Destination
Sydney Surrounds South

Sydney Surrounds South
Destination Management Plan

2022-2030

DRAFT

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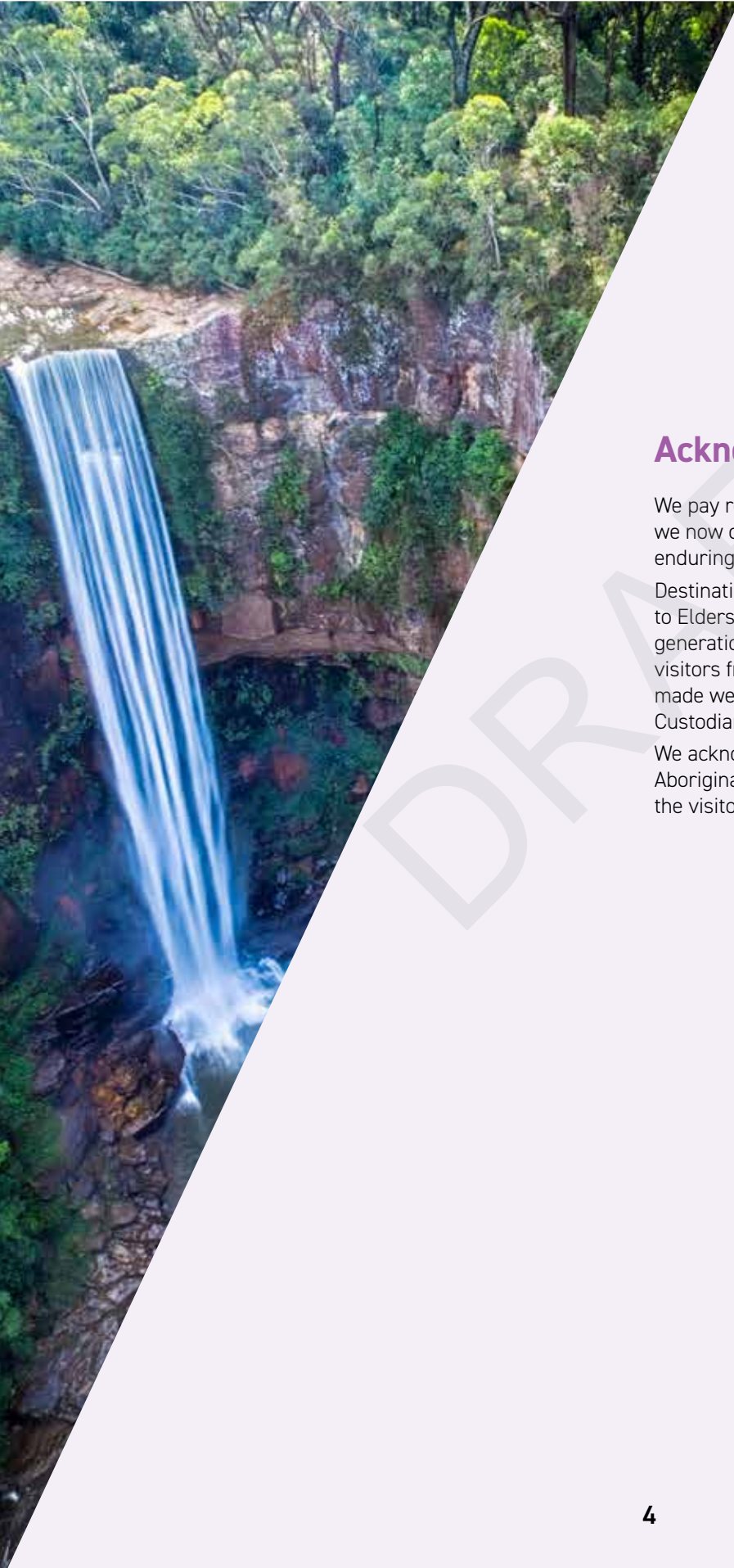
ACKNOWLEDGEMENT

We acknowledge the Indigenous peoples of the lands, waters and communities we work together with. We pay our respects to their cultures; and to their Elders – past, present and emerging.

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Acknowledgement of Country

We pay respect to the Traditional Custodians of the land we now call New South Wales and acknowledge their enduring culture and continued connection to Country.

Destination Sydney Surrounds South pays our respect to Elders, past and present, and acknowledge future generations of Aboriginal people. We acknowledge visitors from across Australia and around the world are made welcome on Aboriginal lands by the Traditional Custodians of NSW.

We acknowledge the significant contribution made by Aboriginal people to the development and promotion of the visitor economy.

Message from the Sydney Surrounds South Board

We support an innovative, sustainable, connected and inclusive Sydney Surrounds South visitor economy

This Destination Management Plan (DMP) responds to current and forecast conditions for the region and will deliver the potential to create the greatest benefits for our community and regional visitor economies. Every minute of every day, tourism delivers $5,457 of visitor spend into Sydney Surrounds South - $7.9 million every day.[1] Our region relies on the visitor economy to deliver jobs, support business and grow the economy.

This DMP is a high-level framework that will guide the delivery of the tourism sector's economic and social benefits and positions Destination Sydney Surrounds South (DSSS) as an important advocate and facilitator for the growth and development of the regional visitor economy.

Given the learnings of 2020 and 2021, and the Covid-19 pandemic impacts on travel and tourism, this DMP inspires greater flexibility and agility in how our regional priorities are fulfilled when faced with substantive changes in market and industry contexts.

Our values, included in this DMP talk to how we want to develop as a destination. Our focus is on delivering responsible tourism – environmentally, socially, culturally, economically, and ethically.

Our opportunity

This plan takes a borderless view to identify and quantify regional level strategies and actions for the DSSS region and exists to:

- Align regional visitor economy growth and development activities with the NSW Visitor Economy Strategy (VES) 2030 and the Regional Economic Development Plans (REDS)
- Provide a framework for local DMPs to be developed or updated within the region
- Capture stakeholder consultation to ensure the regions stakeholders are invested in the plan
- Provide a roadmap for the development of the visitor economy in Sydney Surrounds South region to 2030
- Provide an action plan with a focus on cross-regional projects for visitor economy growth and development to guide the work of DSSS
- Ensure the visitor economy is planned through a coordinated and sustainable approach.

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1 DSSS: The Value of Tourism YE December 2019

Overview

Destination Sydney Surrounds South (DSSS) is one of seven Destination Networks (DNs) in regional NSW. Its principle role is to represent and coordinate the growth and development of the Sydney Surrounds South visitor economy. The Sydney Surrounds South region comprises the five local government areas: Kiama, Shellharbour, Shoalhaven, Wollongong and Wingecarribee (Southern Highlands). Each has their respective vision for the future, and projects and priorities, which are relevant to the sustainable growth of the region.

The Sydney Surrounds South visitor economy delivered 6.6% of the region's jobs, supports 6,295 businesses and directly delivers 4.0% ($1.3 billion) of the region's Gross Value Add (GVA) which has grown every year since 2010-11 at an average 4.9% pa. The region attracted just over 13 million visitors and 14 million visitor nights[2].

The Sydney Surrounds South Destination Management Plan has been prepared to create a collaborative framework to guide the work of local, regional and state tourism stakeholders to grow, develop and promote the region's visitor economy to 2030 and contribute to the NSW Government's target to achieve $25 billion in visitor expenditure by 2030.

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2 YE December 2019 (pre-Covid-19 health pandemic) Tourism Research Australia visitation data is used as a base measure to recover and grow the visitor economy

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

1. Support the Sydney Surrounds South visitor economy to recover and be sustainable, capable, and resilient

2. Build the identity of Sydney Surrounds South's destinations to align with the Feel NSW brand and strengthen collaborative marketing partnerships

3. Continue to develop authentic visitor experiences to drive greater visitor dispersal and longer stays to the Sydney Surrounds South region

4. Grow the Sydney Surrounds South visitor economy through the delivery of high quality events and attraction of new events

5. Provide an enabling environment to attract investment to the Sydney Surrounds South visitor economy

Vision

To be recognised as the closest must see, vibrant destination to Sydney. A great day trip or overnight holiday known for its beautiful coast and highlands, dynamic attractions and events, rich food and wine culture.

Introduction

Destination Sydney Surrounds South commissioned the preparation of the Sydney Surrounds South Destination Management Plan to create a collaborative framework to guide the work of local, regional and state tourism stakeholders to grow, develop and promote the region's visitor economy to 2030.

The Destination Sydney Surrounds South DMP 2022 to 2030 has been developed to align with the directions of Visitor Economy Strategy (VES) 2030.

The VES 2030 acknowledges regional New South Wales (NSW) as a key to the future of the NSW visitor economy. The NSW statewide target for 2030 is $65 billion in total visitor expenditure. Regional NSW will contribute $25 billion in overnight visitor expenditure to this target.

Tourism is identified as one of seven 'engine industries' expected to drive regional NSW economies over the next 18 years and is identified as one of 50 new priorities to drive long-term stimulus impact[3].

Following a review of regional tourism in 2017 the New South Wales (NSW) Government, through Destination New South Wales (DNSW), established six administrative zones, referred to as Destination Networks (DNs). In July 2022, one additional DN was added, Destination Central West NSW, and several other changes were made to DN boundaries to assist the growth of the NSW regional visitor economy.

3 NSW 2020 Economic Blueprint

The seven DNs are:
- Destination Central West NSW
- Destination Country and Outback
- Destination North Coast NSW
- Destination Riverina Murray
- Destination Southern NSW
- Destination Sydney Surrounds North
- Destination Sydney Surrounds South

A Destination Network Project Management Group (DNPMG) was established in September 2021 that comprises the General Managers of each Destination Network as well as the General Manager, Destination New South Wales - Engagement and Development.

Importantly, the DNPMG committed to working collaboratively to deliver a suite of seven new Destination Management Plans (DMPs) (2022 to 2030) that are aligned to the Visitor Economy Strategy 2030.

A Destination Network DMP planning framework was established to create a consistent and collaborative approach to guide the work of the Destination Networks, consultants and local, regional and state tourism stakeholders to consider how to grow, develop and promote the NSW regional visitor economy to 2030.

Consultants, TRC Tourism, were engaged from January to July 2022 to prepare the Sydney Surrounds South DMP 2022 to 2030.

The aim of the Visitor Economy Strategy 2030 and the Destination Network DMPs is to stimulate economic prosperity, create new jobs and enhance the lifestyles of the people of NSW.

Sydney Surrounds South DMP 2022 to 2030

Destination Sydney Surrounds South comprises five local government areas: Kiama, Shellharbour, Shoalhaven, Wollongong and Wingecarribee (Southern Highlands).

The Destination Sydney Surrounds South visitor economy delivers 6.6% of the region's jobs, supports 6,295 businesses and directly delivers 4.0% ($1.3 billion) of the region's Gross Value Add (GVA) which has grown every year since 2010-11 at an average 4.9% pa. The region attracted just over 7 million visitors and 11.4 million visitor nights[4].

The destination management planning process involved:

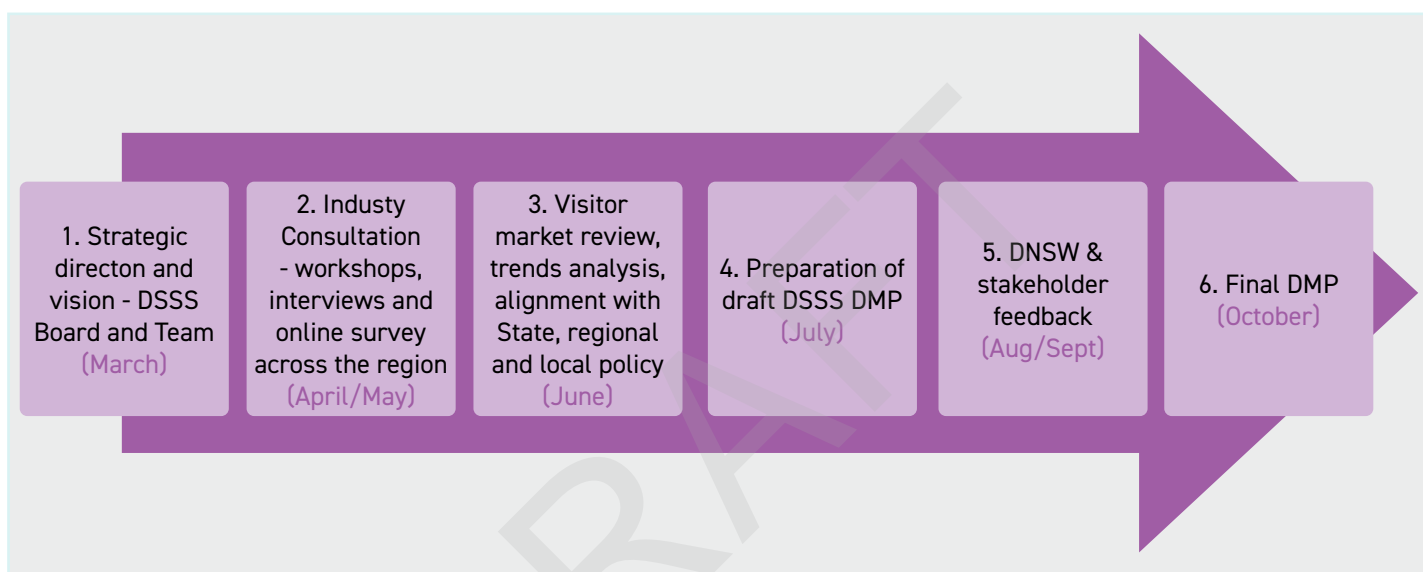| 1. Strategic directon and vision - DSSS Board and Team (March) | 2. Industy Consultation - workshops, interviews and online survey across the region (April/May) | 3. Visitor market review, trends analysis, alignment with State, regional and local policy (June) | 4. Preparation of draft DSSS DMP (July) | 5. DNSW & stakeholder feedback (Aug/Sept) | 6. Final DMP (October) |

Figure 1. Destination management planning process

The DMP was prepared during the first half of 2022, based on a program of market research and engagement with stakeholders, including:

- A workshop with the Board of DSSS to understand their vison and aspirations for the region
- A series of one-on-one meetings with a range of stakeholders including NSW government, Visit Canberra and targeted industry representatives
- A workshop with significant regional stakeholders from government and industry associations
- Online workshops with invitations issued to all councillors and tourism and economic development staff for each LGA across the region
- A workshop with Tourism Managers from each LGA
- Visitor economy industry workshops held in Mittagong, Nowra, Wollongong
- An online survey was distributed to stakeholders inquiring about opportunities, challenges and vision for the region.

Figure 2. Map of the DSSS region indicating LGAs

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4 Documentation supplied by DSSS TRA Data YE Dec 2019

Strategic Context

Strategic Context

The Sydney Surrounds South DMP 2022 to 2030 has been developed to align with the directions of the NSW *Visitor Economy Strategy 2030*. The strategy comprises three phases:

RECOVERY PHASE TO 2024 — The focus of this phase is to assist businesses and the industry to rebuild. The goal is to return total visitor expenditure to pre-COVID levels ($43 billion in 2019).

MOMENTUM PHASE TO 2026 — A number of major infrastructure projects will be completed during this period, including the new Western Sydney Airport in 2026. This will provide a major stimulus to grow and expand the visitor economy in NSW. Visitor expenditure is expected to grow strongly during this time to reach over $50 billion by 2026.

ACCELERATE PHASE TO 2030 — By 2030, the momentum gained through the increased capacity and investment in the visitor economy over the previous phases will accelerate growth, with visitor expenditure targeted to reach $65 billion.

Figure 3. Visitor Economy Strategy 2030 phases

Ambitions, Outcomes and Targets

The ambitions, outcomes and targets of the *Visitor Economy Strategy* are important indicators to this DMP.
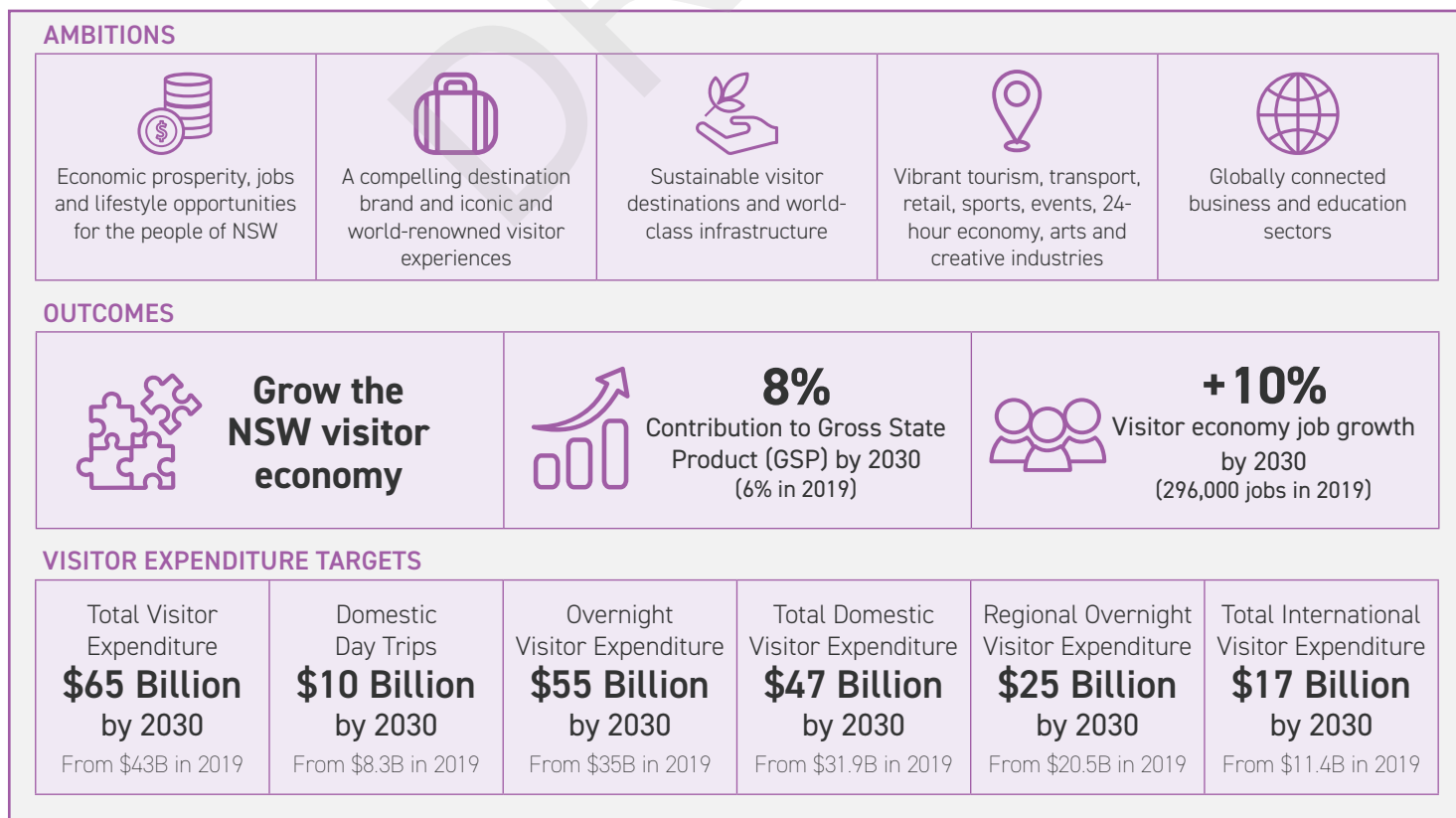
AMBITIONS

Economic prosperity, jobs and lifestyle opportunities for the people of NSW	A compelling destination brand and iconic and world-renowned visitor experiences	Sustainable visitor destinations and world-class infrastructure	Vibrant tourism, transport, retail, sports, events, 24-hour economy, arts and creative industries	Globally connected business and education sectors

OUTCOMES

Grow the NSW visitor economy	**8%** Contribution to Gross State Product (GSP) by 2030 (6% in 2019)	**+10%** Visitor economy job growth by 2030 (296,000 jobs in 2019)

VISITOR EXPENDITURE TARGETS

Total Visitor Expenditure	Domestic Day Trips	Overnight Visitor Expenditure	Total Domestic Visitor Expenditure	Regional Overnight Visitor Expenditure	Total International Visitor Expenditure
$65 Billion by 2030 From $43B in 2019	**$10 Billion** by 2030 From $8.3B in 2019	**$55 Billion** by 2030 From $35B in 2019	**$47 Billion** by 2030 From $31.9B in 2019	**$25 Billion** by 2030 From $20.5B in 2019	**$17 Billion** by 2030 From $11.4B in 2019

Figure 4. Visitor Economy Strategy 2030 – ambitions, outcomes, and visitor expenditure targets

Guiding Principles

Five Guiding Principles inform the NSW Government's policy and investment in the visitor economy.

PUT THE VISITOR FIRST	ACCELERATE DIGITAL INNOVATION	LEAD WITH OUR STRENGTHS	MOVE FAST, BE RESPONSIVE AND AGILE	COLLABORATE WITH INDUSTRY AND GOVERNMENT
We have put the visitor front and centre of this strategy. A greater understanding of potential visitors by segment will deliver high performance marketing solutions and improve the visitor experience.	We will use technology to deliver personalised marketing to potential visitors, streamlined interactions between government and industry, and to enhance the visitor experience.	We will focus on the distinctive character and features of NSW and our people to help us stand out in a crowded market.	We will build agility into the way we operate so we can take advantage of opportunities as they emerge and adapt to changing conditions.	We will foster greater engagement and cooperation with the industry to deliver the vision and take a whole-of-government approach to growing the NSW visitor economy.

Strategic Pillars

Five Strategic Pillars have been established to guide visitor economy growth to 2030.

1. Road to Recovery
2. Build the Brand
3. Showcase our Strengths
4. Focus on World Class Events
5. Facilitate Growth

These pillars and associated key result areas are explained further on page 32.

Other Considerations

The Sydney Surrounds South DMP 2022 to 2030 has also been developed to align with:

- The broader NSW Government strategic context and to recognise how different NSW Government priorities and strategies may influence the growth and development of the regional visitor economies (see Appendix 1 for a list of strategies reviewed)
- Relevant regional and local government plans and strategies

Trends Influencing Visitor Demand

The Covid-19 health pandemic has resulted in a range of new consumer trends related to travel decision planning.

The following provides an overview of the main trends influencing recovery from the pandemic as sourced from travel research commissioned in 2022 that is also relevant to regional NSW visitor economy growth and development. It is recommended that continual monitoring of consumer trends be undertaken to 2030[5].

TREND	DESCRIPTION
Edventures / Mixing Work & Play	Is about combining education and holidays for the youngest members of the family. While adults may need to telework or attend meetings, their children can be doing workshops and learning in a playful way – workcations.
Transformative Travel Experiences	These are experiences that are less about just looking at things and more about experiencing something new that engages and connects visitors, in a meaningful way, to the place, its history and heritage and its people.
Conscious Travel	Travel to more distant destinations, but with prolonged durations of stay, as consumers look to enjoy as much of each place they visit as possible.
Green Travel	Climate change is a problem that is present and growing. Consumers now are much more responsible and aware of the reality they live in on daily basis.
Rural Experiences	Rural and regional destinations in Australia will continue to benefit from the desire of source markets for city escapes that continue to boost domestic tourism.
New faces and places	2022 will finally be the time to branch out and make new connections with 55% wanting to meet new people while away. A resurgence of vacation romances is also likely, with 41% hoping for one on their next trip.
Travel as Self Care	Travel will become an essential form of self-care. Travellers agree that travel helps their mental and emotional wellbeing more than other forms of self-care.
Community First	Authentic connection with the local community will be a priority. Travellers agree it's important that their trip is beneficial to the local community at their destination.
Just Say Yes	People will be saying YES to travel, making up for lost vacation time with travellers now more open to different types of vacations.
Embracing the Unpredictable	People will use technology to embrace travels continued unpredictability with travellers agreeing that technology will be more important than ever while on vacation.

5 See more at https://www.unwto-tourismacademy.ie.edu/2021/08/tourism-trends-2022, https://skift.com/megatrends-2022/, https://skift.com/megatrends-2022/

Growing the Sydney Surrounds South Visitor Economy

Growing the Sydney Surrounds South Visitor Economy

Growing the Sydney Surrounds South Visitor Economy will initially require strategies to continue to recover from impacts of bushfires and the Covid-19 health pandemic to 2024, followed by growth strategies to stimulate the visitor economy to 2030.

Bushfire and Covid-19 Recovery Impacts

A survey of small businesses determined that 72% of businesses in southeastern NSW were significantly impacted by the Summer 2019/20 bushfires, equivalent to a decline in the visitor economy to the value of $292 million[6].

In March 2020 the Commonwealth Government closed its international borders due to the rapid spread of Covid-19 virus. Domestic travel to NSW was constrained by Public Health Orders resulting in numerous lockdowns and restrictions on intrastate and interstate movement.

The disruption to the tourism sector in 2020 was unprecedented. The immediate halt to people movement to prevent the spread of Covid-19 was significant to the industry in Australia and worldwide that experienced: a sudden halt in international visitation; restrictions on domestic mobility; and increased health and safety concerns. Australia's proactive management approach to the pandemic played a key role in protecting domestic demand for tourism despite ongoing disruptions to the tourism industry[7].

At Y/End Dec 2021 the number of total visitors to the region (including parts of the Destination Networks of Sydney Surrounds South and Southern NSW) was 4.8 million or 32 per cent below the pre-Covid period (year 2019).

6 Economic impact of bushfires to visitation in Southern NSW March 2020
7 Tourism Research Australia, Tourism Investment Monitor 2019-20. Australian tourism investment and COVID-19 impacts

Recovery Goals

The focus of the goal Recovery Phase to 2024 is to assist businesses and the industry to rebuild and return total visitor expenditure to pre-COVID levels (Y/E 2019).

The following figure highlights the 2019 (pre-Covid) visitor economy achievements versus the Y/End 2021 impacts.

Y/END DEC 2019 (pre-covid)		Y/END DEC 2021
13.2 million visitors		**8 million** visitors
13.97 million visitor nights		**9.3 million** visitor nights
$2.68 billion visitor expenditure		**$2.15 billion** visitor expenditure
4 million domestic overnight visitors		**3 million** domestic overnight visitors
9 million domestic daytrip visitors		**4.9 million** domestic daytrip visitors
153,000 international visitors		**n/a** international visitors
15,892 people directly employed in tourism		**14,882 people directly employed** in tourism
6,605 people indirectly employed in tourism		**5,279 people indirectly employed** in tourism

Figure 5. 2019 (pre-Covid) visitor economy indicators versus 2021 outcomes[8]

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8 International visitation data is not statistically reliable for YE December 2021

Main Opportunities & Challenges

The following strengths, weaknesses, opportunities, and threats were identified during the destination management planning process to inform the development of the Sydney Surrounds South DMP.

STRENGTHS	WEAKNESSES
• Diversity of experiences linked to sub regions • Proximity to Canberra and Sydney, as well as the Shellharbour Airport • Iconic nature-based experiences including whale watching, sea pools, walking trails, diving, surfing, waterfalls and rock climbing • Outstanding regional produce including wine, breweries, distilleries and agritourism experiences • The region's coastline including the Grand Pacific Drive • Well known and established brand visitor destinations including Wollongong, Jervis Bay, the Southern Highlands and the Shoalhaven • There are quality experiences for every season • Country village boutique shopping experiences • Sydney and Canberra are significant sources of visitation to all points of the region	• Limited trading hours and lack of evening activities hampers overnight visitor market growth • Negative or outdated visitor perceptions of the region and individual destinations • Lack of clarity on image and brand identity of some destinations within the region • Destinations, products and experiences not well linked and packaged • Gateway and wayfinding signage • Digital connectivity blackspots in parts of the region • Lack of accommodation options in many parts of the region • Many small operators need help to up skill and establish direction to adapt an everchanging digital landscape

Main Opportunities & Challenges (continued)

OPPORTUNITIES	THREATS
• The region's proximity to Sydney and Canberra provides a key opportunity to grow the self-drive touring market • The proximity to growth in Western Sydney, including the new international airport • Being developed and recognised as a sustainable destination • Existing operators increasing capacity • Facilitating investment in improved and new visitor products and experiences • Visitor economy friendly planning regulations • Advocating for improved connectivity to and within the region • Building connectivity between accommodation and other visitor economy products • Initiatives which address the industry's current workforce challenges • Continued efforts to improve communication and collaboration throughout the region • Advocating for improved digital connectivity, including addressing blackspots • Facilitating marketing collaboration within the region, where in line with market demand • Facilitating major events growth • Facilitating improved industry skills development and knowledge • Working with NSW NPWS on projects and investment in new facilities and assets that will drive visitation	• Climate change and natural disasters impacting the region • Competitiveness from other destinations as borders reopen • On-going disruption from COVID-19 • Disruption to key markets including international students influencing visitation and workforce • Challenges within local planning frameworks making it hard to do grow the value of the visitor economy • Change of government (local and NSW) influencing direction of tourism policy • Macroeconomics affecting local markets and creating uncertainty regarding recession • Skilled workforce continuing to move into other industries

Vision & Positioning

Vision & Positioning

Vision and Values

The following vision and values were created from findings of the destination management planning process:

To be recognised as the closest must see, vibrant destination to Sydney. A great day trip or overnight holiday known for its beautiful coast and highlands, dynamic attractions and events, rich food and wine culture.

The Sydney Surrounds South vision is underpinned by the following values:
- A welcoming, safe and inclusive destination
- A sustainable destination, where we meet the needs of visitors and our communities, while protecting and enhancing the environment for the future
- Our lifestyle, our character, and our sense of place
- Growing the visitor economy, First Nations tourism, accessibility and industry sustainability
- High calibre, seamless experiences, and consistent quality customer services
- A spirit of industry collaboration and co-operation within and beyond our regional boundary
- Ensure the whole community understands the value and benefits that the visitor economy brings to the region
- Opportunities for our industry to broaden and deepen their skill sets so that they may strengthen business resilience, increase yield, develop products and services, and access new markets
- Growing spend, not necessarily visitor numbers, through sustainable, well researched and market driven product development

Positioning

Sydney Surrounds South offers a range of complementary visitor experiences across its three sub-regions – coastal, inland hinterland and urban.
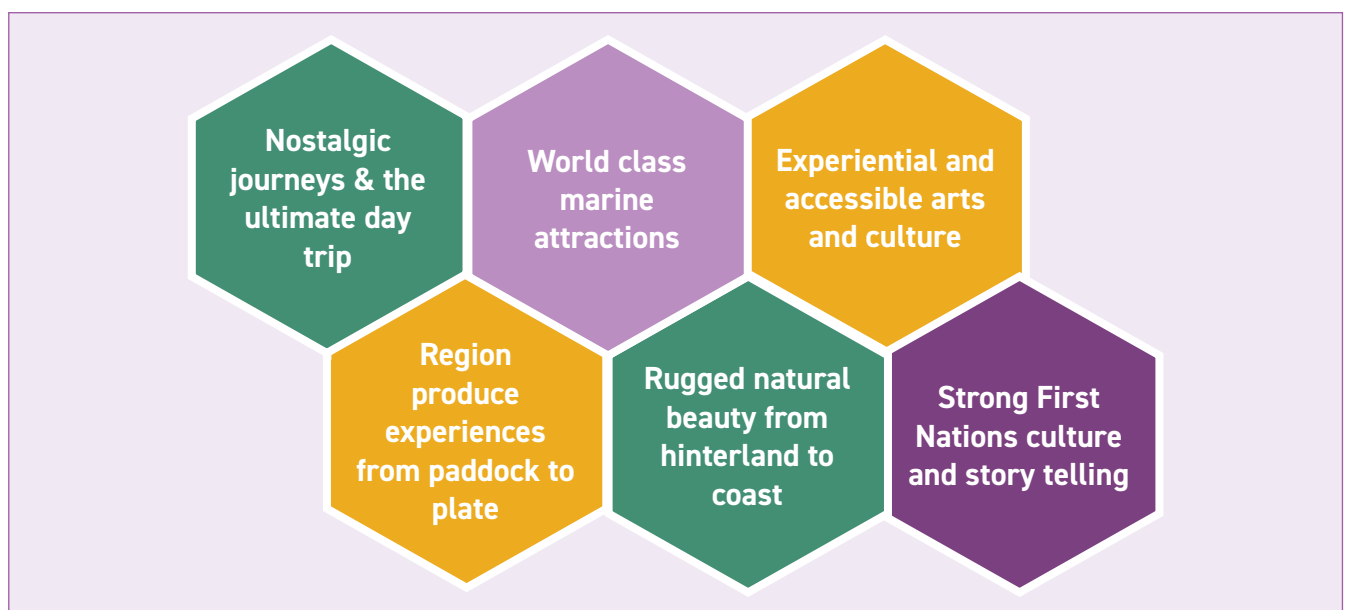

Figure 6. Presents the positioning strengths of the Sydney Surrounds South region

Sub-region Positioning

The Sydney Surrounds South region has three distinct visitor offerings: coastal areas, inland hinterlands and urban, each with their own variations in seasonality. The following summarises the main identity and positioning themes for each of the Sydney Surrounds South sub regions as identified in their outward marketing material. This provides visitors with an array of activities that create lifelong memorable experiences.

Coastal: Kiama, Shellharbour and the Shoalhaven all provide an escape-worthy collection of world-class beaches, playful adventures, eats, arts and iconic attractions. Their visions include to be recognised as year-round destinations, valued for their quality environments and visitor experiences. With the aim to protect the natural destinations for everyone to enjoy.

Inland hinterlands: the Southern Highlands is a special place, sitting atop the Great Dividing Range, enjoying a cool climate with four distinct seasons, a natural landscape of gorges, waterfalls and rolling hills, distinct towns and villages; and most importantly, people. Their goal is to enable towns and villages to strengthen as vibrant and active places respecting the heritage of the region.

Urban: the city of Wollongong and towns of the region like Nowra and Bowral are increasingly attractive to visitors with their vibrant day and night life and exciting retail offering.

Sub-region Positioning (continued)

The following table describes the Sydney Surrounds South main destinations, their related vision, positioning and experience development themes as identified in current destination management plans and brand positioning strategies.

LGA	PLANNING DOCUMENTATION	MAJOR THEMES/PROJECTS
Kiama Municipality	• Community Strategic Plan • Kiama Tourism Opportunities Plan • Kiama Regional Economic Development Strategy • Kiama Tourism and Event Plan	• Hero experiences include: Seaside lifestyle; Iconic Coastal Walk; Saddleback Mountain walks and lookouts and Family adventures • Beach and Foreshore Activation Program • Headland, Harbour and Foreshore Activation • Activating Walking and Trail Experiences • Jerrara Dam Activation Options • Short term holiday rentals • Redevelopment of the Kiama Harbour, Kiama Visitor Centre and the Kiama arts and culture precinct • Additional experiences and new developments at Jamberoo Action Park
Shellharbour	• Community Strategic Plan • Shellharbour Regional Economic Development Strategy	• New locations for accom could include Shell Cove, the Airport precinct, a Links golf course and Holiday Parks • Shell Cove Marina and Precinct Development to develop marine-based tourism • Princes Highway Albion Park - bypass • Upgrade to the Illawarra Regional Airport • The Bass Point Aboriginal Interpretive Centre and Killalea State Park have been identified as a key piece of cultural infrastructure
Shoalhaven	• Community Strategic Plan • Shoalhaven Destination Management Plan • Shoalhaven Regional Economic Development Strategy • Visitor Economy Recovery Plan	• Infrastructure to support Shoalhaven River precinct activation at Nowra; and to support events • Marine tourism facilities to support commercial operators and small private vessels • Built Tourism – interesting CBD precincts, bike and walking trails and sports facilities • Road upgrades, camping grounds and walking trail infrastructure and signage within natural areas • Regional transport service for visitors, specifically day-trippers; connecting with bus and train depots, towns, shopping centres, accommodation sites and popular day use areas • Caravanning infrastructure • Future proofing infrastructure eg: electric car chargers • Conscious traveller and sustainable tourism are critical • Events to generate off season visitation

Sub-region Positioning (continued)

LGA	PLANNING DOCUMENTATION	MAJOR THEMES/PROJECTS

Wingecarribee	• Community Strategic Plan
	• Southern Highlands Destination Strategy
	• Wingecarribee Regional Economic Development Strategy
		• Promote Southern Highlands' unique brand identity
		• People: encourage local training and workforce development
		• Place: conduct place activation initiatives in key towns
		• Prosperity: focus on key industries: Tourism and Attractions (Agritourism, events, nature based experiences, Wellness, international readiness, marketing, luxury), Agribusiness (produce brand)
		• Partnerships: Partner with industry to deliver key catalytic projects
		• Catalytic Projects: The region would benefit from,
		  » a Multi-purpose all weather events centre
		  » a Regional Performing Arts Centre (a new arts precinct with conference and hotel facilities) and a Regional Sports Hub

Wollongong	• Community Strategic Plan • Wollongong Destination Development Plan • Wollongong Economic Development Strategy	• Build the city as a tourist destination of choice for conferences, events, and a place to live, learn, work and visit. • Enable signature events and festivals where communities and visitors can gather and celebrate. • Critical transport projects to reduce the travel time between Wollongong and Sydney • Attraction of more major events • Investments in tourism infrastructure • Marine-related tourism credentials by establishing the Cruise Wollongong initiative

Sydney Surrounds South Hero Experiences

There are three standout hero experiences across the region (i.e. those elements that can drive visitation and make us stand out from other destinations):
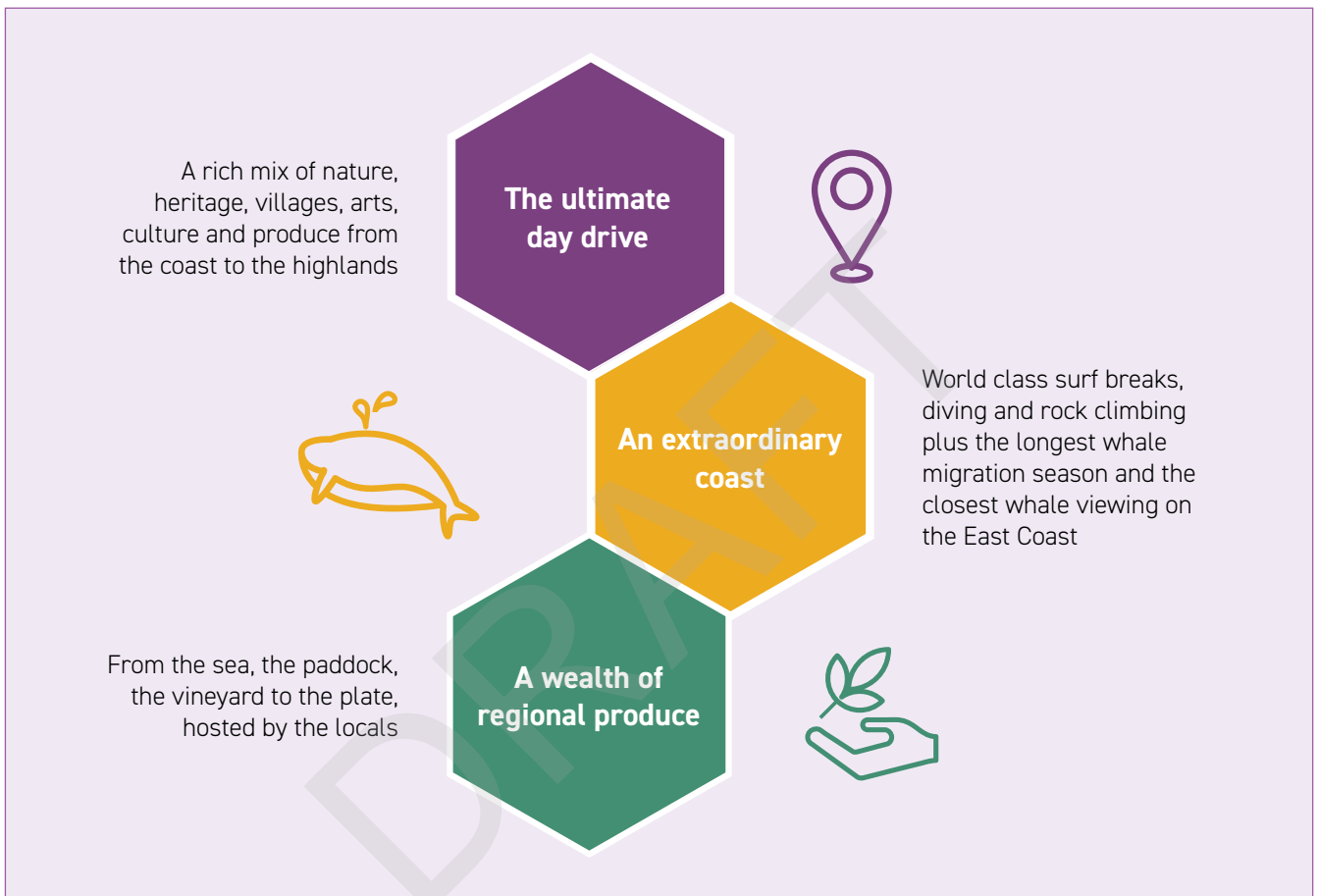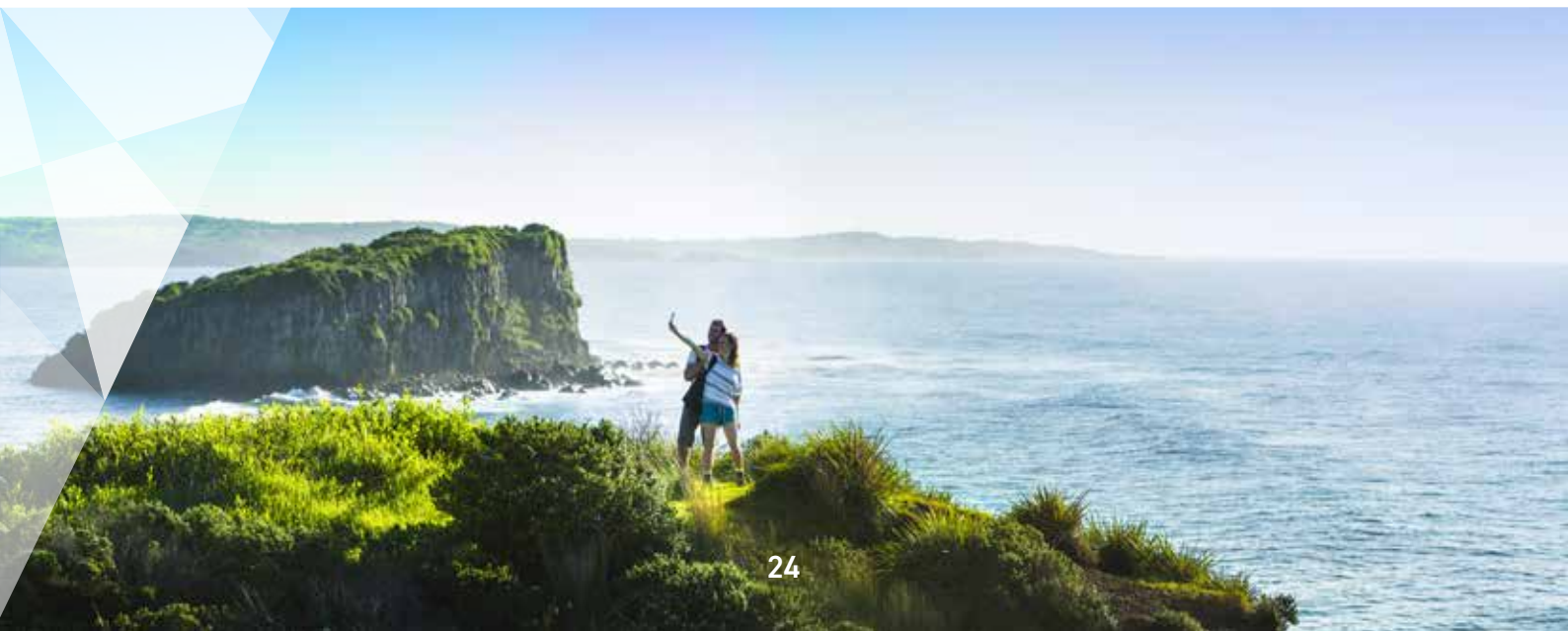
A rich mix of nature, heritage, villages, arts, culture and produce from the coast to the highlands

The ultimate day drive

World class surf breaks, diving and rock climbing plus the longest whale migration season and the closest whale viewing on the East Coast

An extraordinary coast

From the sea, the paddock, the vineyard to the plate, hosted by the locals

A wealth of regional produce

Figure 7. Presents the three main experience themes of the Sydney Surrounds South region

Experience Strengths

Sydney Surrounds South delivers **a compelling destination** for visitors. Combining the rich mix of nostalgic journeys, heritage, villages, arts, and culture, as well as produce of the South Coast and Southern Highlands.

With the **rugged natural beauty** of clifftops and rolling coastlines offering day and overnight experiences within easy access from Canberra and Sydney.

The coast also boasts the longest season and closest viewing points of the famous annual whale migration on the East Coast as well as **world class surf breaks**, **secret diving locations** and **iconic sea pools**.

The **extent of national parks and diversity of nature-based settings** including Fitzroy and Carrington Falls and Jervis Bay, opportunities for outdoors adventure including all modes of cycling, health and wellness experiences and welcoming villages, special music and arts events and **First Nations stories** encourages longer stays throughout the year.

A **journey** from Sydney along the coastal Grand Pacific Drive and returning via the rolling green valleys of Southern Highlands including a diversity of vibrant towns/villages is the **ultimate day trip**.

A **wealth of regional produce** – the best oysters from the sea, the best dairy from paddock, the best wines from the vineyard to your plate and hamper, hosted by the locals – offer opportunities to strengthen the story of a destination that is both diverse and unique.

Wollongong continues its transformation to a **vibrant and active city** with a flourishing restaurant and nightlife scene and recent designation as an international Bike City driving new cycling events and services.

Potential exists to strengthen the awareness and product offering related to **heritage, equine and beach villages**.

Figure 8. Presents the experience strengths of the Sydney Surrounds South region

Target Markets & Visitor Profiles

Target Markets & Visitor Profiles

The Sydney Surrounds South destination management planning process identified the following main visitor markets and growth development opportunities for the region.

PRIMARY TARGET MARKET	MARKET SEGMENT & ORIGIN	GROWTH OPPORTUNITIES & DRIVERS
200km Drive Market (Domestic)	**SEGMENT** Families Young Couples Singles/ Millennials **ORIGIN** Southern and Western Sydney Canberra South Coast	Increase yield from the day visitor segment is important for the *Recovery*, *Momentum* and *Accelerate* phases up to 2030. Convert to overnight stays by raising awareness of the quantity and diversity of offerings and incentivise with packaging. Leverage the region's accessibility by creating touring routes and itineraries. Develop new and elevate existing experiences to motivate trip decisions. Leverage forecast population growth and increased accessibility. Build awareness and advocacy within the region as a means of supporting sustainable growth for the visitor economy. Build on high quality and authentic events to act as triggers for visits including sporting and music festivals. Maximise Wollongong positioning as UCI designated 'Bike City" and leverage off 2022 UCI Road World Championships and other events. Identify and foster early evening/night-time economy options to convert day trips to overnight stays.
International	**SEGMENT** Day visits/ group travel, ex Sydney Overnight stays Visiting Friends and Relatives NSW to VIC touring via coast **ORIGIN** Western Markets include UK, USA, France, Germany and New Zealand Eastern Markets include Asian, China, Singapore, and Korea	As international markets return, aligning opportunities with the *Momentum* and *Accelerate* phases up to 2030 are particularly important. VFR, Singapore, New Zealand, UK, Germany are likely to provide the best opportunities in the Recovery and Momentum phases. Leverage airport development – Western Sydney. Identify hero products and experiences and mentoring those businesses to become international ready with commissionable and bookable experiences. Work with operators across the region to maximise the benefits of ICU international cycling events based in Wollongong and position the region into the marketing and promotion.

Target Markets & Visitor Profiles (continued)

SECONDARY TARGET MARKET	MARKET SEGMENT & ORIGIN	GROWTH OPPORTUNITIES & DRIVERS
Travel for Purpose (Self-drive)	**SEGMENT** Leisure Events Arts and Cultural visitors Recreational and Sporting competition participants Nature observers Marine Tourism **ORIGIN** Greater Sydney Interstate (Queensland, Victoria) Intra-region/regional NSW	Maximise growth across these niche visitor segmetns is important for the *Recovery*, *Momentum* and *Accelerate* phases up to 2030. Package and link itineraries – commissionable bookable experiences linked to travel purpose. Connectivity which links experiences across the region to extend stay and increase yield. Cooperative marketing campaigns and brand development to build identity and resonate with these secondary markets. An increased depth and range of experiences, including new/improved signature accommodation. Build on Local Government investments into sporting and community infrastructure facilities. Self-drive/touring trips to/within the region activated by purpose driven travel.
Business events (corporate travel, conferences, association & government events and incentives)	**SEGMENT** Mid-week trade, with links to hero food and wine experiences Pre, Post and Partner conference visitor programs **ORIGIN** Intra-region Greater Sydney	Local, regional, and national meetings can be a key driver in the *Recovery* phase, with the sector being a core part of the business model for hotels and meeting venues New build and upgrade of existing conferencing venues and cultural centres can open up capacity and new event markets Meet the needs of market requirements for hybrid meetings Develop stronger communica-tions and awareness of the value and opportunity of leveraging off business event activities
Cruise, Boating and Voyaging	**SEGMENT** Expedition, luxury, and speciality cruise ships Regional and port-based tours and experiences **ORIGIN** Greater Sydney Regional NSW	The cruise industry is forecast to bounce back strongly on its reopening in 2022 – domestic markets are the key driver Accessible new/improved experiences can be the driver for additional landside visitor expenditure by cruise visitors

Strategic Objectives

Strategic Objectives

Our strategic objectives are designed to coordinate the region's tourism industry to grow the Sydney Surrounds South visitor economy to be fit for the future and align to the VES 2030 strategic pillars.

	Road to Recovery	Build the Brand	Showcase our Strengths	Invest in World Class Events	Facilitate Growth
VES Strategic Pillars	A comprehensive program of marketing and industry development will ensure NSW recovers quickly from the impacts of COVID-19, bushfires, drought and floods and elevates its status as the premier visitor economy in the Asia Pacific.	Compelling new brands will be developed for Sydney and NSW to provide a strong foundation for differentiation, consumer messaging, local pride and competitiveness to turbocharge recovery and accelerate future growth.	NSW is a state of breathtaking diversity and bucket list visitor attractions and experiences. We will focus on existing strengths and develop new opportunities to ensure place making, destination marketing, events and visitor experiences drive visitation.	An accelerated investment in signature sporting and cultural events as well as business events will help position Sydney and NSW as the events capital of the Asia Pacific, drive visitation and enhance the social wellbeing of NSW residents.	Investing in infrastructure, job creation, industry resilience and sustainability, future planning, and better ways to do business will ensure the continued growth and future prosperity of the NSW visitor economy.
Sydney Surrounds South DMP Strategic Objectives	Support the Sydney Surrounds South visitor economy to recover and be sustainable, capable, and resilient.	Position and promote Sydney Surrounds South's destinations to align to the Feel NSW brand.	Develop authentic visitor products and experiences to drive visitation to the Sydney Surrounds South region.	Grow current events and attract new events that grow the Sydney Surrounds South visitor economy and are aligned to our community values.	Provide an enabling environment to attract investment in the Sydney Surrounds South visitor economy.
Key Result Areas	• Return visitation and expenditure to pre-Covid levels by 2024 • Sustainable and resilient visitor economy businesses	• Increased demand to visit Sydney and NSW • Greater brand awareness in target markets • Improved response to campaign activity • Increased community satisfaction	• Increased average length of stay and yield • Growth in visitation and expenditure for regional destinations • Higher levels of repeat visitation	• Increased economic impact and visitor attendance at events • Greater promotion of Sydney and NSW as an events destination • Increased community and visitor satisfaction	• Increased private and public sector investment in visitor infrastructure • Improved access to visitor destinations and visitor attractions • Increased visitor satisfaction with accommodation and experiences

Action Plan

Action Plan

The following sections identify actions related to the five Sydney Surrounds South DMP strategic objectives.

Actions align with the three phases of the VES 2030:

- Recovery Phase to 2024
- Growth Momentum to 2026
- Growth Accelerate to 2030

1.0 Road to Recovery

Strategic Objective: Support the Sydney Surrounds South visitor economy to recover and be sustainable, capable, and resilient

The 2020-2022 period has been tumultuous for the region's visitor economy. The COVID-19 pandemic, bushfire emergencies and periods of drought have challenged the sector like never before. Business and destination resilience has heightened in importance. These events have impacted on the visitor economy in similar ways, in the sense of restricting trade through closed borders, being inaccessible or the perception of not being open for business. This has created an opportunity for a reset and to plan for the visitor economy to grow back differently and ensure community support for the visitor economy.

The following actions focus on building industry sustainability, capability and resilience to best support recovery to return visitation and expenditure to pre-COVID levels by 2024.

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
1.1	Facilitate Industry Development programs that engage with industry to increase skills levels, grow partnerships and improve the visitor experience	DSSS	DNSW LGAs LTOs	2022 to 2024
1.2	Work with DNSW to deliver NSW First initiatives to strengthen industry sustainability, capability, and resilience	DNSW	DSSS	2022 to 2024
1.3	Work with the Destination Network Project Management Group to create an 'Understanding the Regional Visitor Economy Program' to improve understanding of local government, industry and community about the Sydney Surrounds South visitor economy	DNPMG	DSSS Regional NSW LGAs	2022 to 2024
1.4	Work with the Destination Network Project Management Group to advocate and maximise the opportunities and resources available from external grant funding opportunities to support regional visitor economy resilience and growth	DNPMG	DSSS Regional NSW	2022 to 2024
1.5	Work with the Destination Network Project Management Group and regional stakeholders to advocate for work force solutions around visitor economy staff and skills shortages	Regional NSW	DNPMG DSSS	2022 to 2024

2.0 Build the Brand

Strategic Objective: Build the identity of Sydney Surrounds South's destinations to align with the Feel NSW brand and strengthen collaborative marketing partnerships

The following actions focus on continuing to develop, leverage and communicate cooperative marketing opportunities to build the positioning of the Sydney Surrounds South region.

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
2.1	Work with DNSW, LGAs and LTOs to create a Sydney Surrounds South Marketing Toolkit that maps the destination brand identities, product and experience strengths and ways to align with Feel NSW brand	DSSS	DNSW LGAs LTOs	2022 to 2024
2.2	Work with LGAs and LTOs to create coordinated experience trails and itineraries related to positioning strengths of the region and link to Sydney and Canberra source markets	DSSS	DNSW LGAs LTOs	2022 to 2026
2.3	Continue to maintain a strong partnership with DSNSW to identify cooperative regional marketing opportunities for South Coast stakeholders including the Grand Pacific Drive	DSSS	DSNSW DNSW LGAs LTOs	2022 to 2030
2.4	Work with DNSW to coordinate and communicate opportunities for Feel New NSW content development for Sydney Surrounds South stakeholders	DSSS	DNSW LGAs LTOs	2022 to 2030
2.5	Work cooperatively with LGAs and LTOs of Greater Sydney, the South Coast and Canberra Region to leverage mutual benefits	DSSS	DNSW LGAs LTOs	2022 to 2030

3.0   Showcase our Strengths

Strategic Objective: Continue to develop authentic visitor experiences to drive greater visitor dispersal and longer stays to the Sydney Surrounds South region

Although Sydney Surrounds South has well developed product and experiences, there is a need to continue to support development of high-quality visitor experiences, that will be motivators for trip decisions for new and repeat visits. The region's proximity to Australia's largest source visitor market in Greater Sydney provides a significant advantage relative to other regional NSW destinations. Investment in existing or new experiences is a key enabler if the region is to provide the depth of experiences that incentives trips and encourages visitation.

The following actions focus on coordinating programs to support operators to enhance and create products and working collaboratively with visitor economy partners to identify and activate new opportunities.

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
3.1	Work with DNSW to coordinate famils and deliver NSW First programs that encourage and support development and packaging of new and improved products and services	DSSS	DSNSW	2022 to 2030
3.2	Work with DNSW to coordinate the delivery of DNSW First programs and resources to support operators to be international ready	DNSW	DSSS LGAs LTOs	2022 to 2030
3.3	Work with the Destination Network Project Management Group to support operators to further develop agritourism product and experiences, to capitalise on agritourism planning reforms	DNPMG	DNSW Regional NSW LGAs, LTOs	2022 to 2026
3.4	Work with DSNSW to develop an investor prospectus and advocacy plan for significant catalyst projects including whole of Southern NSW Cycling strategy; Great South Coast Walk; Agritourism and the Grand Pacific Drive	DSSS DSNSW	DNSW Regional NSW	2022 to 2030
3.5	Work with the Destination Network Project Management Group to advocate and support the development of new heritage and First Nations products and experiences including tailored industry development and support to help bring forward new cultural tourism product development opportunities	DNPMG	DNSW NATOC Museums & Galleries NSW LGAs, LTOs LALCs	2022 to 2030
3.6	Work with the Destination Network Project Management Group, NPWS and NSWFC and private landowners to identify opportunities for nature-based product and experience development	DNPMG	DNSW Regional NSW LGAs LTOs	2022 to 2026

4.0   Invest in World Class Events

Strategic Objective: Grow the Sydney Surrounds South visitor economy through the delivery of high quality events and attraction of new events

Generating additional economic benefits through the delivery of quality current and new events is imperative to help recover and grow the Sydney and Surrounds South Visitor Economy.

The following actions focus on supporting event organisers and the region's LGAs to improve event coordination and capacity.

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
4.1	Support LGAs and LTOs to deliver event development resources for organisers of events that have the capacity to grow visitation to the region including effective grant writing resources	DSSS LGAs LTOs	DNSW	2022 to 2026
4.2	Identify key events that have the potential to be amplified to attract increased or new audience segments and work with event organisers to develop next growth stage	DSSS LGAs LTOs	DNSW	2020 to 2030
4.3	Support event organisers, LGAs and LTOs to attract new events that have the potential to attract new and repeat visitors to the region	DSSS	DNSW Regional NSW	2020 to 2030
4.4	Advocate to LGAs and LTOs to consider event infrastructure development needs for new local precinct and place-building projects including activation of an evening economy	DSSS	DNSW Regional NSW LGAs LTOs	2022 to 2030

5.0 Facilitate Growth

Strategic Objective: Provide an enabling environment to attract investment to the Sydney Surrounds South visitor economy

Supporting operators to make it easier to do business and working with local and state governments to streamline planning and approvals processes is important to grow and further develop the region's visitor economy.

This action focuses on positioning Destination Sydney and Surrounds South as an attractive region to invest through working with partners to develop and disseminate market intelligence which raises awareness of new investment opportunities.

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
5.1	Continue to advocate and support investment in the proposed projects that have the potential to grow the region's visitor economy related to the regions' positioning strengths	DSSS	DNSW LGAs LTOs	2022 to 2026
5.2	Support private investors, LGAs and LTOs to grow the quantity, diversity, and quality of accommodation across the region	DSSS	DNSW LGAs LTOs	2022 to 2030
5.3	Work with Destination NSW and the Destination Network Project Management Group to disseminate and communicate relevant visitor economy research to regional stakeholders	DSSS DNPMG	LGAs LTOs	2022 to 2030
5.4	Work with the Destination Network Project Management Group to advocate to the NSW Government and LGAs to streamline planning requirementsand remove barriers inhibiting growth to better support the development of the visitor economy	DNPMG	NSW Govt DNSW Regional NSW LGAs LTOs	2022 to 2030
5.5	Work with the Destination Network Project Management Group to advocate to the Australian and NSW Governments for improved digital and transport connectivity, including EV infrastructure	DNPMG	NSW Govt DNSW	2022 to 2030
5.6	Work with Destination Southern NSW to prepare a strong strategy for growing the experiences and the awareness of the Grand Pacific Drive as a journey for international and domestic market	DSSS DSNSW	LGAs LTOs	2022 to 2030
5.7	Work with the Destination Network Project Management Group to leverage opportunities for international and domestic airway route development	DNPMG	DNSW Visit Canberra	2024 to 2030

Regional Priorities

Regional Priorities

A number of important development projects were identified during the destination management planning process that will help to grow the Sydney Surrounds South Visitor Economy.

Pipeline projects (already funded or partly funded)

- Shell Cove Marina accommodation at the Waterfront (Shellharbour)
- Wollongong's WIN Sports & Entertainment Centres
- Grand Pacific Walkway (under construction)
- Wollongong UCI Bike City infrastructure
- Great Southern Walk
- Murramarang Walk
- The Living Estuary Immersive Experience - Jervis Bay Maritime Museum
- South Coast Centre of Excellence (Shoalhaven, Bega, Eurobodalla)

New catalyst projects within the region

- **Marine Activation**
  - » Museum of Underwater/coastal art
  - » Bundanon Cultural boating experience
  - » Kiama Harbour development
  - » Wollongong Harbour infrastructure development
  - » Ulladulla Harbour master planning

- **Cultural and Nature-based**
  - » Placemaking and activation of Wollongong visitor precincts
  - » Nowra riverfront activation
  - » Kiama Harbour arts and cultural precinct
  - » Booderee National Park site re-development and Indigenous tourism hub
  - » Bass Point Aboriginal Interpretive Centre
  - » Illawarra Escarpment Walk
  - » Mt Keira Summit Park

- **Trails – walking, cycling**
  - » Mittagong to Moss Vale Cycleway
  - » Mt Keira Summit Park - Mountain Bike
  - » "Hanging over the Shoalhaven River"- proposed glass bottom walkway
  - » Great South Coast Walks

- **Agritourism projects**
  - » Shoalhaven Agri-hub in Bomaderry

Cross Regional Projects

In addition to these key projects, it is recommended that Sydney Surrounds South stakeholders continue to work with public and private sector partners to position the South Coast as a destination of choice for:

- **Cycling** (all forms) that includes:
  - » The significant cluster of MTB trails from the Snowies and Snowy Valleys to Canberra and along the coast
  - » The rail trails in development across the region
  - » Road cycling including Wollongong with Bike City status and
  - » Cycling events such as L'Etape, and world class MTB events
- **Great South Coast Walks** - the continued development and promotion of the cluster of overnight hikes and high quality day walks from the Royal National Park to the Victorian border with a focus on increasing products, packages and services that commercially leverage off the core trail infrastructure including:
  - » Royal Coastal Track
  - » Great Southern Walk
  - » Grand Pacific Walk
  - » Kiama Coastal Walk
  - » Round the Bay Walking Track, Shoalhaven
  - » Murramarang Walk (cross DN border)
- **Grand Pacific Drive** – through strengthening of the experience and awareness of the beyond Nowra to become a world-renowned iconic drive journey, with options including the entire coast, or via escarpment options, Canberra and the Snowy Mountains to the border.
- **South Coast Centre of Excellence** (Shoalhaven, Bega Valley, Eurobodalla) – skills and development program to provide skilled workers, develop career pathways, ensure employees are educated and enthusiastic and drive longer stays, repeat visitation and higher yields.
- **Agritourism** - engaging regional producers and growers to recognise and take advantage of the growth sector of Agritourism, including strategies and programs that identify hero produce, support industry to become 'visitor ready' and to foster partnerships that increase the promotion and profile of the products, linking purchase to place.
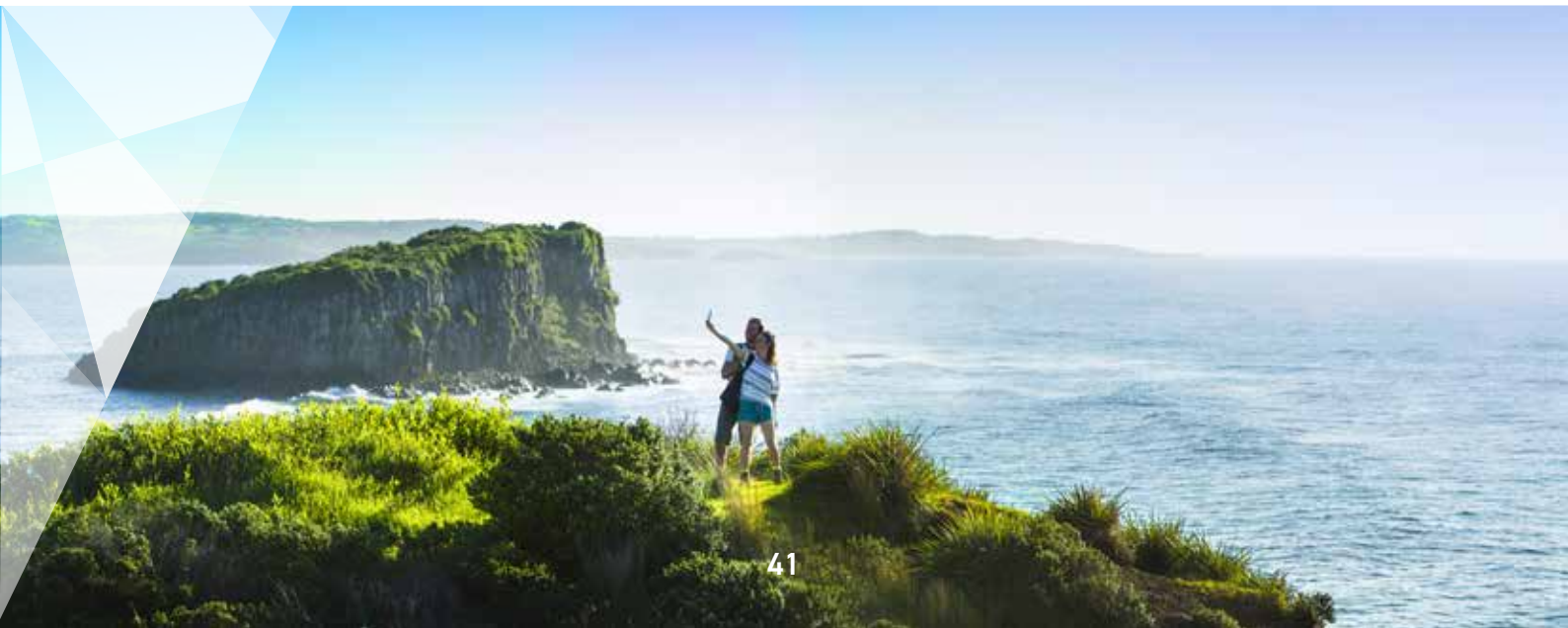
Stakeholder Roles in Growing the Regional NSW Visitor Economy

Stakeholder Roles in Growing the Regional NSW Visitor Economy

The Sydney Surrounds South Destination Management Plan will guide the region's priorities to 2030 and will require cooperative support from other tourism stakeholders across local, regional and state/territory levels to successfully implement the Plans' initiatives.

Stakeholder engagement confirmed a commitment from local governments, tourism businesses, Destination Sydney Surrounds South and Destination New South Wales to develop a solid working relationship to achieve the outcomes prioritised in this Plan.

The following outlines the roles of these stakeholders in implementing this plan to 2030.

Destination Sydney Surrounds South

Destination Sydney Surrounds South is one of seven Destination Networks in regional NSW and is an important conduit between the NSW Government, the local governments and tourism businesses across the Sydney Surrounds South region. It continues to play an important role in delivering regional funding and industry development programs, and in identifying infrastructure needs and investment opportunities to grow the regional visitor economy.

The NSW Destination Networks are considered the champions of the visitor economy in their regions, proactively engaging with stakeholders to identify, prioritise and facilitate opportunities for regional visitor economy growth. They also play a key support role for Destination NSW in the delivery of its industry development and visitor experience and regional event funding programs[9].

The Destination Networks will support Destination NSW in implementing the Visitor Economy Strategy 2030 to achieve the visitation and expenditure targets for regional NSW. The Destination Management Plan for each Destination Network is aligned with the Visitor Economy Strategy 2030.

The Destination Networks are predominantly destination managers and are considered the 'shopfront' for Destination NSW in regional NSW and work closely with local government, tourism organisations and operators .

Their objective is to facilitate visitor economy growth at the local level, through representing and coordinating the region's tourism industry.

Their core responsibilities include:
- Industry Engagement and Industry Development
- Product Development
- Training and Education
- Preliminary Review of Local DNSW Grant Applications to ensure quality/compliance with guidelines
- Collaboration with DNSW on cooperative marketing and industry activities that are aligned to Brand NSW

Specifically, Destination Networks:
- **Develop and implement the region's Destination Management Plan and Business Plan**, in alignment with the NSW Visitor Economy Strategy 2030, and ensure alignment with local tourism and related plans
- **Work with Local Government and industry** on product development, including investment attraction
- **Work in collaboration with DNSW** led marketing and communications activity for their 'hero' destinations, experiences, events and festivals and regional campaigns
- **Explore Industry Development initiatives** (i.e. identify opportunities for growth) e.g. Conferencing, Field Study Tours, local industry education and training needs especially for small to medium sized tourism operators
- **Assist local industry to prepare DNSW grant applications[10].**

The Destination Networks are funded by Destination NSW with an independent skills-based board providing strategic leadership and direction.

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9 Visitor Economy Strategy 2030

10 Destination Networks: Driving Growth of the Visitor Economy in Regional NSW https://www.destinationnsw.com.au/wp-content/uploads/2016/07/Destination-Networks-29-June-2017.pdf

Destination NSW

As the lead NSW Government agency for the visitor economy, Destination NSW will coordinate and amplify delivery of the programs and initiatives of the Visitor Economy Strategy 2030 across all levels of Government.

A whole-of-government approach has been embedded in visitor economy planning with the establishment of a new Visitor Economy Senior Officers Group, to ensure visitor economy strategies are coordinated across government, to monitor performance against targets, and respond to emerging issues.

New approaches to industry engagement and consultation are also proposed to inform the development of new NSW Government initiatives and programs for the visitor economy. The NSW Government will continue to develop the Visitor Economy Index to explore new ways of measuring the impact of the visitor economy and guide future decision-making.

Destination New South Wales has also recently been re-structured. A new Regional Hub Director has been appointed to support the Destination Networks to deliver the strategic directions of the DMPs and grow the visitor economy.

Department of Regional NSW

The Department of Regional NSW is the NSW Government's central agency for regional issues, building resilient regional economies and communities, strengthening primary industries, managing the use of our valuable regional land, overseeing the state's mineral and mining resources and ensuring that government investment into regional NSW is fair and delivers positive outcomes for local communities and businesses[11].

The NSW Government is committed to supporting the development of strong, diverse and innovative regional communities across NSW and making those communities appealing places to live, work and invest through its 'Making it happen in the regions: Regional Development Framework'. In addition, Regional Economic Development Strategies (REDS) provide a clear economic development strategy for the regions and guide government investment in economic development initiatives in regional NSW.

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11 https://www.service.nsw.gov.au/nswgovdirectory/region-al-nsw-department
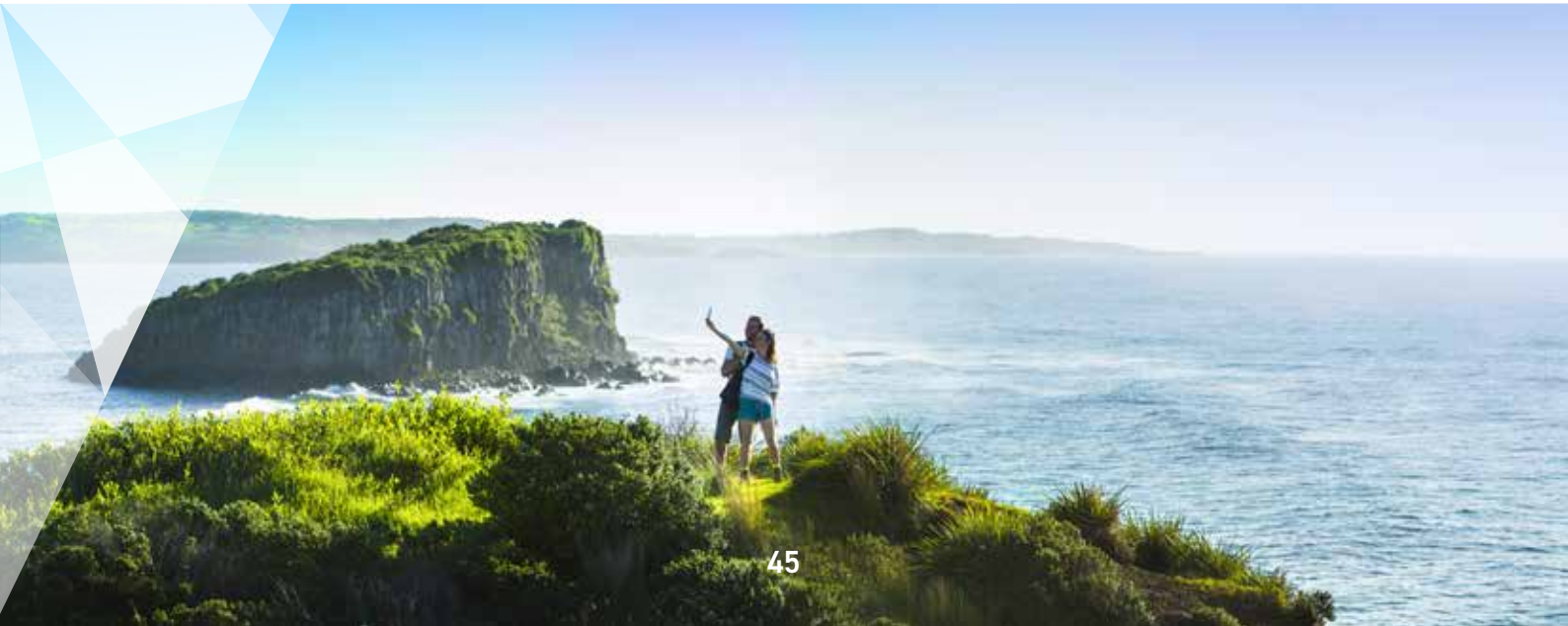
Local Government

Local Government plays a pivotal role in tourism activity, with councils actively involved in promoting tourism, providing infrastructure and services to support tourism, and managing the impacts of tourism. The Australian Regional Tourism and Economic Development Australia benchmarking survey of local governments (2020) shows that each council spends on average $761,000 on tourism annually. Whether it's through the provision of infrastructure, cultural facilities, events, visitor services or public spaces, councils support the economic development of their local communities via either direct financial or in-kind support to tourism. The role of local government in tourism is also recognised in the State Government's NSW Visitor Economy Strategy 2030, which contains a commitment for Destination NSW to work closely with councils and a principle of collaboration between the industry and government, including councils[12].

Other Key Support Partners

Other important local, regional and NSW government and industry stakeholders that have an important role in supporting the DNs to implement strategies and actions of their associated with this Plan to 2030 include:

- Local tourism organisations and Chambers of Commerce
- Tourism industry operators
- Region Joint Organisations
- NSW Government Departments and Agencies (represented by the DNSW Visitor Economy Senior Officers Group)
- NSW Tourism Industry Associations

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12 https://lgnsw.org.au/Public/Public/Policy/Tourism.aspx

Review

Monitoring of the implementation of this Plan's strategies and actions is important to ensure its vision and objectives are achieved and to provide new information that can be used to inform planning and decision-making for the Sydney Surrounds South visitor economy to 2030. A review of this plan will be undertaken in 2024 and 2026.

Visitor Infrastructure Framework Assessment Criteria

The NSW Government uses Cost Benefit Analysis to assess the social, economic and environmental impacts of infrastructure proposals including visitor economy infrastructure. Where feasible, Cost Benefit Analysis will be used to prioritise proposals for regional NSW visitor economies and have been designed to help guide prioritisation and decision-making. See Appendix 3 for the criteria used by the NSW Government to analyse the cost benefit of infrastructure development proposals. See Appendix 2.
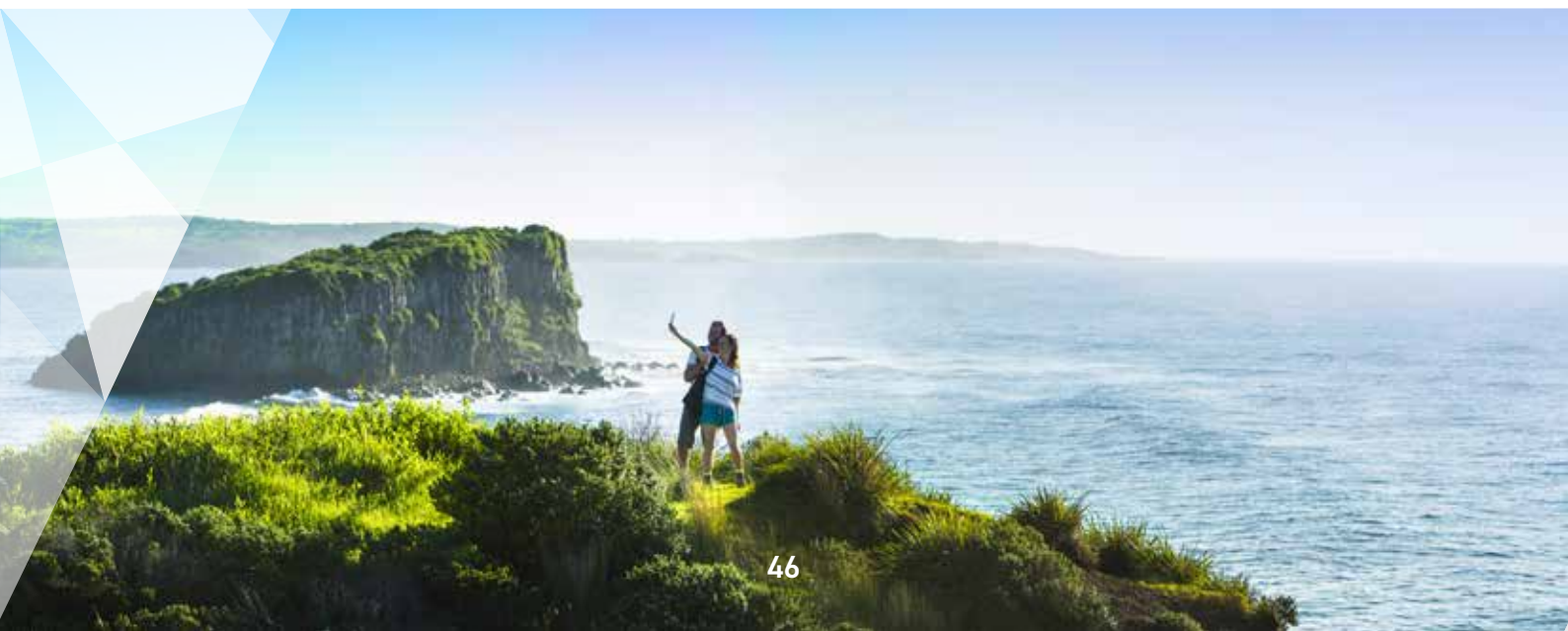
Appendices

Appendix 1: NSW Government strategies relevant to the regional visitor economy

STATEWIDE STRATEGIES

Visitor Economy Strategy 2030

NSW 2040 Economic Blueprint

Gloabl NSW Strategy

The Greater Sydney Region Plan

24-Hour Economy Strategy 2020

Staying Ahead: State Infrastructure 2022 to 2042

Future Transport Strategy 2056

Tourism & Transport Plan: Future Transport Strategy 2056

Smart Places Strategy

Study NSW International Education Strategy

REGIONAL STRATEGIES

20-Year Economic Vision for Regional NSW 2021

Making It Happen in the Regions: Regional Development Framework

Future Ready Regions 2021

Regional NSW Services and Infrastructure Plan

Regional Economic Development Strategies 2018 to 2022 (and updates)

Department Planning Industry Environment - Regional Plans

RELEVANT VISITOR ECONOMY STRATEGIES

Crown Lands 2031

NPWS Visitor Infrastructure Program

NSW Foresty Corporation - Recreation & Tourism Policy 2018

NSW Marine Estates - Mainland Marine Park Network - Draft Management Plan 2021 to 2031

Port Authority of NSW - Vision & Strategic Plan 2020 to 2025

Create NSW - Arts & Cultural Policy Framework

Heritage NSW - Heritage Act Review 2021

Invest NSW - Independent Brewers Action Plan 2020

Planning NSW - STRA Policy 2021 & Planning amendments for agritourism

Appendix 2: NSW Government Cost Benefit Analysis

ASSESSMENT CRITERIA

The NSW Government uses Cost Benefit Analysis to assess the social, economic and environmental impacts of infrastructure proposals including visitor economy infrastructure. Where feasible, Cost Benefit Analysis will be used to prioritise proposals. The following considerations are designed to help guide prioritisation and decision-making.

ASSESSMENT CRITERIA	KEY CONSIDERATIONS
Creates growth opportunities from domestic and international markets	Facilitate growth in demand and address capacity constraints to develop a nationally and globally competitive visitor economy. » The investment addresses identifiable capacity constraints or supports growth in demand as informed by national and international benchmarking, Regional Economic Development Plans and Destination Management Plans. » The investment supports the 2030 Visitor Expenditure Targets and aligns with the Sydney and NSW brand.
Supports a prosperous NSW	Create economic benefits that outweigh the economic costs. » The investment generates economic benefits either in the form of increased tourism expenditure, which benefits NSW economy through higher employment and value added. » The investment generates economic benefits for local residents through access to additional infrastructure and amenities. » The investment generates increased opportunities for direct and indirect employment. » The economic benefits outweigh the costs to the government of supporting the infrastructure.
Aligns and supports other infrastructure strategies and plans	Recognise alignment and support for other government strategies. » Promotes urban and regional development. » Creates sustainable commercial opportunities for indigenous cultural businesses and support Indigenous tourism. » Supports accessible, inclusive, and special interest tourism and encouraging skill development in the sector. » Develops and renew regional government assets. » Aligns with the objectives in REDs, DMPS and local government policies and plans.

ASSESSMENT CRITERIA (continued)

ASSESSMENT CRITERIA	KEY CONSIDERATIONS
Supports equity and access for all	Distribute benefits to disadvantaged and local communities. » The infrastructure utilises universal design principles and promotes accessibility. » Promotes increased participation of disadvantaged young people. » Promotes increased participation of Aboriginal people. » Sustains jobs and generates additional jobs in the visitor economy and associated supply chains. » Supports and benefits local groups.
Fosters a sustainable visitor economy	Ongoing financial viability and contribution to a sustainable and resilient visitor economy. » The investment generates revenue to support operation and management that is likely to minimise unexpected government outlays. » Promotes year-round visitation and grows capacity to reduce reliance on visitation in peak seasons. » Incorporates environmentally sustainable features (such as renewable energy, waste reduction, water, and energy efficiency). » Improves the public realm and adds to the sense of place and community. » Is built in an appropriate location with appropriate materials and responds to the changing climate including more extreme and frequent natural disasters such as bushfires, flood, coastal erosion and inundation.
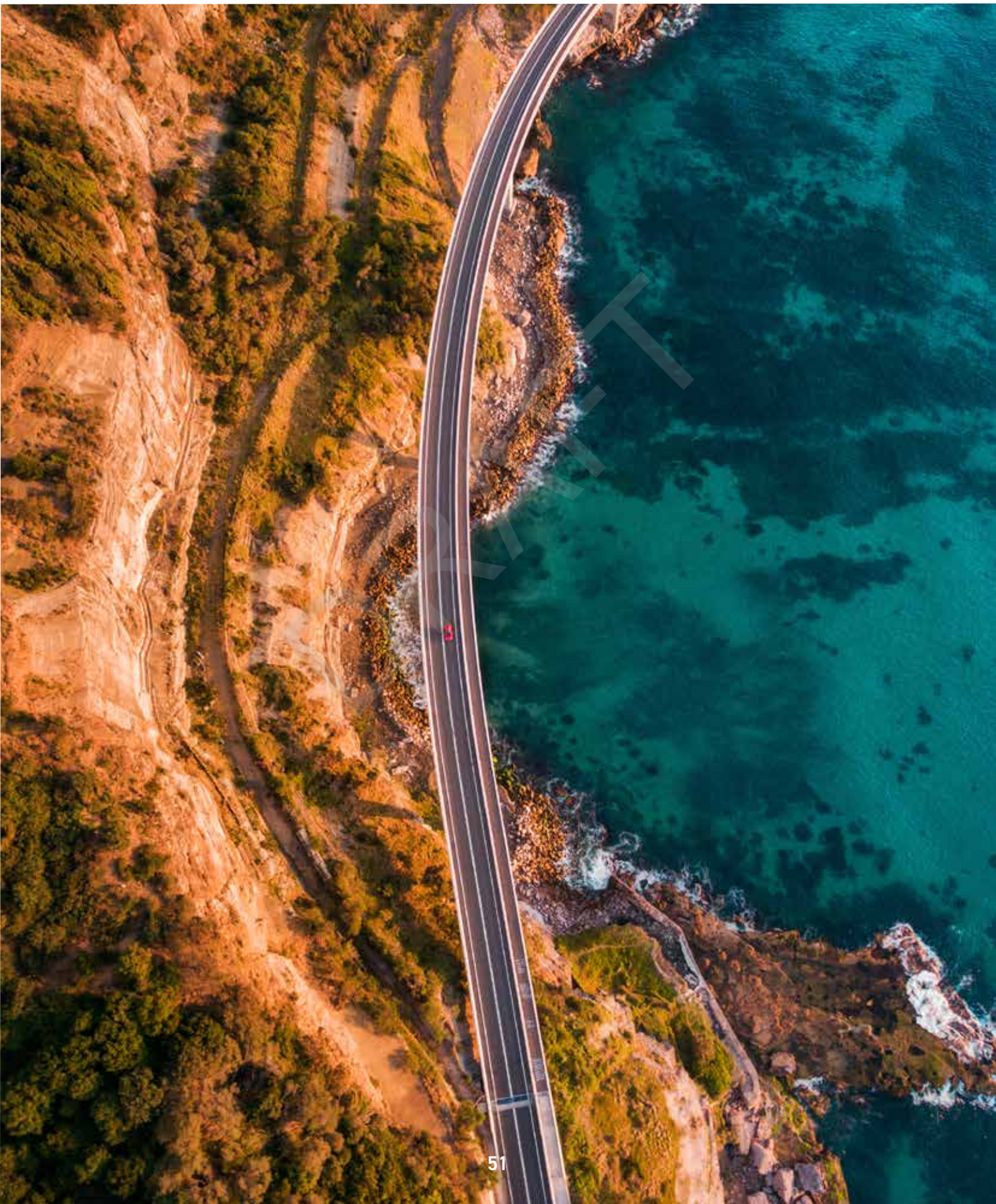
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Destination
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