaven identity • Strong Aboriginal history and community • Commitment from Council to support tourism events program • Increasing move towards "short break" holidays (Sydney and Canberra markets) • Increase in "staycations" in addition to a strong and growing Visiting Family and Friends (VFR) market • New Shoalhaven branding offers chance to upgrade and update all tourist information including brochures and factsheets • Further leverage of activity-based sector • Short drive from capital cities • International destination for Asian market with engaged and motivated operators.	• Similar domestic destinations e.g. Kiama LGA, Eurobodalla LGA, Queensland • Competitor LGAs vying for contestable funds e.g. DNSW grants • Overseas destinations offering similar experiences often for less cost e.g. Bali, Fiji • Destinations with better infrastructure to meet demands of distinct markets e.g. Wollongong better equipped to service MICE market • Seasonality and natural disasters • Economic downturn • Seasonal high demand for tourism product • VIC inability to meet consumer needs • Limited forecast growth in the domestic travel market • Fluctuating $AU • Aged and long term residents of the area against development and tourist • State Legislation; prevents some strategic desirable outcomes.

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Tourism Objectives

To achieve tourism revenue of $850k.

Objective 1 | Industry

- To be recognised as a national tourism industry leader.
- To maximise depth/breadth of tourism offering, driving demand for regional products
- To support local operators in delivering a high quality tourism product.

Objective 2 | Visitation

- To sustain and grow core markets (younger families, over 50s, VFR)
- To ignite potential high yield industry market segments
- To leverage international market opportunities
- To drive tourism asset utilisation all year round
- Deliver high quality Visitor Information Services throughout the region.

Objective 3 | Infrastructure

- To prioritise tourism supporting infrastructure in council policy and priorities
- To recognise and lobby for development that will drive visitation and spend in the region
- Continue to shine a light on inclusive tourism opportunities, supported by inclusive infrastructure.

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Objective 1 | Strategic Roadmap

Industry

- To be recognised as a national tourism industry leader.
- To maximise depth/breadth of tourism offering, driving demand for regional products
- To support local operators in delivering a high quality tourism product.

Strategy

- By creating true innovation that meets visitor demand for information.
- By developing an effective and strategic events calendar driving visitation and working to priorities within council investment in world class facilities that attract major events and conferences
- By establishing collaborative networking activities, exchanging best practice and share industry information and insights.
- Encourage business to a strong develop quality and competitive product offering

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Objective 2 | Strategic Roadmap

Visitation

- To sustain and grow core markets (younger families, over 50s, VFR)
- To ignite potential high yield industry market segments
- To leverage international market opportunities
- To drive tourism asset utilisation all year round
- Deliver high quality Visitor Information Services throughout the region.

Strategy

- Develop Visitor Information Services that meet customer demand
- Create and execute marketing campaigns that drive visitation and spend
- Target and/or develop events to drive visitation in the shoulder and off seasons
- Develop cutting edge digital assets infrastructure to meet customer demand with focus on packaging product to drive spend.
- Collaborate with broader industry to drive international visitation
- Partner with other LGA's and Government agencies to leverage campaign exposure.

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Objective 3 | Strategic Roadmap

Infrastructure

- To priorities tourism supporting infrastructure in council policy and priorities
- To recognise and lobby for development that will drive visitation and spend in the region
- Continue to shine a light on inclusive tourism opportunities, supported by inclusive infrastructure.

Strategy

- Work within council to create smooth and proactive mindset to development, working together with investors to create desired outcomes.
- Ensure tourism priorities are considered and (where appropriate) prioritised in infrastructure planning
- Work in partnership with local tourism industry to support moves towards inclusive tourism.
- Drive tourism investment to the region to build relevant infastructure.

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Strategic Action Plans

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Tourism Management

No.	Issue / Opportunity / Initiative	Critical Steps	Lead	Action Dates
1	Review and refine strategies for each element of the Tourism Master Plan	• Provide guidance and direction for key team to develop strategically-aligned action plans • Conduct annual survey for both visitors and tourism businesses to inform development of 2017 plans.	Tourism Manager	January August
2	Collaborative networking activities	• Set up regular "meet" events • Attend existing meetings • Share best practice via regular e-communication channels • STAG and Council meetings attendance .	Tourism Manager	All year (calendar of meetings to be developed)
3	Ensure delivery of all KPIs, milestones and business-critical deliverables across the entire tourism portfolio	• Set regular review and appraise meetings to ensure timely delivery. • Product and develop reporting in line with Council policy and requirements.	Tourism Manager	All year (quarterly reviews as a minimum)

The Tourism Manager is involved in all areas of the 2016 strategy.

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Infrastructure

	DPOP Priority

No.	DPOP	Issue / Opportunity / Initiative	Critical Steps	Lead	Action Dates
1	3.2.07	Ensure tourist basic infrastructure are of high standard and meet demand	• Audit of basic amenities in key tourist areas • Development plan to address areas of shortfall / priority amenity upgrades • Regular meetings with appropriate Council depts to ensure delivery. • Promote tourism development grants for improvement of infrastructure needs.	Council / Tourism Manager	ongoing
2		Work with Council, National Parks, State and State Forests to identify possible upgrades and promotion opportunities, in line with strategies outlined in the Master Plan.	• Regular meetings • Timeline development.	Council / Tourism Manager	ongoing
3		Inclusive Tourism	• Audit and continue to develop databases and infrastructure for inclusive tourism • Champion market “leaders” in area to encourage other businesses. • Connect infrastructure to marketing opportunities	Council / Tourism Manager / Marketing Specialist.	February onwards
4	3.2.06	Infrastructure investment	• Identify opportunity's in line with council and the master plan to attract tourism investment	Events + Investment Specialist / Tourism Manager	February onwards.
5	3.2.06	Identify new opportunities	• Identify possible new opportunities for basic infrastructure to support events • Work within council to make opportunities in to reality	Events + Investment Specialist / Tourism Manager	May

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Marketing

DPOP Priority

No.	DPOP	Issue / Opportunity / Initiative	Critical Steps	Lead	Action Dates
1	4.2.10.1	Marketing Strategy	• Develop strategy including key actions, timelines and budgets. • Implement agreed plan	Marketing	February Ongoing
2	4.2.10.2	Collaborative networking activities	• Attend all local tourism groups/ committee meetings to share information about tourism activities • Increase sales and marketing skills amongst tourism operators.	Tourism Manager + Marketing Specialist	All year (calendar of meetings to be developed)
3		Collateral consolidation including internal and intra comms upgrade	• Develop strategic Marketing Plan • Develop external and internal communications plan • Review and update marketing collateral, both online and in print with focus on packaging and consumer needs.	Marketing Specialist/ Visitors Services	February
4.		Leverage funding	• Review, develop and implement income generating component to leverage funding and partnership opportunities.	Marketing Specialist	January

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Marketing

	DPOP Priority

No.	DPOP	Issue / Opportunity / Initiative	Critical Actions	Lead	Action Dates
5.	4.2.10.3	Advertising & PR programs	• Create and implement PR strategy in line with Marketing Plan. • Create and implement one major campaign with SCRTO and destination NSW • Create and implement one major VFR campaign • Create and deliver 2017 Visitors Information Guide.	Marketing Specialist	January onwards March June December
6.	4.2.10.4	Communications	• Review current branding and develop as needed • Develop internal and external communications plan • Implement agreed plan.	Tourism Manager + Marketing Specialist	February Ongoing
7.	4.2.10.5	Direct Marketing	• Develop and grow customer database and direct marketing schedule • Continue to develop and grow operator direct marketing schedule.	Marketing Specialist	January Ongoing
8.	4.2.10.6	Support VIS services	• Upgrade all materials to reflect new branding • Assist with all marketing for VIS's including installation of touch screen directories • Assist in Visitor's Mobile services development.	Marketing Specialist	January Ongoing

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Digital

DPOP Priority

No.	DPOP	Issue / Opportunity / Initiative	Critical Actions	Lead	Action Dates
1	4.2.10.7	Website upgrade	• Develop brief for agency • Site architecture testing and design framework finalisation • Go "live" with upgraded site • Disseminate update via marketing and digital channels to key stakeholders (internal and external).	Digital Specialist / Marketing Specalist	January February onwards
2	4.2.10.8	Digital Marketing Strategy	• Develop strategy including key actions, timelines and budgets • Implement agreed plan.	Digital Specialist / Tourism Manager	January February onwards
4		Digital access to tailored information	• Work in partnership with VIS Manager to understand market dynamics and desires • Research options to deliver in innovative digital format	Digital Specialist	January onwards
5		eDM's (Tourism Operators/Visitors)	• Develop eDM framework and structure to deliver regular, important information to core databases.	Digital Specialist	January onwards

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Digital

No.	DPOP	Issue / Opportunity / Initiative	Critical Actions	Lead	Action Dates
6		Support events program with online digital promotion	• Work with Tourism Investment & Events Specialist to devise digital components aligned to core events program.	Digital Specialist	January onwards
7		Develop forms for community requests	• Develop form • Brief internal team on use and distribute to external stakeholders as appropriate.	Digital Specialist	January onwards
8		Develop social media structure and processes	• Host a team brainstorm on planned social media posts • Develop structured content plan including associated imagery and boosts / ads • Develop conversation guidelines • Analyse post responses and FB analytics to tailor and boost FB likes • Share content plan with DNSW Digital Team for greater exposure • Confirm core Admin team with access to passwords (x2 members needed).	Digital Specialist	January Quarterly content plan update Ongoing

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Visitor Information Services

DPOP Priority

No.	DPOP	Issue / Opportunity / Initiative	Critical Actions	Lead	Action Dates
1.	4.2.11.1	Develop business plan with emphasis on high level of visitors services and retail trade to drive visitation.	• Develop strategy including key actions, timelines and budgets • Include key section on move from VIC to SEC across all key stakeholder groups • Implement agreed plan.	VIS Manager	March ongoing
2.		Move current Nowra VIC into the SEC in line with new direction of VIS	• Coordinate operational moving of Nowra VIC services into the SEC	VIS Manager / Tourism Manager / Marketing Specialist.	May
3.		Mobile vans to disseminate information where tourists are e.g. events, city centres	• Investigate options including researching other tourism bodies • Develop proposal including options, timings and costings • Implement agreed plan and launch new service.	VIS Manager	January February March onwards
4.		Develop local ambassador and roving volunteer programs	• Develop proposal including roles, responsibilities and areas of recruitment • Implement agreed plan and launch new service.	VIS Manager / Marketing Specialist	Jan to March
5.		Upgrade all materials to reflect new branding	• Upgrade all materials to reflect new branding.	Marketing Specialist	
6.	4.2.11.2	Upgrade online accommodation booking and packaging system	• Develop proposal including options, timings and costings • Implement agreed plan and launch new service.	VIS Manager / Marketing Specialist / Digital Marketing Assistant	Jan to March

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Events + Investment

DPOP Priority

No.	DPOP	Issue / Opportunity / Initiative	Critical Steps	Lead	Action Dates
1.	3.1.07.1	Develop a strategic Events and Investment plan with emphasis on driving visitation and spend in the region, identifying key opportunities and relevant measures and KPI's.	• Develop strategy including key actions, timelines and budgets • Implement agreed plan.	Events & Investment Specialist	January February onwards
2.	3.1.07.2	Drive investment in events	• Develop and manage event sponsorship opportunities calendar • Develop and manage funding / grants calendar • Devise and submit submissions	Events & Investment Specialist	January
3.		Drive investment in tourism	• Identify opportunities in line with the strategy and seek tourism investment in the region with focus on proactive high density development. • Work on practical ways to cleat the road blocks and reputation of SCC to make the path easy and smooth for investment.	Events & Investment Specialist	February onwards
4.		Events + Investment Collateral Bank	• Develop core suite of materials including event prospectus tailored to core markets,	Tourism investment & events specialist	January Update June

Events + Investment

DPOP Priority

No.	Issue / Opportunity / Initiative	Critical Steps	Lead	Action Dates
5.	Leveraging funds in partnership programs	• Review current partnership program • Develop and implement new plan • Generate $50k in sports partnership additional income.	Tourism investment & events specialist	January
6.	Investment transparency	• Create and ratify core event sponsorship criteria parameters to guide decision making around investment in external activities • Test and measure effectiveness.	Tourism investment & events specialist	January Ongoing
7.	Build and support the current events calendar	• Assist community to grow and develop current event calendar • Work to assist in the sustainability of current community events, lead by volunteers.	Tourism investment & events specialist	February, ongoing.

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Appendices

Appendix 1

Shoalhaven Tourism and VIC Customer Satisfaction Survey Report 2015| Key Findings

- Overall the survey indicates that there is a range of areas for improvement in the services being provided by ST and the VIC
- Clarification of the role of ST and Visitor Services both in terms of services to visitors and services to industry
- Identify that the core activity if ST and VIC is potential and existing visitors and all product and services should be directed at this focus. Operator services are a separate matter
- Improve customer interface and customer service provision
- Communication to be provided to the industry generally that contains a greater level of detail and relevant information in relation to the products, campaigns, timing and budgets
- A greater level of direct involvement with operators and improved knowledge of the industry
- The ongoing development of the relationships with the industry
- The ongoing development of Product Information knowledge
- A review of the direct booking system and the use of a Channel Manager to improve interface with the visitors and operators
- A review of the referral system
- Increased presence in the field by staff leading to a greater level of direct communication
- Improved levels of Famils and industry information sessions
- Review current information distribution process to ensure it has a broader coverage.

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Appendix 2

DNSW, Internet use by visitors to NSW 2014 | Key Findings

- For both domestic and international markets, holiday visitors to NSW were the biggest users of the Internet for sourcing information and for booking
- Increasingly, the internet is the most commonly used source of information used before the trip for both the international and domestic markets to NSW
- The domestic market has a high preference for pre-booking accommodation via the Internet; entertainment, activities and events were LESS likely to be pre-booked online perhaps reflecting the lower online presence of these businesses
- Domestic visitors to NSW aged between 30-44 years are the biggest users of the Internet; international visitors to NSW were aged 15-29 years
- The importance of travel agents has decreased.

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Appendix 3

Expedia, Travel Decisions in a Multiscreen World 2014 | Key Findings

- Mobile device ownership continues to grow steadily – TODAY the mobile travel audience is BIGGER than the PC travel audience with engagement on mobile spanning all travel stages and categories of content
- While mobile bookings are at 6% of the market, over 70% of travellers are engaging with content via their mobile device on a monthly basis
- Mobile bookings will continue to grow – most who have booked on mobile will again, many who have yet to book on mobile intend to in the future
- Those who aren't booking are looking and you need to be where they are
- Consumer experience on mobile across stages has room to grow, ad relevancy and grabbing attention are key to driving mobile ad clicking

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Appendix 4

Tourism Research Australia Forecasts Autumn 2014 | Key Findings

TOTAL SPEND ON TRACK FOR MODERATE GROWTH, BUT GROWTH IN INTERNATIONAL VISITOR SPEND TO OUTPACE GROWTH IN DOMESTIC TOURISM SPEND

- By 2022–23, total tourism expenditure will reach $119 billion in real terms. As domestic tourism enters a low-growth period, the growth of total visitor expenditure is forecast to be primarily sourced from inbound expenditure. From 2012–13 to 2022–23, the share of inbound visitor expenditure is forecast to increase from 29 per cent in 2012–13 to 36 per cent in 2022–23.

A MORE POSITIVE OUTLOOK FOR GROWTH IN INTERNATIONAL VISITOR ARRIVALS

- The improved global economic outlook, especially the sustained economic recovery in Australia's traditional inbound source markets—including the United Kingdom and United States—and for leisure travel has led to an upward revision of forecast growth for Australia's international visitor arrivals for this year and 2014–15.

CHINA TO BE THE MAIN SOURCE FOR GROWTH

- China is the largest contributor to both the growth of inbound arrivals and inbound expenditure. In terms of visitor numbers, from 2012–13 to 2022–23, China will contribute about 24 per cent to the total growth. Further, about 40 per cent of inbound tourism expenditure will be sourced from China over the forecast period.

MORE AUSTRALIANS ARE FORECAST TO TRAVEL OVERSEAS

- The forecast growth for Australians travelling overseas has been upgraded marginally in 2014–15. This is on the back of a slightly higher-than-expected Australian dollar and cheaper airfares due to strong growth of international air capacity to Australia.

MODERATE GROWTH PROSPECTS FOR DOMESTIC TOURISM

- Forecast growth of domestic overnight travel remains low in the next two years, after a period of solid growth.

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