



Destination
Southern NSW

Southern New South Wales Destination Management Plan

2022-2030



This Destination Management Plan was prepared by TRC Tourism

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LIST OF ACRONYMS

ATDW	Australian Tourism Data Warehouse	LALC	Local Aboriginal Land Councils
CRJO	Canberra Region Joint Organisation	LGA	Local Government Area
DMP	Destination Management Plan	LTO	Local Tourism Organisation
DNPMG	Destination Network Project Management Group	MTB	Mountain Bike(ing)
DNs	Destination Networks	NATOC	NSW Aboriginal Tourism Operators Council
DNCW	Destination Central West NSW	NPWS	NSW National Parks and Wildlife Service
DNSW	Destination NSW	NSW	New South Wales
DRM	Destination Riverina Murray	REDS	Regional Economic Development Strategies
DRNSW	Department of Regional NSW	TRA	Tourism Research Australia
DSNSW	Destination Southern NSW	VC	Visit Canberra
DSSS	Destination Sydney Surrounds South	VES	Visitor Economy Strategy 2030
FCNSW	Forestry Corporation of NSW	VFR	Visiting Friends and Relatives
FIT	Free Independent Traveller	Y/End (YE)	Year End
Govt	Government		
GSP	Gross State Product		
GVA	Gross Value Add		

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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 Southern NSW 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 Southern NSW Board

We support a thriving, sustainable, connected and inclusive Southern NSW 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 communities and regional visitor economies. Every minute of every day, tourism delivers \$4,068 of visitor spend into Southern NSW - that is almost \$5.9 million every day. Our region relies on the visitor economy to deliver jobs, support business, grow our region's economy and provide social opportunities for our communities¹.

This DMP is a high-level framework that will guide the delivery of the Southern New South Wales' tourism sector's economic and social benefits and position Destination Southern New South Wales (DSNSW) as an active advocator 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. We want to be front of mind when potential visitors think about a day trip, short break, or holiday, to have a focus on inclusion and contribute to our region's bright future.

We want the region to benefit from its uniqueness, the distinct sub-regions of the Southern Tablelands, South Coast and the Snowies, leveraging the market and the partnership opportunities that Canberra provides. The region in 2030 will be delivering high-quality unique experiences that provide value for money and excellence in customer service.

Our opportunity

This Plan takes a borderless view to identify and quantify regional strategies and actions for Southern NSW and exists to:

- Align regional visitor economy growth and development activities with the NSW Visitor Economy Strategy (VES) 2030
- Provide a framework for sub-regional and local DMPs to be developed or updated within our region
- Capture stakeholder consultation to ensure the region's stakeholders are invested in the Plan
- Provide a roadmap for the growth of the visitor economy in Southern NSW to 2030
- Provide an action plan with a focus on cross-regional projects for visitor economy growth and development to guide the work of DSNSW
- Ensure the visitor economy is planned through a coordinated and sustainable approach

¹ DNSW Value of Tourism to Southern NSW YE 2019

Overview

Destination Southern New South Wales (DSNSW) is one of seven Destination Networks (DNs) in regional NSW. Its principal role is to represent and coordinate the growth and development of the Southern NSW visitor economy.

The Southern NSW region comprises the sub-regions of South Coast, Snowies and Southern Tablelands. Comprising eight local government areas: Bega Valley, Eurobodalla, Snowy Monaro, Goulburn Mulwaree, Hilltops, Queanbeyan-Palerang, Upper Lachlan and Yass Valley. Each has its respective vision for the future, and projects and priorities, which are relevant to the sustainable growth of the region.

The Southern New South Wales visitor economy delivered 9.3% of the region's jobs, supports 2,673 businesses and directly delivers 5.8% (\$725 million) of the region's Gross Value Add (GVA) which has grown every year since 2010-11 at an average 4.1% pa. The region attracted just over 7 million visitors and 11.4 million visitor nights in 2019 (Year End December)².

The Southern NSW 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.

The Plan focuses on the following five enabling strategies to guide the implementation of this Plan:

1. Improving stakeholder collaboration
2. Developing industry engagement and capability
3. Leveraging government investment
4. Improving marketing outcomes
5. Championing the regional NSW visitor economy

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, to reflect these enabling strategies and local priorities, and align with NSW Government's Visitor Economy Strategy 2030:

1. Support the Southern NSW visitor economy to recover and be sustainable, capable, and resilient
2. Position and promote Southern NSW's three sub-regions and their destinations to align to the Feel NSW brand
3. Develop authentic visitor products and experiences to drive visitation to Southern NSW
4. Grow current events and attract new events that grow the Southern NSW visitor economy and are aligned to our community
5. Provide an enabling environment to attract investment in the Southern NSW visitor economy

Vision

Southern New South Wales stakeholders working collaboratively to showcase and develop their sub-regions as compelling destinations and contribute to the regional NSW \$25 billion visitor expenditure target by 2030.



Introduction

Destination Southern New South Wales commissioned the preparation of the Southern New South Wales 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 Southern New South Wales DMP 2022 to 2030 has been developed to align with the directions of the Visitor Economy Strategy (VES) 2030.

The VES 2030 acknowledges regional New South Wales (NSW) as 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 impact³.

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.

Dr Meredith Wray (Wray Sustainable Tourism Research and Planning) was engaged by the DNPMG to coordinate the development of the suite of DMPs and alignment to the VES 2030.

Consultants, TRC Tourism, were engaged from January to July 2022 to prepare the Southern New South Wales 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.



Southern NSW DMP 2022 to 2030

Destination Southern New South Wales comprises the sub-regions of South Coast, Snowies and Southern Tablelands. Comprising eight local government areas: Bega Valley, Eurobodalla, Snowy Monaro, Goulburn Mulwaree, Hilltops, Queanbeyan-Palerang, Upper Lachlan and Yass Valley.

The Southern New South Wales visitor economy delivers 9.3% of the region's jobs, supports 2,673 businesses and directly delivers 5.8% (\$725 million) of the region's Gross Value Add (GVA) which has grown every year since 2010-11 at an average 4.1% pa. The region attracted just over 7 million visitors and 11.4 million visitor nights⁴.

The destination management planning process involved:

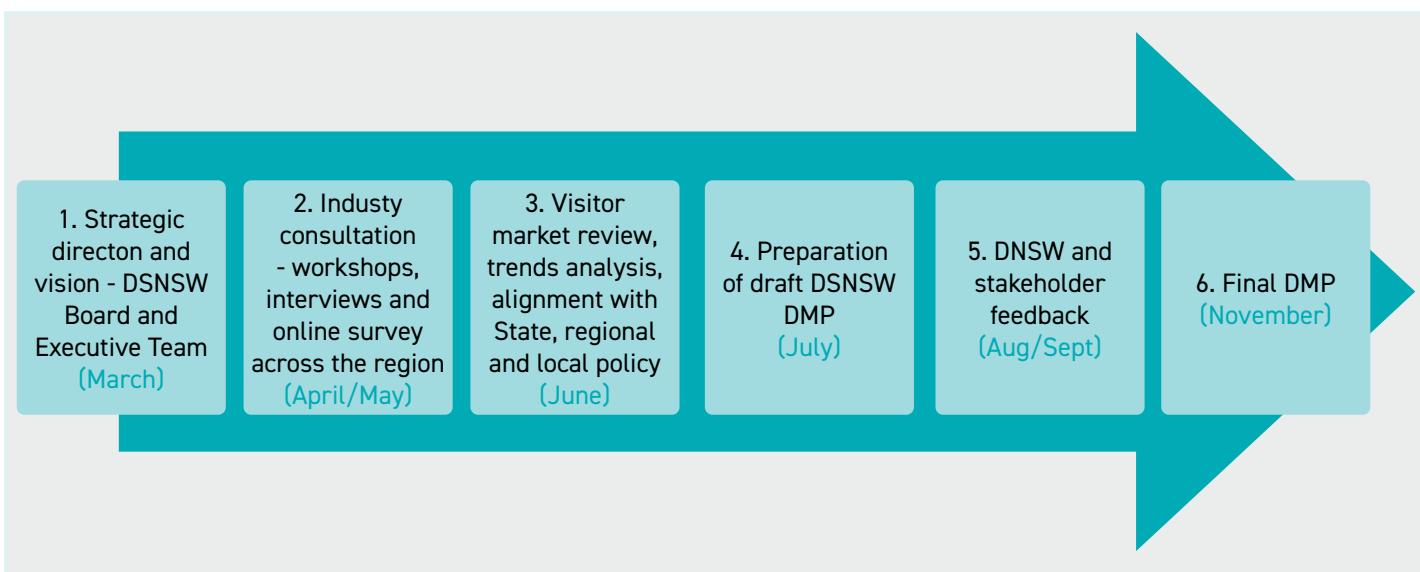


Figure 1. Destination management planning process

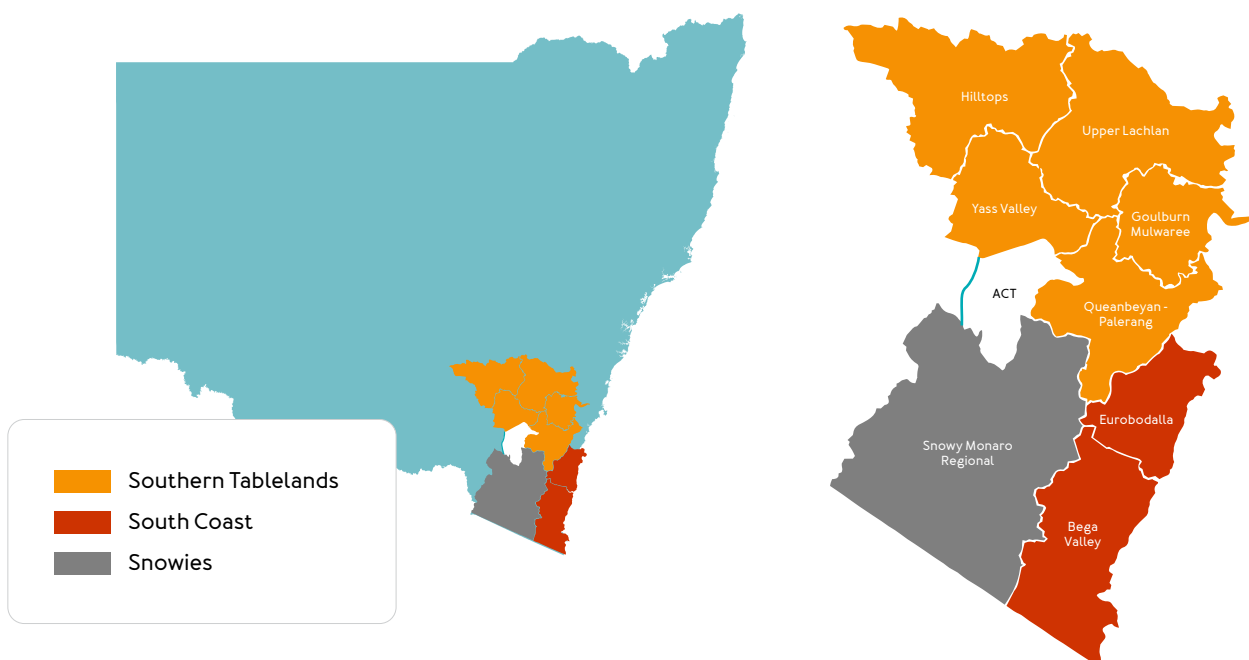


Figure 2. Map of the DSNSW region indicating LGAs and the broader three sub-regions

⁴ DNSW Value of Tourism to Southern NSW YE 2019

Strategic Context



Strategic Context

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



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.

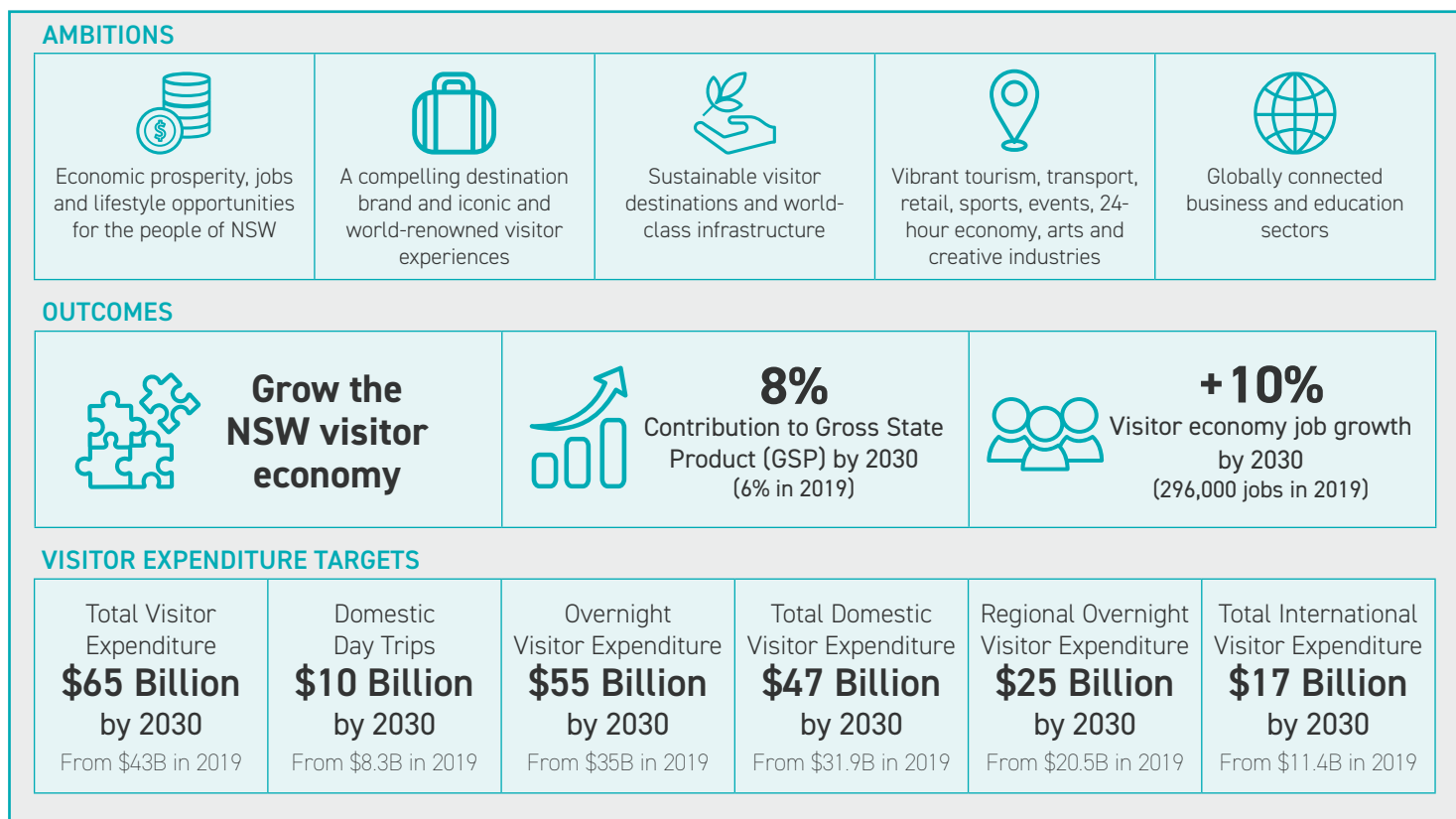


Figure 4. Visitor Economy Strategy 2030 – ambitions, outcomes, and visitor expenditure targets

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.

Table 1. NSW Government Five Guiding Principles for visitor economy policy and investment

Strategic Pillars

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

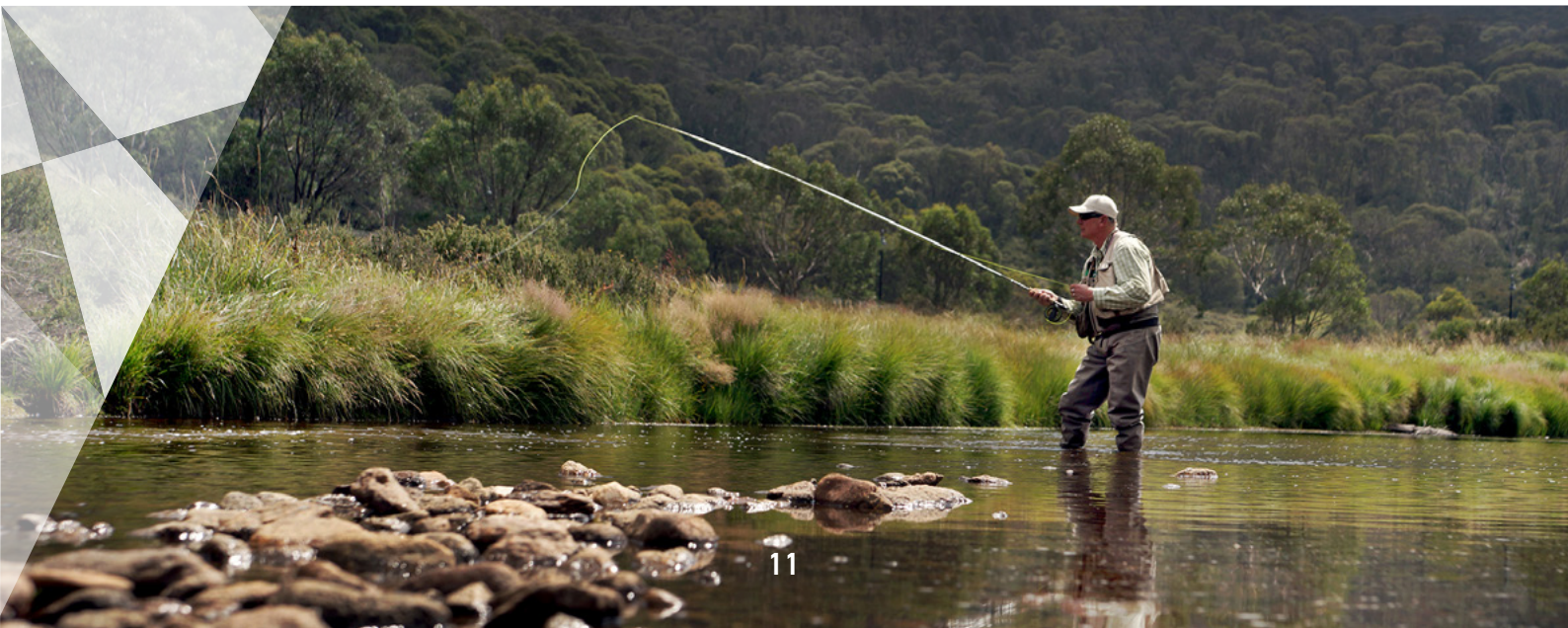
1. Road to Recovery
2. Build the Brand
3. Showcase our Strengths
4. Focus on World-Class Events
5. Facilitate Growth

These pillars and associated key result areas are explained further on page 34.

Other Considerations

The Southern New South Wales 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
- Relevant regional and local government plans and strategies
(see Appendix 1 for a list of strategies reviewed)



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 2030⁵.

TREND	DESCRIPTION
Edventures / Mixing Work and 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.

Table 2. Trends influencing visitor demand

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 Southern NSW Visitor Economy

Growing the Southern NSW Visitor Economy

Growing the Southern NSW 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 million⁶.

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 industry⁷.

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 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.

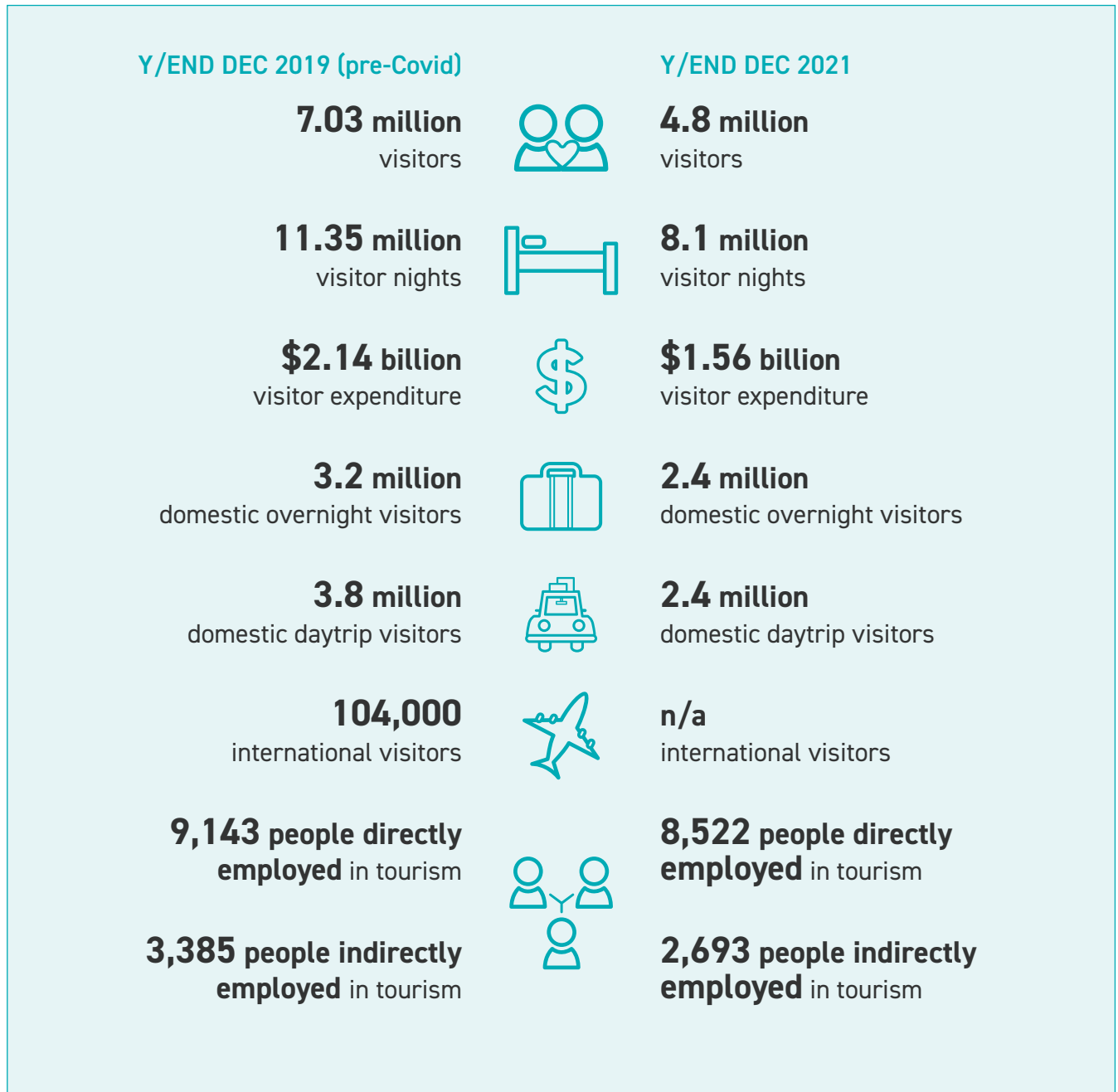


Figure 5. 2019 (pre-Covid) visitor economy indicators versus 2021 outcomes⁸




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

Main Opportunities and Challenges

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

STRENGTHS				WEAKNESSES			
• Diversity of experiences linked to sub regions	✓	✓	✓	• Limited trading hours and lack of midweek, "after 3pm" and evening activities hampers overnight visitor market growth	✓	✓	✓
• Proximity to key markets of Canberra and Sydney and major highway routes between Melbourne/Canberra/Sydney	✓	✓	✓	• Negative or outdated perceptions of the region and individual destinations	✓		
• Significant natural environment (land and water) that provides opportunities for nature based tourism product development including Aboriginal cultural experiences	✓	✓	✓	• Silo approach leading to lack of clarity on image and brand identity of some destinations within the region	✓	✓	✓
• Iconic experiences including Mt Kosciuszko, Montague Island, and the South Coast whaling story		✓	✓	• Destinations/products/experiences not well linked/packaged	✓	✓	✓
• The region's coastline especially surf breaks, sea pools and unspoiled beaches			✓	• Gateway and wayfinding signage lacking or out of date	✓	✓	✓
• The region known for its iconic produce including cherries, oysters, and truffles complemented by a strong producer and grower environment producing an extensive range of stone fruits, sheep products, dairy produce, and seafood with a real opportunity to meet the maker	✓	✓	✓	• Digital connectivity blackspots in parts of the region	✓	✓	✓
• Number and quality of wineries showcasing award winning cool climate wines including the Canberra District and Hilltops Region	✓			• Lack of quality accommodation options in parts of the region (sometime due to infrastructure projects)	✓	✓	✓
• Engaged industry and several industry clusters, associations and collaborative groups keen to collaborate and grow			✓	• Residents reluctant to welcome visitors into 'their' town	✓	✓	✓
• Historical built environment, gardens, and retail exploration	✓			• Business event venues – few large venues in region with appropriate support infrastructure (break out rooms, accommodation, dining)	✓	✓	✓
• Towns and villages with established brands		✓	✓	• National Parks basic infrastructure upgrades and maintenance and activation with contemporary experiences and operators		✓	✓
• Arts and music community (including volunteers driven events)	✓		✓	• Employment and staff accommodation shortages	✓	✓	✓
• Canberra Region Economic Development Strategy [CREDS]	✓	✓	✓	• Quality and updating ATDW listings	✓	✓	✓
• Canberra Region Partnership Framework	✓	✓	✓				

Key:

	Southern Tablelands
	Snowies
	South Coast

Main Opportunities and Challenges (continued)

OPPORTUNITIES				THREATS			
• Leverage the Snowy Mountains Special Activation Precinct and develop opportunities aligned to year round visitation across the Snowies region		✓		• Climate change and natural disasters impacting the region	✓	✓	✓
• Southern Tablelands Destination Development Plan	✓			• Competitiveness from other destinations as borders reopen	✓	✓	✓
• Cruise market			✓	• On-going disruption from Covid-19	✓	✓	✓
• Bundian Way Indigenous story		✓	✓	• Disruption to key markets including international students influencing visitation and workforce		✓	✓
• Accessible tourism	✓	✓	✓	• Challenges within local planning frameworks making it hard to do grow the value of the visitor economy	✓	✓	✓
• Strengthen the experience of the Grand Pacific Drive beyond Nowra to become a world-renowned iconic drive journey, with escarpment options, Canberra and the Snowy Mountains to the border		✓	✓	• LGA resourcing, capacity and priority to fund visitor economy growth and tourism related infrastructure	✓	✓	✓
• Involve regional producers to take advantage of potential of agritourism and culinary tourism based events	✓	✓	✓	• Change of government (local and NSW) influencing direction of tourism policy	✓	✓	✓
• Facilitating investment in improved and new visitor products and experiences	✓	✓	✓	• Ensure adequate facility and services infrastructure to support growth in villages including water, power and sewerage	✓	✓	✓
• Visitor economy friendly planning regulations	✓	✓	✓	• Winery diversification and primary producer legislation and ATO changes	✓		
• Advocating for improved transport connectivity to and within the region	✓	✓	✓	• Macro world economics affecting local markets creating uncertainty regarding recession	✓	✓	✓
• Building linkages through packaging between accommodation and other visitor economy products including events	✓	✓	✓	• Conflicting user groups within assets such as National Parks		✓	✓
• 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 and with DNSW, where in line with market demand	✓	✓	✓				
• Facilitating major events growth	✓	✓	✓				
• Facilitating improved industry skills development and knowledge	✓	✓	✓				
• 4-wheel drive experiences across SE NSW including access to VIC High Country			✓				
• Rail trails, walking trails and MTB trails in development or proposed across the region	✓	✓	✓				
• Cultural tourism including new heritage and First Nations	✓	✓	✓				
• Capitalise on the opportunity that NPWS provides across the region		✓	✓				

Table 3. High-level SWOT analysis with focus by sub-region

Main Opportunities and Challenges (continued)

The Plan focuses on the following five enabling strategies to address these opportunities and challenges and guide the implementation of this Plan:

1. Stakeholder collaboration

Improving the collaboration between LGAs and LTOs to ensure a consistent and cooperative approach to marketing and product development including opportunities for cruise, agritourism, Aboriginal tourism, cycling, inbound tourism, itinerary and trail development.

Continuing to implement the Southern Tablelands Destination Development Plan and use of this approach to create collaboration amongst other Southern NSW destinations for product development and cooperative marketing (e.g. experience trails)

Championing a border-less view of opportunities and projects and working as part of the Canberra Tourism Partnership Framework to further drive cross border visitor economy development opportunities between NSW and the ACT.

2. Industry engagement and capability

Engaging with industry to support and champion the enhancement and development of products, experiences and events across the region.

Increasing industry participation in networking, collaborative opportunities and capacity-building initiatives to strengthen product development, industry sustainability, capability, and resilience.

Monitoring and evaluating visitation to the region and to enable industry stakeholders to better understand and disseminate available research that can be used to inform business decision-making and grant applications.

3. Leveraging Government investment

Leveraging government grant funding opportunities as they emerge and working with industry to advocate for new infrastructure projects and associated funding to ensure Southern NSW operators have the best opportunity for success (e.g. Snowy Mountains Special Activation Precinct, Mountain Biking infrastructure and Arts and Cultural projects and precincts).

Regularly communicating funding opportunities and providing guidance to industry on how to prepare successful grant applications.

4. Improving marketing outcomes

Supporting Southern NSW destinations and sub-regions to articulate their key points of difference; define their brand positioning/story; align their marketing initiatives to the NSW brand, Feel NSW; and review content and PR opportunities for Southern NSW as part of Feel NSW campaigns.

Growing current and new visitor markets including the key source markets, Sydney and Canberra, and experiential markets such as drive tours and food and drink.

Considering changing and emerging consumer and market trends.

Recognising Southern NSW destinations and sub-regions compete with other destinations.

5. Championing the regional NSW visitor economy

Launching this DMP as a tool to reaffirm and educate stakeholders about the value of visitor economy including local governments, Chambers of Commerce, Local Tourism Organisations and industry.

Working with other regional NSW Destination Networks and stakeholders to advocate to government and stakeholders to address important challenges facing the visitor economy into the future. This includes issues such as COVID-19 recovery; natural disaster recovery and resilience; affordable housing; and staff shortages.

Working collaboratively to drive product and experience development in regional NSW such as agri-tourism, nature-based tourism, Aboriginal cultural tourism development, and heritage to create diverse visitor experiences and overcome seasonality.





Vision and Positioning



Vision and Positioning

Vision and Values

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

Southern New South Wales stakeholders working collaboratively to showcase and develop their sub-regions as compelling destinations and contribute to the regional NSW \$25 billion visitor expenditure target by 2030.

The Southern New South Wales vision is underpinned by the following values:

- Ensuring a welcoming, safe and inclusive region
- Considering responsible tourism – environmental, social, cultural, economic, and ethical
- Retaining our lifestyle, our character, and our sense of place
- Fostering a spirit of collaboration within and beyond our regional boundary
- Offering high quality, seamless experiences, and consistent customer services
- Providing opportunities for our industry to broaden and deepen their skill sets.

Positioning

The strength of Southern New South Wales lies in the diverse nature of its three sub-regions that offer different but complementary experiences.



Figure 6. Presents the positioning strengths of the Southern NSW region

Positioning (continued)

The following three main experience themes were identified during the destination management planning process that can help drive visitor economy growth across Southern NSW and its sub-regions:



Figure 7. Presents the three main experience themes of the Southern NSW region

Sub-region Positioning

The following table describes the Southern NSW sub-regions, their related vision, positioning and experience development themes as identified in current destination management plans and brand positioning strategies.

SOUTHERN TABLELANDS	
Description	The Southern Tablelands extends from Hilltops, with its diversity of quality and authentic regional produce, through to Queanbeyan-Palerang, the largest regional centre in southeast NSW adjoining Canberra. The sub-region is known for its unique rural character, natural environment, heritage, and culture. The produce of the Southern Tablelands is complemented by the rural settings, towns and villages of the region including Upper Lachlan which is nestled high on the Great Dividing Range and boasts snow-dusted winters with cozy warm fires, autumns ablaze with colour, spring blooms and mild and sunny summers. Young is known nationally as the Cherry Capital of Australia. The area is recognised for its boutique wineries, including the award-winning cool climate wines of the Canberra District Wine region near Yass. It is also recognised for its rich agricultural heritage, rolling hills and valleys, modern and acclaimed food scene and picturesque country towns. Goulburn Mulwaree is an important gateway for visitors travelling by road, offering a good range of accommodation for overnight travellers. The area is focused on growing a year-round calendar of cultural and sports tourism events.
Vision	The Southern Tablelands will be recognised as a distinct tourism region within NSW offering diverse attractions and experiences to attract overnight and daytrip visitors to explore the region year-round. The visitor economy will be acknowledged as an important contributor to the social and economic fabric of the region ⁹ .
Positioning Statement	This is Country Living: The Southern Tablelands <i>Manifesto</i> Escaping to the country is a great way to unwind and reset in our hectic world. The Southern Tablelands is a country location where you can recharge and enjoy the simple life, but what's on offer is anything but simple. Packed with wineries, livestock, fresh produce and big, local personalities, the country lifestyle in the Southern Tablelands is actually living pretty large ¹⁰ .

⁹ Tablelands Destination Development Plan 2020 to 2025

¹⁰ Southern Tablelands Brand Guidelines 2020

Sub-region Positioning (continued)

SOUTHERN TABLELANDS	
Experience Development Themes	<p>Five experience platforms drive and coordinate tourism product and experience development across the region:</p> <ul style="list-style-type: none"> • Country Life Create experience trails to link key tourism products with country towns and villages allowing visitors to engage with country characters and enjoy country life, local arts, artisans and culture to encourage visitor dispersal across the region • Food, Drink and Produce Leverage the strength of the Canberra District Wine Region, developing Hilltops Wine Region, reputation for regional produce, country 'hatted' restaurants, pubs, cafes, authentic agri-tourism experiences and distilleries • Australian Heritage Provide opportunities for visitors to engage and experience the rich Australian heritage story of the Southern Tablelands in an appealing and contemporary way • Nature and Outdoors Increase awareness and activation of the Southern Tablelands' distinct nature-based tourism experiences including caves, waterways, camping and cycling • Country Festivals and Events Establish a hierarchy of tourism events (hallmark events, destination events, sports tourism events and community events) across the region to promote and develop the region's authentic country festivals and events.

Table 4. Sub-region positioning for Southern Tablelands

SNOWIES	
Description	The Snowy Monaro region is a significant tourism destination that attracts large numbers of visitors each year for recreation and relaxation activities and to explore the rich history and diverse landscapes. The region is most well-known as a snow holiday destination and it is the winter tourist market that has the largest economic impact on our regional communities. Outside of winter, there are significant tourism opportunities that have capacity for growth ¹¹ .
Vision	The Snowy Mountains is the best nature adventure destination in Australia NB: The brand Snowy Mountains is an asset to the region. Successful tourism businesses will leverage this brand because of its high recognition in the marketplace.
Positioning Statement	Be invigorated by alpine challenges, summer adventures and inspirational stories. Feel the source of powerful energy, where legends are still made.
Experience Development Themes	<ul style="list-style-type: none"> • Challenge yourself in nature • Remarkable journeys • Our heritage • Savour the Snowies

Table 5. Sub-region positioning for Snowies

¹¹ Snowy Monaro Destination Management Plan 2019

Sub-region Positioning (continued)

	SOUTH COAST
Description	Eurobodalla and the Sapphire Coast (Bega Valley) make up the South Coast with its beautiful coastlines, deserted beaches, famous surf breaks, tranquil rainforests, national parks, rivers and lakes, and striking mountain backdrops.
Vision	<p>EUROBODALLA¹²</p> <p>Cooperate and support each other to achieve a strong and innovative visitor economy that preserves our natural environment, fosters support and pride from our community, celebrates and offers distinctive and quality visitor experiences related to our natural and marine assets, regional food, culture and heritage, and welcomes and cares for our visitors.</p> <p>SAPPHIRE COAST¹³</p> <p>Sapphire Coast is a compelling year-round tourism destination, offering internationally competitive, unique and immersive world-class, nature based experiences. The towns and villages complement the stunning landscape with passionate chefs and artisans providing unique connections with the pristine oysters, seafood and produce of the region. The warm and welcoming locals create year-round festivals to celebrate this unique place with visitors and community alike.</p>
Positioning Statement	<p>EUROBODALLA</p> <p><i>Eurobodalla all Kinds of Natural</i></p> <p>To: Individuals, couples and families living in busy urban centres. They're looking to escape the city and reconnect in a more natural environment.</p> <p>Who want: More than just flopping on a beach and doing what everyone else does. They want to feel alive, exhilarated, and a sense of freedom. They're looking for adventure, something new, and extracting the most out of their time away from daily reality.</p> <p>SAPPHIRE COAST</p> <p>Sapphire Coast is a hidden, but easily accessible pocket of Australia's epic coastline, where you can celebrate and share your love of nature.</p> <p>Immerse yourself in a lush network of National Parks, heritage sites, dramatic mountains, bordered by coastal wilderness and lapped by pristine waters teeming with life. The towns and villages complement the stunning landscape with passionate chefs and artisans providing unique connections with the pristine oysters, seafood and produce of the region. The warm and welcoming locals create year round festivals to celebrate this unique place with visitors and community alike¹⁴.</p>

¹² Eurobodalla Destination Action Plan 2018 to 2021

¹³ Sapphire Coast Vision & Platform for Growth (2019)

¹⁴ Eurobodalla All Kinds of Natural Brand Style Guide 2019

Sub-region Positioning (continued)

SOUTH COAST	
Experience Development Themes	<p>EUROBODALLA</p> <ul style="list-style-type: none"> • Nature - Leisure and recreation experiences provided by our beaches, waterways, national parks and state forests, local recreational areas including adventure and Aboriginal tourism. • Food - Opportunities for visitors to purchase and taste local produce, markets, food, tourism events, restaurants and cafes, pop-ups. • Towns and Villages - Opportunities for visitors to experience distinct local village life, shopping, arts, culture, heritage, entertainment. • Events - Major tourism events that attract new and repeat visitors, special interest events that enhance the visitor experience. <p>SAPPHIRE COAST – What makes us unique</p> <ul style="list-style-type: none"> • Immerse Yourself in Nature - Refreshing, exceptional nature-based experiences. Personal, uncurated encounters with nature. Personal challenge through active holidays. • 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. • Remarkable Journeys - Be enticed to journey across the region by stunning landscapes and experiences. Journey by car, adventure by kayak, bike or walk. • Our Heritage and Culture - Indigenous connections present and past. Arts, culture and events. Early European and multicultural Australia.

Table 6. Sub-region positioning for South Coast



Experience Strengths

The following highlights the experience strengths of the Southern NSW region.

Surrounding Canberra and close to Sydney, **there is nowhere else in Australia** where you can ski or hike Australia's highest mountains and then head to the coast and experience the oldest mainland whaling story on the same day.

With a **vibrant events, arts and crafts scene**, matched with **contemporary cultural experiences**, visitors have the opportunity to interact with artists and artisans through unique events and everyday visits. These interactions are a reflection of the region's authentic and welcoming village atmosphere.

Spectacular landscapes and waterways provide a setting for **adventure and nature-based experiences**, right across the mountains, forested national parks and deep valleys to the coastal beaches and surf breaks.

With the **region's proximity to Sydney, Canberra and Melbourne** and the challenges with airline capacities, the **self-drive touring market** and flow of visitors are continuing to be a significant influence and opportunity to increase yield.



The region is rapidly developing its positioning as a trails destination catering for all forms and levels of adventure ranging from the existing **long-distance hikes, rail trails, road cycling routes and challenging MTB tracks**.

Canberra adds depth to the region's visitor experience. Its **infrastructure, including transport hubs (air and rail), national institutions and accommodation** stock are all important influences for our region that can either act as an entry point or encourage length of stay across the region.

The region's **fertile soil and marine environment** gifts agritourism operators with a **diverse and rich harvest of world-class offerings**; including award-winning cool climate wines, distilleries and craft breweries of Canberra District and Hilltops, the iconic cherries of Young, international quality wool products from Goulburn, the famous oysters of the South Coast and renowned cheeses and dairy products from Bega.

Figure 8. Presents the experience strength of the Southern NSW region

Target Markets and Visitor Profiles



Target Markets and Visitor Profiles

The Southern NSW destination management planning process identified the following main visitor markets and growth development opportunities.

SUB-REGION	MAIN VISITOR MARKETS
Southern Tablelands	<p>Primary</p> <ul style="list-style-type: none"> • Domestic visitors from Sydney, ACT and regional NSW • NSW targeting family road trippers and affluent 45+ Australians • Visiting Friends and Relatives (VFR) <p>Secondary</p> <ul style="list-style-type: none"> • Young travellers – Traditional market Gen Y/Z • Australians and internationals • Domestic visitors travelling between Melbourne and Sydney targeting affluent 45+ Australians
Snowies	<p>Existing Markets</p> <ul style="list-style-type: none"> • Nature tourism - is a market segment based around outdoor and nature experiences. • NSW family market – the NSW family domestic travel fulfills a key role in busy family lives by offering a chance for families to reconnect, recharge and have a break from normal routine. <p>New and Growth Markets</p> <ul style="list-style-type: none"> • Roadtrippers - this market is attracted to a destination by strong positioning for drive tourism supported by planned itineraries and high-quality experiences. Creating and promoting a small number of high-quality drive routes with good experiences, will support growth in this market. • International backpackers - this market is seeking a diversity of experiences often with an active and adventure focus. An increase in adventure product, especially in summer and better transport to and within the region will underpin growth for this market.
South Coast	<p>EUROBODALLA</p> <p>The focus for Eurobodalla promotional initiatives should be concentrated on the following key visitor markets:</p> <ul style="list-style-type: none"> • Domestic overnight visitors from Canberra/ACT and Sydney (primary), Regional NSW and Victoria (secondary) targeting families, retirees, VFR with the intention of attracting them to stay longer • Domestic daytrip visitors from the South Coast and Canberra targeting families and friends, retirees and VFR with the intention of converting them to overnight stays • International visitors arriving in Canberra and Sydney with the intention of attracting them to stay longer in Eurobodalla. <p>SAPPHIRE COAST – what makes us unique</p> <ul style="list-style-type: none"> • Established family - School holidays and longer breaks, share experiences in nature, family tradition, visiting family and friends • Young families - Nature experiences, walkers, getaway with friends, short breaks, VFR • Nomads - Food and wine, caravan trips, visiting family and friends • Couples no kids (any age) - Nature experiences, walkers, getaway with friends, short breaks, adventure • Conference – New undiscovered location, short travel time, small groups • Accessible – Nature experiences, getaway with friends, short breaks, VFR

Table 7. Main visitor markets for the Southern NSW region

Target Markets and Visitor Profiles (continued)

In addition to these sub-region and destination visitor markets, the following growth opportunities were identified during the destination management planning process for the main target markets – domestic, international, travelling with purpose and marine tourism across the Southern NSW region.

TARGET MARKET	GROWTH OPPORTUNITIES
<p>Domestic families, couples, groups of women, VFR</p> <p>ORIGIN Sydney Canberra NSW Regional Sydney - Melbourne FIT Victoria</p>	<p>Increasing yield from the day visitor segment is important for the <i>Recovery</i>, <i>Momentum</i> and <i>Accelerate</i> phases up to 2030.</p> <p>Convert to overnight stays by raising awareness of the quantity and diversity of offerings and incentivising conversion with packaging.</p> <p>Leverage the region's accessibility by creating touring routes and itineraries.</p> <p>Develop new and elevate existing experiences to motivate trip decisions.</p> <p>Build awareness and advocacy within the region as a means of supporting sustainable growth for the Visitor Economy.</p> <p>Investigate significant cultural centres as showcases for First Peoples stories, regional produce, experiences, and activities.</p> <p>Identify and foster evening economy options to convert day trips to overnight stays.</p> <p>Position renewable energy infrastructure to education and interest groups.</p> <p>Accessibility for all to tourism facilities, products, and services should be a central part of any responsible and sustainable tourism policy. Accessibility is not only about human rights. It is a business opportunity for destinations and companies to embrace all visitors and enhance their revenues.</p> <p>Leveraging the visitation from festivals and events to grow broader economic activity.</p>
<p>International Day visits/group travel, ex Sydney Day visits/group travel, ex Canberra</p> <p>ORIGIN Sydney/Melbourne drive consumers FIT arrivals by road, air and ship VFR Western Markets include UK, USA, Germany, and New Zealand Eastern Markets include SE Asia and China</p>	<p>As international markets return, aligning opportunities with the <i>Momentum</i> and <i>Accelerate</i> phases up to 2030 are particularly important.</p> <p>Reopening of Canberra International Airport and back to capacity.</p> <p>VFR, SE Asia and New Zealand are likely to provide the best opportunities in the Recovery phase.</p> <p>Identify hero products and experiences and mentor those businesses to become international ready with commissionable and bookable experiences that align to markets that DNSW and VC are focused on.</p> <p>Investigate the opportunity for Signature Experiences to align with Tourism Australia activities.</p>

Target Markets and Visitor Profiles (continued)

TARGET MARKET	GROWTH OPPORTUNITIES
<p>Travel with a purpose - meetings, incentives, business, conference and exhibitions (emerging)</p> <p>Canberra political, business and conference attendees</p> <p>Mid-week trade, with links to hero food and wine experiences</p> <p>Pre, post and partner conference visitor programs</p> <p>ORIGIN: Greater Sydney</p>	<p>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.</p> <p>New build and upgrading of existing conferencing venues and cultural centres can open up capacity and new business events markets.</p> <p>Meeting the needs of market requirements for hybrid meetings.</p> <p>Develop stronger communications and awareness of the value and opportunity of leveraging off business event activities.</p> <p>Leverage off capital city business and conference markets.</p> <p>Development of appropriate accommodation offerings.</p>
<p>Marine Tourism (cruising, boating, voyaging)</p> <p>Charter, sailing, ferry, and cruising vessels, regional and port-based tours experiences</p> <p>ORIGIN</p> <p>Victoria, Regional NSW</p>	<p>The cruise industry is forecast to bounce back strongly on its reopening in 2022 – domestic markets are the key driver.</p> <p>Accessible new/improved experiences can be the driver for additional landside visitor expenditure by cruise visitors.</p> <p>Sailing, diving, and recreational boating markets are booming, and safe harbours and ports are popular.</p> <p>Recreational and sport fishing including deep water, competition and inland angling are growth segments that attract strong visitation that could address low-season challenges.</p>

Table 8. Growth opportunities for Southern NSW region



Strategic Objectives



Strategic Objectives

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

VES Strategic Pillars	Road to Recovery	Build the Brand	Showcase our Strengths	Invest in World Class Events	Facilitate Growth
Southern NSW DMP Strategic Objectives	Support the Southern NSW visitor economy to recover and be sustainable, capable, and resilient.	Position and promote Southern NSW's three sub-regions and their destinations to align to the Feel NSW brand.	Develop authentic visitor products and experiences to drive visitation to Southern NSW.	Grow current events and attract new events that grow the Southern NSW visitor economy and are aligned to our community values.	Provide an enabling environment to attract investment in the Southern NSW visitor economy.
Key Result Areas	<ul style="list-style-type: none"> Return visitation and expenditure to pre-Covid levels by 2024 Sustainable and resilient visitor economy businesses 	<ul style="list-style-type: none"> Increased demand to visit Sydney and NSW Greater brand awareness in target markets Improved response to campaign activity Increased community satisfaction 	<ul style="list-style-type: none"> Increased average length of stay and yield Growth in visitation and expenditure for regional destinations Higher levels of repeat visitation 	<ul style="list-style-type: none"> Increased economic impact and visitor attendance at events Greater promotion of Sydney and NSW as an events destination Increased community and visitor satisfaction 	<ul style="list-style-type: none"> Increased private and public sector investment in visitor infrastructure Improved access to visitor destinations and visitor attractions Increased visitor satisfaction with accommodation and experiences

Table 9. Strategic objectives for the Southern NSW visitor economy aligned to the VES 2030.

Action Plan



Action Plan

The following sections identify actions related to the five Southern NSW 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 Southern NSW 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 and bushfire emergencies on top of record 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	Work with DNSW to deliver DNSW First initiatives to strengthen industry sustainability, capability, and resilience	DNSW	DSNSW LGAs, LTOs	2022 to 2024
1.2	Work with the DNPMG to create an 'Understanding the Regional Visitor Economy Program' to improve understanding of local government, industry and community about the Southern NSW visitor economy	DNPMG	DNSW DRNSW LGAs	2022 to 2024
1.3	Work with the DNPMG to advocate and maximise the opportunities and resources available from external grant funding opportunities to support regional visitor economy resilience and growth	DNPMG	DNSW DRNSW	2022 to 2030
1.4	Work with the DNPMG and regional stakeholders to advocate for work force solutions around visitor economy staff and skills and housing shortages	DRNSW	DNPMG DSNSW	2022 to 2030

Southern NSW Destination Management Plan

2.0 Build the Brand

Strategic Objective: Position and promote Southern NSW's three sub-regions and their destinations to align to the Feel NSW brand

Building the Southern NSW brand is about building and strengthening awareness of the sub-regions and their related destination identities to align with the Feel NSW brand and identify opportunities for cooperative marketing that will drive regional dispersal, higher yield and longer stays.

The following actions focus on identifying and communicating marketing cooperation opportunities and initiatives across the Southern NSW region.

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
2.1	Work with DNSW, LGAs and LTOs to create a Southern NSW Marketing Toolkit that maps the three sub-regions and related destination brand identities, product and experience strengths and ways to align with Feel NSW brand	DSNSW	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 Southern NSW with Canberra, Sydney, Victoria and Regional NSW source markets	DSNSW	DNSW LGAs, LTOs	2022 to 2026
2.3	Continue to maintain a strong partnership with Visit Canberra to identify cross regional marketing opportunities for Southern NSW stakeholders	DSNSW	Visit Canberra DNSW LGAs, LTOs	2022 to 2030
2.4	Work with DNSW to coordinate and communicate opportunities for Feel New NSW content development for Southern NSW stakeholders	DSNSW	DNSW LGAs, LTOs	2022 to 2030

3.0 Showcase our Strengths

Strategic Objective: Develop authentic visitor products and experiences to drive visitation to Southern NSW

There is a need to continue to support the development of high-quality visitor experiences that will be motivators for new and repeat visitors. Investment in existing or new products is a key enabler if the region is to provide the depth of experiences that have the potential to incentivise and encourage visitation. The region's proximity to Canberra also provides a significant advantage relative to other regional NSW destinations.

The following actions focus on supporting and developing authentic experiences focused on the sub-regional and destination identities and strengths.

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
3.1	Work with DNSW to deliver NSW First programs that encourage and support development and packaging of new and improved existing products and services	DNSW	DSNSW	2022 to 2030
3.2	Work with the DNPMG, NPWS and FCNSW and private landowners to identify opportunities for adventure and nature-based product and experience development	DNPMG	DNSW NPWS FCNSW LGAs, LTOs	2022 to 2030
3.3	Work with the NSW Government to leverage opportunities for product and experience development for the Snowy Mountains Special Activation Precinct	DSNSW	NSW Govt	2022 to 2026
3.4	Work with the DNPMG to support operators to further develop agritourism and produce product development opportunities	DNPMG	DNSW DRNSW LGAs, LTOs Industry collaborative groups	2022 to 2026
3.5	Continue to work with Visit Canberra, LGAs and LTOs to identify cross regional product and experience development opportunities	DSNSW	Visit Canberra DNSW LGAs, LTOs	2022 to 2030
3.6	Work with the DNPMG 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 and Galleries NSW LGAs, LTOs LALCs SEA/STA	2022 to 2030
3.7	Work with DNSW to coordinate the delivery of DNSW First programs and resources to support operators to be international ready	DNSW	DSNSW LGAs, LTOs	2022 to 2030

4.0 Invest in World Class Events

Strategic Objective: Grow current events and attract new events that grow the Southern NSW visitor economy and are aligned to our community values

Events that align to the key strengths of the region play a pivotal role in driving year-round visitation, creating reasons to visit, engage new visitors and drive visitation in shoulder seasons. With a diversity of events across Southern NSW aligned to the region's positioning strengths there is an opportunity to generate additional economic benefits through delivering higher quality events across the region, and the retention of existing events and attraction of new events is imperative.

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	DSNSW 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	DSNSW 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, including business events	DSNSW	DNSW DRNSW SEA/STA	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 and advocate for infrastructure funding	DSNSW LGAs, LTOs	DNSW DRNSW	2022 to 2030

5.0 Facilitate Growth

Strategic Objective: Provide an enabling environment to attract investment in the Southern NSW visitor economy

There is a need to position DSNSW as an attractive region to invest through working with partners to undertake and analyse relevant market research to identify and understand new visitor economy investment opportunities. Advocating to local and state government stakeholders for the need to continue to streamline planning and approvals processes is also important. Continuing to support operators to make it easier to do business is also critical.

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	DSNSW	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	DSNSW	DNSW LGAs LTOs	2022 to 2030
5.3	Work with Destination NSW and the Destination Network Project Management to disseminate and communicate relevant visitor economy research to regional stakeholders	DNSW DNPMG	LGAs LTOs	2022 to 2030
5.4	Work with the DNPMG to advocate to the NSW Government and LGAs to streamline planning requirements to better support the growth of the visitor economy	DNPMG	NSW Govt DNSW DRNSW LGAs LTOs	2022 to 2030
5.5	Work with the DNPMG to advocate to the Australian and NSW Government to collectively advocate for improved digital and transport connectivity	DNPMG	NSW Govt DNSW	2022 to 2030
5.6	Work with DSSS 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	DSNSW DSSS	LGAs LTOs	2022 to 2030
5.7	Work with the DNPMG 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 infrastructure development projects were identified during the destination management planning process that will help to grow the Southern NSW Visitor Economy.

There has been significant progress in terms of planning and development of new infrastructure development across the Southern NSW region. At the time of preparing this Plan, there is a current pipeline of over \$183 million in visitor economy infrastructure development and grant funded projects across the region. In addition, there is over \$390 million allocated to the Snowy Mountains Special Activation Precinct.

The following table presents a summary of infrastructure development projects that have been completed, are in progress and proposed to enhance the visitor experience across the three DSNSW sub-regions.

STAGE	SOUTHERN TABLELANDS	SNOWIES	SOUTH COAST
Completed	<ul style="list-style-type: none"> Goulburn Performing Arts Centre Murrumbateman Winery Trail The Chinese Tribute Garden upgrade 	<ul style="list-style-type: none"> Snowies Alpine Walk <ul style="list-style-type: none"> » Guthega to Charlotte Pass Thredbo Valley Track Cooma Performing Arts Centre Bundian Way Gallery, Delgate 	<ul style="list-style-type: none"> Wharf to Wharf Walk Eden Wharf and Welcome Centre The Twyford, Merimbula Bay Pavilions Merimbula Airport Basil Sellers Exhibition Centre
In Progress Funded or partially funded (P)	<ul style="list-style-type: none"> Braidwood Museum Wombeyan Caves Tourism Project Nick O'Leary Wines, Cellar Door and Restaurant Goulburn Sporting facilities upgrades (P) St Clair Museum and Archives (P) Rocky Hill War Memorial Tower conservation (P) Goulburn Catholic Cathedral restoration project and minor Basilica application (P) Harden Golf Club upgrade 	<ul style="list-style-type: none"> Snowies Alpine Walk <ul style="list-style-type: none"> » Charlotte Pass to Perisher via Porcupine Rocks » Perisher to Bullocks Flat Lake Jindabyne Shared Trail Cooma Sports Hub 	<ul style="list-style-type: none"> Bundian Way Walking Track (Node 1) Murramarang South Coast Walk Light to Light Walk Batemans Bay Coastal Headland Walk Narooma Arts and Community Centre Mogo MTB Trails Eden Mountain Bike Hub Narooma Mountain Bike Hub Muliyaan Cultural and Wildlife Centre South East Centre for Contemporary Art Bega (SECCA) Old Bega Hospital Community Cultural Centre Jigamy Campgrounds
Proposed	<ul style="list-style-type: none"> Rail Trails <ul style="list-style-type: none"> » Goulburn to Crookwell » Galong to Boorowa » Molonglo Australian Agricultural Centre, Crookwell Murrumbateman Winery Trail Extension 	<ul style="list-style-type: none"> Rail Trails <ul style="list-style-type: none"> » Monaro Snowy Alpine Heritage Centre Jindabyne MTB Adventure Park 	<ul style="list-style-type: none"> Eden Wharf Extension Murramarang to Batemans Bay Coastal Walk Batemans Bay Foreshore and Marina National Circularity Centre, Bega Merimbula and Eden lakeside boardwalk upgrades

Table 10. Regional priorities for the Southern NSW visitor economy by sub-region and project status

Regional Priorities (continued)

In addition to these key projects, it is recommended that Southern New South Wales continue to develop infrastructure and amenities to support:

- **Cycling** (all forms) that includes:
 - » The significant cluster of MTB trails from the Snowies to Canberra and along the coast including world-class MTB events
 - » The rail trails in development across the region that have the potential to provide a variety of cycling experiences
 - » Road cycling including events such as L'Etape and leveraging off neighbouring Wollongong as a UCI Bike City
- **Great South Coast Walks** - the continued development and promotion of the cluster of overnight hikes and high quality day walks from the Royal National Park to the Victorian border with a focus on increasing products, packages and services that commercially leverage off the core trail infrastructure.
- **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. Potential to expand program to include Snowy Monaro.
- **Agritourism** - engaging regional producers and growers to recognise and take advantage of the growth sector of Agritourism, including strategies and programs that identify hero produce, support industry to become 'visitor ready' and to foster partnerships that increase the promotion and profile of the products, linking purchase to place.
- **Southern Tablelands Destination Development** - Continue to implement The Southern Tablelands Destination Development Plan which has been developed to create a roadmap to guide the collaborative work of local, regional and state tourism stakeholders to grow, develop and promote the Southern Tablelands region and its towns and villages as a distinct new, appealing and competitive tourism region in NSW.
- **Canberra Partnership Framework** - capitalise on the regions proximity to Canberra. The region comprises a diversity of tourism opportunities with attractions including an international airport, national cultural institutions, growing regional food and wine offerings, and easy access to the coast and Snowy Mountains. This unique geographic situation presents a range of opportunities and challenges for the development and delivery of tourism experiences and products.
- **Cross Border opportunities** - in addition to cross border opportunities with Canberra, work with stakeholders across destination network (DSSS, DRM and DNCW) and local government borders to deliver visitor focused outcomes.





Stakeholder Roles in Growing the Regional NSW Visitor Economy



Stakeholder Roles in Growing the Regional NSW Visitor Economy

The Southern NSW 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 Southern NSW, Destination NSW and Visit Canberra 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 Southern NSW

Destination Southern New South Wales 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 Southern NSW 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 Southern NSW 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.

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 operators¹⁵.

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**¹⁶.

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

¹⁵ Visitor Economy Strategy 2030

¹⁶ 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. DNSW will 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 businesses¹⁷.

The NSW Government's 'Regional Development Framework' and '20-Year Economic Vision for Regional NSW – Refresh' set out the Government's priorities and plans to achieve long-term social and economic success for regional communities across the state. In addition, Regional Economic Development Strategies provide a clear economic development strategy for the regions and guide government investment in economic development initiatives in regional NSW.

¹⁷ www.regional.nsw.gov.au



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 councils¹⁸.

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
- Regional Joint Organisations, including CRJO
- NSW Government Departments and Agencies (represented by the DNSW Visitor Economy Seniors Officers Group)
- NSW Tourism Industry Associations

¹⁸ <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 Southern NSW 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 has 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

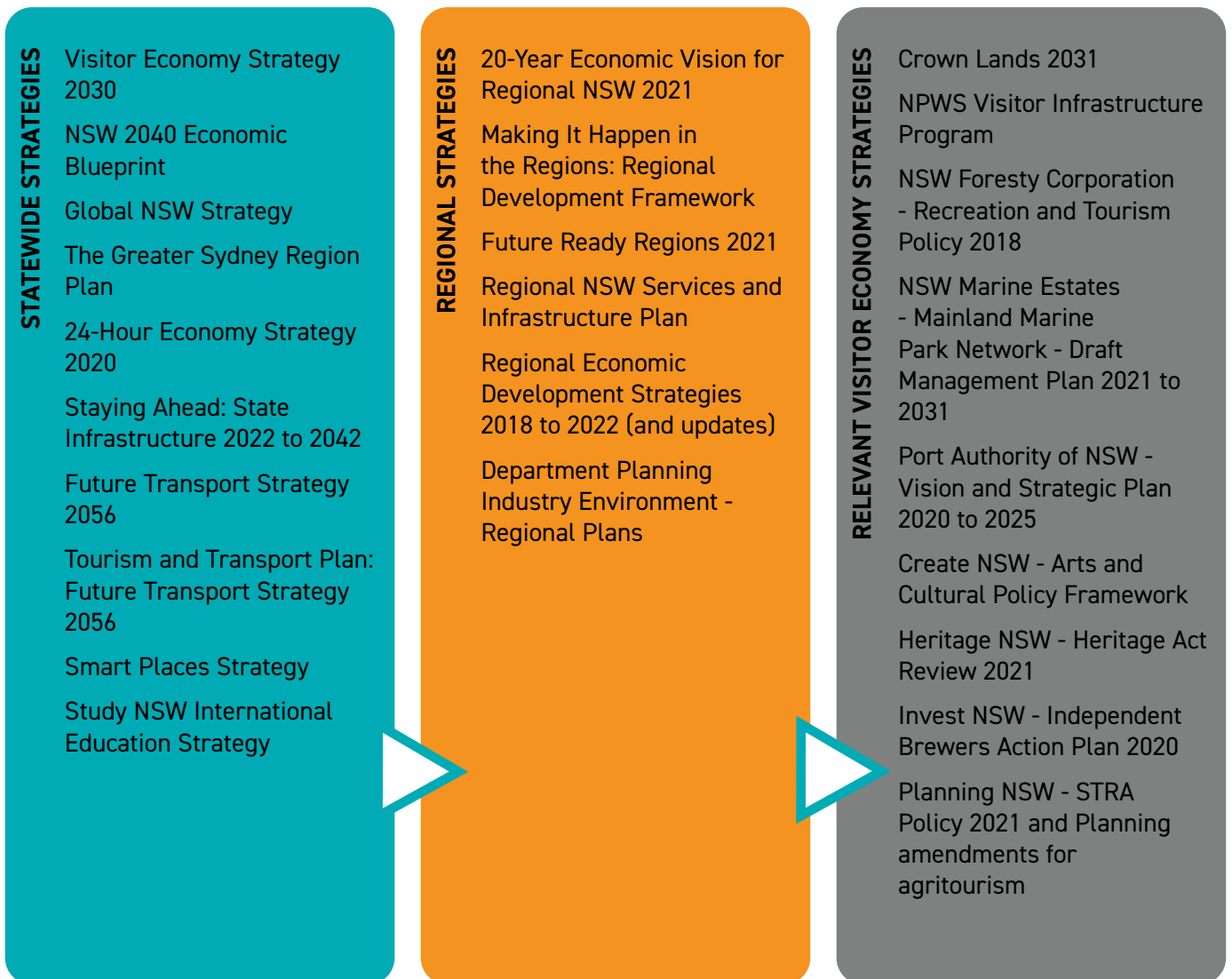


Figure 9. Strategies relevant to the regional visitor economy

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	<p>Facilitate growth in demand and address capacity constraints to develop a nationally and globally competitive visitor economy.</p> <ul style="list-style-type: none"> » 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	<p>Create economic benefits that outweigh the economic costs.</p> <ul style="list-style-type: none"> » 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	<p>Recognise alignment and support for other government strategies.</p> <ul style="list-style-type: none"> » 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 encourages 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. <ul style="list-style-type: none"> » 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. <ul style="list-style-type: none"> » 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.

Table 11. Assessment criteria for NSW Government Cost Benefit Analysis



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