



Destination Sydney Surrounds North

Destination Management Plan 2018 – 2020



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ABBREVIATIONS & ACRONYMS

ATE	Australian Tourism Exchange
ATEC	Australian Tourism Exchange Council
DMP	Destination Management Plan
DNs	Destination Networks
DNSW	Destination New South Wales
DSSN	Destination Sydney Surrounds North
FIT	Free Independent Travel
ITOs	Inbound Tour Operators
LGA	Local Government Area
LTO	Local Tourism Organisation
MICE	Meetings, Incentives, Conference and Events
OTA	Online Travel Agent
RAAF	Royal Australian Air Force
RFEP	Regional Flagship Events Program
RTF	Regional Tourism Fund
SWOT	Strengths, Weaknesses, Opportunities and Threats
TRA	Tourism Research Australia
UNESCO	United Nations Educational, Scientific and Cultural Organisation
VIC	Visitor Information Centre
VFR	Visiting Friends and Relatives

1 EXECUTIVE SUMMARY

Destination Sydney Surrounds North (DSSN) is one of six Destination Networks (DNs) established in New South Wales (NSW) as a result of the NSW Government's review of Regional Tourism Organisations in 2016. The DN comprises 13 Local Government Areas (LGAs): Blue Mountains, Hawkesbury, Penrith, Central Coast, Lake Macquarie, Newcastle, Port Stephens, Maitland, Dungog Shire, Upper Hunter Shire, Muswellbrook Shire, Singleton and Cessnock.

The primary responsibility of the DSSN DN is to drive the growth of the Visitor Economy in the region to help achieve the NSW Government's goal of doubling overnight visitor expenditure for the state between 2009 and 2020. It is an administrative zone, not a consumer facing brand or marketing entity, with the principal role of destination management.

The DSSN footprint is an important region to the New South Wales Visitor Economy generating **\$4.07billion** (TRA 2017) annually equating to **12.3% of the State's \$33.2billion** Visitor Economy.

DSSN is a diverse tourism region with a significant number of existing assets and a number of international-ready destinations with recognised brands in both the domestic and international markets. Its diversity is one of its key strengths, with a tourism offer encompassing aquatic and coastal, nature and adventure, food and wine, history and heritage, events and festivals and business events. It is generally well connected with Sydney by road and rail, providing access to the large Greater Sydney market as well as international visitors arriving at



Sydney Airport. Moreover significant developments at Newcastle Airport and the Port of Newcastle, as well as the planned Western Sydney Airport at Badgerys Creek, will allow more interstate and international visitors to access the region directly.

The region's Visitor Economy growth will be dependent on overcoming a number of key challenges. Overnight visitation is in decline, with a number of contributing factors including lack of awareness of some areas, perception of the region as a day trip rather than an overnight destination from Sydney, increasing competition and loss of market share of the key Sydney short break market. There are also significant gaps in the region's product and experience appeal and destination infrastructure. Industry skills development is needed and Local Governments and residents alike need to be positively engaged with the Visitor Economy.

In the past there has been a fragmented approach to managing the destination, coupled with an inconsistent approach to marketing in both the domestic and international markets. The new DN can now be leveraged to increase collaboration across the region and attract Government and private sector investment and marketing and events funding.

In consultation with stakeholders, the DN has developed a Destination Management Plan (DMP) to assist in achieving its vision of making Sydney Surrounds North one of the world's most successful regional tourism and events destinations; its mission of making Destination Sydney Surrounds North the most successful Destination Network in NSW; maximising the benefits of the Visitor Economy for the region and NSW; and to help achieve the NSW Government's goal of doubling overnight tourism expenditure by 2020.

Seven key strategic priorities have been identified, along with an Action Plan to deliver them in partnership with State and Local Government, Local Tourism Organisations (LTOs), industry and relevant associations. The seven priorities are:

1. Advocate for the DSSN Visitor Economy and foster greater collaboration between regions in DSSN.
2. Facilitate destination infrastructure development.
3. Facilitate product and experience development.
4. Facilitate major events and conference growth.
5. Maximise the benefits of regional tourism funding programs.
6. Facilitate industry skills development and knowledge.
7. Improve destination marketing effectiveness.

2

INTRODUCTION

2.1 About Destination Sydney Surrounds North

Destination Sydney Surrounds North (DSSN) is one of six Destination Networks (DNs) established in New South Wales (NSW) as a result of the NSW Government's review of Regional Tourism Organisations in 2016. The primary responsibility of the DN is to drive the growth of the Visitor Economy in their regions to help achieve the NSW Government's goal of doubling overnight visitor expenditure between 2009 and 2020. The operations of the DN are funded by Destination NSW.

Like the other DN, DSSN is an administrative zone, not a consumer facing brand or marketing entity. Its principal role is destination management, including representing and coordinating the region's tourism industry, product development, capacity building, identification of infrastructure opportunities and impediments to Visitor Economy growth, promotion of regional tourism funding programs and initial assessment of applications, and collaboration with DNSW on skills training, publicity and marketing activities.

Councils, Local Tourism Organisations (LTOs) and industry are encouraged to utilise the DSSN Destination Network as a source of information and support, as well as a coordinator for the region.

This Destination Management Plan (DMP) sets out the opportunities and challenges for the DSSN region, and the strategic priorities and actions to address them. The DMP will be a working document, allowing for fluidity and the ability to tweak priorities if necessary as new insights emerge.



2.2 Key Stakeholders

NSW Government	Joint Organisations of Councils
Destination NSW	Regional Strategic Alliance
NSW Office of Environment & Heritage	Hunter Regional Organisation of Councils (HROC)
Transport for NSW	Regional Development Boards
Other NSW government agencies	Regional Development Australia
National Parks & Wildlife Service	
Department of Industry	
Local Government Areas (LGAs)	Local Tourism Organisations (LTOs)
Blue Mountains City Council	Blue Mountains Accommodation and Tourism Association
Central Coast Council	Central Coast Tourism
Cessnock City Council	Destination Port Stephens
Dungog Shire Council	
Hawkesbury City Council	Tourism operators
Lake Macquarie City Council	
Maitland City Council	
Muswellbrook Shire Council	
Newcastle City Council	
Penrith City Council	
Port Stephens Council	
Singleton Council	
Upper Hunter Shire Council	
Industry Groups and Associations	
Newcastle Tourism Industry Group	
Hills, Hawkesbury and Riverlands Tourism	
Tourism Hunter	
Upper Hunter Country Tourism	
Hunter Valley Wine and Tourism Association	
Blue Mountains Economic Enterprise	
Tourism Accommodation Australia NSW (TAA)	
Hawkesbury VEAC	

2.3 Methodology

The following documents were reviewed in the preparation of the DSSN DMP:

- Newcastle City Tourism Draft Vision Workshop Notes, August 2017
- Central Coast Destination Management Plan 2017 – 2021 Draft Version 2, May 2017
- Blue Mountains Destination Management Plan, November 2016
- Maitland Visitor Economy Marketing Activity Plan, 2016
- Newcastle City Council Destination Management Plan 2016-2019
- Newcastle Visitor Economy Vision for the CBD, July 2015
- Penrith Destination Management Plan, April 2015
- Tourism Plan for Dungog Shire 2015 – 2018
- Hunter Valley Visitor Economy Destination Management Plan Draft, March 2014
- Destination Port Stephens Destination Management Plan 2014
- Upper Hunter Country Destination Management Plan, October 2013
- Hunter Visitor Economy Draft Destination Management Plan, July 2013
- Hills, Hawkesbury & Riverlands Destination Management Plan, May 2013
- Upper Hunter Shire Economic Development & Tourism Strategic Plan 2010
- Lake Macquarie Destination Management Plan Draft, 2017
- Hawkesbury Destination Management Plan Draft, 2017.

Key opportunities, challenges, strategic priorities and actions were then workshopped with key stakeholders across the region in draft format, in order to develop the final DMP.

The Destination Sydney Surrounds North Destination Management plan will be reviewed and updated regularly. The intent of the document is to remain current. Review periods will be 3 months, 6 months and 12 months.

DSSN DMP review dates:

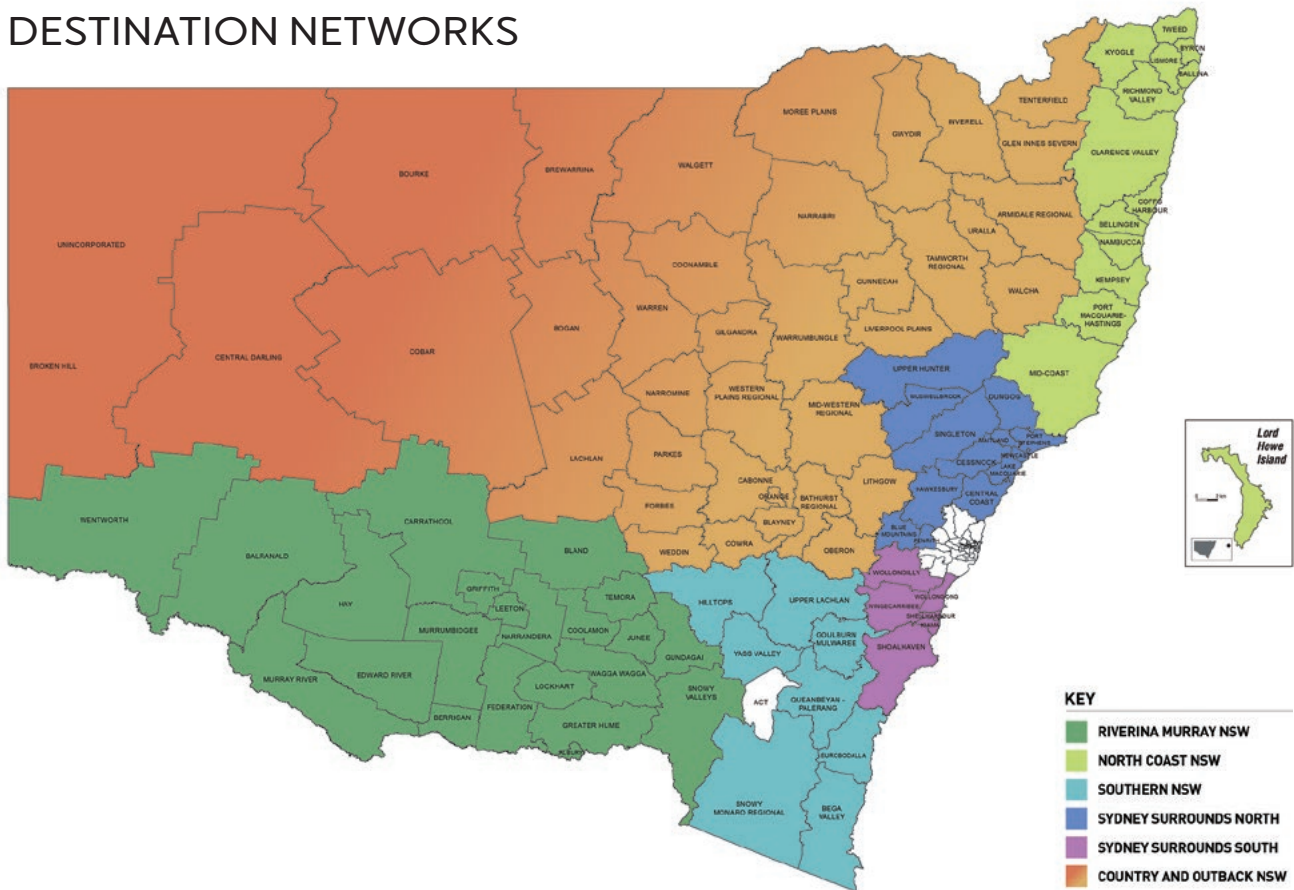
- May 2018 (3 Month Review)
- November 2018 (6 Month Review)
- November 2019.

3 SITUATION ANALYSIS

3.1 Destination footprint

Destination Sydney Surrounds North comprises 13 Local Government Areas (LGAs).

DESTINATION NETWORKS



It is a diverse region, rich in tourism destinations, experiences and products, including a number of international-ready destinations with recognised brands in domestic and international markets, such as the Blue Mountains, the Central Coast, the Hunter Valley, Newcastle and Port Stephens.

The Visitor Economy plays a key role across the broad region, generating significant expenditure that supports small businesses.

Blue Mountains

The Blue Mountains is situated 120km west of Sydney's CBD. Natural landscapes are a focus of the region's tourism offering, with the Blue Mountains National Park declared a UNESCO World Heritage site. The area has a relatively small urban footprint, and boasts a rich indigenous and multi cultural heritage. The Blue Mountains is one of NSW's leading international tourism brands.

Population: 80,072
 Total Visitor Numbers: 2,937,000
 Total Visitor Expenditure: \$496million
 VisitNSW listings: 509
 MeetinNSW listings: 21
 Export ready listings: 31

Penrith

Penrith is located 50km from Sydney's CBD, is on the popular domestic and international visitor route to the Blue Mountains, and is recognised as the gateway to the Blue Mountains. Penrith offers adventure opportunities and proximity to the planned Western Sydney Airport and the region is positioned as one of three major growth areas in Western Sydney, however its unique point of difference is water-based. Penrith Lakes and the Nepean River present an important tourism opportunity, but need development.

Population: 202,076
 Total Visitor Numbers: 1,274,000
 Total Visitor Expenditure: \$223million
 VisitNSW listings: 62
 MeetinNSW listings: 0
 Export ready listings: 5

Hawkesbury

The Hills, Hawkesbury and Riverlands region stretches from the mouth of the Hawkesbury River to the Blue Mountains, and is accessible in just 40 minutes from Sydney's CBD. The 120km long Hawkesbury River is the heart of the region, which is best known for its natural beauty and pioneer heritage. Also known as the food bowl of Sydney, regional produce, farm-gates, history & heritage.

Population: 66,782
 Total Visitor Numbers: 961,000
 Total Visitor Expenditure: \$115million
 VisitNSW listings: 113
 MeetinNSW listings: 1
 Export ready listings: 5

Central Coast

The Central Coast is located midway between Sydney and Newcastle, and is a region characterised by its natural beauty, including beaches, national parks, lakes, waterways, headlands and hinterland.

Population: 334,857
Total Visitor Numbers: 4,600,000
Total Visitor Expenditure: \$801million
VisitNSW listings: 377
MeetinNSW listings: 16
Export ready listings: 15

Newcastle

Newcastle is NSW's second largest city, and Australia's only regional city simultaneously on the beach and a working harbour waterfront. A thriving city itself, Newcastle is only a two hour drive from Sydney, and is an ideal base to explore the broad area comprising Port Stephens, Lake Macquarie, Upper and Lower Hunter, the Hunter Valley and the foothills of the Barrington Tops National Park.

Population: 162,766
Total Visitor Numbers: 3,607,000
Total Visitor Expenditure: \$782million
VisitNSW listings: 226
MeetinNSW listings: 13
Export ready listings: 20

Port Stephens

Port Stephens is a sophisticated coastal tourism destination within easy reach of Sydney along the Pacific Highway, and home of Newcastle Airport. It is characterised by its natural environment, including coastal, national park and hinterland, and an abundance of aquatic marine life. The region has established products and experiences and good awareness in both the domestic and international markets.

Population: 71,406
Total Visitor Numbers: 1,366,000
Total Visitor Expenditure: \$526million
VisitNSW listings: 158
MeetinNSW listings: 7
Export ready listings: 17

Lake Macquarie

Lake Macquarie is home to the largest saltwater lake in Australia, and also boasts a unique combination of stunning beaches and a pristine mountain environment. The region is easily accessible from both Sydney and Newcastle by road, rail and air and has a key market of Families and Caravan & Camping.

Population: 205,748
Total Visitor Numbers: 1,121,000
Total Visitor Expenditure: \$177million
VisitNSW listings: 127
MeetinNSW listings: 6
Export ready listings: 3

Maitland

The Maitland region is characterised by its scenic beauty and unique villages. It is one of the oldest and heritage rich regional centres in Australia, built on the banks of the Hunter River that brought life and trade to the early city. Maitland Gaol and the historic river port of Morpeth already feature in wholesalers' Newcastle cruise stop itineraries, with the potential to further develop the region.

Population: 78,096
Total Visitor Numbers: 648,000
Total Visitor Expenditure: \$94million
VisitNSW listings: 35
MeetinNSW listings: 3
Export ready listings: 1

Hunter Valley

The Hunter Valley encompasses both the Cessnock (C) and Singleton (S) LGAs. It is Australia's oldest and most visited surviving commercial wine region, located in the heart of the Hunter region and surrounded by World Heritage National Parks, rich heritage and colonial, indigenous and industrial history. The area also boasts superior accommodation and golf courses, and has a reputation as a quality short break destination.

Population: (C) 56,532, (S) 24,061
Total Visitor Numbers: (C) 1,102,000 (S) 397,000
Total Visitor Expenditure: (C) \$966million
(S) \$502million
VisitNSW listings: (C) 38 (S) 47
MeetinNSW listings: (C) 16 (S) 2
Export ready listings: (C) 19 (S) 1

Upper Hunter Country

Upper Hunter Country encompasses both the Muswellbrook Shire (M) and Upper Hunter (UH) Shire LGAs. The region is one of the closest complete rural environments to Sydney, and is home to the largest concentration of thoroughbred breeding businesses in Australia, for which it is internationally recognised. The area has a diverse environment, from western grasslands to subtropical and alpine.

Population: (M) 16,468 (UH) 14,522
Total Visitor Numbers: (UH) 275,000
Total Visitor Expenditure: (UH) \$46million
VisitNSW listings: (M)12 (UH) 67
MeetinNSW listings: (M) 3 (UH) 1
Export ready listings: (M) 0 (UH) 0

Dungog Shire

Dungog Shire is in the Hunter Region, and is bordered in the north by the Barrington Tops Plateau, which is part of the Great Dividing Range. It is rugged and hilly country, renowned for its national parks, forests, mountains and picturesque river villages. The area offers a quality rural experience within 2.5 hours drive from Sydney.

Population: 8,975
Total Visitor Numbers: 202,000
Total Visitor Expenditure: \$47million
VisitNSW listings: 105
MeetinNSW listings: 0
Export ready listings: 0

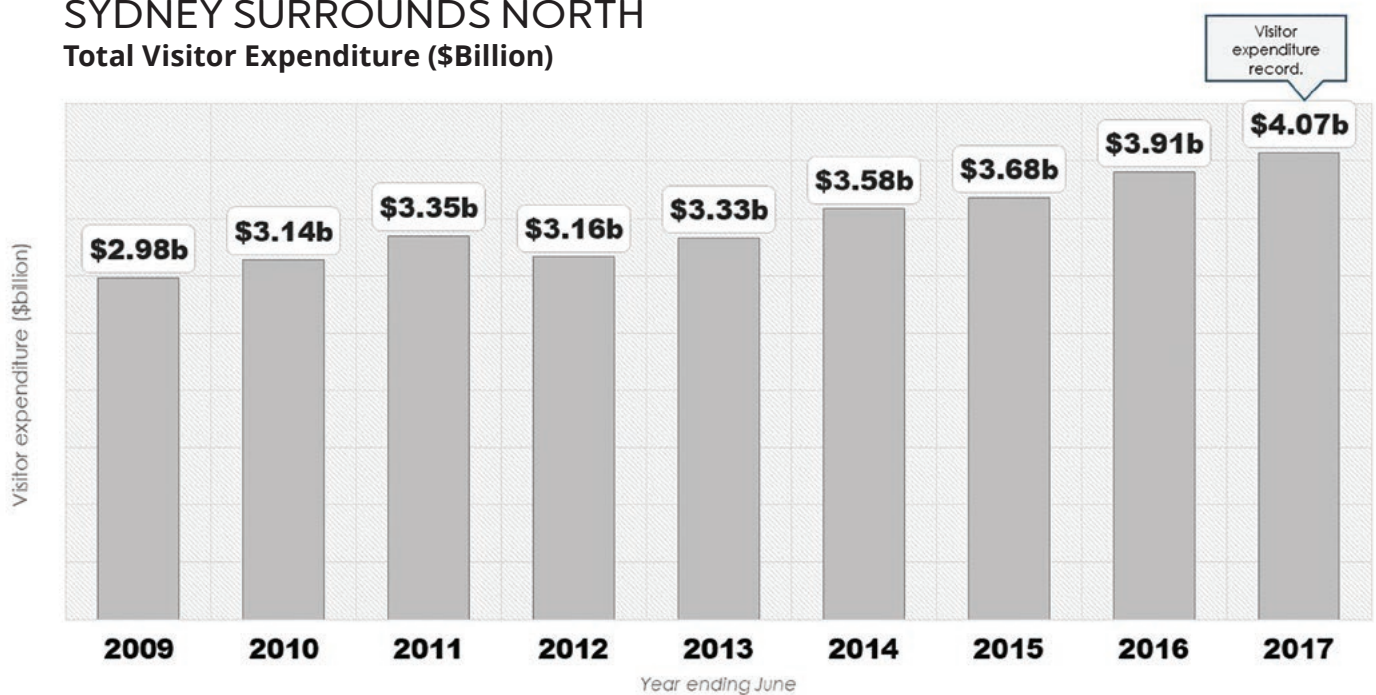
Data source: TRA Local Government Area Profiles 2016
(<https://www.tra.gov.au/research/regional-tourism/local-government-area-profiles/local-government-area-profiles>)



3.2 Value of the Visitor Economy

In 2017, the DSSN region attracted \$4.07billion in tourism expenditure, growth of 4.2% average growth over the past 10 Years (TRA).

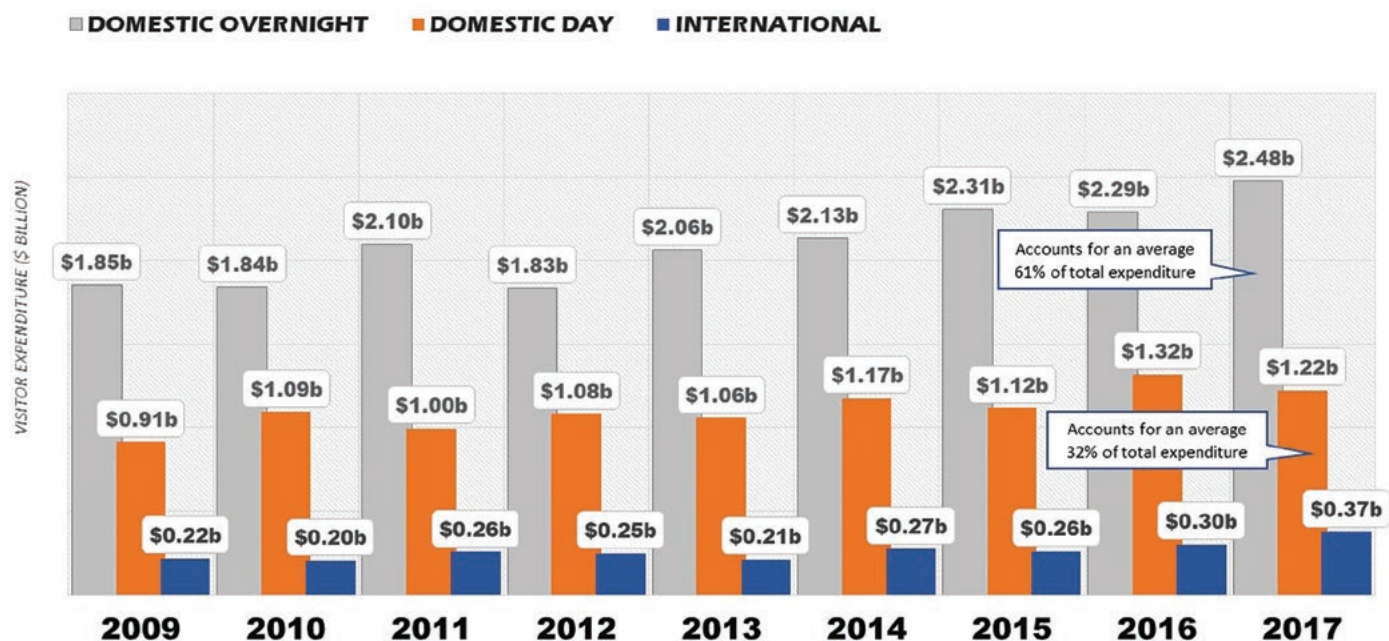
SYDNEY SURROUNDS NORTH Total Visitor Expenditure (\$Billion)



3.3 Visitor trends

Comparison of contribution of Domestic Overnight / Domestic Day / International (day and overnight)

SYDNEY SURROUNDS NORTH Visitor Expenditure Breakdown (\$Billion)



3.4 Target markets and customers

Each LGA in the DSSN region has developed market and customer targeting specific to its strengths and priorities.

Domestic Market

Greater Sydney and the DSSN region is by far the largest source market for DSSN and should continue to be the main focus, although the broader domestic market, particularly Victoria and Southeast Queensland, and the international markets present good growth opportunities in the mid to longer term, as the region's infrastructure, products and experiences develop.

- **Domestic day trip**

Predominantly intrastate, with the vast majority coming from the Greater Sydney area. Domestic day trip visitors are attracted by the region's diverse experience offer – coastal and aquatic, food and wine, nature and adventure, history and heritage. There is also significant potential to continue to grow the domestic day trip market from the Visiting Friends and Relatives (VFR) sector, and to increase the intra region day trips.

- **Domestic overnight**

Attracting the Greater Sydney short break market is a key success factor for the DSSN region, with further potential to grow intrastate short breaks as well as overnight visitors from Victoria and Southeast Queensland. Extending length of stay from short break visitors is also a priority along with increasing intra region day trips.

International Markets

Western markets have traditionally been the source of international visitors to the DSSN region, and there is opportunity to continue to grow these and also attract the significant growth markets of North Asia, Southeast Asia and India.

- **International day trip**

Predominantly group travel, originating in Sydney, from North and Southeast Asia.

- **International overnight**

Predominantly self-drive visitors from Western markets - UK, Europe, North America and New Zealand. DSSN's proximity to Sydney, with its international airport, and the new international terminal at Newcastle Airport as well as the planned Western Sydney Airport, present significant opportunities to grow the international overnight markets in terms of self-drive touring, school groups, sports groups, study tours and VFR. Development of new itineraries and products will enhance opportunities in this market.

Meetings, Incentives, Conference and Events (MICE)

The MICE market should be pursued as a key source of midweek visitors.

Events

Sporting and cultural events and festivals have the potential to attract domestic and international visitors.

Cruise

The cruise market is a significant growth segment, both domestically and internationally. The DSSN region is well placed to further leverage this market, with increased capacity at the Port of Newcastle. Whilst there is potential to attract cruise passengers arriving in Sydney, regional visitation is to be further explored.

Special interest

Weddings, golf, food and wine focus, equine, nature and adventure, soft adventure, arts, culture, education, indigenous and Wellness Tourism.



3.5 Competitors and competitive position

The different LGAs in the DSSN region compete with each other in the domestic market. They also face stiff competition from other domestic destinations, particularly the NSW North Coast and South Coast regions.

A key issue is the region's loss of market share in the Greater Sydney short breaks market, which is a key element in growing the DSSN Visitor Economy. Possible reasons include an inconsistent approach to destination management and a fragmented approach to marketing the region, resulting in a lack of relevant product and experience development and a lack of consumer understanding of what the region has to offer.

In the international market, DSSN competes with a vast number of Australian and other international destinations.

3.6 Products and experiences

A key strength of the DSSN region is the diversity of products and experiences on offer. The region has a strong base on which to build, but there are nonetheless a number of gaps that need to be addressed. The table below summarises the different regions' "hero" products and experiences, key infrastructure and gaps. In addition, signage and visitor information services have been identified as needing improvement across the region. There is also a significant gap across the region in terms of touring routes, trails and packaging.

A key action for DSSN is to develop comprehensive audits of existing infrastructure, products, experiences and events for each region. Gaps and priorities can then be identified and strategies developed to address them.

Region	Hero Experiences/ Products	Key Infrastructure	Gaps
Blue Mountains	Nature – UNESCO World Heritage listed Blue Mountains National Park Walking and hiking trails Culture and heritage – indigenous and pioneer Events and festivals Food (high end restaurants) Health & Well Being	Echo Point – Three Sisters precinct Heritage-built environment (buildings and trails) Great Western Highway Rail line Blue Mountains Cultural Centre Springwood Theatre & Hub	Lack of accommodation A Blue Mountains "Great Walk" needed No overnight in-park trekking No coach drop off area at Leura Lack of evening activities Lack of experiences for younger children/families No large conference facility Need longer trains on weekends Wifi & 4G coverage is patchy Strong digital presence Large event space

Region	Hero Experiences/ Products	Key Infrastructure	Gaps
Penrith	<p>Gateway to the Blue Mountains</p> <p>Events and festivals – sporting and cultural</p> <p>Culture</p> <p>Adventure</p>	<p>Good train, bus and road access</p> <p>Nepean River recreational facilities</p> <p>Joan Sutherland Performing Arts Centre</p> <p>Penrith Regional Gallery and The Lewers Bequest</p> <p>Penrith Lakes</p>	<p>Lack of accommodation for major events</p> <p>Limited high quality dining options</p> <p>Lack of Hallmark events and festivals</p> <p>Public transport within the region</p> <p>Limited retail trading hours</p> <p>CBD needs to be revitalised</p> <p>Lack of planning zones designated for tourism</p> <p>Penrith Lakes and Nepean River need tourism development</p>
Hawkesbury	<p>Explore the Hawkesbury</p> <p>Arts Discover history, arts and culture</p> <p>Taste the regional flavours</p> <p>Enjoy festivals and events</p> <p>Adventures in nature</p> <p>Food and wine</p> <p>Stay and savour the tranquility</p>	<p>Houseboats</p> <p>Seaplanes</p> <p>Australiana Pioneer Village</p> <p>Orchards</p> <p>Wineries / Cider</p>	<p>Need to upgrade Google and GPS mapping</p> <p>Limited public transport</p> <p>Limited opportunity to engage with the Hawkesbury River waterfront</p> <p>Limited restaurant options</p> <p>Limited accommodation for groups</p>
Central Coast	<p>Culture and heritage, including beach culture</p> <p>Soft adventure</p> <p>Water and natural features</p> <p>Business and sporting events</p>	<p>Marina berths</p> <p>Tuggerah regional sporting and recreation complex</p> <p>Glenworth Valley</p> <p>Australian Reptile Park</p>	<p>Investment in premium and boutique accommodation needed</p> <p>Investment in attractions/ experiences needed– marine, nature and culinary</p> <p>Mountain bike trails – event standard</p> <p>Lack of public transport connections within the region</p> <p>Regeneration of town centres needed</p>

Region	Hero Experiences/ Products	Key Infrastructure	Gaps
Newcastle	<p>A city on the beach</p> <p>A working harbour</p> <p>Events Gateway – both a host and gateway to sporting, cultural and community events in the Greater Hunter region</p> <p>Living Heritage – a city with a balance of old and new</p> <p>University in city centre</p>	<p>Newcastle Airport: \$80m expansion providing capacity for international flights</p> <p>Port of Newcastle: \$14.5m new dedicated cruise ship terminal</p> <p>Light rail: a future network that will link multiple locations across the city</p> <p>Bathers Way coastal walk</p> <p>Newcastle University city campus</p> <p>M1 and Pacific Highway</p>	<p>Accommodation shortage</p> <p>Upgrade of harbour foreshore required</p> <p>Lack of Aboriginal tourism experiences</p> <p>Night time opening hours need to be extended</p> <p>Tourism precincts</p> <p>International flights</p> <p>Access and road infrastructure</p>
Port Stephens	<p>Coastal and aquatic - beaches, water activities, marine life, especially dolphins</p> <p>Diving</p> <p>Marine and national parks</p> <p>Stockton Island Dunes</p> <p>Culture and Heritage</p> <p>Food and Seafood</p> <p>Worimi Conservation Lands</p>	<p>Newcastle Airport</p> <p>Good road access from Sydney and Newcastle</p> <p>2 marinas</p> <p>Boat ramps</p> <p>Golf courses</p>	<p>National/international brand hotels</p> <p>Conference and event facilities</p> <p>Transport access needs improvement</p> <p>Wi-Fi and 4G coverage is patchy</p> <p>Public transport around town</p> <p>Nelson Bay CBD redevelopment</p> <p>Limited opening hours of tourism related businesses</p> <p>Wedding venues</p>
Lake Macquarie	<p>Combination of beach, lake and mountain environments</p> <p>Lake Macquarie – largest saltwater lake in southern hemisphere</p> <p>Coastal and aquatic - beaches, water activities, marine life</p> <p>Nature and wildlife – mountains, nature reserves</p>	<p>Trinity Point Marina</p> <p>Lake Macquarie Variety Playground and Speers Point Precinct</p> <p>Lake Macquarie City Art Gallery</p> <p>Lake Macquarie Airport</p> <p>Warners Bay foreshore shared pathway</p> <p>Fernleigh Track</p>	<p>Lake foreshore needs activation</p> <p>Improved access to the waterway</p> <p>Conference and event facilities</p> <p>Public transport from Newcastle Airport</p> <p>International standard sporting complex</p>

Region	Hero Experiences/ Products	Key Infrastructure	Gaps
Maitland	<p>Scenic beauty</p> <p>Unique villages</p> <p>History and heritage</p> <p>Events</p>	<p>Maitland Gaol</p> <p>Maitland Regional Art Gallery</p> <p>Historic village of Morpeth & Morpeth Museum</p> <p>The Levee Lifestyle Precinct</p> <p>Sporting facilities</p>	<p>Recognition as a tourism destination</p> <p>VFR</p> <p>Transport</p> <p>Accommodation</p> <p>Caravan park</p>
Hunter Valley	<p>Food and Wine</p> <p>Nature and soft adventure</p> <p>Golf</p> <p>Events and festivals – cultural, music, food and wine</p> <p>Conferences and meetings</p>	<p>Good road access from Sydney and Hunter Expressway</p> <p>Vineyards/wineries/cellar doors</p> <p>International standard championship golf courses</p> <p>Hunter Valley villages/towns</p> <p>Hunter Valley Gardens</p> <p>Army Base Museum</p> <p>Quality accommodation</p> <p>Crowne Plaza with convention facilities</p> <p>2 local coach operators</p> <p>Newcastle Airport</p> <p>Large conference facilities</p> <p>Cessnock</p> <p>Award winning restaurants</p>	<p>Roads, cycle paths and nature trails need improvement</p> <p>Attractions that leverage regional food and providing</p> <p>Lack of public transport</p> <p>Wifi & 4G coverage is patchy</p> <p>Limited family/wet weather experiences</p>

Region	Hero Experiences/ Products	Key Infrastructure	Gaps
Upper Hunter Country	<p>Nature tourism and outdoor recreation – diverse environment/climatic zones; national parks, including UNESCO World Heritage listed Barrington Tops and Wollemi National Parks; Giant's Leap</p> <p>The Devil Ark Tasmanian Devil Project at Barrington Tops</p> <p>Largest concentration of thoroughbred breeding events in Australia</p> <p>Unique festivals and events – equine, Highland Games</p> <p>Food and wine</p> <p>Drives, walks and trails</p> <p>Arts, culture and heritage – indigenous and European</p>	<p>A number of large vineyards/ wineries</p> <p>Horse studs</p> <p>Scone Airport</p>	<p>Improved link road through the Barrington Tops needed</p> <p>Need to develop a Devil's Ark interpretive centre</p> <p>Limited horse riding opportunities and limited facilities to access horses</p> <p>Improved access to historically significant sites needed</p> <p>Accommodation</p>
Dungog Shire	<p>National Parks, wilderness, forests and reserves, including part of the UNESCO World Heritage listed Gondwana Rainforests of Australia</p> <p>Rivers – swimming, kayaking, fishing</p> <p>Scenic drives</p> <p>Events</p> <p>Attractive historic towns and villages</p>	<p>James Theatre</p> <p>Good access to Sydney and also Newcastle Airport</p> <p>Rail access (limited service)</p> <p>Dungog Festival/Events</p>	<p>Improved access to the Barringtons needed</p> <p>Forest walks not well maintained</p> <p>Accommodation – small scale farm-stay</p>

3.7 Marketing

Like the other DNs, DSSN is an administrative zone, not a consumer facing brand or marketing entity. As such, it does not own brand or marketing assets. However a key role of DSSN is to represent the region and collaborate with Destination NSW in the development and implementation of Destination NSW's domestic and international marketing strategy and campaigns.

DSSN also has a responsibility to create an environment that encourages the regions to adopt a more collaborative approach to their domestic marketing activity, while at the same time respecting their competitive positions.

In the international markets, DSSN will provide platforms that assist the regions in their engagement with international trade and consumers, and work closely with Destination NSW to ensure the region is well represented in new marketing asset, content creation, itineraries and promotions in international markets.



3.8 SWOT Analysis (strengths, weaknesses, opportunities and threats)

Strengths	Weaknesses
<ul style="list-style-type: none"> • Diverse region • World Heritage listed Barrington Tops, Wollemi, Blue Mountains National Park • Australia's largest saltwater lake (Lake Macquarie) • Hawkesbury River • World class wineries • Abundant, quality beaches • Natural escarpment landscapes, 1/2 day walks, historic houses/hotels, artisan, boutique shopping • World class horse studs • "Food bowl" of NSW – producers and provedores • Newcastle a top 10 city in Lonely Planet's "Best in Travel" and an award winning, internationally recognised events city • Blue Mountains Hospitality School • University of Newcastle campus expansion • A number of international ready destinations with recognised brands in domestic and international markets (Newcastle, Port Stephens, Hunter Valley, Blue Mountains) • Rich history and heritage – industrial, colonial and indigenous • Direct/expanding air access via Newcastle Airport • Port of Newcastle cruise terminal expansion • Marina berths in multiple locations for white boats and pleasure craft • Proximity to Sydney (international airport and large Sydney short break market) • Good rail network linking Sydney with most of the region • Large established VFR market • Quality accommodation, conference and golf facilities in Hunter Valley • Strong equine and energy industries in Upper Hunter • Diverse fauna and natural assets • Williamtown RAAF Base • Hunter Event Strategy • Events facilities and capabilities • Diversity of food and wine offerings 	<ul style="list-style-type: none"> • Regional access, road, rail, air and water • Gateway and Wayfinding signage • Perceived as a day trip destination • Limited trading hours and lack of evening activities hampers overnight growth • Destinations/products/experiences not well linked/ packaged • Lack of accommodation infrastructure in the Blue Mountains, Upper Hunter and elsewhere for major events • Inadequate tourist information services and signage • Lack of conferencing infrastructure in some areas • Under investment in natural assets • Lack of Aboriginal Tourism offering • Limited family and wet weather experiences and attractions • Significant gaps in equestrian experiences to capitalise on horse studs – Upper Hunter Shire • Poor roads/cycle paths • Wifi and 4G/3G inadequate • Limited public transport to and within the region • Large number of events/festivals but relatively few signature events • Lots of small operators need help/up skilling/ direction • Lack of local community understanding of, and engagement with, the Visitor Economy • Limited preparedness for Asia • Fragmented approach to destination management • Inconsistent approach to marketing the region • Underinvestment of natural and urban assets • Digital presence • Connectivity • Environmental constraints to development • Digital footprint • M1 not linked to main access and regional roads • Local council restrictions • Availability of visitor and perception data

Opportunities	Threats
<ul style="list-style-type: none"> • Capitalise on current growth trend in both domestic and international tourism • Capitalise on current growth trend in food and wine tourism • Capitalise on proximity to Sydney to maintain day trips/grow short break market • Leverage additional direct air capacity to Newcastle Airport – domestic and international potential • Development of a new international airport at Badgerys Creek (Western Sydney) • Capitalise on the cruise market into Sydney, Newcastle and Blue Mountains • Harness Newcastle as a home port and grow stopovers • Engage local communities to further develop and grow the VFR market • Develop the education sector • Review, consolidate and develop world class sporting and cultural events • Extend festival and event stays by packaging broader experiences • Activate town centres/develop precincts and build the night time economy • Develop the wedding sector through product development and marketing • Build the midweek MICE market • Product and experience development (existing and new), including signature experiences, based on customer insight • Link destinations and experiences by developing touring itineraries and packages • Better align with established touring routes • Develop walking trails and a “Great Walk” with associated infrastructure in the Blue Mountains • Work with destinations to improve consumer perception • Build a case for investment in caravanning and camping parks • Develop walks across destinations, e.g. Pacific Coast – Mudgee • To enhance wayfinding and signage including digital footprint 	<ul style="list-style-type: none"> • Increasing competition for domestic, international and MICE visitors • Loss of market share of key Sydney market • Declining length of stay in short break market, with shift from domestic overnight to day trips • Lack of awareness of some destinations in the DSSN region • Multiple consumer brands confuse the customer and dilute the identity of the DSSN region • Highly seasonal industry • Local residents don’t support tourism and/or develop negative attitude • Google and GPS mapping not adequate • Urban development impact on nature brand • Land use conflicts between tourism and other industries • Local Government and industry don’t buy into the Destination Network structure • Increase in tourist numbers not properly managed

Opportunities	Threats
<ul style="list-style-type: none"> • Harness the DSSN Destination Network to increase collaboration, develop partnerships and attract Government and private sector investment in product and infrastructure • Develop and implement an Asia Ready program • Embrace digital technology and social media in marketing and visitor information • Commit to improving signage and visitor information services at the Destination Network level • Leverage the growing corporate market in Western Sydney & major conferences in Sydney • Ability to link with key destinations/products outside of DSSN region 	



4 OPPORTUNITIES AND CHALLENGES

4.1 Opportunities

Undoubtedly significant opportunities exist to grow the DSSN Visitor Economy. A number of key opportunities have been identified that can be maximised working in partnership with Local and State Government and industry:

- Both international and domestic tourism are growing, and there is a growth trend in food and wine tourism. The region's proximity to Sydney can be exploited to grow both markets.
- DSSN is a diverse tourism region with a significant number of existing assets that can be leveraged for growth, including UNESCO World Heritage listed national parks, a diverse aquatic offering including coastline, beaches, rivers and Australia's largest saltwater lake, a diverse hinterland, world class wineries, a strong food offering, rich history and cultural heritage, world class horse studs and vibrant cities.
- The region already has a number of export ready destinations with recognised brands in both the domestic and international markets. These "hero" destinations can be further capitalised, and also used to build awareness for the whole region.
- DSSN's existing events and festivals calendar is a solid base on which to build an events calendar, including the development of more signature events.
- Significant current and planned transport infrastructure to the region, including a new cruise terminal at Port of Newcastle, existing marina berths at Lake Macquarie, Port Stephens, Central Coast, Hawkesbury and Newcastle, a new international terminal at Newcastle Airport, local airport infrastructure throughout the region, and a good rail network connecting Sydney with most of the region and Newcastle with surrounding areas.
- The new Destination Network structure can be leveraged to increase collaboration across the region, and attract Government and private sector investment and marketing and events funding.
- The region already has a large, established Visiting Friends and Relatives (VFR) market, that can continue to grow, and the local population can be engaged and converted to advocate for the Visitor Economy.
- A number of segments can be further developed for the region, with a coordinated approach and a focus on destination management, such as weddings, meetings, incentives and conferences and education.



4.2 Challenges

A number of key challenges have been identified from the situation analysis that need to be addressed, working in partnership with Government and industry, in order to be able to realise the significant opportunities identified:

- Over the years, there has been a fragmented approach to managing the destination, coupled with an inconsistent approach to marketing, in both the domestic and international markets.
- Overall visitation to the region is growing at 4.2% (based on 10 year average) however key challenges such as lack of awareness in some areas, perception of the region as a day trip destination, increasing competition and loss of market share of the key Sydney short break market.
- Significant gaps in the region's product and experience appeal, including a need to better utilise existing products, experiences and events by better connecting and packaging them, a requirement for new product, experience and event development, a need to develop the night time economy and insufficient visitor information services and signage.
- Significant infrastructure gaps in terms of under investment in natural assets, inadequate Wifi/4G, lack of accommodation infrastructure in some key areas like the Blue Mountains, lack of conferencing facilities and poor roads and cycle paths.
- Tourism is a highly seasonal industry in some areas, with midweek also underperforming across the region.
- The region's tourism industry is made up of a large number of small operators and, as such, the industry has skills and knowledge gaps in key areas such as Asia, digital and social media.
- The region's local community lacks understanding and therefore engagement with the Visitor Economy.
- Federal transport issues (M1, Rail, Palm Beach Ferry and Newcastle Light Rail).

5 VISION, MISSION, GOALS AND OBJECTIVES

5.1 Vision

To be the leading Destination Network in New South Wales.

5.2 Mission

To make Destination Sydney and Surrounds North the most successful Destination Network in NSW, and maximise the benefits of the Visitor Economy for the region and NSW.

Working with industry partners to ensure that they are enabled to maximise opportunities and grow the Visitor Economy.

5.3 Goal

To positively contribute to the 2020 State Visitor Economy Goal of doubling the Visitor Economy.

5.4 Objectives

- Increase overnight tourism expenditure in the region year on year
- Increase MICE expenditure in the region
- Increase leisure expenditure in the region
- Increase visitor length of stay in the region
- Grow the region's export ready product
- Increase partnerships between the LGAs in the region
- Grow funding secured by DSSN regions
- Ensure stakeholder satisfaction with the DN

6 STRATEGIC PRIORITIES

6.1 Advocate for the DSSN Visitor Economy and foster greater collaboration between regions in DSSN

A key role of the DSSN DN is to advocate for the Visitor Economy, and represent the region. It is therefore important to gain buy in and commitment to the Destination Network structure from stakeholders across the region, through extensive ongoing stakeholder engagement.

There is a requirement to raise the profile of the broad Visitor Economy with Local Governments and local residents alike, educating them on how the Visitor Economy benefits the broader economy and the entire community. Converting Local Governments into advocates for the Visitor Economy will greatly assist the case for investment and development, and engaging local residents as ambassadors will improve the visitor experience.

To maximise the Visitor Economy potential, the DSSN region needs to be managed in a coordinated, cohesive way, with a strong and collaborative network of Government, industry and commercial partners taking a coordinated approach to product and experience development, as well as destination marketing.

There are already examples of collaboration within the region, such as the alliance between the Blue Mountains, Penrith and the Hawkesbury and a good working relationship between Newcastle, Port Stephens and Hunter Valley Wine Country.

The DN will work to build on existing best practice, creating an environment that encourages the individual regions to collaborate more over time, by bringing the different organisations of relevant LGAs together and facilitating partnerships between them.

6.2 Facilitate destination infrastructure development

Successful destinations are built on strong infrastructure, including access, accommodation, conference and event facilities, visitor attractions, food and beverage options and natural assets. The DSSN region has a strong core infrastructure, with a number of key developments recently completed, planned or in the pipeline, such as the development of a new Western Sydney Airport at Badgerys Creek, the development of a new international terminal at Newcastle Airport and significant redevelopment of the Port of Newcastle cruise terminal and the recent widening and upgrade of the Great Western Highway over the Blue Mountains. However there are still significant gaps and continued investment in infrastructure development across all areas of the Visitor Economy is needed to support future growth.

The DN will champion and facilitate a coordinated approach to infrastructure development across the region, in partnership with stakeholders. A region wide audit of existing infrastructure, planned infrastructure, necessary upgrades and new infrastructure requirements will be developed and maintained, segmented by key infrastructure categories. Existing infrastructure audits will form the basis for this, and any gaps in these will be addressed to ensure a comprehensive audit for the whole region.

While not exhaustive, the following list gives a sense of infrastructure needs to be addressed:

Accommodation:

- Build high quality/five star hotels with conferencing facilities
- Attract nationally branded hotels
- Build small scale eco-friendly chalets
- Caravanning, holiday parks and camping parks – upgrades and new developments

Events and Conference infrastructure:

- New venues to accommodate larger conferences, festivals, concerts and events
- New venues for weddings
- Upgrades to facilities at existing venues
- Security requirements

Natural assets upgrades and development:

- National and public parks
- Lookouts
- Walking, hiking and biking trails, including night walking and walking across regions
- A “Great Walk” developed in the Blue Mountains
- Activation of the Lake Macquarie foreshore

Cities:

- Penrith CBD revitalisation
- Creation of tourism precincts in Newcastle CBD, and elsewhere across the region
- Improvements to Katoomba, Wentworth Falls, Leura, Blackheath and Nelson Bay Town Centres

Visitor attractions:

- New attractions to cater to growth markets, families and special interest visitors
- Upgrades to existing attractions

Transport:

- Development of Air Service Agreements to secure direct international flights to Newcastle Airport
- Attract “Home” porting to the Port of Newcastle
- Increase frequency of transport to key areas like Penrith and the Blue Mountains
- Improve transport links within the region, e.g. between Newcastle Airport and key destinations
- Build a coach layover hub in the Blue Mountains
- Advocate for improved public transport

Other

- Develop the night time economy – longer weekday opening hours, increased weekend opening hours, more dining options
- Improved WiFi and 4G coverage

The DN will work with industry and Government to identify infrastructure development priorities and support the development of business cases to attract investment from all levels of Government and the private sector.



6.3 Facilitate product and experience development

The DSSN region already has export ready destinations with recognised brands in both the domestic and international markets - Newcastle, Port Stephens, the Hunter Valley and the Blue Mountains. These “hero” destinations can be further developed and leveraged to introduce less well known destinations to travel distributors and customers.

Products and experiences

One of the region’s key strengths is its diverse product and experience offer. Key strengths to build on include:

- An abundance of national parks, including World Heritage listed Barrington Tops, Wollemi and Blue Mountains National Parks
- A world class aquatic and coastal offer, with an abundance of spectacular beaches, coastline and marine life
- An extensive hinterland
- Alpine regions
- Lake Macquarie, Australia’s largest saltwater lake
- The 120km long Hawkesbury River
- Rich culture, history and heritage, both indigenous and pioneer
- World class horse studs
- World class wineries
- Quality food
- Golf courses
- Picturesque villages
- A diverse events calendar
- Newcastle, a top 10 city in Lonely Planet’s “Best in Travel”
- Greater Blue Mountains World Heritage Area (GBMWhA)

Some examples of new product and experience development that could assist the region in attracting more overnight visitors include:

- Linking food and wine experiences with existing “hero” products and experiences
- Packaging high quality products for the weddings market
- Packaging experiences for the white boat/leisure boat market
- Developing pre and post conference touring packages for delegates attending major Sydney conventions
- Leveraging Upper Hunter Country’s world class horse studs by developing related tourism experiences
- Developing more indigenous and pioneer heritage experiences
- Developing arts and culture based experiences
- More soft adventure experiences – walking, cycling, mountain biking, fishing, golf

- Activation of the Lake Macquarie foreshore
- Developing Hawkesbury riverfront trails
- Better leveraging the rail network between Sydney and the DSSN region and Newcastle and the surrounding areas to create short break options
- Further leveraging regional airports as Lake Macquarie Airport has done in its partnership with Skydive Australia to provide beach-landing and airport landing skydives
- Developing facilities to cater to the growing recreational vehicle/motor home market
- Developing evening experiences to encourage overnight stays
- Cessnock
- Scone
- Rutherford Airport
- Elderslie Airstrip

The DN will work with the regions to develop a products and experiences audit for the DSSN region. Consumer insight will assist the development of a gap analysis and priorities will be developed based on this. A key role of the DN will be identifying barriers to product development and working with Councils, Tourism Associations and others to address these, for example obtaining approvals for commercial tourism products to operate in public areas that are currently not available to them.

Increasing the number of products and experiences that are export ready will be a key focus, with products and experiences with international potential to be identified, developed and supported to go to market.

Touring routes, trails and packaging

A key challenge the region currently faces is that destinations, experiences and products are not well linked and packaged, so opportunities are being missed. Linking destinations through touring routes and trails, and packaging experiences, could make the region a more attractive customer proposition, encourage visitors to travel further and see more, and ultimately increase length of stay and associated expenditure. Moreover a key element of success in international markets is the ability to offer packaged, commissionable product to the international distribution chain.

Some examples that could be developed are:

- Build multi-stop touring itineraries within the DSSN region
- Build itineraries that harness local accommodation to reduce the need to return to Sydney after excursions
- Develop itineraries that enter and/or exit via Newcastle Airport, rather than Sydney
- Develop overnight products and itineraries for cruise passengers arriving in Newcastle
- Package attractions and experiences around major events
- Develop Penrith as a quality gateway tourism experience to the Blue Mountains

The DN will work with destinations and operators to build and package touring routes for the international markets, and undertake a coordination role in the domestic market.

Visitor information services, centres and signage

Visitor information and signage are a key part of the visitor experience, particularly in a region like DSSN where there is significant scope to grow free independent travel (FIT) and self-drive touring.

The region's LGAs have all identified a need for an upgrade to signage, wayfinding and current Visitor Information Centres (VIC) and services. As an example, there is a current disconnect for visitors arriving at Katoomba Station, with no clear information on how to make the 2.6km trip to Echo Point. While visitors still use traditional information services extensively, they are also increasingly looking for information on the internet and via apps, using mobile devices. Information dissemination across all consumer touch points will require online and offline distribution.

The DN will work with Councils, Destination NSW and other areas of the NSW Government to develop world class visitor information services for the DSSN region, taking a whole of region (or even a state wide) approach to ensure consistent signage and the provision of consistently high quality visitor information. Digital distribution channels and multi-language capability will be key additions to traditional visitor information services and kiosks.

6.4 Facilitate major events growth

Events are a key pillar of the NSW Visitor Economy, and the DSSN region already has a strong and diverse event offering. Newcastle is internationally recognised as an events city and the Hunter Valley attracts large scale music events, while Upper Hunter Country hosts unique events like the Aberdeen Highland Games as well as a series of horse festivals. Between them the regions host a diverse calendar of sporting events, such as endurance events in the Blue Mountains or Dragon Boats NSW State Championships in Penrith.

Existing events can be further leveraged, including amplification of the local experience and the development of an events calendar to encourage locals, their friends and relatives, as well as visitors, to repeat.

There is also potential to create and bid for new events for the DSSN region. Potential examples include:

Create:

- Identify major event extension opportunities (e.g. Vivid) to attract to regional locations
- A Blue Mountains cycling event that showcases the area's natural beauty
- A chef swapping event
- An iconic annual event of national significance for Newcastle, e.g. a signature food and beverage event
- Harvest events and garden events in the Hawkesbury
- Spring flora festival

Bid for:

- Major sporting events
- Major concerts and other cultural events
- Aquatic events
- Mass participation events
- Passion events, e.g. car clubs
- Festivals
- Iconic events

The DN will work with the regions to develop an events calendar for the DSSN region, capitalise existing events that have more potential and identify and bid for new events. The DN will work with each of the regions to develop an event product audit for their area, and identify current events that can be further leveraged. A gap analysis will also be undertaken and potential new events identified, as well as a facilities analysis to determine what we have capacity for. A process will then be established for bidding for new events and additional funding to grow existing events. Where two or more regions could benefit from the same event, the DN will coordinate partnerships between the regions, and joint bids could be developed.

6.5 Maximise the benefits of funding programs

The NSW Government, through Destination NSW, makes contestable funding available to the regional Visitor Economy through three funds:

Regional Tourism Fund

Funding is available through two streams:

- Regional Cooperative Tourism Marketing Program
- Regional Tourism Product Development Program

Regional Flagship Events Program (RFEP)

Identifies and supports events in Regional NSW that have the potential to act as flagship tourism events by attracting overnight visitation and delivering long term benefits to their region. In 2017 the RFEP has been expanded, and now comprises three funds:

- Incubator Event Fund
- Flagship Event Fund (the original RFEP)
- Event Development Fund

Regional Event Investment Program

Destination NSW identifies, attracts and nurtures events that provide strategic and/or community benefits to Sydney and regional NSW. Events that provide substantial economic impact, provide opportunities for marketing and promoting NSW nationally and internationally and enhance NSW's international brand are eligible to apply.

The DN will take a lead role in promoting these funding opportunities to industry to ensure the region maximises this opportunity. It will also support local industry in the preparation of funding applications, including the development of robust key performance indicators. The DN will also have responsibility for initial assessment of contestable funding applications, working in partnership with Destination NSW.

Other Funding Programs

The DN will provide support and access to other various sources of funding.

6.6 Facilitate industry skills development and knowledge

The tourism industry in DSSN is made up of many small operators who don't have the resources to develop their skills and knowledge on an ongoing basis. The DN will undertake a leadership role in this area, working with Local Government and operators in the region, and Destination NSW, to deliver knowledge and skills to the region's tourism industry.

Some examples are:

- Identifying research gaps and working with Destination NSW to provide relevant research and insights to assist the industry in developing new products and experiences for both the domestic and international markets that are based on customer insight.
- Educating the industry on the international distribution system and how to develop packaged, commissionable products that international travel distributors will pick up.
- Developing market readiness programs to assist the industry in building knowledge that will help them service key growth markets in Asia. China and India, for example, are two high growth potential markets with specific distribution and customer needs that operators should understand before investing in these markets.
- Providing digital marketing and social media insights and training to industry to help them maximise these effective marketing channels, in partnership with Destination NSW.

Another priority will be engaging the local youth market in the tourism industry, by advocating for tourism as a sustainable career choice, and developing mentoring programs. Opportunities to leverage the region's existing assets to become centres of excellence will be investigated, as will the development of innovation hubs. For example the Hunter Valley could be transformed into a centre of hospitality training excellence, leveraging the Hunter Valley Hotel School at Kurri Kurri.

6.7 Improve destination marketing effectiveness

The approach to marketing in the DSSN region has, in the past, been inconsistent. A key role for the DN will be to create an environment to encourage the individual regions to collaborate more consistently in their marketing approach and activities, while respecting the competitive landscape.

Domestic Marketing

The regions are competitors in the domestic market, therefore the DN's role will be relatively limited, and focused on co-ordination. Where regions do believe there is opportunity for non-competitive partnerships, the DN will broker these and support best practice and leadership in marketing.

International Marketing

The regions can be considered competitors in the domestic market in some instances, however the DN's role will be to develop partnership opportunities where value can be provided, and focused on co-ordination. Where regions do believe there is opportunity for non-competitive partnerships, such as International Marketing, the DN will broker these.

"Hero" Destinations and Experiences

Currently, the region's "hero" destinations with appeal to international markets are Newcastle, Port Stephens, the Hunter Valley and the Blue Mountains. These destinations and their brand awareness will be exploited to present the DSSN offer overseas.

The region's "hero" experiences with appeal internationally are:

- Nature and adventure
- Food and wine
- Aquatic and coastal
- History and heritage
- Major events
- Golf
- UNESCO World Heritage listed National Parks
- Self-drive touring as part of a Pacific Coast route
- Cultural Tourism

DSSN will work with the regions to identify and develop emerging "hero" destinations and experiences.

Marketing Assets

The DN will work with Destination NSW to develop a suite of quality marketing assets that will represent the region's hero destinations and experiences to global consumers.

An asset development plan will be produced for the region, to feed into Destination NSW's planned still and moving imagery shoots.



Consumer Marketing

Destination NSW's marketing expertise and consumer marketing activities in the international markets will be leveraged, and the DN will ensure the DSSN region is well represented.

Digital channels and social media will be the focus of consumer marketing, to efficiently reach target customers with the right messages at the right point in their decision-making process.

The DN will work with Destination NSW to identify and host relevant international media and bloggers, encouraging them to experience the best of the region and publicise it.

Trade Marketing

Destination NSW's international distribution development expertise and trade marketing activities will be utilised, and the DN will ensure the DSSN region is well represented.

International travel wholesalers and retailers, online travel agents (OTAs) and inbound tour operators (ITOs) will be targeted, and key distribution partners will be identified for each overseas target market.

The DN will work with destinations and products within our region to ensure we are represented. We will utilise other opportunities, for example:

- Sales trips to market as part of Destination NSW delegations
- Attendance at key overseas trade shows under the NSW umbrella
- Presence at The Australian Tourism Exchange (ATE)
- Presence at Tourism Australia's Corroboree West and Corroboree Asia events under the NSW umbrella
- Attendance at Australian Tourism Exchange Council ATEC Meeting Place
- Working with Destination NSW to bring travel sellers to the region on familiarisation visits.

7 ACTION PLAN

Action	Owner	Partners	Timeframe			
			17/18	18/19	19/20	20/21
Strategic priority 1: Advocate for the DSSN Visitor Economy and foster greater collaboration between regions in DSSN						
1.1 Consult with key stakeholders in the development of the DMP	DSSN	LGAs, LTOs, DNSW, Industry	✓			
1.2 Develop a stakeholder engagement plan and update annually	DSSN		✓	✓	✓	✓
1.3 Develop and issue regular stakeholder communications and progress reports	DSSN		✓	✓	✓	✓
1.4 Develop a list of potential partnerships between regions and broker new partnerships	DSSN	LGAs, LTOs, Industry	✓	✓	✓	✓
1.5 Develop and implement a Visitor Economy awareness campaign for LGAs and local residents	DSSN	DSSN, LGAs, LTOs	✓	✓	✓	✓
1.6 Develop and implement a stakeholder satisfaction survey	DSSN		✓	✓	✓	✓
Strategic priority 2: Facilitate destination infrastructure development						
2.1 Pull together into one central repository all existing infrastructure audits from the region, and maintain one up to date infrastructure audit	DSSN	LGAs	✓	✓	✓	✓
2.2 Build on the compilation of existing infrastructure audits and address any gaps to develop and maintain a complete infrastructure audit for the DSSN region	DSSN	LGAs	✓	✓	✓	✓
2.3 Identify infrastructure development priorities	LGAs	DSSN, DNSW, Industry Assoc.	✓	✓	✓	✓
2.4 Support the development of successful infrastructure feasibility studies and business cases to attract investment and funding	LGAs	DSSN, DNSW, Industry Assoc.	✓	✓	✓	✓
2.5 Work across the NSW Government to support the effective development and integration of DSSN's infrastructure needs into significant planning initiatives	LGAs	DSSN, DNSW	✓	✓	✓	✓

Action	Owner	Partners	Timeframe			
			17/18	18/19	19/20	20/21
Strategic priority 3: Facilitate product and experience development						
3.1 Build and maintain a comprehensive products and experiences audit for the DSSN region, identify gaps and development priorities and work to address these	DSSN	LGAs, LTOs, Industry, Industry Assoc., DNSW	✓	✓	✓	✓
3.2 Identify and develop new products and experiences for international markets	DSSN	LGAs, LTOs, Industry, Industry Assoc., DNSW	✓	✓	✓	✓
3.3 Identify barriers to product and experience development in the domestic market and develop plans to address these	DSSN	LGAs, LTOs, Industry, Industry Assoc., DNSW	✓	✓	✓	✓
3.4 Develop and implement targeted product development strategies	DSSN	LGAs, LTOs, Industry, Industry Assoc., DNSW	✓	✓	✓	✓
3.5 Develop and implement a strategy to deliver world class visitor information services (digital and traditional) across the region	DSSN	DNSW, LGAs, LTOs, Industry Assoc., Industry		✓	✓	✓
3.6 Develop and deliver a strategy to deliver better quality, consistent signage across the region	DSSN	DNSW, LGAs, LTOs, Industry Assoc., Industry		✓	✓	✓
Strategic priority 4: Facilitate major events growth						
4.1 Develop an events audit for each region, identify gaps, opportunities to better leverage existing events and create/bid for new events	DSSN	DNSW, LGAs, LTOs	✓	✓	✓	✓
4.2 Establish a process for bidding for new events	DSSN	DNSW, LGAs, LTOs	✓	✓	✓	✓
4.3 Encourage and coordinate partnerships and joint bids between regions where feasible	DSSN	LGAs, LTOs	✓	✓	✓	✓
4.4 Develop and maintain a comprehensive events calendar for the DSSN region, segmented by regions	DSSN	DNSW, LGAs, LTOs	✓	✓	✓	✓

Action	Owner	Partners	Timeframe			
			17/18	18/19	19/20	20/21
Strategic priority 5: Maximise the benefits of regional tourism funding programs						
5.1 Develop and communicate a process for the development of funding applications in the DSSN region	DSSN	DNSW	✓			
5.2 Develop an annual communications plan to promote contestable funding opportunities and flag key submissions deadlines	DSSN	DNSW	✓	✓	✓	✓
5.3 Assist in the preparation of contestable funding applications	DSSN	Industry, Industry Assoc., LGAs, LTOs	✓	✓	✓	✓
5.4 Develop initial assessment criteria for funding applications	DNSW	DSSN	✓			
Strategic priority 6: Facilitate industry skills development and knowledge						
6.1 Identify knowledge gaps in market and consumer understanding and work with DNSW to provide the industry with quality insights and consumer research	DNSW	DSSN, industry, LGAs, LTOs, Industry Assoc.	✓	✓	✓	✓
6.2 Develop and run export ready product development workshops	DSSN	DNSW, Industry, Industry Assoc., LGAs, LTOs	✓	✓	✓	✓
6.3 Develop and run market readiness workshops on China, India and potentially other Asian markets	DSSN	DNSW, Industry, Industry Assoc., LGAs, LTOs	✓	✓	✓	✓
6.4 Develop and run digital and social media skills workshops	DNSW	DSSN, industry, LGAs, LTOs, Industry Assoc.	✓	✓	✓	✓
6.5 Investigate the feasibility of developing a mentoring program and implement	DSSN	DNSW, Industry, Industry Assoc., LGAs, LTOs		✓	✓	✓
6.6 Investigate the feasibility of developing innovation hubs in the region	DSSN	DNSW, Industry, Industry Assoc., LGAs, LTOs			✓	✓
6.7 Investigate the feasibility of developing centres of training excellence in the region	DSSN	DNSW, Industry, Industry Assoc., LGAs, LTOs			✓	✓
6.8 Implement a process for ongoing identification of industry skills gaps and addressing these	DSSN	DNSW, Industry, Industry Assoc., LGAs, LTOs	✓	✓	✓	✓

Action	Owner	Partners	Timeframe			
			17/18	18/19	19/20	20/21
Strategic priority 7: Improve destination marketing effectiveness						
7.1 Identify potential partnerships between the regions for domestic marketing and assist in the development of these	DSSN	LGAs, LTOs	√	√	√	√
7.2 Represent the region in the development of DNSW's domestic marketing strategies and campaigns	DSSN	DNSW	√	√	√	√
7.3 Create and maintain an up to date asset development plan for international marketing	DSSN	DNSW, LGAs, LTOs	√	√	√	√
7.4 Work with DNSW to develop and regularly refresh a suite of quality visual, moving and content assets for international marketing	DSSN	DNSW, LGAs, LTOs	√	√	√	√
7.5 Develop and implement an international consumer marketing strategy and plan, leveraging DNSW's strategy and activity	DSSN	DNSW, LTOs, LGAs, Industry	√	√	√	√
7.6 Develop and implement an international trade marketing strategy and plan, leveraging DNSW's strategy and activity	DSSN	DNSW, LTOs, LGAs, Industry	√	√	√	√
7.7 Measure and monitor key marketing campaign activity against KPIs	DSSN	DNSW, LTOs, LGAs, Industry	√	√	√	√

8 RESOURCES

8.1 Human Resources

DSSN has three FTEs:

- General Manager
- Industry Development Manager
- Executive Assistant

DSSN has a board comprising an independent Chair appointed by Destination NSW and five skills-based Directors. In addition, the team is supported by a dedicated Regional Tourism Development Manager at Destination NSW.

8.2 Financial Resources

DSSN operational funding is guaranteed for a period of four years, from Destination NSW until 30th June 2020.

In addition, a range of tourism contestable funding programs will be available to the DSSN region, through Destination NSW, including:

Regional Tourism Fund

Funding will be available through two streams:

- Regional Cooperative Tourism Marketing Program
- Regional Tourism Product Development Program

Regional Flagship Events Program (RFEP)

In 2017 the RFEP has been expanded, and now comprises three funds:

- Incubator Event Fund
- Flagship Event Fund (the original RFEP)
- Event Development Fund

Regional Event Investment Program

Destination NSW identifies, attracts and nurtures events that provide strategic and/or community benefits to Sydney and regional NSW. Events that provide substantial economic impact, provide opportunities for marketing and promoting NSW nationally and internationally and enhance NSW's international brand are eligible to apply.

9

KEY PERFORMANCE INDICATORS [KPIs]

Objective	KPIs	Baseline	2017/18	2018/19	2019/20	2020/21
Increase overnight tourism expenditure in the region year on year	Overnight tourism expenditure	4.2% previous 10 years 4.07B	4.6% 4.25B	4.6% 4.45B	4.6% 4.65B	4.6% 4.87B
Increase international expenditure in the region	Total expenditure by international visitors	\$370 million 2017, 10 year Average 7% growth	\$407 million (10%)	\$447 million (10%)	\$492 million (10%)	\$542 million (10%)
Increase leisure expenditure in the region	Total expenditure by leisure visitors	\$1,228 per visitor (2017), average growth 2%p.a.	3%p.a.	3%p.a.	3%p.a.	3%p.a.
Increase visitor length of stay in the region	Average length of stay	As per LGA data		10%	10%	10%
Grow the region's export ready product	Number of export ready product	126 (2017)		+10% (138)	+10% (152)	+10% (167)
Increase partnerships between the LGAs in the region	Number of partnerships per annum	0	2	3	3	3
Increase the contestable funding secured by DSSN regions	Funds received from DNSW	10 Events funding 2016	12	14	16	18
		Co-operative marketing funding \$240,000	\$400,000	\$450,000	\$500,000	\$550,000
		Product Development RVEF 801K 5 in 15/16	5 funded projects	5 funded projects	5 funded projects	5 funded projects
Ensure stakeholder satisfaction with the DSSN DN	Stakeholders indicate that DSSN adds value to their business	Baseline to be developed	+10%	+10%	+10%	+10%

10 KEY RISKS

Risk description	Causes	Consequences	Likelihood	Potential Impact	Treatment
1. 2020 State goal of doubling overnight visitor expenditure not met	Competition Slowdown in domestic and/or international travel	Negative impact on tourism businesses' revenue	Possible	High	Destination management strategy and plans in place Regular reviews of performance and tweaks to strategy as required
2. Government funding cuts for tourism	Changing political priorities Lack of understanding of the benefits of the Visitor Economy to the broader community	Opportunities not realised and targets not met	Unlikely	High	Advocate for the Visitor Economy across all levels of Government Strive to make Local Governments ambassadors for the Visitor Economy
3. Regions and industry don't buy into the Destination Network structure	Reluctance to shift away from previous regional tourism structure New DN structure not yet proven	Operational funding ceases after initial 4 years	Possible	Medium	Identify and communicate the benefits of the new DN network structure quickly Prioritise ongoing stakeholder management Regular progress reporting
4. Regions within DSSN don't work together	Intra-regional competition Lack of understanding of the benefits of collaboration	DN not successful and operational funding ceases after initial 4 years Opportunities missed Targets not met	Possible	Medium	Identify and communicate the benefits of the collaboration, tailored to each individual region Prioritise ongoing stakeholder management Regular progress reporting

Risk description	Causes	Consequences	Likelihood	Potential Impact	Treatment
5. Locals are not advocates for the Visitor Economy	Lack of understanding of the benefits to the broader community	Pressure on Local Government that could ultimately affect funding Visitor experience suffers	Possible	Medium	Advocate for the Visitor Economy across all levels of Government Strive to make Local Governments ambassadors for the Visitor Economy
6. Infrastructure and product development doesn't happen	Lack of funding Lack of commitment	Opportunities not realised Targets not met	Unlikely	High	Develop strong, evidence based, business cases for investment and development Regular communication with stakeholders



11 IMAGE CREDITS

PAGE	NAME OF IMAGE	CREDIT
<i>Front cover – left to right, top to bottom:</i>		
	Oyster Eating	Central Coast Community News
	Convict Trail Tourist Drive	Cessnock City Council
	Penrith Sydney	Matthew Newtown
	Big4 Koala Shores Port Stephens Holiday Park	Destination NSW
	Regional Gallery and Arts Centre Gosford	Destination NSW
	Boy and dog Callatoota Estate	Phillip Quirk and Destination NSW
	Muswellbrook Race Club	Power FM
	Newcastle Fort Scratchley	Newcastle City Council
	Scenic Skyway	Blue Mountains Gazette
	Wedding in Vineyard	Cessnock City Council
	Newcastle Tunnel	Newcastle City Council
5	Surfest 2017 Newcastle	Surfest
7	Snorkel Couple	Destination Port Stephens
15	Riverlights (2)	Karina Lee
18	Dreamtime	Hawkesbury Gazette
	Skydive the Beach and Beyond Newcastle	Lake Macquarie Council
24	Dolphin Watching	Destination Port Stephens
27	iFLY Girl	Penrith City Council
29	Katoomba Visitor Centre 30	Blue Mountains City Council
	Relax in heritage grounds of Penrith Regional Gallery and Lewers Bequest	PCC Tourism
34	Didgeridoo player at Lake Macquarie Community Event	Lake Macquarie Council
	Family Beach	Lake Macquarie Council
41	Hunter River Morpeth	Paul Foley
49	Steamfest	Ben Treveto
<i>Back cover – left to right:</i>		
	No name of image provided	Cessnock City Council
	Horse Stud Upper Hunter	ABC
	Houseboat on Hawkesbury	Australian Traveller

Imagery and Tourism Visitation Statistics sourced by TRA and IVS Data.

DSSN Board



CHAIR – David Fellows

David Fellows has over 30 years corporate experience in the international tourism and customer service industries, including working for British Airways and the Hong Kong Tourist Association in a variety of senior marketing and regional development positions. Mr Fellows has served on the Boards of Central Coast Tourism and the Australian Federation of Travel Agents, and as Chairman of the East Asia Travel Association (Australian/New Zealand Chapter) and the Association of National Tourism Office Representatives.



DIRECTOR – Paul Gerard Hughes

Paul Hughes has a senior management career spanning over 30 years, including Local Government and 10 years as CEO of Newcastle Airport where Tourism Development was a key focus. Currently, Paul is also a Board member of Compass Housing Co. Ltd, Regional Development Australia – Hunter, Peterson House Limited, Catholic Care Social Services Advisory Board – Hunter Manning and a member of the Australian Institute of Company Directors Hunter Committee. Paul is a Fellow of the Australian Institute of Company Directors.



DIRECTOR – John V McCarthy AO

John McCarthy has extensive experience in senior management and corporate governance. Mr McCarthy currently serves as Chairman for Australian Enterprise Holdings Pty Ltd, EP&T Global, Playoust Churcher Architects, Sustainable Built Environment National Research Centre and The Village Building Co. Ltd. Mr McCarthy is also a Board Member for the McGrath Group and Northern Metropolitan Cemeteries and Crematorium Trust. Mr McCarthy was awarded an Order of Australia in 2009 for his service to the property and construction industry.



DIRECTOR – Richard Becker

Richard has worked in the entertainment industry for over 30 years selling television programming in Australia and Asia to film distribution and production through his company, Becker Group Ltd. Sold to Prime Television in 2007, the company was one of the largest independent entertainment companies in Australia, producing 14 feature films in Australia, USA and United Kingdom and over 100 hours of internationally televised TV productions including Banjo Paterson's "Man From Snowy River". After a short break, Mr Becker started a new independent film distribution business (Becker Film Group) and a wine business (Oakvale Winery & Ablington Vineyards) which operate today in Sydney and the Hunter Valley.



DIRECTOR – Naomi Farrelly

Naomi is a tourism marketing professional with 19 years experience working across local, state and national tourism organisations, with Australian tourism products and destinations. Passionate about educating the industry, Naomi is the founder of Lighthouse Tourism, a tourism marketing consultancy, which delivers workshops, training, and industry development programs and works on a range of strategic tourism projects. Naomi is also the co-owner of Spark CoWork, a shared office space in Port Stephens.



DIRECTOR – Kerry Comerford

Kerry Comerford has extensive experience in market development through commercial licensing and joint venture projects in the global arts and entertainment industry, in particular producing, presenting and managing live large scale musicals productions in Asia. Ms Comerford was Vice President, Asia Pacific of entertainment company The Really Useful Group Ltd, which was founded by Andrew Lloyd Webber.

DSSN Staff



GENERAL MANAGER – Glenn Caldwell

Glenn comes to this important role with over 15 years' experience in Tourism and Major Events management having been responsible for the development and implementation of Destination Management Plans including investment, attractions, strategic partnerships, major events strategy, tourism research, visitor services, brand and destination marketing. As Tourism Manager for the Coffs Coast, Glenn has worked successfully in both corporate and government environments. Glenn's skills neatly complement those of the widely experienced DSSN Board.



INDUSTRY DEVELOPMENT MANAGER – Michael Forster

With over 15 years experience in Hospitality and Tourism, Michael is a true industry professional. Having worked with international Hotel brands including TFE Hotels and The Minor Hotel Group he has recently turned his focus to Regional NSW. Partnering with a number of suppliers in the MICE, Corporate, Government and Leisure sectors to drive business into the region. Michael has worked in a variety of departments ranging from Business Development, Partnerships, Front Office and F&B. His diverse range of skills nicely complements his strong passion for Hospitality and Tourism in Regional NSW.



EXECUTIVE ASSISTANT – Michelle Jenkins

Michelle Jenkins is an enthusiastic and well-organised Executive Assistant with a solid background in office administration, data entry, database and record management, diary management and customer service. She is a multi-tasking Executive Assistant with outstanding telephone manner, customer service skills and a high work ethic. Also regarded as a highly competent Office Manager who has run offices in both private enterprise and the Public Sector.

Office location and contact details

Destination Sydney Surrounds North office is conveniently located in Gosford CBD, walking distance from Gosford Railway Station and the bus and taxi interchange.

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Phone: 61 2 9191 7807

Email: admin@dssn.com.au

