



Destination Southern NSW Destination Management Plan 2018-2020

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Introduction

The Destination Southern NSW (DSNSW) Regional Destination Management Plan (DMP) identifies and informs strategic directions and themes that will encourage growth of the region's visitor economy. DSNSW Region is a truly unique part of New South Wales and Australia that offers a diversity of experiences and landscapes like no other.

This DMP has been developed with the support and involvement of the relevant Local Government Area (LGA) leaders of our region and the Local Tourism Organisations (LTOs) they fund and operate. The eight Councils of the DSNSW Region are arguably the most critical partners and stakeholders of DSNSW. It is one of the real advantages to developing a regional approach to identifying tourism priorities and opportunities that the DSNSW Region mirrors that of the Canberra Region Joint Organisation (CBRJO) - a formal body where the member councils come together as one border-less forum of cooperation.

This DMP becomes the definitive "road map" to rally purpose, concentrate effort and inform all stakeholders of what the strategic themes, related positioning and areas of focus are for the DSNSW Region. These areas of focus are at a high level, and through collaboration, have potential to yield widespread benefit.

The role of DSNSW is to coordinate tourism related strategies and projects that will promote and achieve growth and prominence of the visitor economy across the DSNSW Region. These will be in line with the objectives, strategies and commitments of the NSW Government and in particular Destination NSW (DNSW). This will be achieved in partnership and with the support of other State and Australian Government agencies; industry and business associations; and tourism and allied business operators throughout the DSNSW Region; in addition to the councils and DNSW.

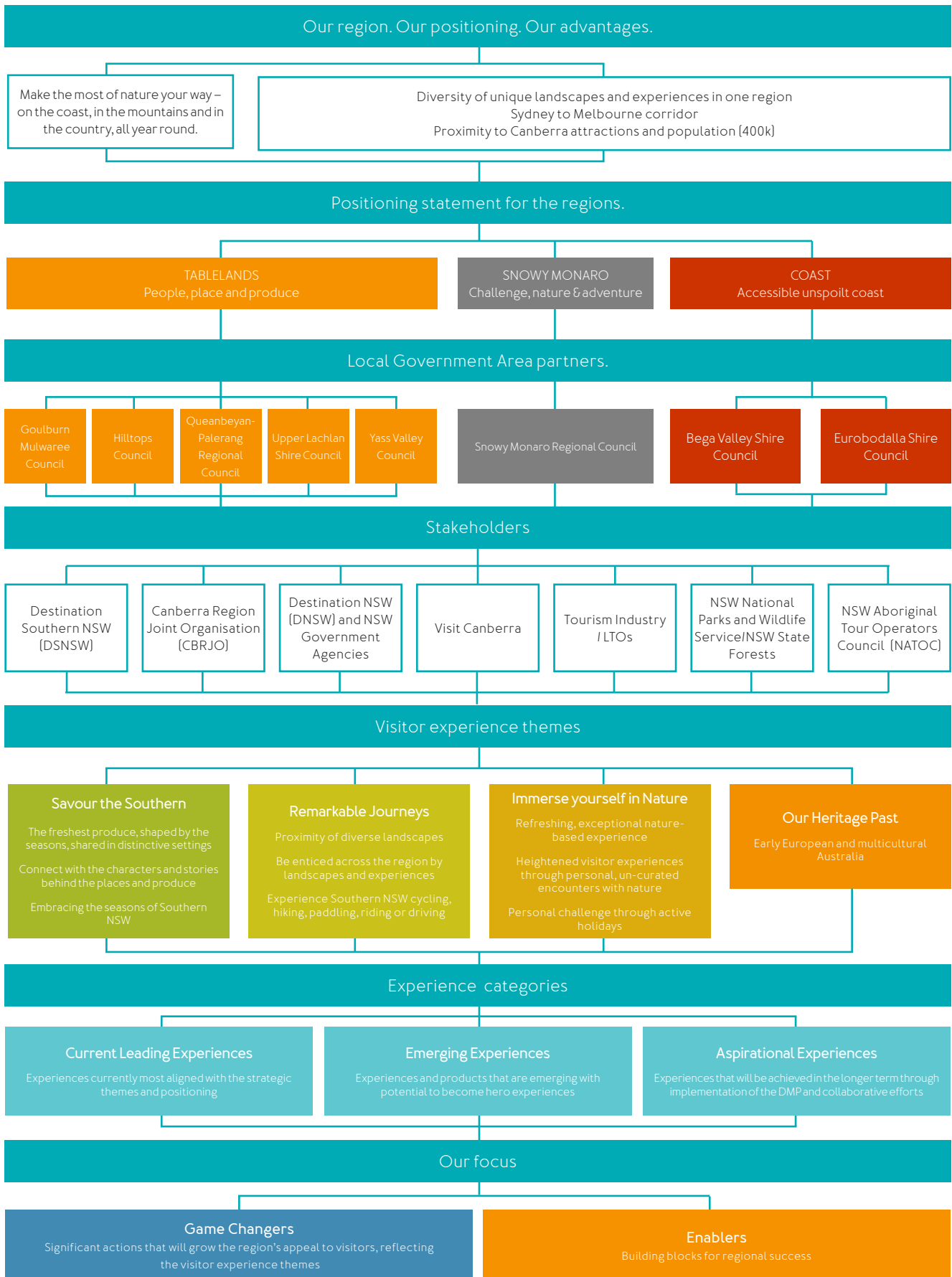
Taking a border-less view of opportunities and projects underpins all aspects of this document and the activities DSNSW will lead the coordination of.

This DMP is a high-level document that provides a base for further strategic and operational work in a number of specific areas. Success depends on cooperation, communication and shared support for agreed projects and goals.

Whilst this plan has been developed as an initiative of DSNSW, its role will be one of ongoing coordination, advocacy and support. Implementation will largely be in the hands of tourism industry stakeholders.

There have been widespread contributions and contributors to the development of this DMP. Input has been received from industry stakeholders throughout the DSNSW Region and the bordering areas. Research, surveys, workshops, interviews, presentations and review and reference to existing plans have been the basis of information (and evidence), gathered to generate the strategic directions, vision and potential opportunities and actions identified.

The DSNSW Region has the opportunity to grow the visitor economy, building on strengths of the Tablelands, Coast and Snowy Monaro as highlighted in this DMP.



The Region and Sub Regions

The DSNSW Region stretches from the South Coast, to the Snowy Monaro and across to the Canberra Region Tablelands. It is home to a significantly diverse landscapes and natural features, and is located along the Sydney to Melbourne travel routes, both coast and inland. In addition, the region is adjacent to the ACT with direct access to Canberra.

The region's diverse visitor offering and jurisdictional boundaries lend themselves to the DSNSW Region being divided into three sub-regions for the purposes of this DMP:

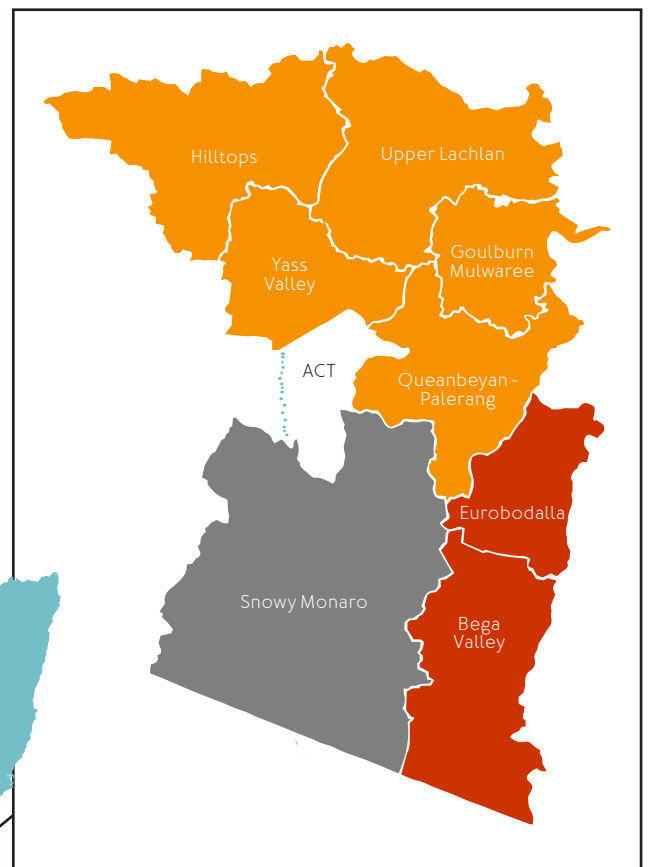
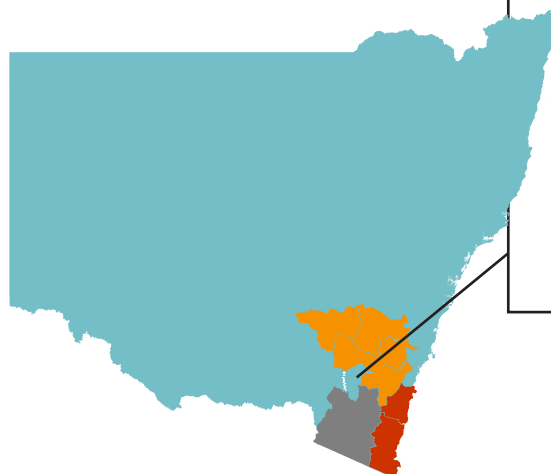
The sub-regions are based on natural groupings of themes and products that reflect consumer perceptions of the destinations. They also position the region for natural partnerships with Canberra and the adjoining LGAs where there may be opportunities for partnering for marketing or industry development activities.

The DSNSW Region encompasses the eight local government areas (LGAs):

- Bega Valley Shire Council (Coast)
- Eurobodalla Shire Council (Coast)
- Goulburn Mulwaree Council (Tablelands)
- Hilltops Council (Tablelands)
- Queanbeyan-Palerang Regional Council (Tablelands)
- Snowy Monaro Regional Council (Snowy Monaro)
- Upper Lachlan Shire Council (Tablelands)
- Yass Valley Council (Tablelands)

Sub regions

- Tablelands
- Snowy Monaro
- Coast



Governance

The DSNSW Region covers the same geographic area and eight LGAs as the Canberra Region Joint Organisation [CBRJO]. CBRJO has formalised its recognition of DSNSW as the responsible body on behalf of its members to lead the coordination of agreed strategic tourism projects in the region. This includes representing the interests of CBRJO in dealings with DNSW, other NSW government agencies and the ACT Government including Visit Canberra.

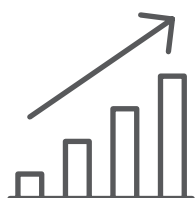
To achieve the requisite level of communication, the Chair of DSNSW attends Board meetings of CBRJO and the General Manager of DSNSW attends meetings of LGA General Managers.

Each of the LGAs in the region has its own Tourism and Economic Development portfolio. Strategic tourism plans exist in various formats and states of implementation, and the models for managing and delivering tourism services differ from council to council. This DMP and the work of DSNSW understands and respects the local priorities of each LGA.

Potential tourism projects, activities and actions highlighted in this DMP, will be reviewed and prioritised by stakeholders. This includes CBRJO, LGA, LTO, DNSW, NSW NPWS, NSW government agencies and the industry.

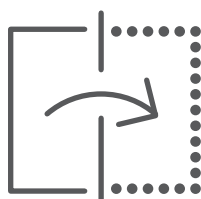
**Canberra
Region**
JOINT ORGANISATION

Market trends



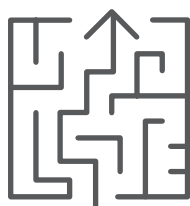
Growing

- International and domestic overnight stays in NSW
- Interest in cycling, adventure and nature-based activities
- Domestic and intra-regional day visitation
- Population of healthy and mobile retirees interested in drive holidays



Changing

- Evolution of the role of overnight stays in NSW
- Increasing reliance on online information for visitor planning and booking
- Visitor expectations of fundamentally high-quality experiences



Challenging

- Traditionally high seasonality patterns
- Inconsistent data collection
- Localised transport congestion in some locations during peak season
- Limited public transport
- Limited investment in upgrading/diversifying/developing accommodation
- Current industry service levels

Visitor Data

Agreed metrics and a consistent approach to the collection of visitation data and visitor economy impacts is a priority need for the DSNSW Region. It also represents an opportunity for collaboration involving all LGAs/LTOs and NSW NPWS in partnership with DSNSW.

Reliability of existing data is contested. For example, discrepancies between the data reported by Tourism Research Australia (TRA) and that captured within the DSNSW Region and reported through the experience and observations of local businesses. Some data is also not being captured at all, for example the size and impact of the share economy, as well as some visitor trends.

Presently there are challenges measuring the visitor economy within the DSNSW Region. Visitor data exists in the form of profiles from TRA for most but not all LGAs. To address this, a report from TRA was commissioned for DSNSW, which provides an overview of visitation to the region. Analysis of this data is included at Appendix 8.



Visitor Economy

LGAs within the DSNSW Region are at significantly different stages of tourism development. Some have highly developed and mature product offerings with established brands recognised by their target markets, and other destinations are in the earlier stages of developing or implementing their brand and product offering.

Different models are used across the DSNSW Region to manage tourism and associated services and to market and promote tourism. Several councils provided top-line information on their tourism related spend and where this information was provided it is included in Appendix 6. The total value invested in tourism by those councils is almost \$3 million.

The size of the tourism industry and its proportion of the local economy also varies, with the economy highly dependent on tourism in regions like the Snowy Monaro and parts of the Coast. The true value of the visitor economy across the DSNSW Region will not be captured and fully understood until there is improved and consistent data collection .

Currently, the total income from tourism across the DSNSW Region is almost \$1.6 billion per annum with a total of 2,630 tourism businesses in operation .

Regional market influencer: Canberra

The opportunity to develop a sustainable partnership strategy with VisitCanberra, was consistently voiced by stakeholders throughout the development of this DMP.

The ACT neighbours the DSNSW Region. Canberra adds depth to the region's visitor experience. Canberra is also a significant source of visitors to all points of the region.

Canberra Airport provides direct access to all states and territories and international arrivals currently from Singapore and Doha. Canberra's cultural attractions and events are renowned. Canberra is home to a large international diplomatic community and growing numbers of international students. Canberra has a large visiting friends and relatives (VFR) market that presents an opportunity for the region.

The ACT Government promotes "Canberra plus 3 hours" as an economic zone of 800,000+ people. This fact was highlighted as part of the ACT Government's business case to secure direct international flights to Canberra Airport.

Since the commencement of international flights to and from Canberra Airport, there have been efforts by individual LGAs, and CBRJO members collectively, to partner with VisitCanberra to promote regional experiences to the international market.

The proposed strategy is an opportunity to:

- Highlight the experiences in neighbouring NSW that are accessible to Canberra's residents and visitors to the ACT
- Contribute to growing the DSNSW Region's Visitor Economy
- Collaborate on targeted marketing and development programs with VisitCanberra that will benefit the DSNSW Region.



“Canberra, the market for our region. VisitCanberra, a strategic partner for our Region.”

Regional market influencer:

NSW National Parks and Wildlife Service


National Parks are a major draw card for nature-based visitor experiences. National Parks and Wildlife Service (NPWS) is an essential partner for the region.

Stakeholders in the DSNSW Region, particularly in the Snowy Monaro and Coast sub-regions, where national parks make up a significant proportion of the land tenure, repeatedly highlighted the need for the visitor experiences and assets managed by NPWS (and the access to them), to be sufficiently resourced so that they can be presented and maintained in a manner that has a positive impact on the visitor experience

Many of the region's national parks are major draw cards for visitors. NPWS plays a vital role in providing nature based visitor experiences, including those delivered by commercial operators.

NPWS will be developing a Visitor Experience Strategy in 2018 that will provide further opportunities to collaborate on tourism experience development and delivery.

It should be noted that NSW State Forests are also a major land manager across the region making them an important stakeholder.



“National Parks are a major draw card
for nature-based visitor experiences.
NSW National Parks and Wildlife
Service is an essential partner.”

“Our region must make the most of the Sydney to Melbourne corridor and in and out of Canberra through development and promotion of touring routes.”



Regional market influencer: Touring

A strategy that focusses on the importance of touring across the region that recognises our proximity to Sydney, Canberra and Melbourne is a widely agreed priority.

Most visitors arrive in the DSNSW Region by road. Visitors travel in and around the region along major routes from Sydney to Melbourne (Hume Highway and the Princes Highway along the coast), the Barton, Kings and Monaro Highways into and out of the ACT, and other routes across all the sub-regions. There are airports providing access for fly-drive travelers in Canberra, Merimbula, Moruya and Cooma.

There is some evidence and significant anecdotal reporting of high levels of intra-regional day visitation throughout the region. This is significant as over time, as the tourism product offerings grow, day visitors might be converted into overnight visitors resulting in longer stays and generating increased expenditure. Day visitation flows across the region include from Canberra to the Coast, Snowy Monaro and Tablelands (residents, VFR and Canberra visitors). There is also day visitation between the Coast and Snowy Monaro, Snowy Monaro and Tablelands, and Tablelands to Coast.

Our Vision

Southern NSW is recognised nationally and globally as a compelling destination featuring the coast, mountains and inland Australia within proximity of Sydney, Canberra and Melbourne.





Positioning of the region

Positioning is not a consumer facing statement.

Positioning seeks to crystallise what is unique and appealing about the destination, and can include intangible benefits that a visitor can gain from visiting.

It is not intended for use in a tag line or logo. Ideally, positioning is used to focus product development, marketing and communications so that each of these consistently work towards delivering the region's unique offerings to visitors.

DSNSW Region has not undertaken a separate positioning exercise prior to the preparation of this DMP. This DMP seeks to reflect and draw on the positioning of the sub-regions where possible.

Call to action for the region:

“Make the most of nature your way – on the coast, in the mountains and in the country, all year round”

Sub-region positioning

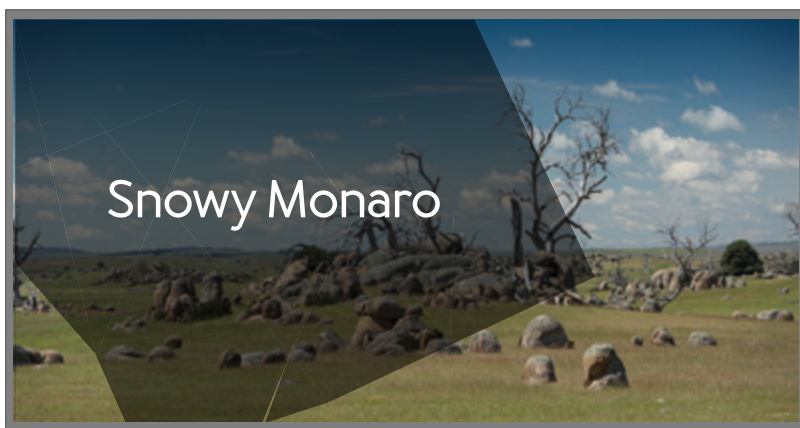
The positioning for each sub region seeks to highlight its strengths.



Tablelands

People, place and produce

- Goulburn Mulwaree
- Hilltops
- Queanbeyan-Palerang
- Upper Lachlan
- Yass Valley



Snowy Monaro

Challenge, nature and adventure

- Snowy Monaro



Coast

Accessible, unspoilt coast

- Bega Valley
- Eurobodalla

Visitor experience themes

Visitor experience themes have been identified and developed, building on current and emerging strengths of the DSNSW Region. They reflect the competitive advantages and the different stages of tourism development. They aim to focus collaboration across the DSNSW Region – just one layer in a complex tourism planning and development space.

Each of these themes has relevance across the whole region, although the extent to which they are currently available varies across the sub-regions. They are not proposed as consumer facing marketing, but as guidance for industry continuing to develop cohesive regional tourism offerings.



Savour the Southern

The freshest produce, shaped by the seasons, shared in distinctive settings.

Connect with the characters and stories behind the places and produce.

Embracing the seasons of Southern NSW.



Remarkable Journeys

Proximity of diverse landscapes.

Be enticed across the region by landscapes and experiences.

Experience Southern NSW cycling, hiking, paddling, riding or driving.



Immerse yourself in Nature

Refreshing, exceptional nature-based experiences.

Heightened visitor experiences through personal, un-curated encounters with nature.

Personal challenge through active holidays.

Indigenous connections present and past.



Our Heritage Past

Early European and multicultural Australia.

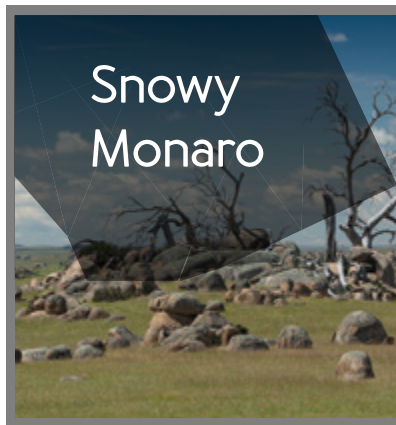
Aligning sub-region positioning with visitor experience themes



Tablelands

Can build on people, place and produce to be recognised for a wealth of premium produce and agritourism experiences enticing you across the region and connecting you with the people, their produce, art, creative works and stories.

Remarkable journeys building on product cluster approach will encourage visitors.



Snowy
Monaro

Challenge, nature and adventure can further develop its outdoor experiences and, in particular become known as an iconic cycling destination linking Canberra/ Queanbeyan and the mountains through MTB hubs in Thredbo, Jindabyne, Cooma, road riding, the potential rail trails and events.

Promoting active experiences in nature and specialty producers of the region will diversify the visitor experience and encourage longer stays outside of winter.



Coast

Positioned as an accessible, unspoilt coast that can build on its current product offering.

It can become a vibrant seafood and coastal trail destination with nature based experiences and active packaged experiences on land, water and by air.



DSNSW: roles, actions, and priorities



Based on the consultation, research and analysis a series of potential high impact and collaborative projects have been identified to ensure the DSNSW Region is able to meet its visitor economy growth targets. The actions include a collection of potential strategic projects, “Game Changers”, and “Enabler Projects” that will enable greater coordination and effectiveness in tourism development across the region.

The actions will need to be further prioritised and developed including details of stakeholder responsibilities and implementation timeframes.

The areas of focus for each of the major stakeholder groups across the DSNSW Region include:

Government

- Road access, mobile connectivity, broadband speed, skills & capability training/development. Governance arrangements to formalise collaboration and underpin strategic cooperative activity.

Industry representatives

- Providing borderless information to assist. Promoting touring routes - hard copy/online/real time.

Businesses

- Collaboration to define and promote product clusters. Embracing technology to provide online visibility.

DNSW Priorities

- Business Events and Regional Conferencing
- Events
- International Youth Leisure Market
- Aboriginal Tourism
- Food and Wine
- Cruise Sector

In developing this DMP, DSNSW recognises the potential of these sectors, and has emphasised the region's commitment to meeting State tourism goals.

Business Events and Regional Conferencing

At present the region does not play a significant role in hosting large regional conferences and business events, however this is recognised as an opportunity for destinations such as the Snowy Monaro and Coast that have significant accommodation capacity with seasonal peaks in occupancy. Goulburn is also interested in developing this sector. Stakeholders recognise however that limited conferencing venues and the distance from major points of air-access and travel times may limit growth in this sector.

Priority actions to encourage regional conferencing would be to develop a prospectus collating all accommodation, conferencing facility and pre and post conferencing tour and activity options. This could be promoted to appropriate regional conferencing markets, small to medium sized events, out of Canberra and potentially Sydney (via Canberra, Merimbula or Moruya airports).

Aboriginal Tourism

The DSNSW Region has recognised the importance of current and potential indigenous tourism experiences. There are currently indigenous owned and operated experiences within the region, and growing these businesses and experiences offered will significantly contribute to the visitor experience themes with strong links to Immerse yourself in Nature. Where indigenous tourism experiences can be developed to contribute to the delivery of Savour the Southern theme they would also offer a compelling proposition to visitors.

Events

Events are recognised for their potential to create interest in the experiences on offer, generate publicity and to link in with the region's seasonal variations and associated produce, as well as major events that take place in Canberra that can be complemented by regional events. The region is already home to a large number of interesting and regionally significant events. The potential actions listed in this DMP include the development of strategic theme aligned event calendars, as well as seasonal and sub-regional event calendars. Another supported action is to work with VisitCanberra to identify opportunities to leverage major events such as Floriade, and entice visitors driving through the region (or flying into Canberra) to incorporate regional events as part of their itinerary.

Food and Wine

DNSW has identified Food and Wine as a critical component of the visitor experience, and food and wine motivated visitors as a key target market for the State. The DSNSW Region is located within the distance many of these motivated travellers are willing to travel for either day or weekend trips. Research found that 25% of this market would travel any time of year, with spring and autumn the next most popular. The DSNSW Region has significant offerings, through the Savour the Southern theme and related priority projects including agritourism and strengthening clusters of product linked by suggested itineraries and maps, will grow the region's attractiveness to this market. Doing so in a manner that is authentic to the region, featuring the produce across seasons, creating potential for this sector to help address seasonal visitation peaks, encourage dispersal throughout the region and repeat visitation.

International Youth Leisure Market

This market is defined as young, independent and adventurous visitors aged 15-29, from overseas. They may come to NSW on holiday, visiting friends and relatives or on a working holiday. They are identified as just over one-third of all international leisure visitors to NSW, however their length of stay means they contribute to almost half of the international leisure nights in NSW. The DSNSW Region offers many experiences of interest to this market, including opportunities to experience genuine Australian country life, nature based and adventure activities, including beach and outdoor activities. Each of the four visitor experience themes and projects arising from them, will deliver highly desirable experiences for the international youth leisure market. There is great potential to grow the market's visitation in the region as currently they only represent 6% of visitors and only 2.9% of visitor nights.

Cruise Sector

The Cruise sector in NSW generated expenditure of approximately \$1.05billion (2015-2016), with growth in cruise ship visits and days in port. DNSW reports that Sydney is the gateway to cruising in NSW and feeds Eden as one of the State's 'sister ports'. Eden is reported to have received \$1million in economic benefit in 2015-2016. The cruise industry offers significant potential for the DSNSW Region, with the development of the Port of Eden upgrade and access for large vessels to anchorage close to the centre of town. There is significant work underway in Eden to grow on-shore visitor experiences and capitalise on the cruise visitors that disembark to experience the region for a day, and to stimulate interest in return visitation on subsequent visits.

Projects and priorities

A facilitated strategic planning workshop will be held at the earliest opportunity involving the region's stakeholders to determine the priority actions, projects and activities for the region.

The consultation to develop this DMP resulted in the visitor experience themes and positioning highlighted earlier. As part of the process, questions and research about potential projects and activities categorised as “Game Changers” and “Enablers” was conducted. More detail about these descriptors is on the following pages as well as a list of the types of projects and activities that could be pursued as part of an action plan. It should be noted the list is not exhaustive and is subject to change.

DSNSW acknowledges that confirming and prioritising projects requires the involvement, input and agreement of all relevant stakeholders – including LGAs/LTOs, CBRJO, DNSW, NPWS other State Government agencies and industry and business groups and/or individuals.

The projects and activities considered will be those that have the potential to bring benefit across the DSNSW Region or sub-regions that will lead to the achievement of growing the visitor economy. An important outcome once projects and activities for action are identified, will be to prioritise them followed by identifying “who is responsible for what?”.

Game Changer Projects – Overview

Savour the Southern activation

Initiatives to grow the region's seasonal food and wine experiences delivered in distinctive local settings, reflecting the provenance of the produce and offering the opportunity to interact with the grower or producer. Visitors throughout the year can experience seasonal events, clusters of food and wine experiences, farm stay and country living.

Regional approach to Drive Tourism and cross regional linking products

Encourage dispersal and visitor stay through identifying and promoting one or two strategic touring routes based around experience themes, as well as potential to grow the RV and motor bike market (shoulder and non-peak visitation). Infrastructure connectivity including major road upgrades.

Experience and product development

A number of significant projects in this category will contribute to elevating 'emerging' and 'aspirational' themes to realising the hero experiences and targeting international markets and other key growth segments. Nature based tourism, cycle experience product development and infrastructure, identifying business and conferencing assets and opportunities to grow appropriate scale and business and conferencing events across the DSNSW Region.

Building destination appeal, supported by itineraries and product clusters

A strong focus on growing the range of on-brand, high quality visitor experiences, and collaborative marketing and PR programs will build destination awareness and appeal amongst the target markets identified in this plan. This is a broader action with the potential for great impact on growing the visitor economy. It will be supported by specific actions such as identifying itineraries based around experience themes and promotion of themed product clusters. This is an important distinction as a focus on developing touring routes alone will not generate an experience compelling enough to attract new or return visitation to the region. Successful itineraries will be used to help visitors build their itinerary in the region once they have decided to visit.

Support for events that underpin sub-regional positioning

Growing events and collating regional, themed and seasonal events calendars to increase visitation and leverage Canberra's major events. Highlighting seasonal visitor opportunities.

Enabler Projects – Overview

Collaborative approach between all LGAs, LTOs and Canberra

- Increase understanding of current and potential visitor segments. A regional approach, building on VisitCanberra's visitor segmentation research.
- Pooling resources to understand visitors and trends (research), market shared regional experiences.
- Formalising a coordinated, experience based approach to tourism marketing and research, allowing economies of scale, greater reach and impact and longer-term, strategic collaboration. Ensuring collaboration with important agency stakeholders such as NPWS as well as local government and other tourism stakeholders.

Positive and supportive approach to investment

- Encouraging investment into tourism ventures. Demonstrating value of the industry, growth of the visitor economy, potential for new accommodation and experiences.
- Streamlining government regulation and approvals for development and activities.
- Identification and progressing solutions to specific constraints on tourism growth and innovation, including: ability to sell seafood at point of catch, reducing red-tape constraints facing tourism on farms, development approval timeframes, National Parks approvals and length of lease/permits.

Tourism Supply and Demand Analysis

- Audit current supply of tourism products and experiences and industry capacity in light of current and potential markets and competitor destinations. Assist with developing business cases for investment in improvements / additions, including to accommodation stock.

Industry Development and Visitor Servicing Initiative

- Improve quality and professionalism of customer service across all tourism businesses, encouraging individual businesses to deliver on the positioning.
- Review Visitor Information servicing at the cross-regional level to ensure consistent, accessible and strategically located visitor services and cross-regional famils and promotion opportunities.

Infrastructure investment and connectivity

- Improving visitor access and flows throughout the region, via improved connectivity in road infrastructure and mobile/wifi connectivity across the region. Three priority Rail Trails. Walks and associated visitor infrastructure.

Appendix 1: Experience Map - Regional Snapshot and Blueprint

This table is an overview of how the visitor experience themes are currently represented in the sub-regions. It provides a foundation for how these themes can be further developed to grow the region's visitor economy. **The listing of experiences and visitor opportunities are intended to be indicative only, and do not represent a complete audit.**

Theme: Savour the Southern

Vision: Regional cluster of outlets and experiences delivering local produce in distinctive settings

	Tablelands	Snowy Monaro	Coast
Experience	Product	Product	Product
Current Leading Experiences	<ul style="list-style-type: none"> Canberra region/Hilltops wineries Country landscapes, Harvest & produce festivals 	<ul style="list-style-type: none"> Brewing/distilling 	<ul style="list-style-type: none"> Oyster/producer tours
Emerging Hero Experiences	<ul style="list-style-type: none"> High quality food and produce with great hospitality in authentic local settings. Surprising visitors with sophisticated quality in a variety of settings. On-farm hospitality where visitors can participate in daily farm life and experience the local produce on-site or in the local restaurants. 	<ul style="list-style-type: none"> Wine tasting experiences Cluster of specialty producers emerging - distilleries, River to Plate experiences 	<ul style="list-style-type: none"> Exceptional restaurants showcasing local produce Experiential and nature based tours incorporating oysters Seaplane access to remote waterways Ocean to Plate Food events including EAT festival and Narooma Oyster Festival, SAGE markets, Eurobodalla Food and Art Trail
Aspirational Experiences	<ul style="list-style-type: none"> Map guiding visitors throughout the region and Cluster of 'meet the makers' artisans and producer experiences Cluster of farm stay or similar accommodation and experience options offering food and wine and pick your own / themed event experiences 	<ul style="list-style-type: none"> Exceptional restaurants showcasing local produce Snowy Mountains Venison Snowy Mountains trout - river to plate 	<ul style="list-style-type: none"> Savour the Seafood coastal trail – packaged experiences Seaplane and other modes of access to remote waterways and locations

Theme: Remarkable Journeys

Vision: Visitors disperse throughout the region, enticed by clusters of experiences in diverse landscapes

	Tablelands	Snowy Monaro	Coast
Experience	Product	Product	Product
Current Leading Experiences	<ul style="list-style-type: none"> Scenic drives through the rural landscape, featuring seasonal highlights such as canola fields are in flower, grape harvest, fruit picking 	<ul style="list-style-type: none"> Hiking to Mt Kosciuszko and Alpine Lakes Cycling 	<ul style="list-style-type: none"> Sydney to Melbourne Touring Route – iconic drive experience along Australia's famous coastal areas National Parks Coastal walks
Emerging Hero Experiences		<ul style="list-style-type: none"> Alpine backroads motorbike riding 	<ul style="list-style-type: none"> Coastal sea plane experiences Bundian Way Cruise into Eden
Aspirational Experiences	<ul style="list-style-type: none"> Drive journey with opportunities to engage with the region's stories, clusters of regional producers and farm gate experiences. Heritage experiences and vibrant regional communities Program of seasonal-harvest events Hume and Hovel Track 	<ul style="list-style-type: none"> Kosciuszko Alpine Way Platypus Trail 	<ul style="list-style-type: none"> Strengthen positioning of Sydney-Melbourne coastal drive for domestic markets. Growing an epic coastal drive journey linking Sydney-Adelaide, with accompanying strategic product development and positioning. Mirrored efforts along inland routes to grow the visitor experience

Theme: Immerse yourself in Nature

Vision: Visitor experiences are heightened through encounters with nature in coastal, mountain and country settings

	Tablelands	Snowy Monaro	Coast
Experience	Product	Product	Product
Current Leading Experiences	<ul style="list-style-type: none"> Country landscape, Harvest Festivals Inland waterways, Lake Burrunjuk and Wyangala-Grabine Wombeyan Caves, Carey's Cave and Abercrombie Caves 	<ul style="list-style-type: none"> Snow sports and alpine resorts Mountain biking Thredbo, Jindabyne and surrounds Climbing Kosciuszko Fishing Horse treks Yarangobilly Caves National Parks 	<ul style="list-style-type: none"> Fishing and snorkelling Whale watching Kayaking Coastal walks – e.g. Light to Light walk National Parks Gulaga Mountain - Ngaran Ngaran
Emerging Hero Experiences		<ul style="list-style-type: none"> Great Alpine Walk Thredbo Valley Track Kosciuszko National Park Alpine River Indigenous adventures 	<ul style="list-style-type: none"> Additions to Light to Light walk - trail and accommodation A range of recreational cycling journeys Mountain biking hub (Tathra) Bundian Way
Aspirational Experiences	<ul style="list-style-type: none"> Molonglo, Monaro, Crookwell-Goulburn and Harden-Boorowa Rail Trails, Seasonal harvest festivals 	<ul style="list-style-type: none"> Monaro Rail Trail Activating Lake Jindabyne Rich indigenous culture being shared through new visitor experiences 	<ul style="list-style-type: none"> Murramarang to Bawley Point coastal walk Southern Coastal Trail joining together many existing trails Rich indigenous culture being shared through new visitor experiences Additional Gulaga story telling

Theme: Our Heritage Past

Vision: Visitors will appreciate fascinating chapters of European and multicultural history throughout the region

	Tablelands	Snowy Monaro	Coast
Experience	Product	Product	Product
Current Leading Experiences		<ul style="list-style-type: none"> • Snowy Mountains Scheme • Kiandra Goldfields 	<ul style="list-style-type: none"> • Ben Boyd and Old Tom story
Emerging Hero Experiences	<ul style="list-style-type: none"> • Links to early Australian Chinese population e.g. Lambing Flat • Early Colonial history and architecture 	<ul style="list-style-type: none"> • Connections to the Man from Snowy River • Pastoral Stations with visitor experiences 	<ul style="list-style-type: none"> • Historic villages of Mogo, Tilba and Candelo
Aspirational Experiences	<ul style="list-style-type: none"> • The story of the Light Horse • Bill the bastard 		

Important local and regional stories to develop and share	<ul style="list-style-type: none"> • The experience and lifestyle of modern farming in Australia. Where our food comes from and what goes into its production. How it tastes at the source. Innovation and evolving farming practices • Seasonality of life on the land in the Tablelands • Regional connections to Australia's early Chinese population through the gold mining era • Visitors researching architecture and family history 	<ul style="list-style-type: none"> • Delights of the Snowy Mountains in summer – including environmental and cultural features and events. • Yarangobilly Caves • Snowy Hydro scheme and multicultural Australia today • Australia's European Explorer and early colonial heritage • Connections to the Man from Snowy River, high country culture and pastoral stations 	<ul style="list-style-type: none"> • Produce of the region from the ocean and the hinterland, including fresh local seafood and oysters, dairy and cheese, restaurants and cafes • Diversity in the hinterland villages • Be surrounded by nature and wild places – 75% of the region is National Park • Access to wildlife – throughout the region intimate encounters with wildlife on land and in the sea • An active holiday mecca – walk, paddle, swim, fish • Experience remote coves and beaches through water-based and active access • Immerse yourself in the coastal environment through high quality, multi day walk.
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Appendix 2:

ACTION PLAN - Game changer projects

2.1 Summary

Visitor experience theme	Potential action	Stakeholders & Role	Example indicative measures of success
Savour the Southern	Savour the Southern Activation [Game Changer 1] <ul style="list-style-type: none"> • Coordination: Agritourism Project Officer to guide industry development, visitor experience and marketing • Industry development: Tool Kit to guide new entrants to industry • Celebrity Chef Initiative to trigger and incentivise restaurant initiatives across Southern • Experience development workshops and mentoring for additional visitor experience creation • Regional signage improvements based on consistent approach • Continued development of Australian Agricultural Centre 	<ul style="list-style-type: none"> • Influence: DSNSW, LGAs, LTOs • Advocacy: DSNSW • Action: LGAs, LTOs, tourism industry (existing & new entrants), state government agencies 	<ul style="list-style-type: none"> • Additional new agritourism experiences and products available • Growth in high quality restaurants serving and reflecting the provenance of local produce • Increase in visitation and expenditure year-round • Increase in participation in special events • Increase length of stay and return visitation • Additional number of primary producers with diversified income sources
Remarkable Journeys	Ride the Southern Region [Game Changer 2] <ul style="list-style-type: none"> • Continued development and maintenance of priority mountain bike hubs and trails • Feasibility study into round Lake Jindabyne ride/walk experience • Rail Trail projects – feasibility assessment, development and supporting experience / services • Growth in cycle events • Cycle-friendly initiatives in the region • Supporting implementation of ACT & Region Cycle Tourism Strategy 	<ul style="list-style-type: none"> • Influence: DSNSW • Advocacy: LGAs, DSNSW • Action: LGAs, tourism industry, ACT Government and industry 	<ul style="list-style-type: none"> • Growth in target markets – visitation and expenditure • Growth in associated / support businesses (number, turnover, employment)

Visitor experience theme	Potential action	Stakeholders & Role	Example indicative measures of success
<p>Remarkable Journeys</p> <p>Savour the Southern</p> <p>Our Heritage Past</p> <p>Immerse yourself in Nature</p>	<p>Regional Drive Tourism Strategy [Game Changer 3]</p> <ul style="list-style-type: none"> • Remarkable Journeys through a diverse region • Regional Drive Tourism Strategy • Experience and Product cluster development and promotion aligned to each strategic theme • Experience development workshops and mentoring for additional visitor experience creation • Themed itinerary development • Growth of experiences engaging visitors with 'Our Heritage Past' including expansion of NPWS educational programs (Snowy Mountains and Coast) and through private sector – depth of interpretive content and information shared with visitors before and during visits • High yield self drive strategy • Support the development of two great walks in the region • Light to Light and Alps Great Walk • Encourage the repositioning of the Bundian Way as a storyline linking the mountains and the coast with visitor nodes suited to a range of markets 	<ul style="list-style-type: none"> • Influence: LGAs, LTOs, ACT government, CBRJO • Advocacy: DSNSW • Action: DSNSW, tourism industry, LGAs, LTOs, ACT government, CBRJO • Advocacy: Tourism industry, NSW NPWS, DSNSW; NATOC, LGAs, LTOs • Action: Tourism industry, NSW NPWS, LTOs 	<ul style="list-style-type: none"> • Well recognised, positioning aligned, product clusters featured in visitor itineraries and regional map. Seasonal variations depending on produce and events across the region • Visitors using high quality information (maps, online resources) to find and experience clusters of high quality experiences throughout the region • Growth in visitation / expenditure / length of stay outside of peak season in each sub-region • Sustainable growth in self drive visitation, generating returns for the local community and local assets while protecting environmental features • Growing participation in great walks • Growing business opportunities supporting the great walks visitors • Greater awareness of the Bundian Way and opportunities for visitors to engage with the story throughout the region • Increasing opportunities for Indigenous tourism operators

Visitor experience theme	Potential action	Stakeholders & Role	Example indicative measures of success
Immerse Yourself in Nature	Development - Nature Based Tourism (Game Changer 4) <ul style="list-style-type: none"> • Accessing the region's waterways • Creating opportunities for immersive nature based experiences throughout inland and coastal waterways • Improving / evolving existing inland waterway opportunities • Pursue new water based infrastructure for Lake Jindabyne that can underpin a broad range of water based experiences • Local / micro level water access opportunities • Growing existing and new multi-day coastal walks, and supporting products 	<ul style="list-style-type: none"> • Influence: DSNSW; LGAs, LTOs • Advocacy: DSNSW, LGAs, LTOs, tourism industry • Action: LGAs, LTOs, tourism industry, NPWS 	<ul style="list-style-type: none"> • Increase in range of opportunities for waterway experiences • Longer stays and increased return visitation at coast / waterway locations • Explore possible stakeholder partnership opportunities to fund or provide support for project development.
Our Heritage Past	<ul style="list-style-type: none"> • Profiling the region's Chinese heritage and World War History • Enhancing sharing of the region's Chinese heritage, in relation to the gold rush and Lambing Flat story, implementation of Currawong Art Museum Australia (CAMA) 	<ul style="list-style-type: none"> • Influence: DSNSW; LGAs, LTOs • Advocacy: DSNSW, LGAs, LTOs, tourism industry • Action: LGAs, LTOs, tourism industry 	<ul style="list-style-type: none"> • Increase in understanding and interest in the links between DSNSW Region and China • Growth in Chinese visitors and their satisfaction



Appendix 2:

ACTION PLAN - Game changer projects

2.2 Additional detail

Game Changer 1. Savour the Southern Activation	
Project description	This is a suite of projects that has the potential to have a major impact across the DSNSW Region, with opportunities for collaboration and destination-wide benefits. It includes Savour the Southern Canberra Region Tablelands and Savour the Southern Coastal Trails.
What is required to deliver the project	<p>This is a significant initiative comprising a number of elements, ranging from itinerary building, infrastructure enabling projects, attraction development, industry development, year-round visitor calendar building.</p> <ul style="list-style-type: none"> • Coordination – Regional Agritourism Project Officer position with the job of growing the sector including experience and industry development (collaboration, networking, partnerships) and marketing. • Industry development – Guide for farmers / hosts for 'how to' become visitor-ready: infrastructure / procedures to address biosecurity issues and operational constraints associated with visitation to a working farm. • Analysis of infrastructure requirements (accommodation, access, support services) insurance requirements of bringing visitors on-farm, storytelling and experience development for farmers. • Analysis of farm-stay accommodation opportunities – e.g. existing cottages that could be renovated for visitor accommodation, farmstay / B&B opportunities, group accommodation. • Development of the 'night time economy' in parts of the destination where this is currently under developed – a strategy to build visitor expenditure opportunities through reliable, regular, opening arrangements in order to build investor confidence and support business development. • Savour the Southern celebrity chef initiative – Roving celebrity chef paddock-to-plate program – events and season-based, including a mentoring opportunity for local chefs, mirror events in Sydney / Canberra (supply of seasonal produce for one-off dinners). Seasonal Calendar of events. Themed trails with packaged / bookable products based on themes (seafood / farmgate produce paddock to plate. Growing the night time economy – fostering confidence in businesses to stay open, or attracting new operators to meet demand. • Australian Agricultural Centre – Currently at concept stage, the first of its kind as an immersive educational visitor experience, to showcase and demonstrate technology and innovation in the agricultural industry. Proposed for a site near Crookwell – land has been allocated for the project (100ha site), with working model farm, multi-purpose education facility (Questacon-style), paddock to plate restaurant, and accommodation. • Currawong Art Museum Australia – arts and cultural facility drawing on the Chinese cultural heritage in the Hilltops region. • Signage to Tablelands townships / drive route from major access points (Hume Freeway). Highlight themed routes when they are identified. • Identify opportunities to capitalise on Young Airfield – charter flight access, joy flights in peak times / canola season. • Photo opportunities at scenic points such as the Canola fields - platform / "selfie frame". • Creating a visitor experience at the Yass Sale Yards (by appointment, guided tours, limited but regular operations).

Target Markets	<ul style="list-style-type: none"> Families, school / education market, international visitors (from Sydney and Canberra), food and wine visitors.
Economic and Social benefits	<ul style="list-style-type: none"> This project has the potential to generate major economic and social benefits across the region. Economic benefits will arise from: <ul style="list-style-type: none"> Diversification of income sources for farmers / primary producers. From tourism activity and additional farmgate sales Growth in regional events / dining opportunities outside of current opening hours. Increased length of stay / return visitation by linking the visitor experiences on offer through itinerary development. Encouraging return visitation by showcasing seasonal events across the region. Modelling by the Australian Agricultural Centre (AAC) proponents suggests the facility could attract up to 250,000 visitors per year once fully operational. This would generate jobs at the AAC and additional economic benefits for Crookwell and Upper Lachlan Shire.
Game Changer 2. Ride the Southern Region – Mountain biking, cycling journeys and events	
Project description	<ul style="list-style-type: none"> This suite of projects will draw together the existing, emerging and potential cycle tourism opportunities in the region, feature a calendar of events across the region and provide opportunities to work with the ACT as it works to grow cycle tourism. The suite of projects include three Rail Trails across the region, and recognition of a significant expansion of mountain biking facilities in the Cooma, Thredbo Valley and Jindabyne region as well as support for road cycling. An opportunity to develop a multi day ride around Lake Jindabyne has also been identified <p>Rail Trails:</p> <ul style="list-style-type: none"> Goulburn – Crookwell Rail Trail Monaro Rail Trail (Queanbeyan – Bombala) Molonglo Rail Trail (Bungendore – Captains Flat) Boorowa – Harden Rail Trail These rail trail projects are supported by community groups and have varied amounts of feasibility and planning work undertaken. They have the potential to significantly add to the “Ride the Southern” theme identified in this DMP, and to create linkages with the cycle tourism market and experience development occurring in the ACT.
Infrastructure and Business Development needs	<ul style="list-style-type: none"> Each of the Rail Trails proposed require the infrastructure, experience development and promotion associated with successful rail trails in other locations, as well as ongoing investment in promotion and maintenance of the asset / infrastructure.

What is required to deliver the project?	<ul style="list-style-type: none"> • Monaro Rail Trail • Goulburn – Crookwell Rail Trail • Molonglo Rail Trail • Thredbo Valley Trail • Lake Jindabyne around the lake trail feasibility study • The trails require development in terms of infrastructure along the cycle track itself, as well as growing the experience and support services along the ride. For example, shuttle services, accommodation options, catering / dining services, guided options, interpretive / storytelling collateral whether digital, print or hard signage along the way (most likely a combination).
Economic and Social benefits	<ul style="list-style-type: none"> • New news – tourism growth opportunity associated with launch of a new product • Opportunity for associated business establishment / growth – support and retail services • Potential for broader economic benefit to local service providers – new customers in the region for wellbeing / massage, bike shops • Greater exposure and opportunity to generate overnight stays in small townships along the way, or for landholders to diversify income through offering accommodation, supplying goods and services, farmgate produce etc

Game Changer 3. Regional Drive Tourism strategy: themed routes, Recreational Vehicle Strategy and Product Cluster development and promotion

Project description	<ul style="list-style-type: none"> • A regional strategic approach to growing drive tourism, including RV Tourism. This would include identifying and promoting one or two routes, linking with themed clusters of products, and aligning infrastructure priorities to ensure connectivity and excellence in visitor experiences. • The product cluster development will involve identifying regionally significant clusters of products or experiences that deliver on the region / sub-regional positioning. It will actively increase the appeal of the destination and help generate interest amongst visitors and potential visitors. Clusters of well-known and emerging products that relate to key themes for the region should be mapped, with suggested itineraries and visitor experiences. They could be across the region or at specific locations. They can be activity based – such as cycling or paddling, or product based such as wine or specialty producers, or farm-based experience. • Self drive tourism has been identified across the DSNSW Region, and within Canberra, as a growing segment. In part the self drive segment has been a focus of some destinations within the region as a result of current constraints in accommodation capacity, particularly during peak season and events. The Drive Tourism strategy will allow the region to grow the experiences and opportunities for this important market, that is often keen to explore a destination in shoulder or off-peak periods, and contribute to sharing the benefits of tourism through regional dispersal.
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Infrastructure and Business Development	<ul style="list-style-type: none"> • This project will involve partnerships across the region to identify the current and emerging product clusters, a potential themed drive route, and coordination to map and promote the opportunities to visitors / media. • The self drive project would identify any gaps in infrastructure required to cater for the market, which include a range of existing camp/caravan sites suitable for those seeking limited or a full range of service and facilities. The project should take into consideration the opportunities provided in the region's substantial number of National Park and other Crown Lands. Any gaps identified in the market offering would indicate business development opportunities, including service and provisions required by the target market.
What is required to deliver the project	<ul style="list-style-type: none"> • The themed route and experience cluster projects will benefit from implementation of the governance-oriented Enabler project. Regional coordination and a strategic approach to cross-regional promotion will have greater impact with consumers and strengthen the proposition of the experiences on offer. • The strategy will require background research – insights into self-drive market segments (currently visiting the region and potential segments that could be attracted), their requirements and preferences. Research into the current demand and supply of self-drive experiences and associated infrastructure. Opportunities for growth, experience development and itinerary planning to highlight the region's attractions, including themed itineraries that reflect the region's key themes (food and wine / agritourism, wildlife and nature, heritage and arts, etc). • Identification of sites with potential to add to the self-drive suite of opportunities (accommodation, associated infrastructure, experiences to cater for the self-drive market). • Case studies of successful self-drive destinations drawing conclusions / learnings applicable to the DSNSW Region.
Target markets	<ul style="list-style-type: none"> • Drive visitors to the region come from the Sydney-Melbourne routes, Canberra, intrastate NSW and intrastate Victoria. There is increasing propensity of international visitors, including the VFR of Canberra's international student population, to also explore the region independently by car. • The self-drive market includes youth travellers, families and older couples including 'grey nomads'. Research undertaken as part of the project would clarify the best target markets for growing self-drive tourism within the region. It would identify the market segments that the DSNSW Region's experiences would be most attractive to. It would also identify how experiences could be developed to increase the appeal of the destination to visitors that are currently choosing to visit competitor destinations, or driving through the DSNSW Region, particularly those on journeys along the Hume Highway or Sydney – Melbourne coast route.

Partnership and Investment potential	<ul style="list-style-type: none"> • This project will create great opportunities for partnerships and collaboration across the DSNSW Region, with all LGAs to be included in experience development and themed itineraries. In researching the best opportunities for growing self-drive tourism, opportunities for investment should be identified. • Ongoing partnership with existing organisations including Sydney Melbourne Touring. • Themed routes, in many cases it is important to ensure NPWS as a stakeholder is again included. Many possible touring routes may traverse or end in a national park. NPWS is keen to ensure its partnership involvement in identifying and providing a range of visitor experience opportunities that will assist to ensure a quality touring route experiences for potential visitors to a destination. • The self-drive strategy could also build on existing partnerships established with the Sydney-Melbourne touring route. It was also identified by VisitCanberra as being of interest, providing a good opportunity to work in partnership with VisitCanberra and develop itineraries to grow the self-drive experience seamlessly across the region, leveraging visitors to Canberra – both self-drive and fly-drive visitors.
Economic and Social benefits	<ul style="list-style-type: none"> • Self-drive tourism growth can benefit the region through growing visitation and dispersal throughout the region particularly in shoulder or off-season periods. While there is a perception that it is a low-spending market, there is increasing evidence that it is a valuable market, willing to participate in experiences, stock up on fuel, groceries and other supplies.

Game Changer 4. Experience Development – Nature Based Tourism, Opportunities for immersive nature based experiences throughout the region’s protected areas, inland and coastal waterways.

Project Description	<ul style="list-style-type: none"> • Development of experiences within natural areas, including work with existing and potential tourism operators, in conjunction with the land and waterway management agencies, to grow the range and availability of high quality, immersive, nature based activities. • Increase access to water – identify and implement local / micro level improvements to access for unique opportunities [scenic boat trips, jet boats, stand-up paddle boarding / kayaking. This would involve identifying gaps in trails where a new access point / stopping point would allow visitors to link up broader experiences. It could generate new free independent traveller (FIT) access to water based activities, immersed in nature, as well as generating opportunities for tour operators to create new itineraries / tour products.
Infrastructure and Business Development	<ul style="list-style-type: none"> • Multi day coastal walk – joining Light to Light – through coastal wilderness from Tuross Head to Mallacoota. Unique selling point (USP) to be identified • Water based infrastructure for Lake Jindabyne to improve opportunities for use. • Strategic approach to reviewing access to National Park sites and use / appeal of visitor facilities.
What is required to deliver the project	<ul style="list-style-type: none"> • Develop branding for nature based experiences, including coastal and other areas • Industry development initiatives such as the development of toolkits, workshops, mentoring and business development assistance.
Target markets	<ul style="list-style-type: none"> • Concept stage only – NPWS upgrade of Light to Light Walk including upgrade to track and hard roof accommodation. Opportunities for commercially run tours, including Indigenous-run products.
Infrastructure and Business Development	<ul style="list-style-type: none"> • Concept stage only – NPWS Murrumbidgee – Bawley Point coastal walk – trail upgrade.
What is required to deliver the project	<ul style="list-style-type: none"> • Pre-concept consideration – NPWS consideration of improving the Montague Island visitor experience.



Appendix 3:

ACTION PLAN - Enabler projects

3.1 Summary

Enabler	Potential action	Stakeholders & Role	Example indicative measures of success
1	<ul style="list-style-type: none"> • Collaborative Governance arrangements • Research, product development and marketing • Further strategic planning 	<ul style="list-style-type: none"> • Influence: DSNSW, CBRJO, LGAs, LTOs, VisitCanberra • Advocacy: DSNSW, CBRJO • Action: CBRJO, LGAs, LTOs, VisitCanberra 	<ul style="list-style-type: none"> • Greater depth of understanding of the region's visitors and how to reach them through marketing
2	<ul style="list-style-type: none"> • Positive approach to investment • Consideration of potential tourism benefits in strategic planning for land use / management • Demonstrating the value of tourism in the local economy and successful outcomes / growth • Highlighting potential for new accommodation or experiences • Addressing approval process constraints, including timeframes • Encouraging successful business outcomes through approvals and lease / permit timeframes • Addressing regulatory burdens 	<ul style="list-style-type: none"> • Influence: DSNSW, CBRJO, NSW Government, tourism industry • Advocacy: DSNSW, CBRJO, LGAs, tourism industry • Action: CBRJO, LGAs, NSW Government, tourism industry 	<ul style="list-style-type: none"> • Increase in value of tourism in local economy • Investor response to accommodation investment priorities • Reduced approval process timeframes, positive business sentiment towards further investment • Fresh locally caught seafood available • Increased business certainty through longer lease / permits • Ongoing investment in tourism products / experiences due to confidence in tenure / permit terms

Enabler	Potential action	Stakeholders & Role	Example indicative measures of success
3	<ul style="list-style-type: none"> Regional tourism supply and demand analysis Product supply audit to determine gaps and opportunities, export ready products and experiences, industry capacity Review of accessible tourism product / disabled access, and opportunities for meeting the needs of this market. Development of a Destination Disability Inclusion Plan Accommodation Demand and Supply Analysis, and Investment Priority Prospectus Accommodation investment prospectus identifying priority opportunities 		<ul style="list-style-type: none"> Comprehensive understanding of tourism supply, and gaps Comprehensive understanding of accessible tourism product in the region, and priorities / gaps for meeting the needs of this market Acceptance of and action across the region on implementation of a Disability Inclusion Plan Growth in visitation across the region Investment in profitable opportunities as identified in the audit
4	<ul style="list-style-type: none"> Industry Development and visitor service initiative Growing professionalisation, service standards and individual business delivery on positioning Identify regional strategy to best provide visitor information Ensure consistency and value for money in delivering visitor information 	<ul style="list-style-type: none"> Influence: DSNSW, LGAs, tourism industry, VisitCanberra Action: DSNSW, LGAs, tourism industry, VisitCanberra 	<ul style="list-style-type: none"> Improved visitor information services and value for money in providing services Consistent customer service standards and opening / availability of services and experiences
5	<ul style="list-style-type: none"> Infrastructure connectivity and reinvigorating DSNSW regional townships Priority road upgrades Connectivity in wifi and mobile phone coverage 	<ul style="list-style-type: none"> Influence: DSNSW, CBRJO, LGAs VisitCanberra, state government Advocacy: DSNSW, CBRJO, LGAs Action: LGAs, NSW and ACT Governments 	<ul style="list-style-type: none"> Improved traffic outcomes and visitor satisfaction in relevant surveys Decrease in mobile blackspots, increased wifi access and associated visitor satisfaction

Appendix 3:

ACTION PLAN - Enabler projects

3.2 Additional Detail

Enabler 1. Collaborative marketing arrangements – Governance Initiative	
Project description	<ul style="list-style-type: none"> Develop an agreement for strategic destination marketing arrangements where participants can pool resources to create greater impact into the marketplace for their marketing initiatives. This would potentially include both market research and strategic and tactical marketing initiatives. The benefits would be a larger budget to undertake research and marketing, consistent promotion of the region as a whole to target markets
Infrastructure and Business Development needs	<ul style="list-style-type: none"> Collaborative marketing governance arrangements could take place through a Memorandum of Understanding or other similar instrument, formalising a collective approach to tourism marketing and research, to gain economies of scale, greater reach and impact in a competitive market place
What is required to deliver the project?	<ul style="list-style-type: none"> Governance arrangements / agreement amongst all willing parties Understanding of the change in arrangements, and promotion of this with stakeholders to garner support and acceptance of the benefits of a new arrangement – examples of how the shared budget could be spent to highlight the benefits Agreement on who will lead the initiative and drive the required work Strategic forward plan based around budget cycles and program of forward opportunities Regular communication mechanisms at various levels Joint cross-regional famil / visiting journalist / influencers program
Target markets	<ul style="list-style-type: none"> This initiative will allow the DSNSW and ACT region, to identify region-wide target markets (demographic / psychographic segments)
Investor and Partnership potential	<ul style="list-style-type: none"> This action will build on existing collaborative arrangements such as the CBRJO, and allow tourism research and marketing partnerships to be formalised with a longer-term horizon, and based on an strategic approach. It will overcome the need for individual initiatives being negotiated and agreed to on an ad hoc basis
Economic and Social benefits	<ul style="list-style-type: none"> Economies of scale in marketing expenditure across the region and reducing replication of effort Growing stakeholder understanding of the benefits of collaboration and joint efforts – including appreciation that the region's proposition is more compelling as a whole and recognising that competitor destinations are not those neighbouring but in other regions / countries

Enabler 2. Positive Approach to Investment	
Project description	<ul style="list-style-type: none"> This project will seek to progress solutions to a range of factors that are identified across the DSNSW Region as constraining tourism development, growth or innovation to varying degrees. Many of the issues affect destinations across NSW and beyond, not only within the DSNSW region. However, they have been identified as important issues requiring joint advocacy, discussion and resolution to improve the outlook for tourism business growth, and accompanying growth in the region's visitor economy Inclusion of this as a significant action within the DMP is a reflection of the region's interest in addressing and overcoming issues that local stakeholders identify as currently constraining the visitor experience and growth in the visitor economy
Specific regulatory issues identified	<ul style="list-style-type: none"> Ability to self-drive / sell seafood at port of catch - local sales from the boat 'farm gate' equivalent – if not to the public at least to local restaurants Reduce barriers to entry – red tape associated with allowing tourism activity on farms Streamline development approval timeframes to reduce uncertainty for investment in businesses National Parks approvals and lease certainty and length of lease / permit terms, and competition with private sector. NSW NPWS Visitor Experience Strategy that is currently under development will inform this] Footpath dining limitations • Ease of alcohol free zones (or exemptions) S94 contributions • Land use management
What is required to deliver the project?	<ul style="list-style-type: none"> Each issue to be resolved / advocated will require a project plan: <ul style="list-style-type: none"> full description of the issue or problem impact on the visitor economy from the current situation stakeholders that are affected (in-region and beyond) potential and preferred solution/s who has the jurisdiction or authority to resolve the issue? specific stakeholder actions to address the issue or advocate for resolution Program of advocacy involving representatives from other regions (if applicable) Increased consultation with the NPWS as a stakeholder in any destination planning relating to visitor experiences pre-project planning or initiation.
Stakeholders involved	<ul style="list-style-type: none"> This project will rely on efforts from many stakeholders in the DSNSW region, including: <ul style="list-style-type: none"> Tourism industry Local Government State Government agencies CBRJO / other cooperative organisations
Economic and Social benefits	<ul style="list-style-type: none"> Effective solutions to regulatory issues currently constraining the tourism industry or affecting the visitor experience will generate significant economic benefits throughout the DS NSW region, representing a series of key 'enablers' that will allow the region to reach its goal of doubling the visitor expenditure by 2020.
Economic and Social benefits	<ul style="list-style-type: none"> Economies of scale in marketing expenditure across the region and reducing replication of effort Growing stakeholder understanding of the benefits of collaboration and joint efforts – including appreciation that the region's proposition is more compelling as a whole and recognising that competitor destinations are not those neighbouring but in other regions / countries

Enabler 3. Tourism Product Supply and Demand Analysis and Investment Priority Prospectus	
Project description	<ul style="list-style-type: none"> Each sub-region within the DSNSW region to undertake an analysis of accommodation demand, current supply, gap analysis and identification of investment priorities that would be presented in a prospectus format
Why?	<ul style="list-style-type: none"> Many of the towns and destinations across the DSNSW Region support a combination of either lack of accommodation capacity, or changing visitation patterns / market expectations resulting in current accommodation stock not meeting market needs. There are also changes to accommodation occupancy patterns arising from the emerging share-economy with Airbnb listings growing across the region. A thorough analysis will demonstrate demand (current and future) providing a basis for existing operators and potential new entrants to make investment decisions with confidence
What is required to deliver the project?	<ul style="list-style-type: none"> Most or all of the region's LGAs have access to reasonably current accommodation stock counts and occupancy data. This project would build on existing knowledge to examine current supply in light of current and potential markets and competitor destinations. A Gap Analysis and review of global trends and issues relevant to the region's visitor economy will provide the information required to develop a business case for investment in improving or adding to the region's accommodation stock
Investor and Partnership potential	<ul style="list-style-type: none"> This project is highly likely to generate investment in accommodation – including upgrades and improvements to existing stock, and attraction of investment into new accommodation in the short – medium term
Economic and Social benefits	<ul style="list-style-type: none"> Addressing any current gaps in accommodation supply or style will immediately assist with enabling additional visitation to the region, and encouraging longer stays or higher yield opportunities by meeting visitor preferences. This project will also assist the region to ensure it is on the 'front foot' in being able to secure further investment for forecast growth and meet the needs of visitors and market sectors into the future Economic benefits will be generated through any construction expenditure that occurs, as well as new job creation including as direct employment within new accommodation and with suppliers and associated self-drives

Enabler 4. Industry development and visitor self-drive initiative	
Project description	<ul style="list-style-type: none"> This project will create impact across the region as it works to lift the tourism industry's standards, visitor self-driving, how to prepare for international markets, how to attract the education market (school groups and international students), particularly existing markets out of Canberra. Growing the understanding of the value and importance of the visitor economy across the region to build support for the industry and encourage welcoming of visitors. VFR development program – ensuring locals are the region's best ambassadors so that their visiting friends and relatives are encouraged to experience the 'best of' the region
Infrastructure and Business Development needs	<ul style="list-style-type: none"> Professional development, training and 'how to' guidelines for the tourism industry to address issues such as how to reflect the region's positioning in product development and customer self-drives, how to maximise the use of online promotion and distribution channels, social media and booking opportunities Regular communication forums – networking opportunities, training, collaborative workshops to develop itineraries and marketing initiatives, famils for VIC teams from across the region, joint famils / visiting journalist programs across the region As a region work towards a comprehensive visitor self-drive strategy – identify key touch points (pretrip and in-region), priority improvements or resourcing requirements, opportunities to streamline self-drive across the region (particularly in neighbouring shires, if self-drives are duplicated or not operating efficiently)
What is required to deliver the project?	<ul style="list-style-type: none"> Training – customer self-drive training (consistent standards across the region), how to with online marketing and distribution channels, how to become international ready, learning from other successful destinations, mentoring program to improve business outcomes and visitor satisfaction Networking and communication: regular meetings / online discussion / sharing of opportunities Tracking value of the industry and sharing regular stories and information through local media to grow appreciation of the visitor economy and contribution to the local economy
Target markets	<ul style="list-style-type: none"> Tourism industry and support self-drives. All tourism stakeholders



Enabler 5. Infrastructure connectivity and reinvigorating DSNSW townships	
Project description	<ul style="list-style-type: none"> • Major road upgrades / duplication – Barton Highway, Kings Highway, Monaro Highway, Princes Highway • Internet and mobile connectivity throughout the region – overcoming blackspots and increasing wifi access (free of charge) for visitors throughout the region • Place-making and reinvigoration of the region's towns
Infrastructure and Business Development needs	<ul style="list-style-type: none"> • This action incorporates major infrastructure priorities across the region, as part of Economic Development Planning and CBRJO discussions. The road and infrastructure upgrades are important to the community and businesses throughout the region as well as the visitor economy • Improvements to road infrastructure would significantly enhance visitor flows through the region, facilitating travel through and within the region and improving the visitor experience. Shorter travel times will allow more time to be spent within destinations. Broader benefits of visitor safety will also improve outcomes in the region • Improved mobile and wifi coverage will help meet visitor expectations of connectivity and generate awareness of the region through further real-time access to social media and 'word of mouse' tools. Consistent and reliable mobile and internet access will assist the region to grow its business events sector, and facilitate greater online marketing and distribution activity for the local industry • Place-making priorities and reinvigoration of the region's towns will also be reflected in Economic Development Plans and local Community Plans, however they will deliver improved visitor experiences as well as community and economic development outcomes
What is required to deliver the project?	<ul style="list-style-type: none"> • Road upgrades - Dept Roads and Maritime Safety, LGAs, and other authorities with responsibility for roads • Mobile Blackspot / internet connectivity – identification of major gaps in mobile coverage and internet coverage, as well as priority locations for free public wifi
Target markets	<ul style="list-style-type: none"> • Drive markets – Sydney to Melbourne drive market, Canberra population, Canberra fly-drive visitors (including growing international markets resulting from direct international flights). • Youth and business visitors as well as International visitors seek seamless mobile and wifi connectivity.

Appendix 4:

Target Markets

4.1 Region wide-target markets

The DSNSW Region extends across existing 'DMP sub regions', reflecting consumer perceptions of the region as being made up of the 'Tablelands', 'Snowy Monaro' and "Coast". Previously identified target markets for each sub-region are summarised in Appendix 4. The DSNSW Region also adjoins Canberra and the ACT. Over time a consistent approach to market segmentation analysis across the region (identifying common psychographic and demographic descriptors), may be developed. At the time of writing this DMP, VisitCanberra is undertaking a segmentation study which may be suitable for broader adoption across the DSNSW Region.

Region wide-target markets include a mixture of geographic source markets, demographic and activity-based groups. Specific target markets across the DSNSW Region include:



Target Market 1

Families, couples, groups of women

Older couples

International students

VFR

Conference small-medium



Target Market 2

Canberra residents / VFR

NSW intrastate

Sydney - Melbourne FIT

Canberra International arrivals (FITs)

Arriving by road, air & ship



Target Market 3

Food and Wine

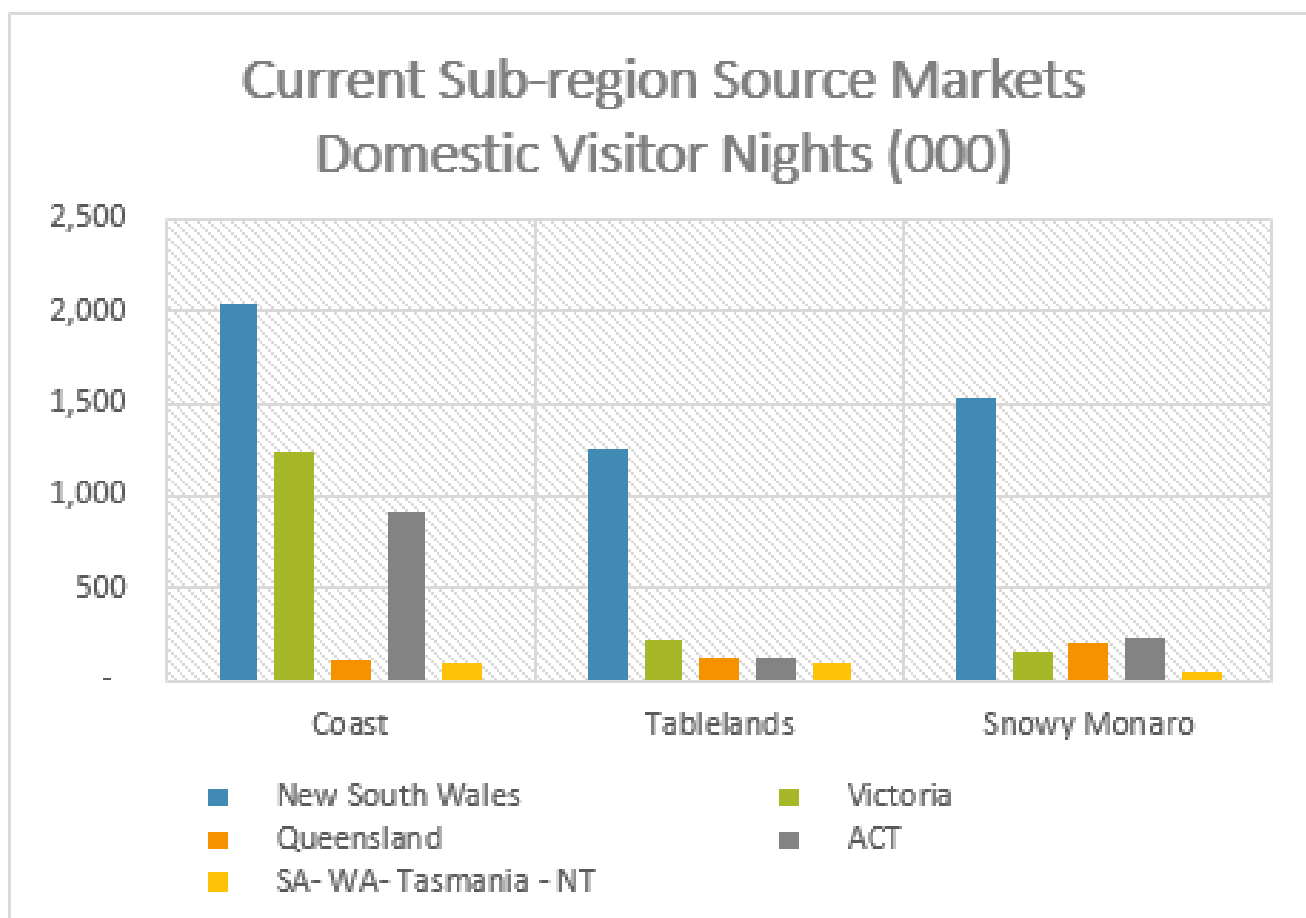
Drive and RV

Adventure activities, cycling and snow sports

Education

Water sports and fishing

Special interest groups eg. photography, motorbike clubs



Source Market 5 year average Visitor Nights. Source: Tourism Research Australia

This table illustrates the source markets for each of the DMP sub-regions, based on a five-year average, illustrating the importance of intrastate travel to the sub-regions, and also the importance of the Victorian and ACT markets to the Coast sub-region.

In relation to daytrips, again intrastate visitors are the largest source market (including many from within the Destination Network area) followed by Canberra, which represents 50% of the Snowy day trip market and 38% of Tablelands'. The following table highlights which source markets offer the best source of growth for each of the sub-regions, building on current visitation.

Source Markets	Tablelands	Coast	Snowy
NSW intrastate	✓✓✓	✓✓✓	✓✓
Sydney	✓✓✓	✓✓✓	✓✓✓
Canberra	✓✓✓	✓✓	✓✓✓
Victoria	✓	✓✓✓	✓
International ex-Sydney	✓	✓✓✓	✓✓✓
International ex-CBR	✓✓✓	✓✓	✓✓✓

Appendix 4:

Target Markets

4.2 Canberra Region Tablelands target markets

The Canberra Region Tablelands tourism target audiences were identified and described in the table below

Target	Who are they?	What are they interested by?
Formal Target Audience True Travellers Persona Sophie & partner/friends 	<ul style="list-style-type: none"> • Late 20s to mid 40s • Lives within a 3 hour drive from the Tablelands • Childless and social • Professional • Mid to high income earner • Digitally savvy • Likes to travel often on short trips with her partner or friends • The planner - plants the seed and coordinates the group • Enjoys spending disposable income on quality experiences 	<ul style="list-style-type: none"> • Food and wine - dining and tours • Romantic escapes • Festivals and events • Shopping
Formal Target Audience Wanderers Persona Barry & Margaret older couple 	<ul style="list-style-type: none"> • 45 years + • Close to retirement - time rich • Middle to high income/affluent • Live interstate • Travel regularly and take the time to explore and discover • Digitally aware • Enjoy luxury/comfort • Spends savings on quality experiences 	<ul style="list-style-type: none"> • Tours and trails • History and heritage • Arts and culture • Food and wine
Formal Target Audience Compatriots Persona Nick, Anne + Jack and Olivia 	<ul style="list-style-type: none"> • Parents with primary school aged kids • Middle income earners • Live in regional NSW • Plan trips around school holidays • Seeking affordable experiences • Want a variety of experiences to suit their own kids' interests 	<ul style="list-style-type: none"> • Interested in food and wine but keeping the kids entertained is a priority • Nature/adventure/outdoors • Festivals and events • Family fun - attractions
Formal Target Audience International Chinese & Indian - significant and emerging markets Visitation by the Chinese and Indian market is strong. Growth predicted from the Indonesian market. 	<ul style="list-style-type: none"> • International visitors • Primarily Chinese and middle-class Indians • 45-59 years old, followed by 15-29 years • 15-29 years are the biggest spenders • Seeking interesting offerings and attractions 	<ul style="list-style-type: none"> • Food and wine • Nature

Appendix 4:

Target Markets

4.3 The South Coast DMP 2013 – 2020: priority markets



Eurobodalla

- ACT – all segments
- Southern Regional NSW, North East Victoria: families in holiday periods, Older couples year-round, events
- Niche markets – e.g. Cycle tourists



Sapphire Coast

- ACT – domestic experience seekers / true travellers, and short stay
- Victoria – all markets
- Melbourne & surrounds: domestic experience seekers / true travellers
- NSW – Southern Region: family holiday market, retirees
- International experience seekers
- Cruise ship market



Snowy Monaro

- The Snowy Mountains 2013 DMP does not identify specific target markets by psychographic descriptors, but identifies the following target markets for growing visitation to the region:
- Domestic overnight visitation
- Domestic day visitors
- International visitors (especially through Canberra International flights)
- Family visitors in non-winter season
- Small – medium business / conference / corporate retreat (Canberra and NSW)
- Events including sports and cultural activities

Appendix 5:

Snapshot of LGA

	Yass Valley	Upper Lachlan	Hilltops	Queanbeyan Palerang	Goulburn Mulwaree	Bega Valley	Eurobodalla	Snowy Monaro	TOTAL
Population	16,870	7,841	18,993	57,334	29,918	33,662	38,119	20,880	215,776
Visitor No's	377,000	np	414,000	509,000	619,000	858,000	1,216,000	1,056,000	
Domestic Day	250,000	np	266,000	303,000	391,000	351,000	518,000	422,000	
Domestic Night Overnight	124,000	77,000	145,000	202,000	222,000	482,000	674,000	619,000	
International	3,000	866	3,000	4,000	6,000	25,000	25,000	15,000	
Visitor Spend \$	\$50 million	np	\$79 million	\$97 million	\$102 million	\$382 million	\$350 million	\$521 million	\$1,581 million
Visitor Nights	324,000		473,000	700,000	537,000	2,249,000	2,529,000	2,322,000	9,134,000
Average Spend	\$132		\$191	\$191	\$164	\$446	\$350	\$494	
Average Night	\$104		\$110	\$104	\$120	\$148	\$116	\$200	
Average Stay	3		3	3	2	4	4	4	
Council Tourism Expenditure									
VIC	\$167,800	\$141,000	\$300,000	\$125,000	\$326,502	\$ 90,000			\$982,502
Other	\$173,800	\$30,000	\$50,000		\$762,044	\$ 296,000			\$1,987,697
Marketing	\$166,100	\$232,000	\$100,000	\$10,000	\$508,053				
TOTAL	\$507,700	\$171,000	\$350,000	\$125,000	\$1,596,599	\$386,000			\$2,970,199

Appendix 6:

CBRJO Regional Infrastructure Priorities

INFRASTRUCTURE MATRIX – CBRJO’S Projects Listed in Priority Ranking 17 May 2017

NOTE: These projects are not tourism-specific, they cover all infrastructure priorities

Rank	Project Description	\$ M	LGA
1	Blayney to Demondrille Rail link	\$40.00	Hilltops
2	East West Link - Brown Mountain / Imlay Road	\$0.50	Bega Valley
3	Barton Highway Duplication	\$900.00	Yass Valley
4	Dual water and Gas supply security between Boorowa and Harden	\$50.00	Hilltops
5	Princes Highway South Batemans Bay	\$30.00	Eurobodalla
6	Kings Highway Corridor Strategy	\$7.00	Eurobodalla
7	Performing Arts Centre	\$13.00	Goulburn Mulwaree
8	MR241 West- Boorowa/Young Road	\$9.50	Hilltops
9	Yass to Murrumbateman Pipeline	\$14.00	Yass Valley
10	Bega Innovation Hub - health, education, industry and research	\$10.00	Bega Valley
11	Rocky Hill War Memorial Museum	\$3.50	Goulburn Mulwaree
12	Nerriga to Federal Highway via MR92 – MR92 Stage 1	\$4.51	Queanbeyan-Palerang
13	Nerriga to Federal Highway via MR92 – Bungendore Road Stage 1	\$1.79	Queanbeyan-Palerang
14	Bombala Wastewater Treatment Replacement	\$8.25	Snowy Monaro
15	Hilltops Education and Community Hub (including regional library)	\$4.50	Hilltops
16	Victoria Park Health & Wellbeing Precinct	\$50.50	Goulburn Mulwaree
17	Goulburn to Crookwell Rail trail	\$15.50	Goulburn Mulwaree
18	Reconstruction and sealing of the Dalton /Rye Park Rd (MR241)	\$11.00	Upper Lachlan
19	Reconstruction /sealing parts Grabbine Rd	\$7.00	Upper Lachlan
20	Jugiong Road	\$8.20	Hilltops

Rank	Project Description	\$ M	LGA
21	Reconstruction and Sealing of Wombeyan Caves Rd [MR 258]	\$32.50	Upper Lachlan
22	Coastal Trail (Batemans Bay)	\$4.00	Eurobodalla
23	Corrigans Inclusive Playground	\$1.34	Eurobodalla
24	Eurobodalla Southern Water Storage	\$85.00	Eurobodalla
25	Fairlight Road upgrade remaining unsealed section (2.5Km)	\$1.30	Yass Valley
26	Regional Road Widening: Range, Gurrundah, Windellema, Bungonia Roads	\$30.00	Goulburn Mulwaree
27	Stage 2 Old Cooma Road - Duplication	\$31.00	Queanbeyan-Palerang
28	Bungendore Recreation Grounds - Stage 1	\$3.00	Queanbeyan-Palerang
29	Tathra Wharf Upgrade	\$3.00	Bega Valley
30	MacKay Park Sporting & Cultural Precinct	\$30.00	Eurobodalla
31	Delegate Water Supply Upgrade	\$1.60	Snowy Monaro
32	Construction new amenities building at Memorial Park, Crookwell	\$1.04	Upper Lachlan
33	Delegate Wastewater Treatment Plant	\$0.26	Snowy Monaro
34	Eden Port to Eden CBD (Albert Terrace)	\$2.00	Bega Valley
35	Bega Valley Water Treatment Facilities	\$63.00	Bega Valley
36	Regional Sports Facility	\$25.00	Queanbeyan-Palerang
37	Mulligans Flat Road upgrade remaining unsealed section (2Km + bridge)	\$1.30	Yass Valley
38	Yass Valley LGA Oval /Facilities Upgrade Program	\$6.40	Yass Valley
39	Murrumbateman Equestrian Facilities & Community Hall	\$5.60	Yass Valley
40	Cooma Livestock Selling Centre-Upgrade Stage 2 (Truckwash upgrade)	\$0.98	Snowy Monaro
41	Heavy vehicle inspection station Crookwell	\$0.50	Upper Lachlan
42	Shared pathway Lion Park to Murrumbidgee River Reserve (Snowy)	\$1.60	Snowy Monaro
43	Goulburn Business and University Hub	\$2.00	Goulburn Mulwaree
44	Bega Valley Regional Sports Facility	\$10.00	Bega Valley

Appendix 7:

Cruise Eden Statistics

Cruise Eden Research indicating the growth of cruise visitation, economic value and potential for growth in visitor flows arising from cruise activity.

2016/17 Season

- Visits 14
- Passengers 17,494
- Estimated crew 7,716
- Disembarkation 91%
- Official shore experience participation 21%

2017/18 Season

- Visits booked 15
- Estimated passengers 23,206
- Estimated crew 9.896

Statistics provided by Sapphire Coast Tourism

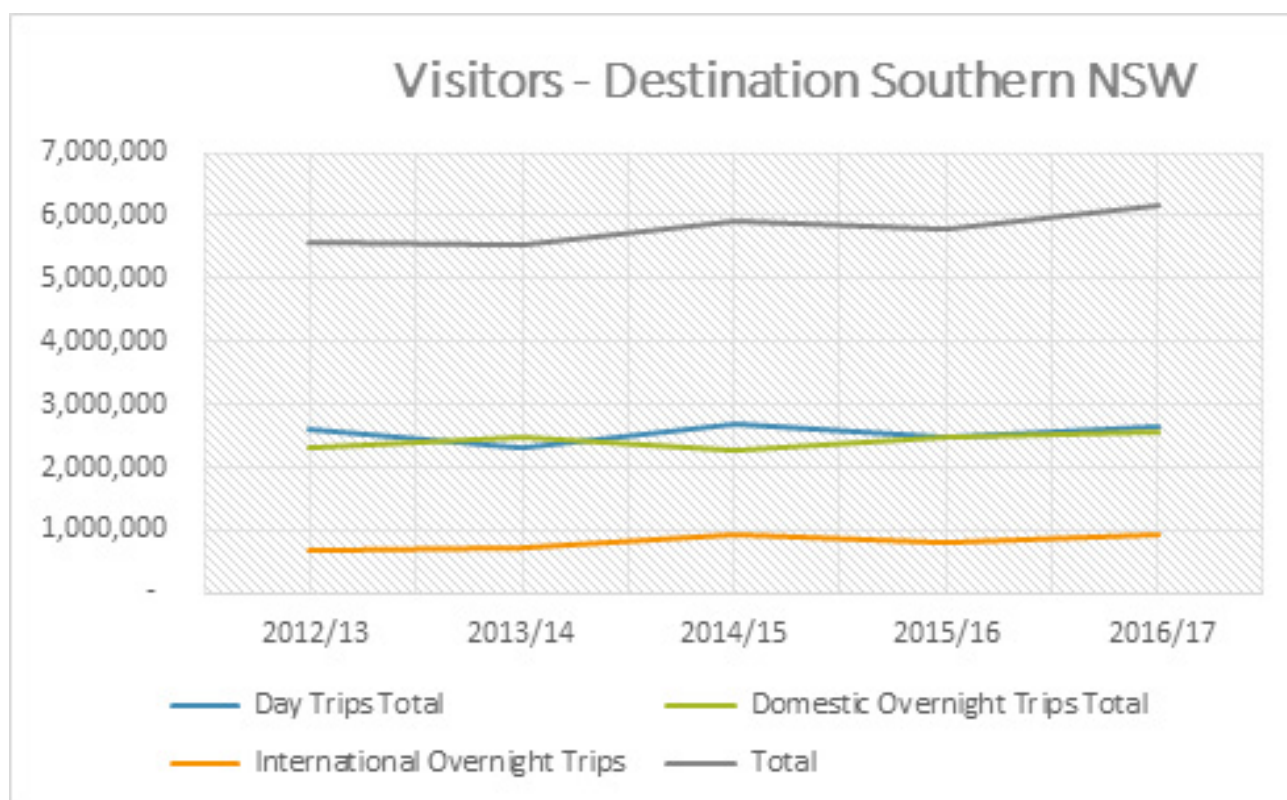
Appendix 8. Visitor Data

Visitation

Figure 1. shows that the total number of people visiting the DSNSW Region has increased 3.6% since 2012/13. Most visitors are domestic visitors with international visitors making up 14% only of the total. Day trips have declined over this period by 1.4%, domestic overnight trips have increased by 4.5% and international overnight trips have increased by 18.2%.

The breakdown of international visitors to the DSNSW Region is 40% from Europe, 23% from Asia and 38% from other countries. This is a lower proportion of visitors from Asia than visitors to NSW as a whole.

Figure 1: Visitors to Destination Southern NSW

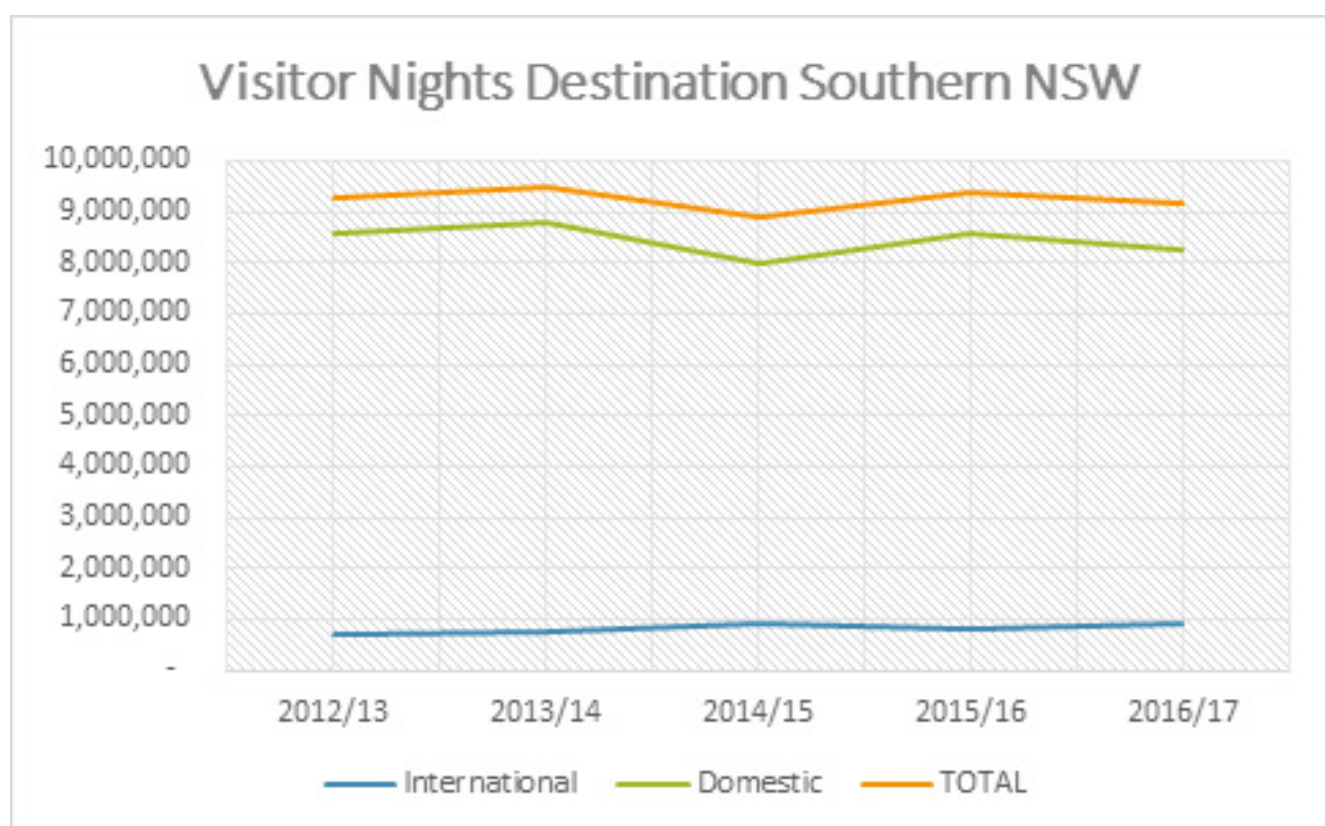


Source TRA

Visitor Nights

Figure 2. illustrates nights spent in the DSNSW Region from 2012/13 to 2016/17. Domestic nights have fallen 4% over the period, while international visitor nights have increased 35%, which is not enough to offset the fall in domestic nights, meaning that total visitor nights have dropped 1%.

Figure 2 Visitor nights to Destination Southern NSW

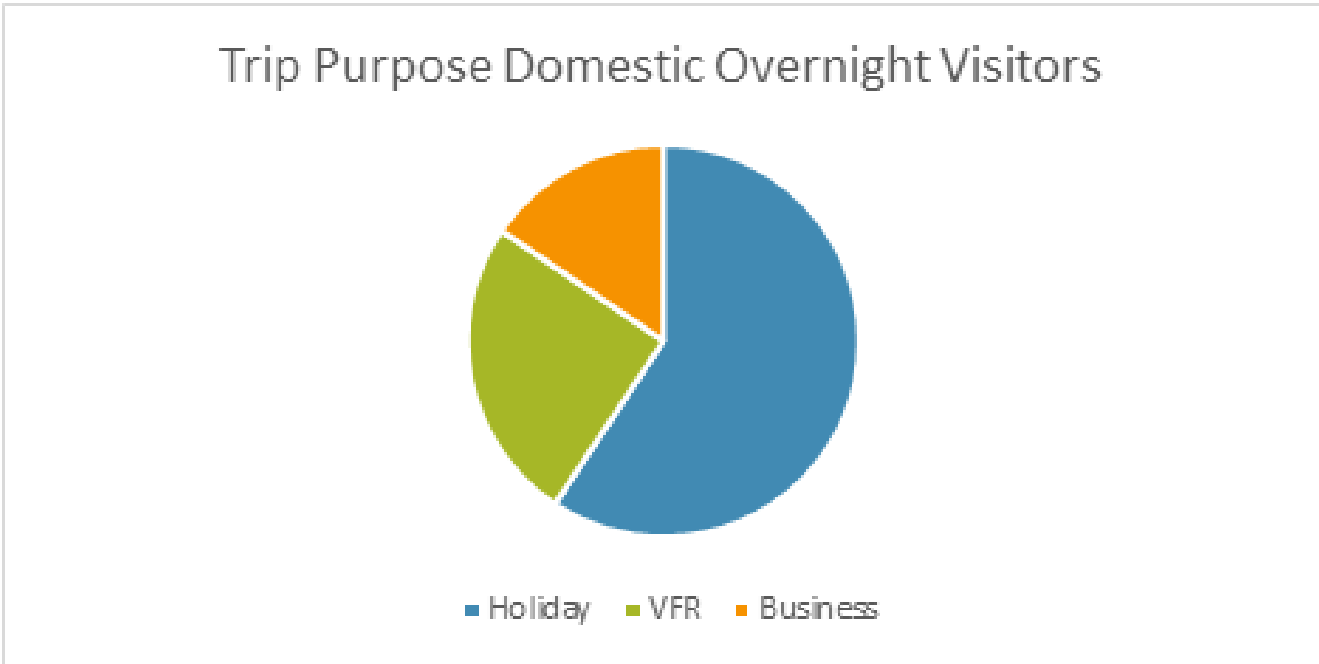


Figures 3 and 4 demonstrate that most visitors to the Destination Southern come for a holiday and that business visitors are the smallest market.

Figure 3 Trip purpose international visitors



Figure 4 Trip purpose domestic overnight visitors



Source TRA

Figure 5. shows the breakdown of total visitors into the DSNSW sub-regions. The Tablelands sub-region has the greatest share of total visitors, at 41%, due to the high number of day visitors.

Figure 5 Sub-region breakdown - visitors 2016/2017

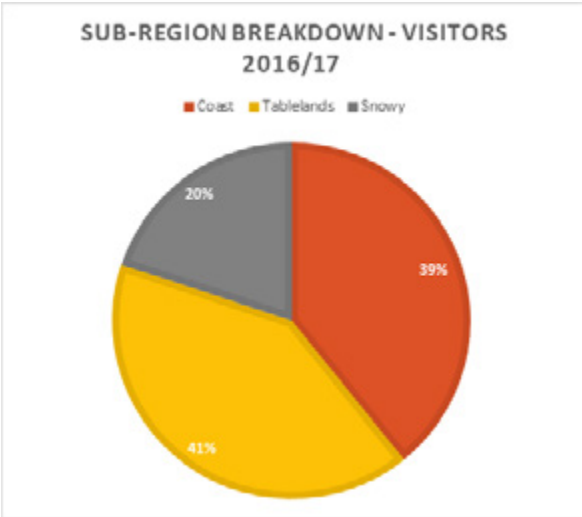
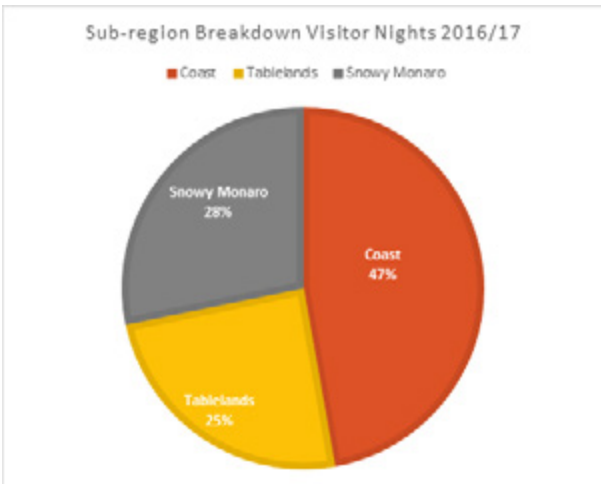


Figure 6. demonstrates that the Coast sub-region received the highest number of visitor nights, followed by Snowy Monaro.

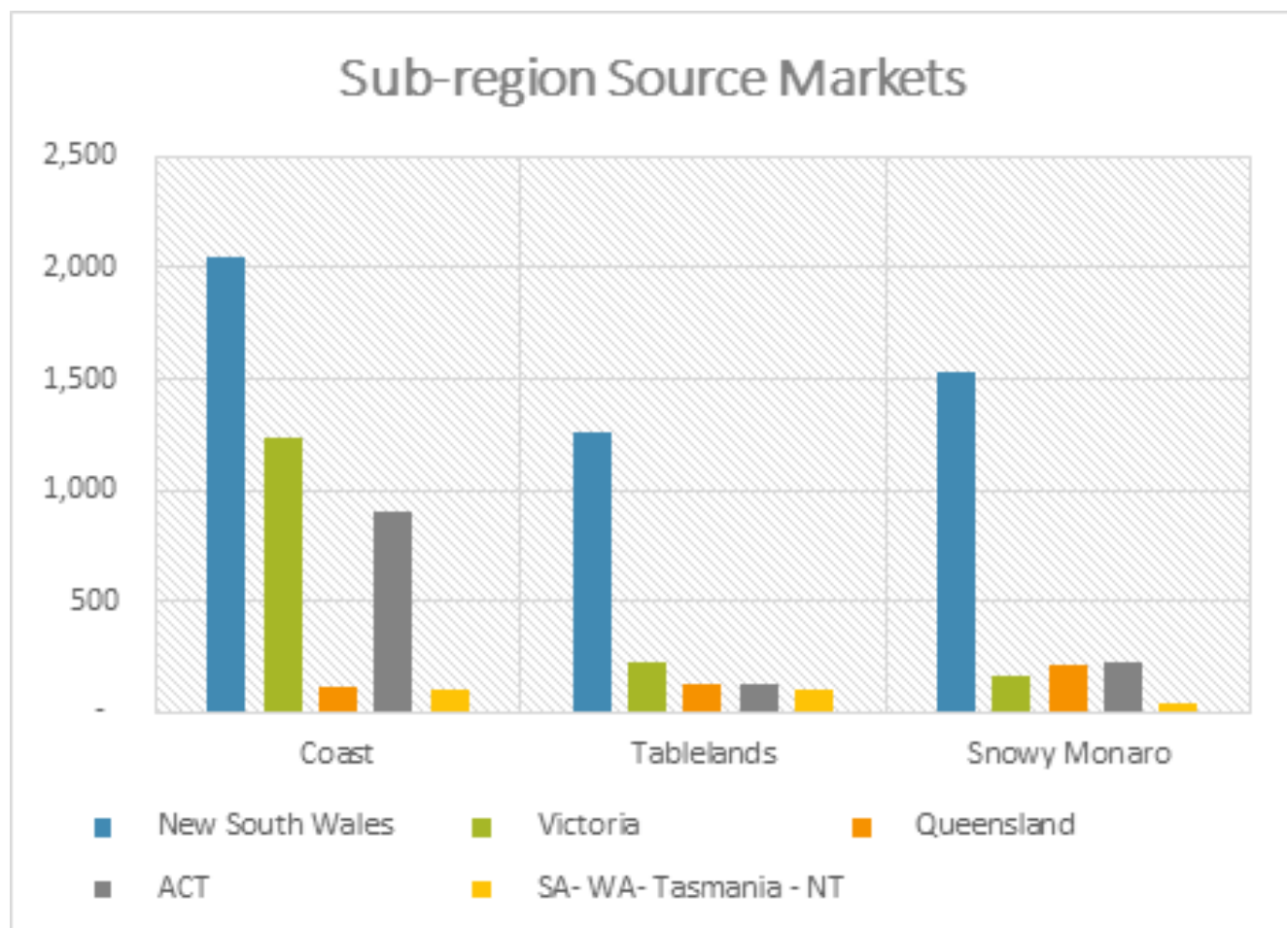
Figure 6 Sub-region breakdown visitor nights 2016/2017



Source Markets

Figure 7. demonstrates the source markets for domestic overnight visitors to the sub-regions. Intrastate travel is the predominant source market for all sub-regions, with Victoria the second source for Coast and Tablelands. The ACT is the second largest source market for Tablelands for day visitors. The ACT is an important market for Snowy Monaro for both overnight and day visitors.

Figure 7 Sub-region Source Markets





Tablelands

Figure 8 Tablelands total visitors

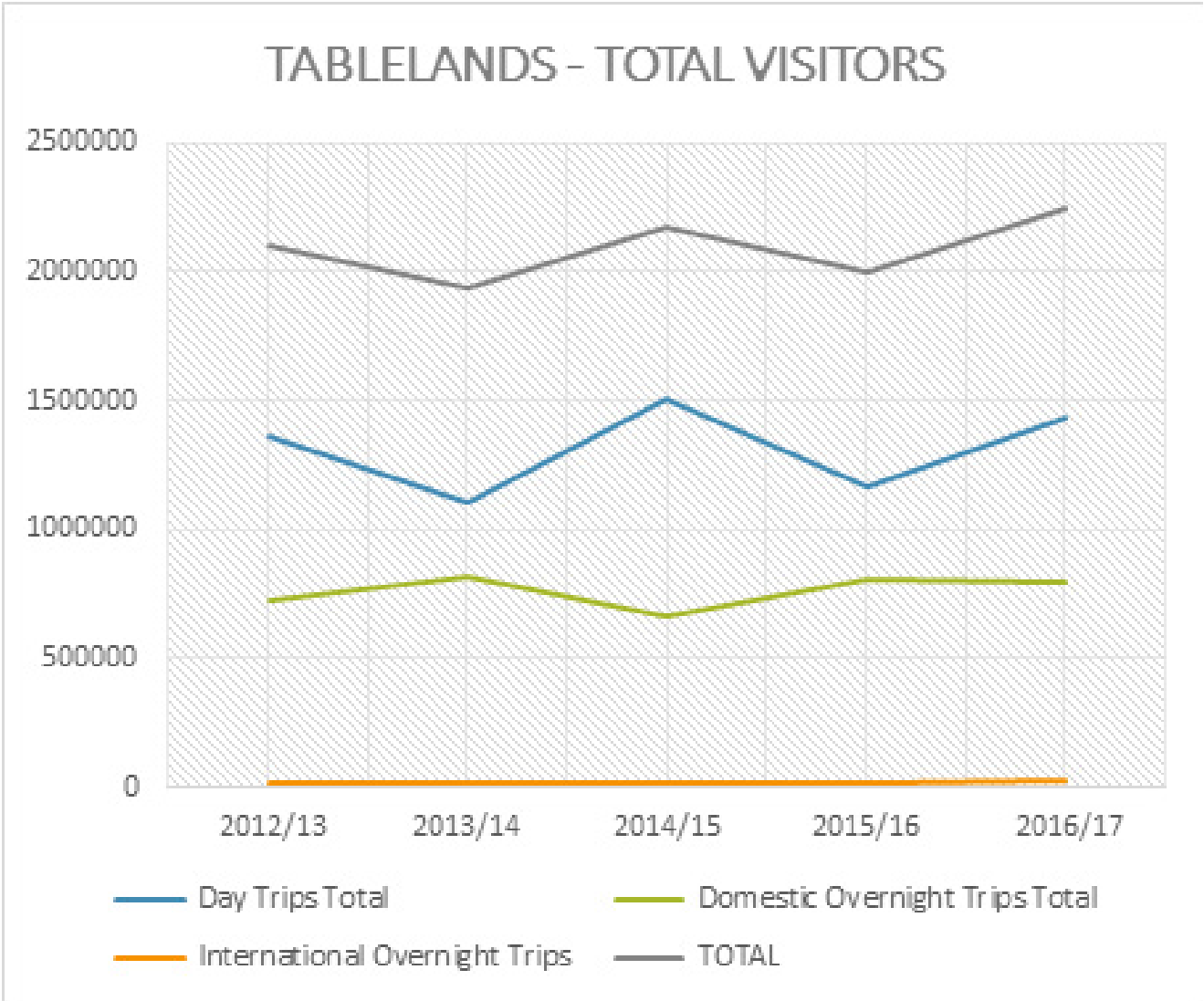


Figure 9 Tablelands purpose of trip

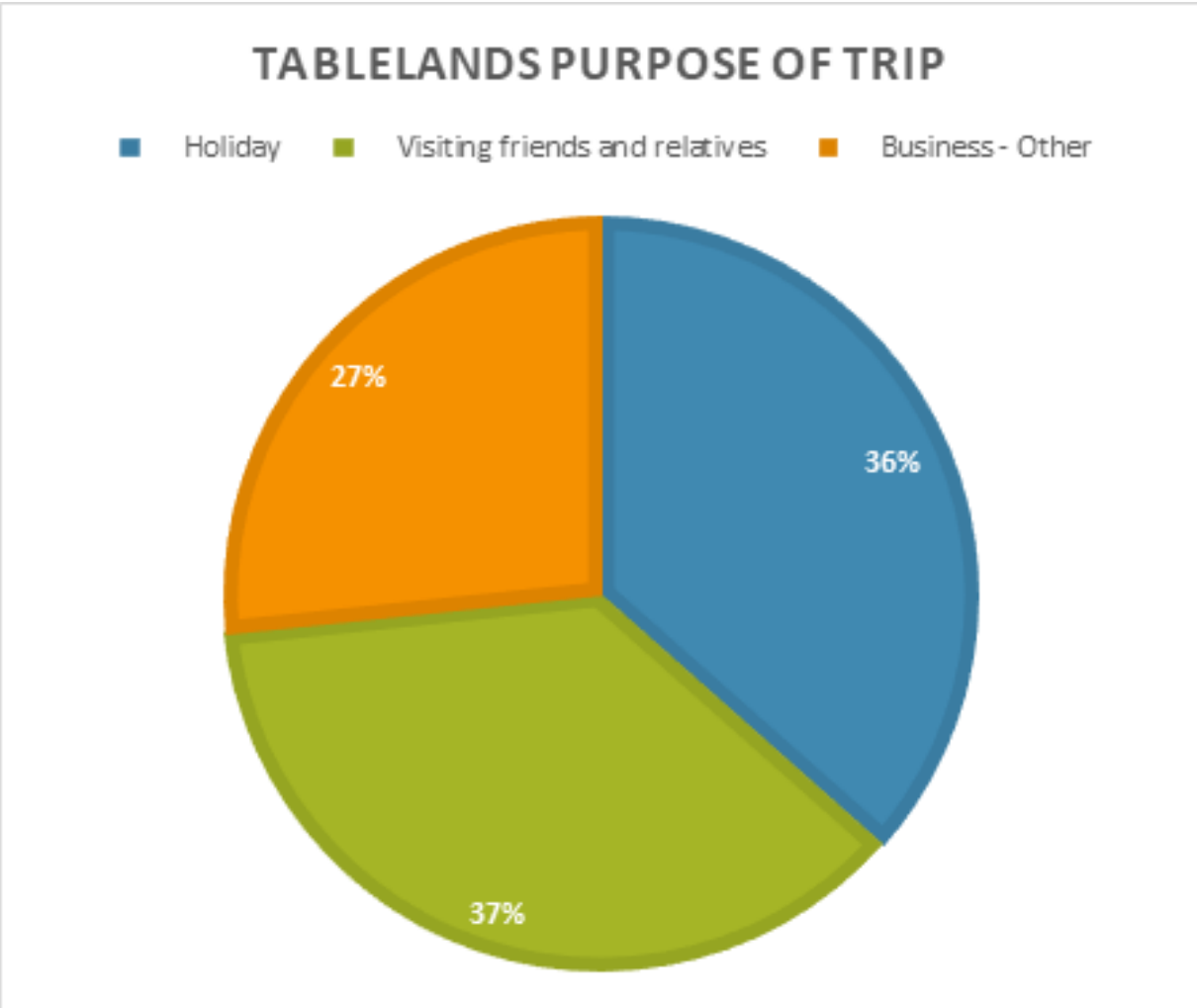


Figure 10 Tablelands Visitor Nights

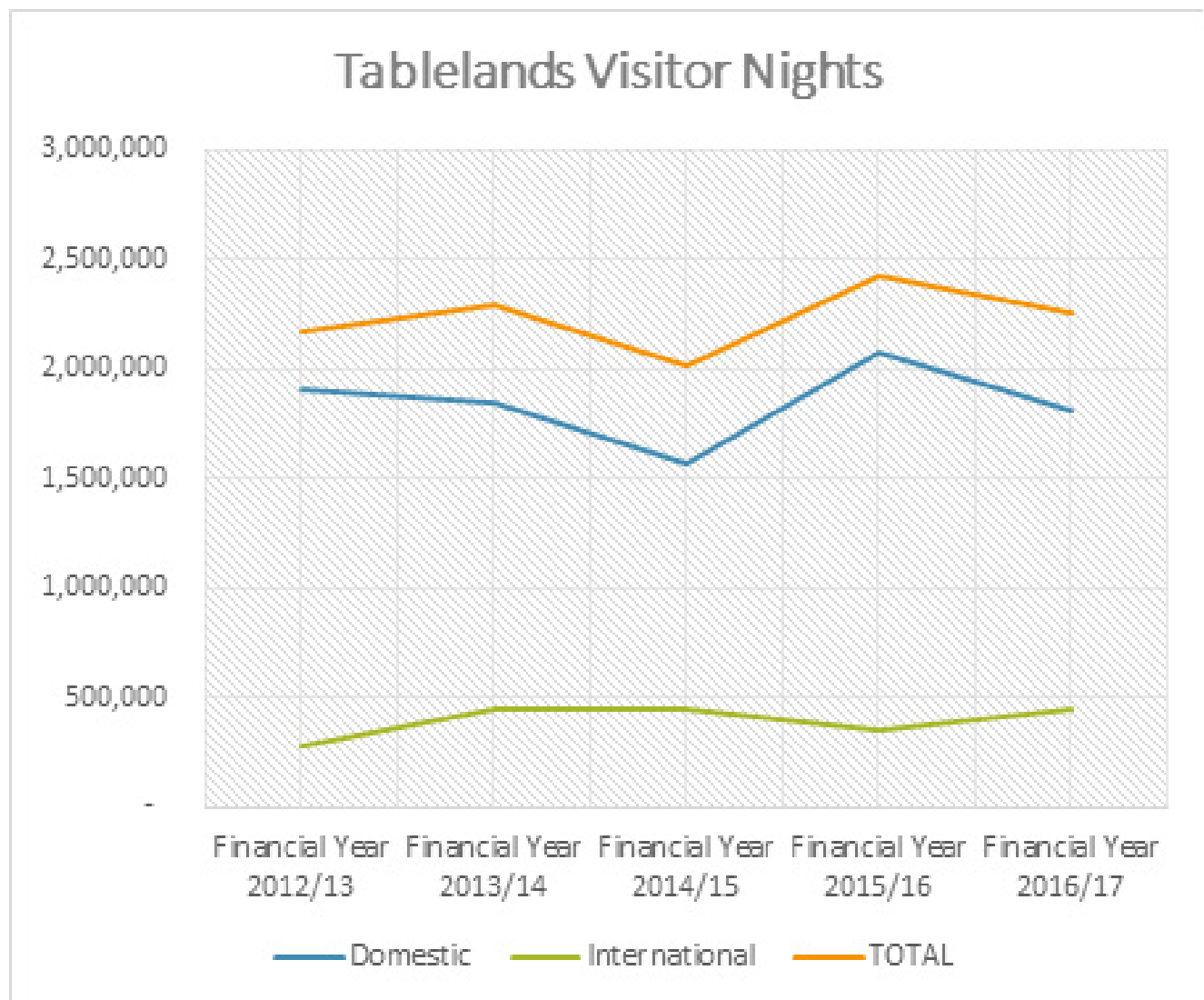


Figure 11 Tablelands Domestic Visitor Nights

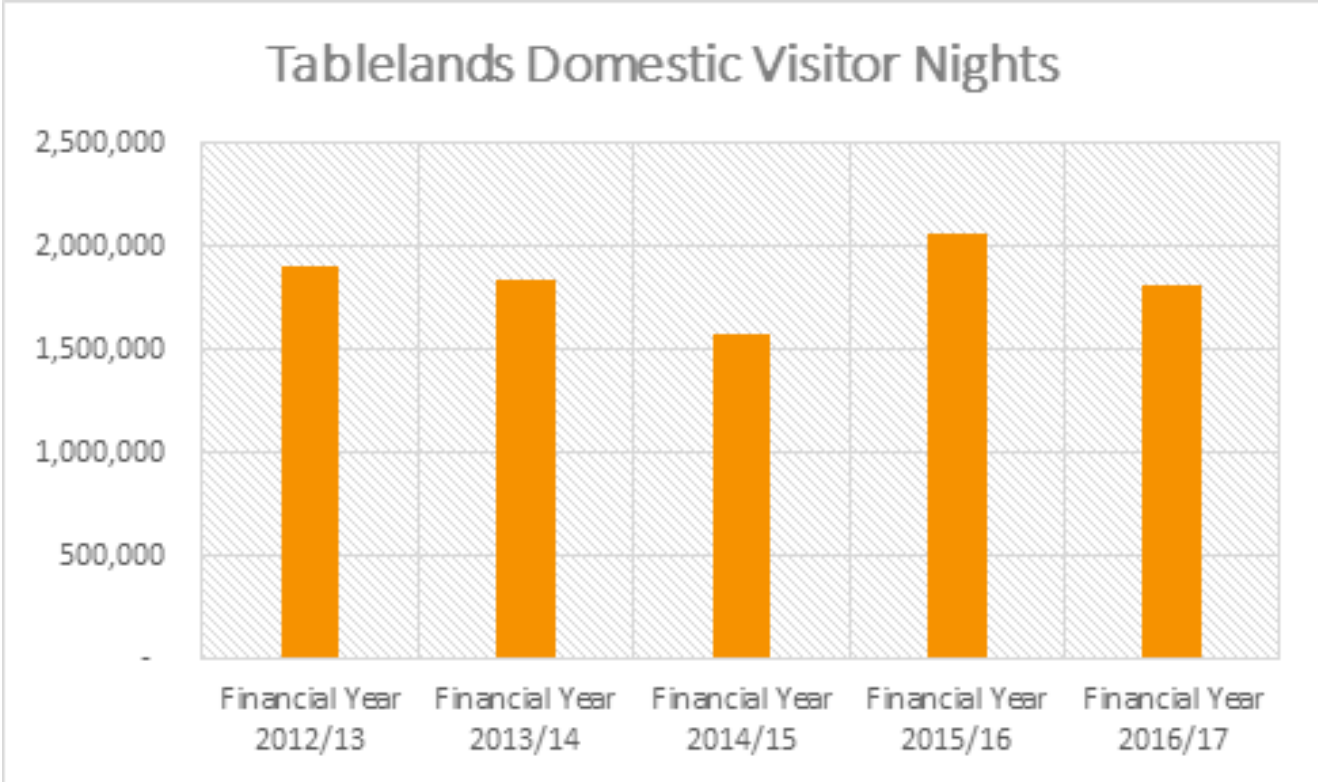
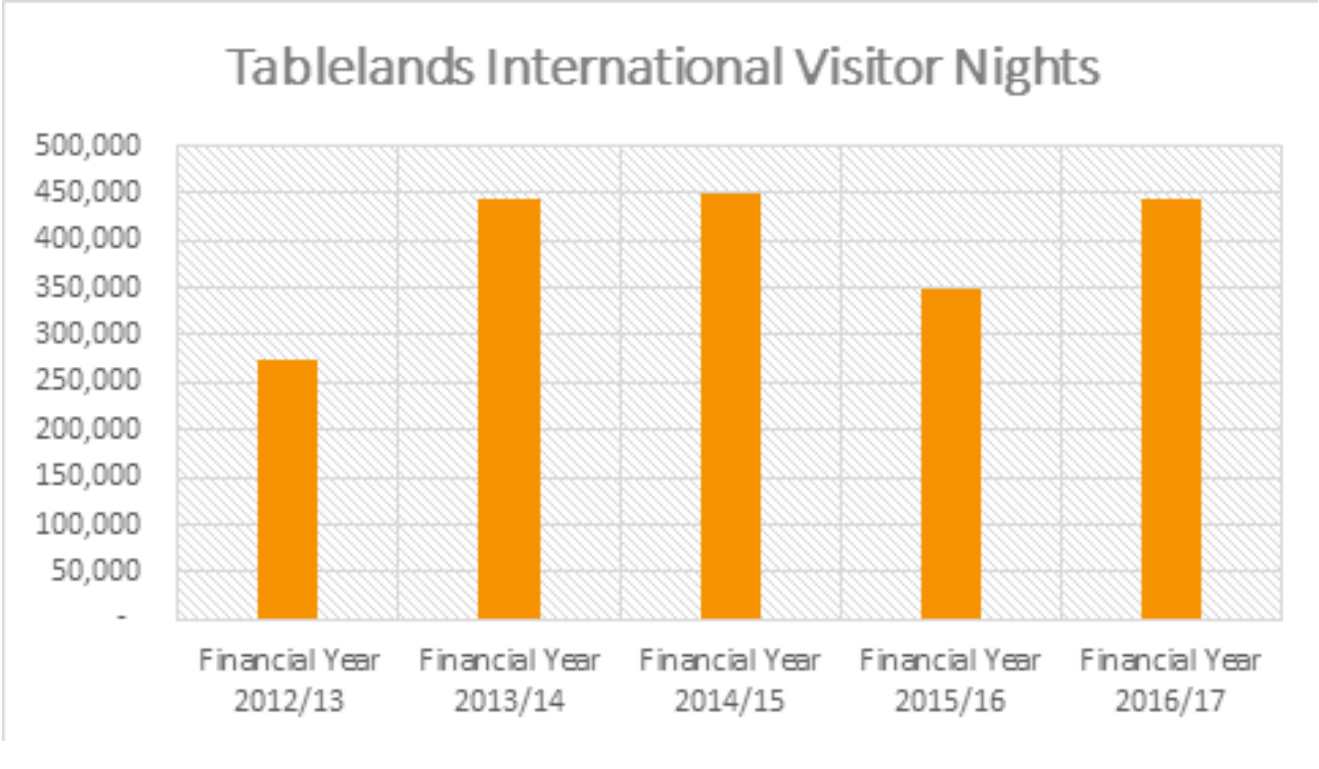


Figure 12 International Visitor Nights



Coast

Figure 13 Coast total visitors coast

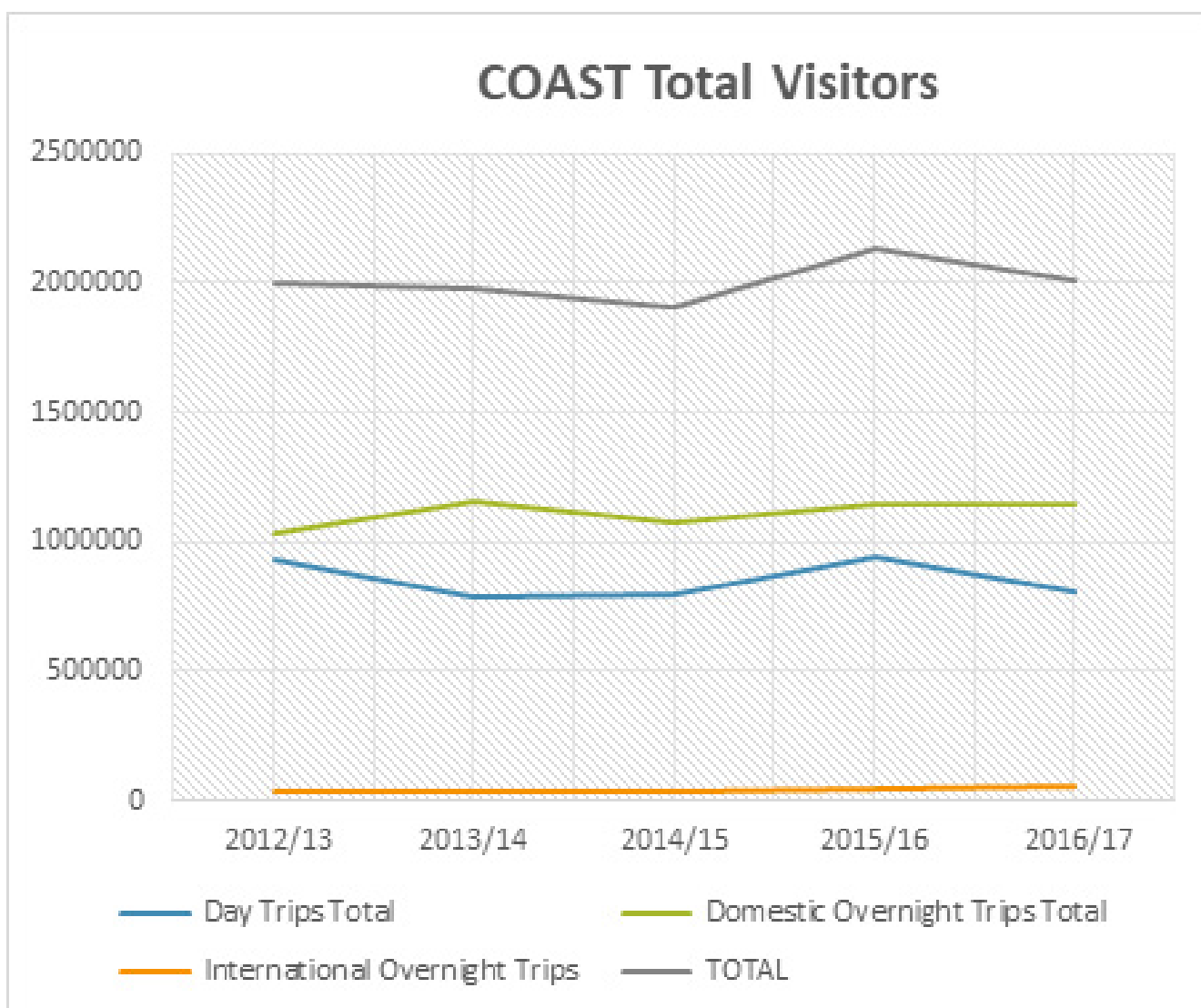
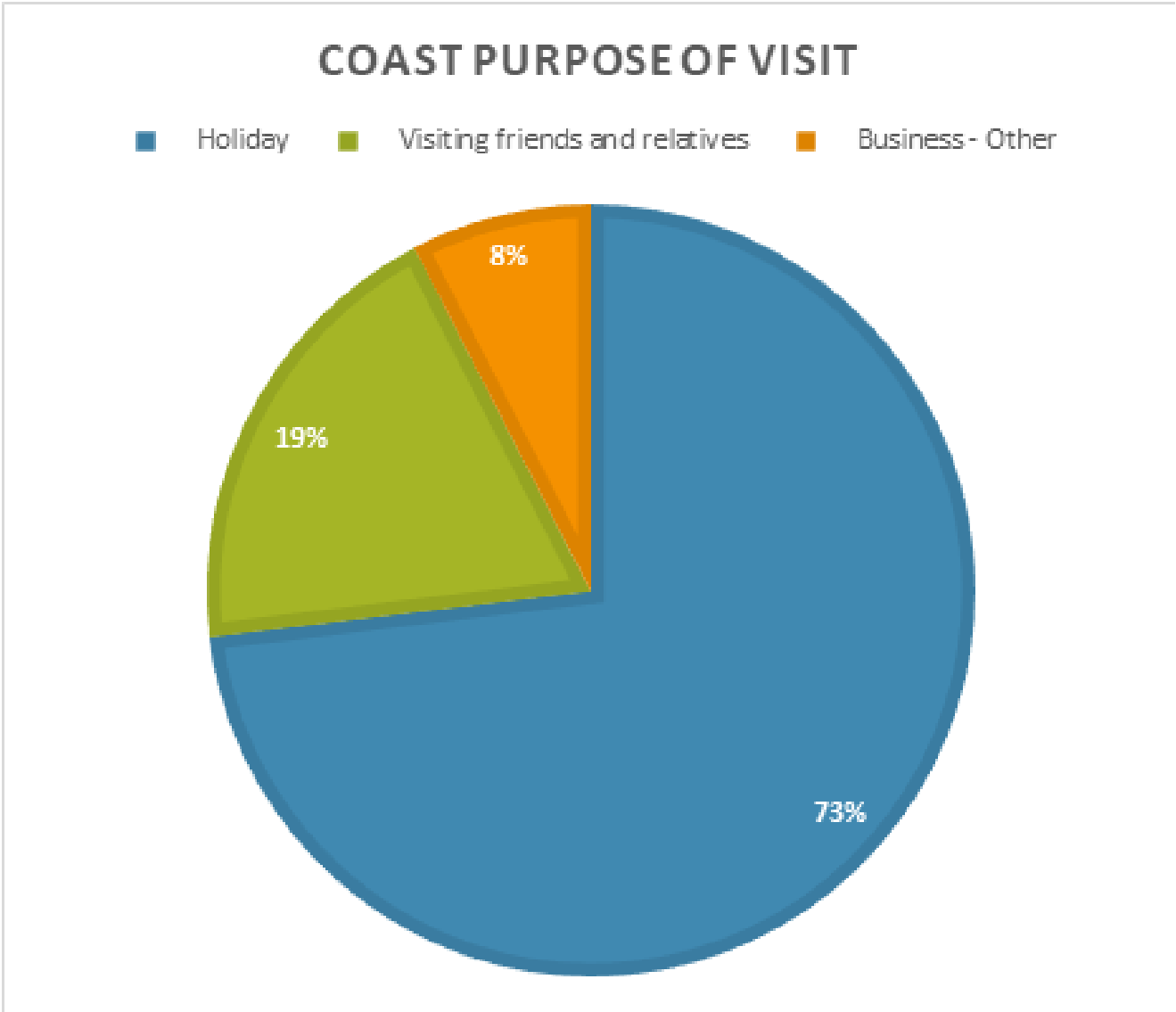


Figure 14 Coast - Purpose of visit



Visitor Nights

Figure 15 Coast visitor nights

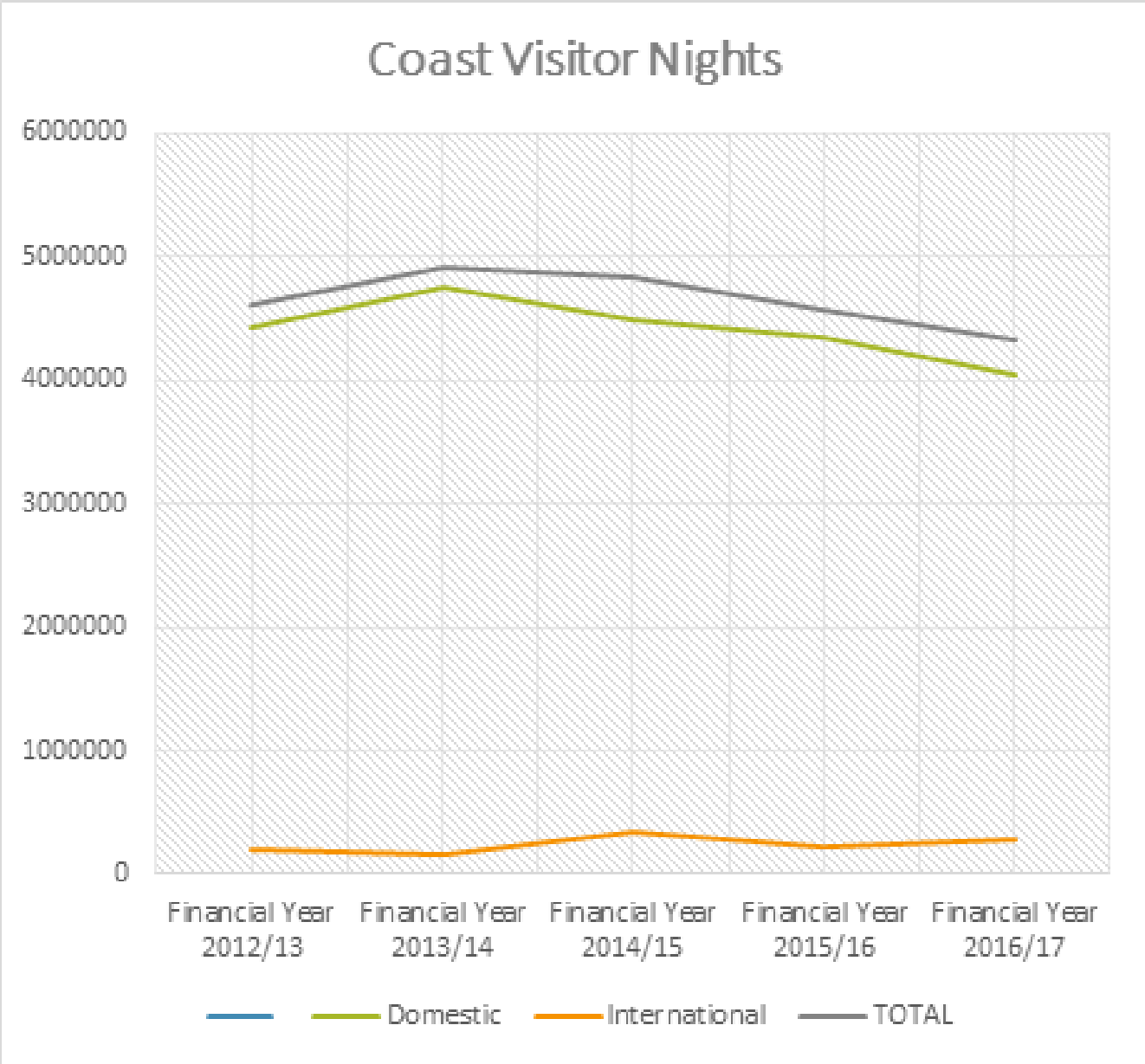


Figure 16 Coast domestic visitor nights

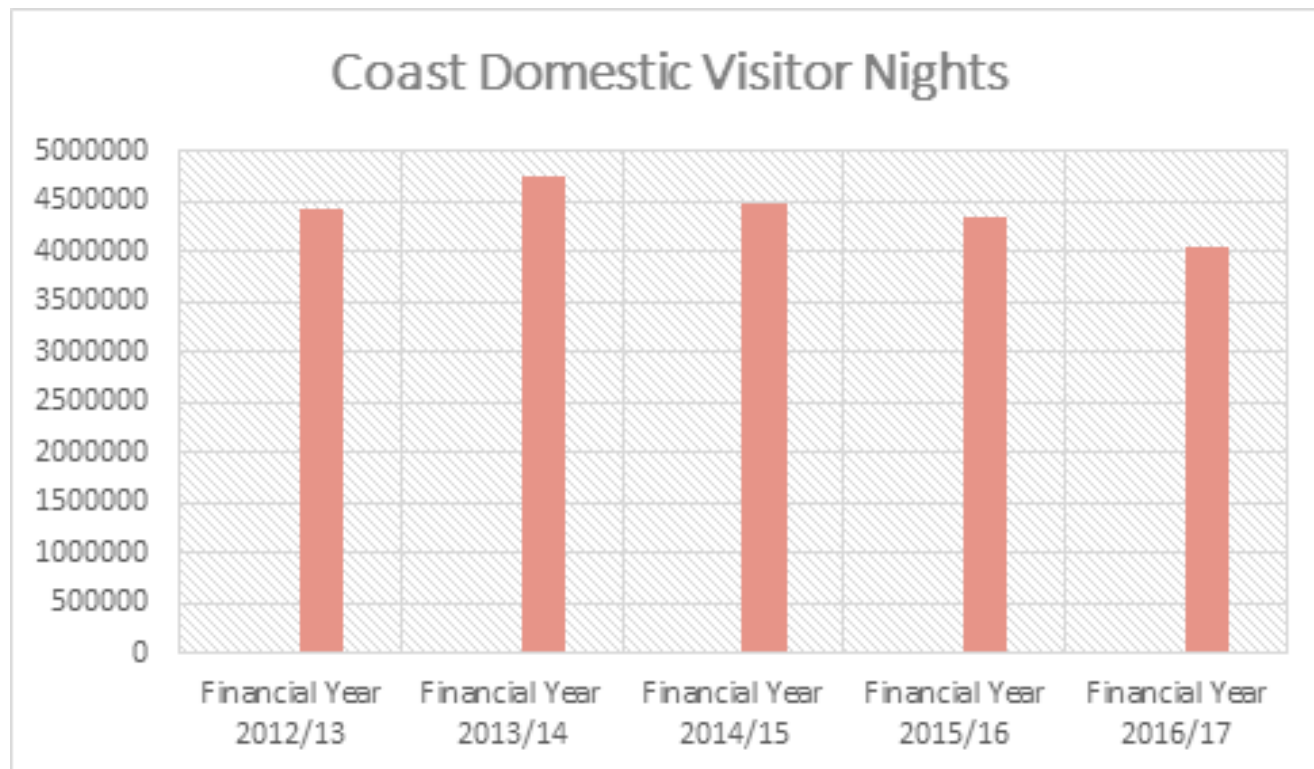
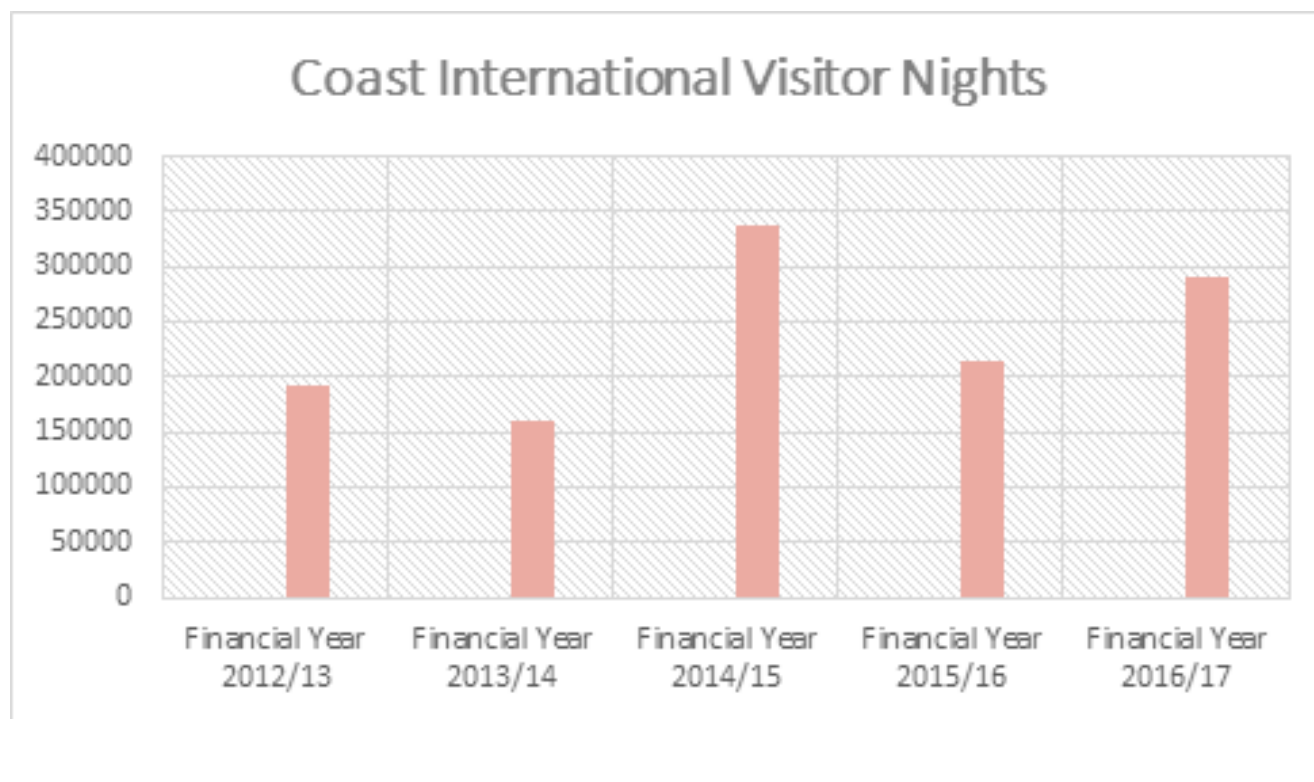


Figure 17 Coast International Visitor Nights



Snowy Monaro

Figure 18 Snowy Monaro Total Visitors

Note day trips for 2012/13 and 2013/14 not published

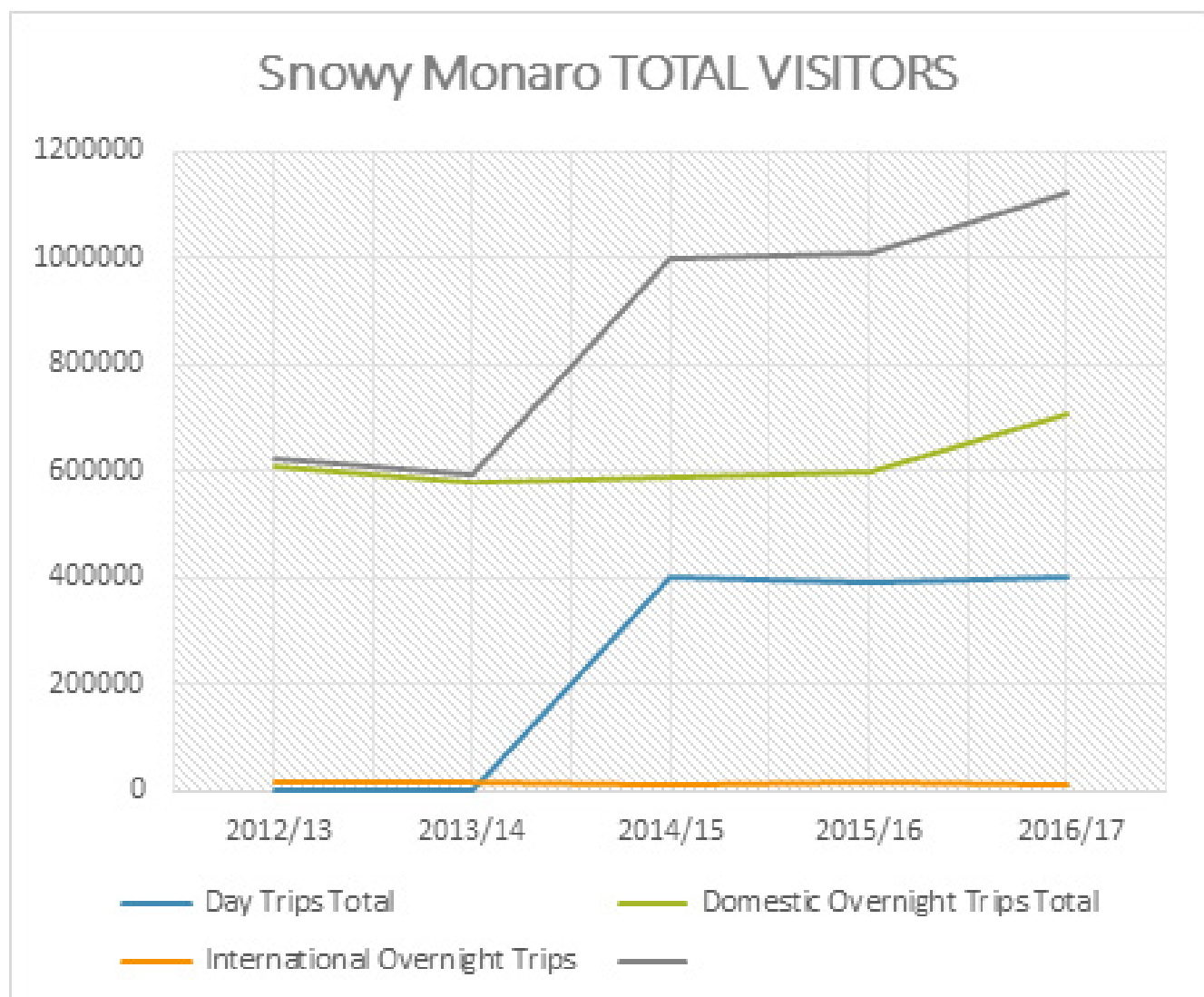
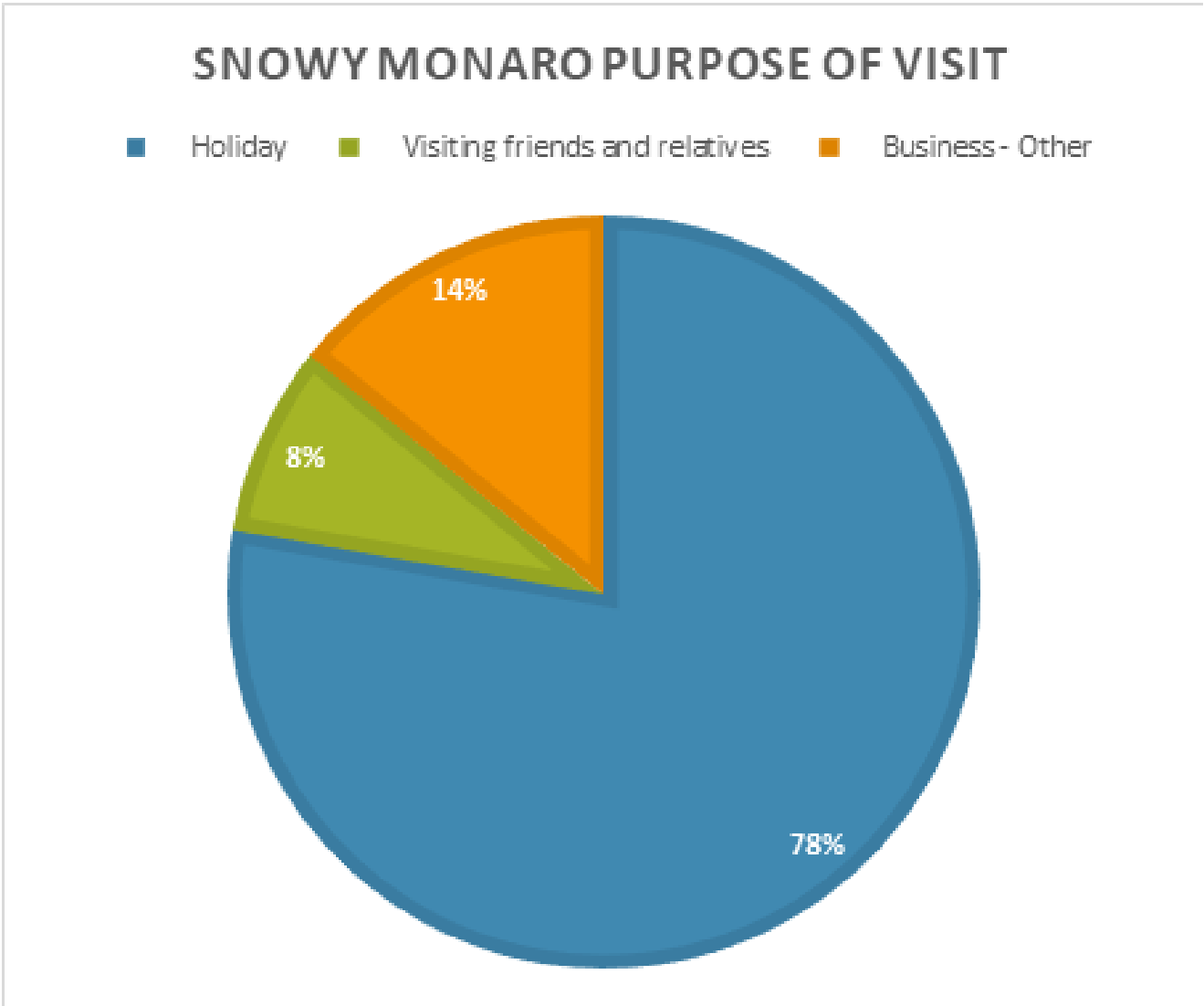


Figure 19 Snowy Monaro Purpose of Visit



Visitor Nights

Figure 20 Snowy Monaro Total Visitor Nights

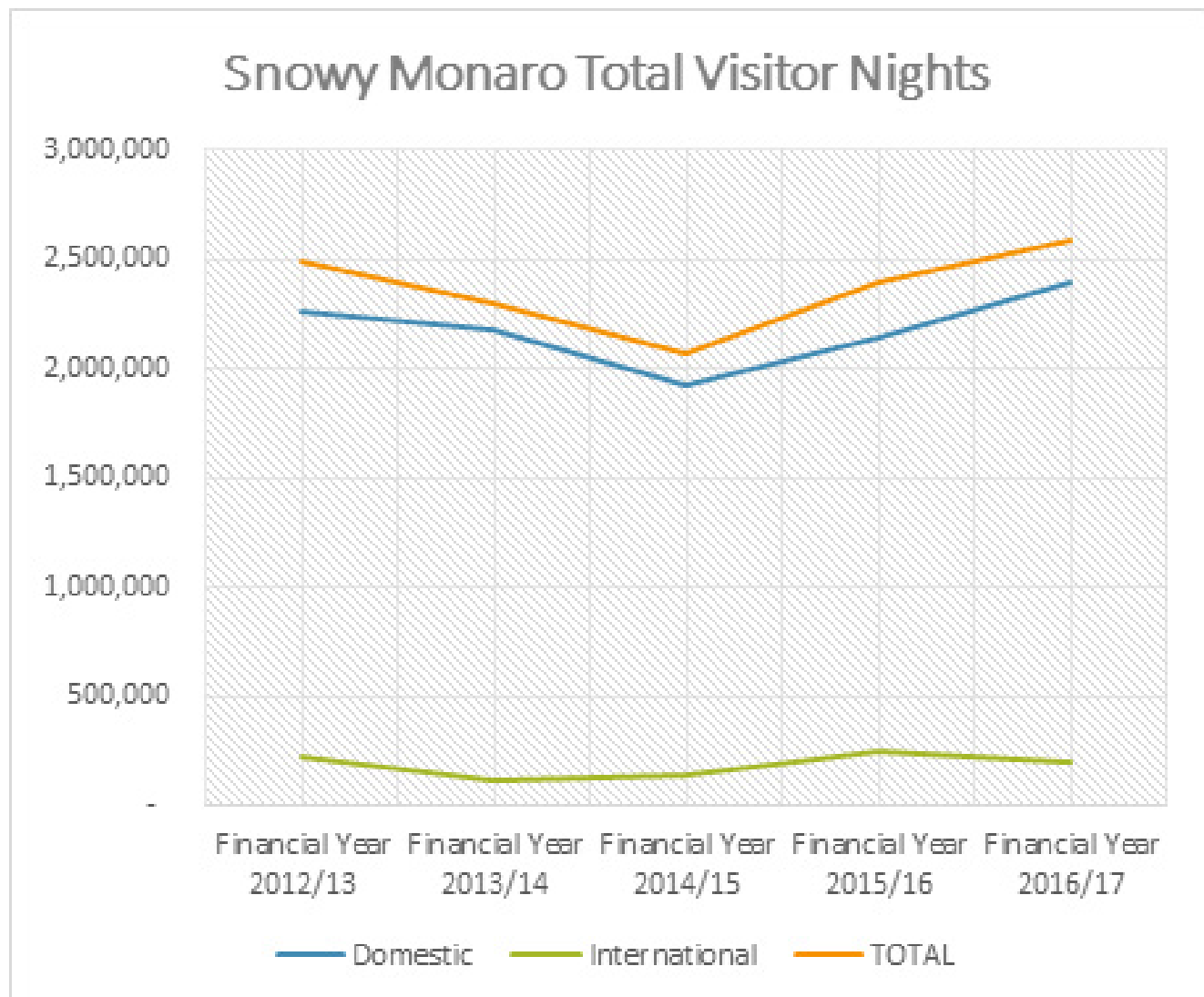


Figure 21 Snowy Monaro Domestic Visitor Nights

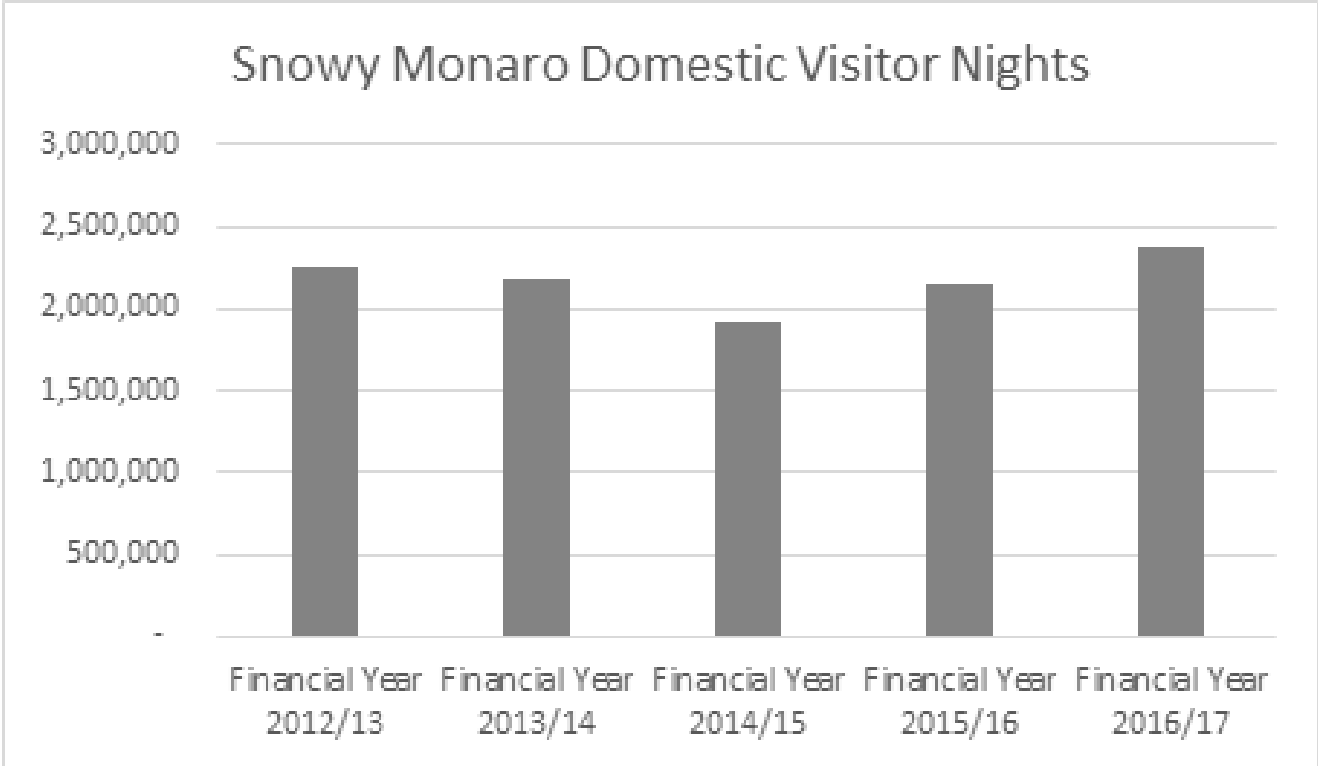


Figure 22 Snowy Monaro International Visitor Nights

