



Destination Management Plan

Public Exhibition Draft – July 2017

Prepared by:
Destination Marketing Store, June 2017



Destination Management Plan

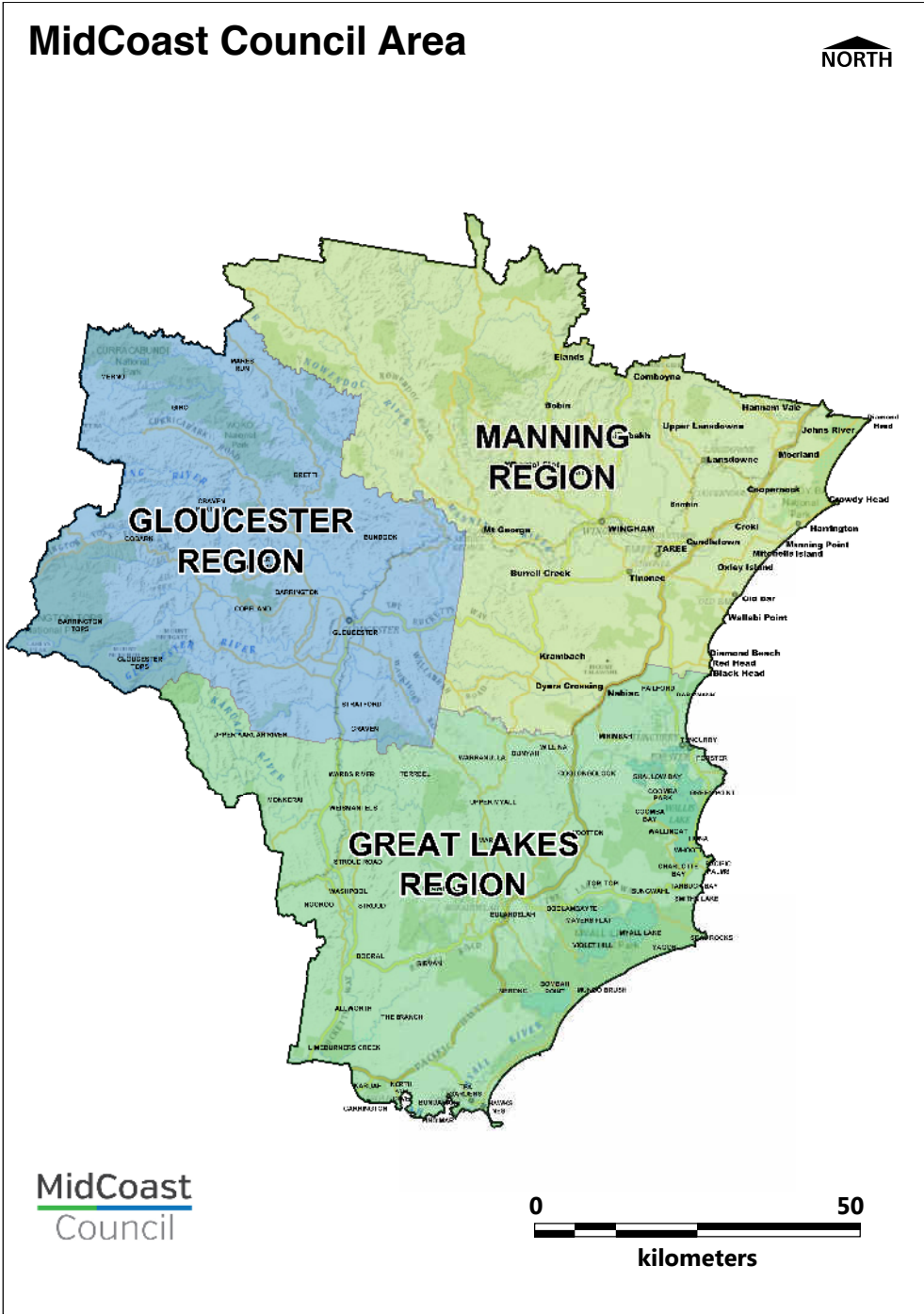
CONTENTS

1. Context for Destination Management Planning in the MidCoast region of New South Wales
2. Insights and Consultation
3. Target Markets
4. Destination Vision, Positioning & Experience Framework
5. Enabling Implementation
6. Delivering Supply – Signature & Supporting Experiences
7. Growing Demand – Destination Branding, Marketing & Visitor Services
8. Next Steps
9. List of Appendices



1. Context for Destination Management Planning in the MidCoast region of New South Wales

Our region

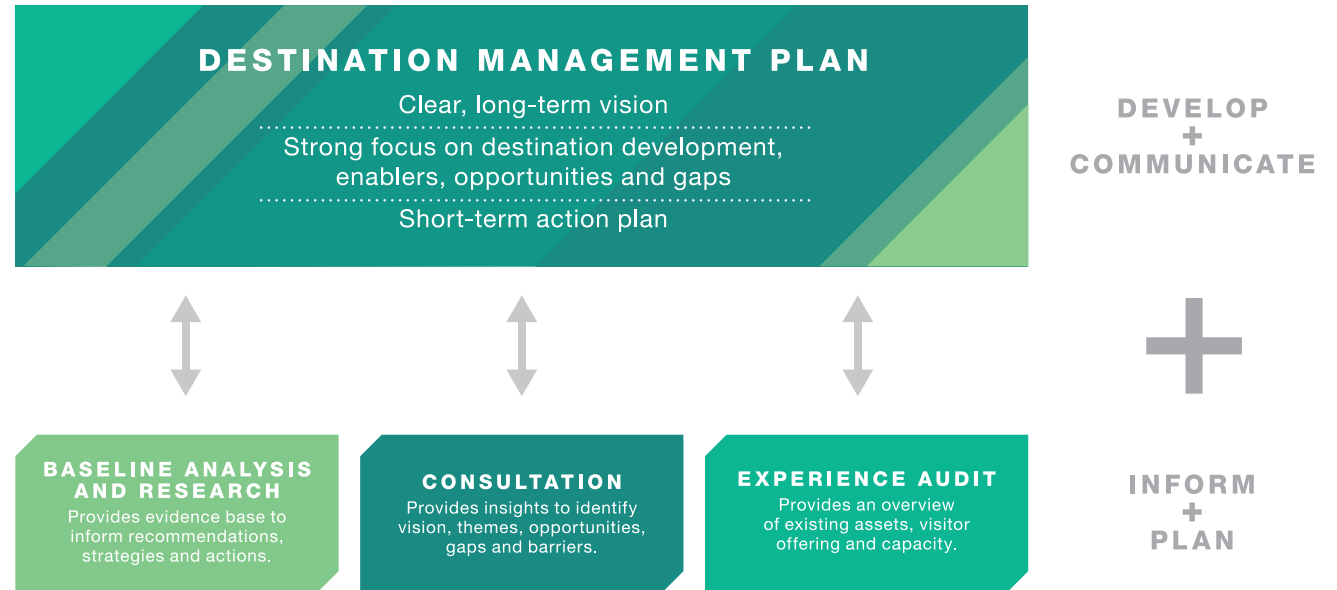


Destination Management Planning

Meaningful destination planning involves:

- Adopting a **visitor-centric approach** to boundary identification, product and experience development and marketing
- Strengthening **partnerships** with stakeholders and businesses **across sectors**
- Applying local meaning to **global and domestic trends** (Think Global, Act Local) and informed by **consumer and visitor research** and **stakeholder consultation**
- Identifying the **experience framework** and **signature experiences** that can be promoted as the region's lead products
- Allocating **resources and accountabilities** and evaluating outcomes against Key Performance Indicators (KPIs)

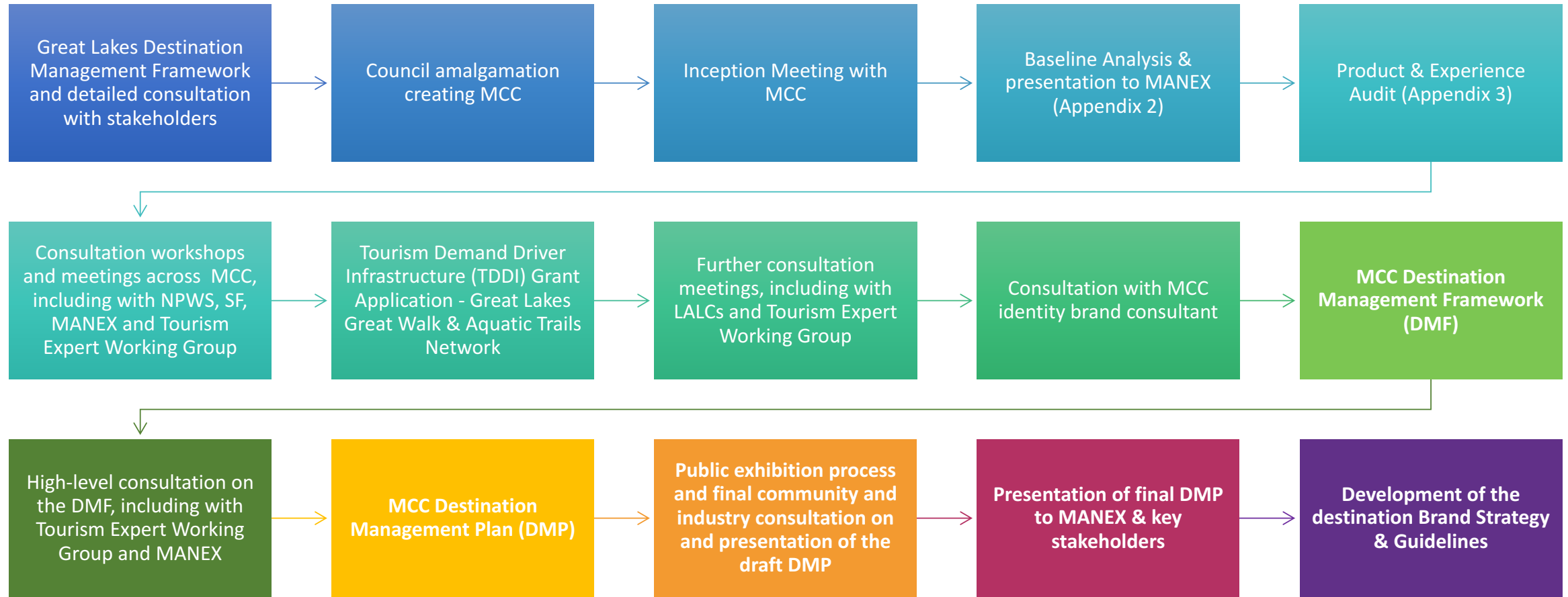
Overview of DMP process and core elements



Destination management planning is a requirement of Destination NSW – see: <http://www.destinationnsw.com.au/wp-content/uploads/2014/03/Destination-Management-Planning-factsheet.pdf>

Process for developing the DMP

The MCC Destination Management Plan is the outcome of a process that has involved the following steps:



MCC Goals for the DMP



Goals set for the MCC Destination Management Plan:

1. It addresses both supply and demand – that is, experience development and marketing
2. Long-term vision with prioritised short, medium and longer-term initiatives
3. Short-term Action Plan, which includes priorities achievable within existing resources
4. Identify game-changing projects that would require additional resources and/or partner organisations to implement
5. Clearly articulate the region's competitive advantage or point of difference, destination positioning and visitor-facing brand framework
6. Identify strategies to:
 - a) Maintain and potentially grow existing markets to encourage repeat visitation and increase length of stay
 - b) Attract new markets (those that have the greatest potential to grow the visitor economy) to increase visitor numbers and yield
7. Ensure seasonality, regional dispersal and linkages to other sectors are addressed

NSW Government Priorities

Delivering on the NSW Government's priorities

The NSW Government is working to achieve 12 Premier's priorities and 18 state priorities to grow the economy, deliver infrastructure, increase employment and create liveable communities. MidCoast Council has the opportunity through the DMP to directly contribute to the NSW Government's goals, in particular:

- Building infrastructure, including projects that improve growth and productivity across the state and those that contribute to liveability; and
- Creating jobs, including growing regional companies as well as enabling small and medium-sized businesses to flourish.

In addition, in December 2012, the NSW Government released the ***Visitor Economy Industry Action Plan*** (VEIAP). It aims to double overnight visitor expenditure to NSW by 2020 and outlines a whole-of-government approach in partnership with industry to achieve this target. The VEIP includes a number of actions that relate directly to MCC's DMP, including contributing to the achievement of the 2020 target and attracting investment to regional NSW. There are specific targets relating to nature-based and adventure tourism, including creating Great Walks in NSW.

The NSW Government has recently announced a record \$193 million investment in tourism and major events in its 2017-18 State Budget. It includes a commitment to regional NSW: **“Visitation to rural and regional areas will continue to be driven by a record \$43 million funding commitment over four years announced in 2016 to drive innovative industry reforms such as the establishment of six Destination Networks across NSW.”**

2. Insights and Consultation

Overview of key insights, strengths, weaknesses, opportunities and challenges for the MidCoast region

The insights, strengths, weaknesses, opportunities and challenges have been informed by three components undertaken as part of the DMP process:

1. Detailed **Baseline Analysis** – see a summary report in Appendix 2
2. Extensive **Product and Experience Audit** – see the report in Appendix 3
3. Comprehensive **Stakeholder Consultation** – see a summary of the consultation meetings and workshops held in Appendix 4

A Baseline Analysis of Tourism in MidCoast New South Wales

Exploring the Potential for Sustainable Tourism Growth
in the MidCoast Region of New South Wales

Baseline Analysis Summary
7 September 2016

Produced by 2iis Consulting in collaboration with

MidCoast
Council

MidCoast Council
Gloucester Region
MidCoast Council
Great Lakes Region

MidCoast Council
Manning Region
DMS
Destination Marketing
NSW



Cover image © Craig Fardell and Christina Armstrong | Barrington Tops National Park.

2 | A SUMMARY OF THE KEY CONCLUSIONS SECTION 16

MidCoast
Council



OVERVIEW

The Baseline Analysis of Tourism in MidCoast New South Wales report summarises the current state of Tourism in the MidCoast and explores some of the opportunities for Sustainable Tourism Growth in the region over the next 15 – 20 years. It was produced in August & September 2016 for MidCoast Council.

It identifies a number of significant opportunities for the region – some very significant – that have the potential to grow the MidCoast Tourism Industry to **over AUS \$1.55 billion by 2030**; an increase of more than 270% from its current value of AUS \$570.4 million.

In exploring these various opportunities, a potential future for the MidCoast's Tourism Industry has emerged that is quite different from its current state.

A future where Tourism makes full use of the region's exceptional Natural Tourism assets much more effectively and where:

- + The overall Tourism mix is **a much more balanced and sustainable one**;
- + Over **25% of the MidCoast economy** is directly or indirectly supported by Tourism; and
- + The MidCoast is renowned both domestically and Internationally as **one of Australia's leading Nature and Adventure-based Tourism regions**.

This future is certainly an ambitious one, but also an attainable one based on the overall growth forecasts and various opportunities that have been uncovered through this baseline analysis.

Consumer research and assessment of the economic contribution and potential for growth of MCC's visitor economy has been outlined in significant detail in the Baseline Analysis prepared for MidCoast Council as part of the DMP project. A summary of the Baseline Analysis is included in Appendix 2.

Baseline Analysis and Research

Current and Forecast Value of MidCoast Visitor Economy, including Nature-based and Adventure Tourism (2015 vs. 2030)

Nature-based and adventure tourism are clear opportunities.

As detailed throughout the Baseline Analysis, these segments are particularly strong opportunities, forecast to grow at almost twice the rate of the other tourism segments in the region; going from a value of **\$142.6 million in 2015 to an estimated value of \$695.3 million in 2030.**



REGION/ SCALE	Estimated Value in 2015			Forecast to 2030*		
	Total Tourism Market (AUS\$)	Nature/ Adventure-Based Tourism		Total Tourism Market (AUS\$)	Nature/ Adventure-Based Tourism	
		20% Share (AUS\$)	25% Share (AUS\$)		35% Share (AUS\$)	45% Share (AUS\$)
Australia	\$82.5 billion	\$16.5 billion	\$20.6 billion	\$223.9 billion	\$78.5 billion	\$101 billion
New South Wales	\$30.6 billion	\$6.1 billion	\$7.7 billion	\$83.0 billion	\$29.1 billion	\$37.35 billion
North Coast NSW	\$3.42 billion	\$0.68 billion	\$0.86 billion	\$9.3 billion	\$3.3 billion	\$4.2 billion
Gloucester Region	\$51.4 million	\$10.2 million	\$12.8 million	\$139 million	\$48.7 million	\$62.6 million
The Great Lakes	\$359 million	\$71.8 million	\$89.8 million	\$974 million	\$340.9 million	\$438.3 million
Manning Region	\$160 million	\$32.0 million	\$40.0 million	\$432 million	\$151.2 million	\$194.4 million
MidCoast (Total)	\$570.4 million	\$114 million	\$142.6 million	\$1.55 billion	\$540.8 million	\$695.3 million

*2030 forecast is modelled on UN, TRA & Destination NSW data. Given the wide variety of variables, it should be taken as indicative only.

Table included in the Baseline Analysis, which was prepared as part of the DMP process

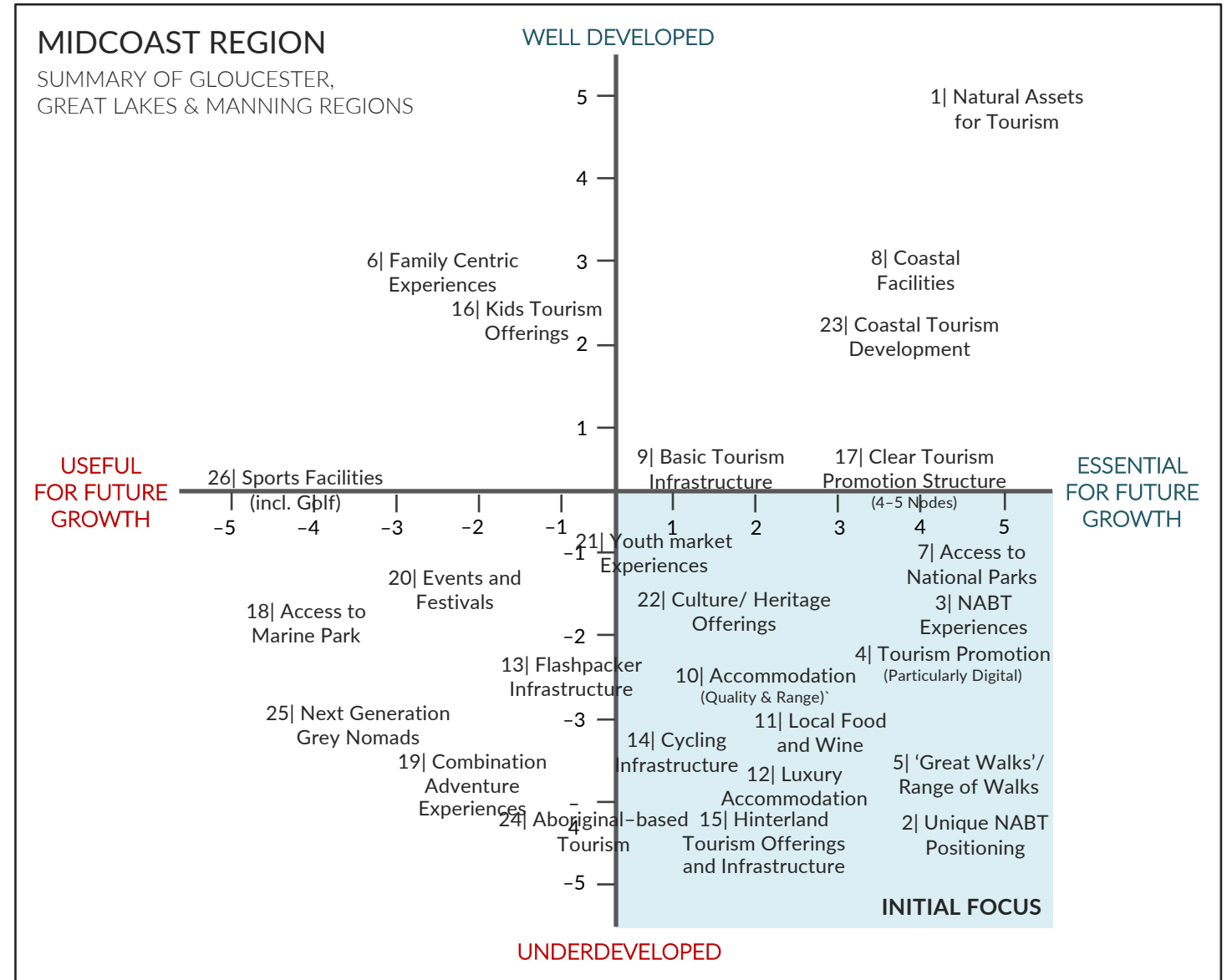
Baseline Analysis and Research

MidCoast Tourism Gap Analysis

As part of the Baseline Analysis, an assessment of the key gaps was undertaken to identify those opportunities that have the greatest potential to contribute to the growth of the visitor economy within the MidCoast region.

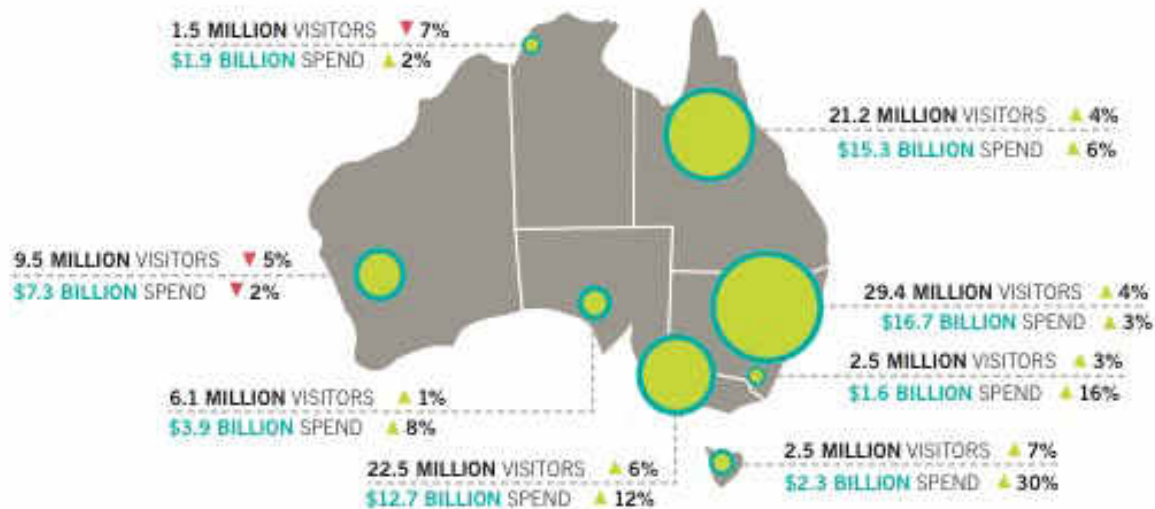
The Gap Analysis highlights the areas for initial focus, which are essential for future growth although currently underdeveloped. These areas have been further investigated through the DMP process and consultations.

This does not preclude continued efforts in those areas that are categorised as ‘useful for future growth’ or ‘well-developed’ as these areas will continue to contribute to the broader appeal of the destination.



Latest National Visitor Survey results

Overnight trips and regional expenditure by state



Source: <https://www.tra.gov.au/research/domestic-tourism-by-australians/national-visitor-survey-results/national-visitor-survey-results>

Australia's domestic visitor economy continues to set new records with the latest figures for 2017 revealing strong growth in overnight trips, nights and expenditure. In the year ending March 2017, there were 91.7 million overnight trips (up three per cent), 335.5 million visitor nights (up four per cent) and \$61.7 billion in overnight expenditure (up six per cent). Domestic and international tourism expenditure has grown \$6.3 billion to \$121.2 billion in the year to March 2017, which has placed the visitor economy just ahead of the mining industry's economic contribution to Australia.

The domestic tourism results highlight the trend for more Australians to holiday or undertake short-breaks in Australia. A significant positive change relates to the purpose for travel being to visit friends and relatives, which has increased by 8%.

Short Breaks Market Insights

Destination NSW, Short Breaks to NSW March 2015 | Key Findings

The annual study into the Australian travel mindset, Domesticate, reported that short breaks are a vital component of a happy life, offering a chance to get away from 'city busyness' and to refresh and relax.

Domestic short breaks often a mix of planned and spontaneous trips, spread across the calendar to provide milestones to look forward to. Australians like to make short domestic trips often, even after returning from long-haul overseas trips.

- The short breaks market to Australia accounts for a quarter (25%) of total overnight visitors (domestic and international) to the country.
- The largest proportion of short break visitors to NSW is youth segment (15 to 29 years); however, the number of visitors aged 60 years and over has seen the strongest (and continuous) growth over the past ten years.

Short Breaks are a growing market in Australia – in the past decade, the short breaks market in NSW grew by 14%. In Y/E September 2015, Regional NSW received three quarters (76%) of domestic short break visitors to NSW.

Short Breaks NVS & IVS results Sept 2015

Destinations	Domestic Visitors (%)	International Visitors (%)
Sydney	24%	98%
Regional NSW	76%	4%
North Coast NSW	16%	*
South Coast	16%	*
Hunter	12%	*
Central NSW	6%	*
Central Coast	5%	*
Blue Mountains	5%	*
The Murray	4%	*
Snowy Mountains	4%	*
Capital Country	4%	*
New England North West	3%	*
Riverina	2%	*
Outback NSW	1%	*
Activities	Domestic Visitors (%)	International Visitors (%)*
Social activities	87%	96%
Outdoor or nature activities	47%	73%
Sports or active outdoor activities	30%	5%
Local attractions or tourist activities	22%	66%
Arts / heritage / festival activities	22%	62%

See: <http://www.destinationnsw.com.au/wp-content/uploads/2014/03/short-breaks-to-nsw.pdf>

Global megatrends defining travel in 2017

- **Growth market segments globally**
 - There is a continuing rise in the numbers of contemporary female travellers, who are more likely to have a higher disposable income and to travel either on their own or in small groups of friends.
 - The fifties are the new demographic for travel brands – more people are choosing to travel earlier than retirement to enjoy the more active or immersive experiences that destinations have to offer.
- **New experiences**
 - Tourism activities, such as tours are finally coming into their own. However, the focus is on small-scale, immersive and locally curated activities. This is particularly important in relation to Indigenous and nature-based tourism;
 - New luxury is defined by small brands with big stories. This is driven largely by the opportunity for genuine engagement and interaction with local people, nature, heritage and arts and culture. The story of the place and its people is increasingly critical to the success of the experience.
 - ‘Festilisation’ of meetings and events – festivals add to the excitement of a destination and increasingly appeal to those organising major conferences and events.
- **Dining out as the main event** – this trend is no longer just about the ‘super-star’ (or multiple-hatted) restaurants but is now about ‘local heroes’ who create immersive and curated experiences rather than simple, expected service.

For a highly credible review of all the megatrends defining travel in 2017 see the SKIFT report at:

<https://skift.com/2017/01/12/the-megatrends-defining-travel-in-2017/>

Domestic tourism trends defining travel in 2017

The appeal of holidaying in Australia to Australians continues to grow:

- Escapism and short breaks have become the norm as Australians look to escape the frenetic pace of everyday life
- Domestic holidays provide a perceived 'safety net' to Australians with easy and affordable trips at home that offer fun and relaxed holiday experiences – for younger Australians, this includes carefree and spontaneous experiences
- Domestic holidays are more about the value of the experience, with Visiting Friends and Relatives (VFR), mid-range hotels, motels, and serviced apartments the desire at home - indulgence is on the rise in relation to products and experiences
- Reconnection with family or friends remains central to the Australian holiday experience
- Camping and caravanning continue to increase in popularity - 30 to 54 year-olds make up 47% of the market, visitors aged 55 years and over (30%) and 20 to 29 years (16%)

Regional NSW is the most visited regional destination in Australia (41%) and the most popular regional destination (43%) that people are seriously considering visiting in the next 12 months for a holiday or short break.

Regional NSW fulfils what Australians look for from holidays: 'Peaceful, a moment of quiet' (20%) and 'Reconnecting with family or friends' (23%).

Sources: For a snap-shot of the trends defining domestic travel in 2017, see the Kantar TNS Australia's annual syndicated study into the Australian travel market:

http://www.destinationnsw.com.au/wp-content/uploads/2012/04/Domesticate_2017_Factsheet_Australia.pdf; and Caravan Industry Association of Australia (CIAA)

— see: <http://www.caravanindustry.com.au/research>

Regional Australia best fulfils Australians' needs Top 5 experiences Australians want from holidays



52%

Peaceful,
a moment of quiet



48%

Leaving the cares of
the world behind



40%

Re-connecting
with family or friends



37%

Enriching
and fulfilling



36%

Indulging
and rewarding

Australians' domestic holiday needs are best fulfilled through regional Australia - 1 in 4 associate regional Australian destinations with peaceful moments of quiet and reconnecting with family and friends, key experiences Australians want on holidays.

Domestic tourism trends defining travel in 2017

- **Word of mouth the most influential in holiday decision-making**
 - Word of mouth from family and friends influences holiday decisions for 1 in 2 Australians, specifically destination, accommodation, and destination choices. In 2016, 60% of young Australians said their decisions were influenced by the experiences of friends and family on social media
 - Digital is still important and impacts decisions about destination, accommodation, and activities. For many Australians, brand websites and Facebook are the preferred platforms, with 2 in 3 Australians sharing about their holidays on Facebook as they experience them
 - Australians want authentic experiences and look to locals and local information bureaus for recommendations on how to do this
- **Sharing economy set to grow**
 - 1 in 8 Australians already use share economy accommodation when holidaying domestically – this is expected to grow by 33% in the short term, mostly from new users. Share economy users are more likely to be aged 25-44 (54%), be middle-income earners (49%), and be based in NSW (35%)

What is on young Australians' minds?

Keep up and get ahead: Rising rent and housing costs and challenges in finding full time employment are contributing to the disappearance of the Australian dream for young Australians. There is a rising resignation of the chance of owning your own home.



Focus on the moment: With the increasing resignation to financial pressures comes the attitude of 'I might as well enjoy what I have'. Young Australians value their holidays and the quality is more refined than it once was for travellers of this age. Experience is crucial – young Australians are looking to expand their knowledge and perspective and enrich their lives.

Time pressures: With pressure to get ahead in their careers and financially, young Australians are feeling time pressure and free time is limited given the focus work requires. Holidays are more important than ever as a tonic to these pressures and are a good way to spend time with friends and family.

Occasion-based travel: Young Australians are travelling domestically for special occasions (birthdays, weddings, sporting and music events), and are looking to make the most of these events by extending their holidays around these occasions. The challenge is therefore promoting the destination and encouraging young Australians to extend their trips.

Source: Kantar TNS Australia's annual syndicated study into the Australian travel market 2016 & 2017 – see:

<http://www.destinationnsw.com.au/tourism/facts-and-figures>

Consultation Insights



Consultation workshops and meetings were held with key stakeholders from within the tourism industry, hospitality sector, State Government agencies and various interest groups. A summary of the stakeholder consultation process is outlined in Appendix 4.

The key insights from the consultation process are summarised below:

- Recognition of the beautiful nature-based attributes of the region and the rivers and waterways connecting the mountains to the sea
- Genuine country living – there are opportunities to experience the real Australian country and coastal lifestyle – rodeos, saleyards, agricultural shows
- Importance of maintaining the integrity of the local feel of the villages of the region – collectively part of the broader story of the region in terms of their history and heritage
- While the region offers traditional country and coastal villages and towns, many of the communities have an entrepreneurial spirit as well as many artists and artisans
- Sustainability viewed as very important for both liveability and the ‘clean, green’ perception of agricultural produce (a competitive advantage)
- Strong support for the continuation of the *Manning River Naturally* industry-led branding for local produce and agricultural industry as well as strengthening the farm gate offer

Consultation Insights



- A lack of Aboriginal cultural experiences was identified as a gap across the region although the opportunity to link more closely with places such as the Manning Regional Art Gallery
- Manning Regional Art Gallery perceived as a strength of the region – attracting high-quality exhibitions and events and popular educational programming
- Many adventure activities and opportunities, especially relating to World-Heritage Barrington Tops, rivers and other natural areas. However, significant community tension over mining, especially coal seam gas – highly divisive in Gloucester and impacting on access to rivers and waterways, including safety concerns for locals and visitors
- Link between the mountains and the sea through the rivers and waterways – ‘Leaves touch the waters from the mountains to the sea’
- Many natural events, including wildlife seasons and migrations, snow in winter, high river flows for white-water rafting
- Many outdoor recreation facilities and activities, from golf courses to fishing, triathlons and sailing
- High quality events and festivals program, including markets - importance of local events was recognised. However, volunteer fatigue was raised as a potential challenge for continued event programming, especially in smaller communities

Consultation Insights



- Strategic urban planning is a key issue that has also been identified as a weakness – opportunities for appropriate and sensitive redevelopment of key sites such as the Dairy Factory in Gloucester and Taree Fishing Coop
- A clear desire to avoid over-development and provide a contrast to other coastal towns, such as Port Stephens, Port Macquarie and Coffs Harbour – as well as the opportunity to revitalise and improve maintenance of key sites etc
- Opportunities for sports tourism, particularly to leverage locally-popular sports such as hockey, equestrian sports, rowing, etc. The potential for Taree to become the host of sporting associations (eg Hockey) and to become a sporting hub for the north coast - could make greater leverage to encourage participants to stay longer or bring friends and family
- Regulation and Council planning policies perceived as a barrier to attracting new businesses. Some examples, such as the Vibrant Spaces policy perceived positively and supported
- Roads, tracks, trails and signage:
 - Maintenance required as well as clearer directional signage
 - Some roads are very busy and limit opportunities for cycling due to safety concerns
 - Poor signage and traffic congestion during peak periods contributing to a lack of regional dispersal

Consultation Insights



- Perceived negative attitudes by some people within the broader community to tourists ie local residents do not wish to see an influx of mass tourism into the region – coastal areas experiencing hyper-seasonality during summer season and impacts on liveability of some places eg Forster
- Need for greater collaboration in industry – levels of industry engagement across the region inconsistent – However, Gloucester was highlighted as an example of stronger collaboration within industry and with Council staff, who were praised as dedicated
- Inconsistent standards of customer service and low levels of collaboration between hospitality and agricultural sectors re cross promotion for local produce or lack of availability. Some outstanding examples of collaboration based on the values and produce of the region (eg Kingfisher Café in Pacific Palms and Bent on Food in Wingham)
- Perceived need for greater marketing effort, particularly in the digital space
- Lack of a range of accommodation, particularly to attract new markets

Strengths and Opportunities

STRENGTHS

- Natural environment including world heritage listed national parks, wetlands of international significance, waterways, lakes and river systems
- Range of existing outdoor recreation and nature-based facilities and places
- Villages showcasing rural heritage, history and rural lifestyle
- High-quality local produce including Wallis Lake oysters, local wineries, etc – Manning Valley Naturally brand doing well in agriculture sector
- Proximity to Sydney and Newcastle
- Established tourism industries e.g. dolphin & whale watching, kayaking and some existing high-quality accommodation
- Cycling and walking trails
- Wide range of popular events and festivals
- Contemporary coastal villages
- Manning Regional Art Gallery attracts high quality exhibits, has an active events and educational program and strong community support

OPPORTUNITIES

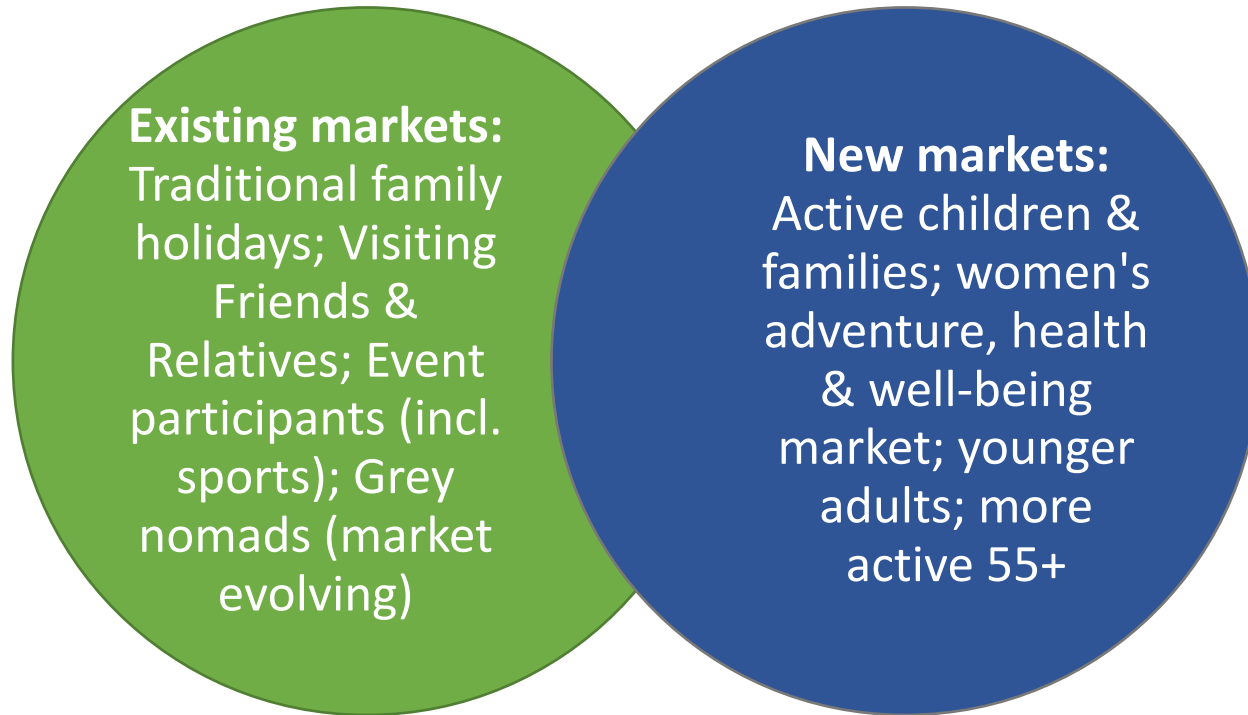
- MCC's and region's commitment to sustainability
- Urban renewal in Taree and Forster to take advantage of and improve access to the Manning River and Wallis Lake respectively
- Amalgamation offers a unique opportunity to identify the common ground and create economies of scale to build awareness of and promote the region
- Short breaks market is growing – tailor regional offer to capitalise on this growth
- The rise of the female traveller offers an opportunity for the region to create products to meet market demand (see 2017 Skift report on travel trends)
- Strengthen relationships with potential partners to deliver new products and experience, such as NPWS and the Local Aboriginal Land Councils and private sector
- Strengthen collaboration through creation of a single destination brand that encapsulates or reflects the values, emotional territory and attributes of the three former local government areas

Weaknesses and Challenges

WEAKNESSES	CHALLENGES
<ul style="list-style-type: none"> • Limited range of accommodation types • Allocation of existing resources not maximising opportunities to build awareness or promote the region to key target markets • Online and digital presence confusing – multiple sites requiring review including content profiled on Visit NSW website • Maintenance required to some visitor infrastructure and facilities eg walking trails • Inconsistent standards of customer service, including some villages not offering 7 day or weekend services • Limited resources for implementation of signature experiences • Inconsistent levels of capacity within the industry and visitor services • Inconsistent levels of industry engagement 	<ul style="list-style-type: none"> • Reconciling and ongoing resourcing of three visitor-facing destination brands • Hyper-seasonality over summer along the coast • Lack of awareness of the region as a single destination • How to geographically locate the region in a marketing sense • Inconsistent promotion and use of local produce in local restaurants and cafes • Managing visitor economy infrastructure projects across multiple land tenure • Growing demand during non-peak (low and shoulder) seasons and increasing regional dispersal • An aging population impacting on available labour resources and visitor services versus community services • Access to waterways eg rivers in the hinterland and easements across private land

3. Target Markets

Target Markets



The strategic approach is to maintain existing markets but also target new higher-value markets

High-level objectives

1. **Existing markets** – strengthen appeal of the destination to existing markets to:
 - a. Extend length of stay
 - b. Encourage repeat visitation
 - c. Increase participation in tours and activities
 - d. Increase regional dispersal (especially during peak coastal periods)
2. **New markets** – focus on those markets with greatest propensity to grow the visitor economy:
 - a. Increase visitor numbers
 - b. Increase visitation during non-peak periods
 - c. Increase yield (through development of higher-yield experiences and accommodation offer)

These objectives are measurable and should have targets identified for each one to monitor performance (refer Priority 2 under *Growing Demand* below).

Target Markets – insights to new markets



Active families are attracted to a destination that offers happy, healthy, sustainable and safe family adventure. There is a strong trend in tourism driven by the motivation of many city-living families to escape the urban environment. They seek opportunities for their children to experience the great outdoors and self-select a break from screen time by providing a fun and exciting alternative. This increasingly includes short breaks. The MCC region is well positioned to offer this type of holiday.

Women's adventure, health and well-being market is continuing to experience significant growth and is the fastest growing segment for great walks. However, there are few if any destinations that have identified this target market segment as key to the growth of their visitor economy. MidCoast region has an opportunity to be an early adopter in this space by directly targeting this market and promoting existing and developing new experiences that suit this market and leverage the region's high quality local produce and its health and well-being sector. Importantly, women within this market segment are also more likely to be the key influencer on holiday decision-making within the Active Families market (see below), so by targeting this market segment, MCC would also be raising awareness of the region as a holiday destination for Active Families.



Target Markets – insights to new markets

Younger adults, in the age group of 25 – 35, are changing the way they travel. This market is highly likely to be attracted to the region as they seek more sustainable, nature-based destinations that offer a variety of accommodation, quality food and wine and contemporary arts and culture. They travel in couples or small groups of close friends, avoid youth hostels and desire to experience a destination ‘like a local’ (ie seek out local experiences)



More active retirees or 55+ market – there has been a clear segmentation of the retiree market, with more active retirees seeking more than a ‘grey nomad’ holiday. This market prefers a more active holiday, especially with recreational opportunities in nature or the outdoors. Many travel with their bikes or kayaks.

4. Destination Vision, Positioning and Experience Framework

Destination Vision and Positioning

A best-practice approach to strategic tourism planning involves identifying a clear place vision and destination positioning for the region at the outset.

A destination positioning statement should be:

- Aspirational
- Invitational
- Based on consumer insights and resonate with the target market

It provides the context and an emotional reason to choose your destination over any other. It is NOT your tagline.

The vision and positioning are the region's DNA and set the direction of MCC's DMP, specifically:

- A clean, green environment for the well-being of the communities and quality of the produce;
- Sustainable development to grow the visitor economy, which is in keeping with the values and character of the communities that make up the region;
- Creating opportunities that are attractive to residents and visitors alike, reinforcing the integrated approach to planning of infrastructure, places and spaces, experiences and products that benefit the community as well as the visitor economy;
- Attracting new events, activities and exhibitions that reflect the local character of the region and contribute to a vibrant community and destination.

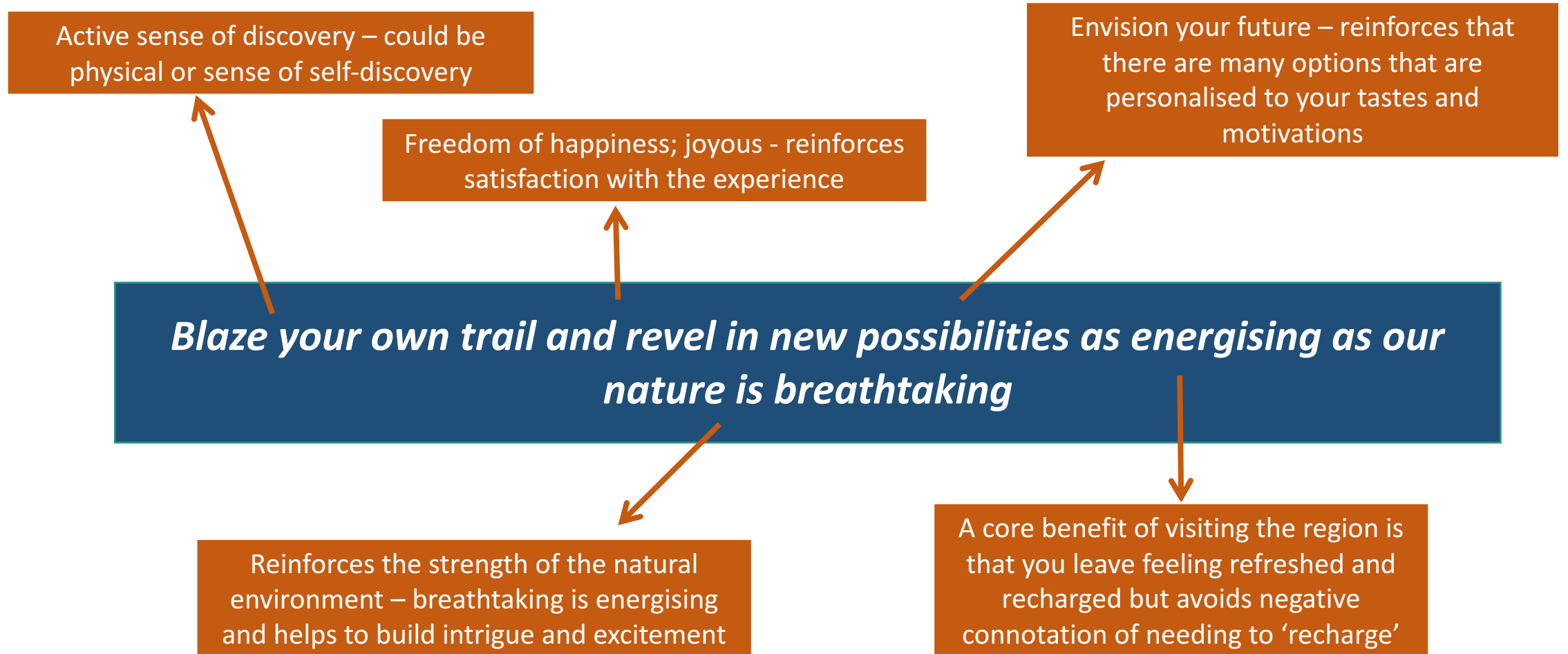
Destination Vision for 2030

MidCoast is renowned as a place where outstanding natural beauty meets vibrant country living, inspiring healthy and active lifestyles

The vision encompasses three core ambitions:

- **Outstanding natural beauty:** The diverse and beautiful natural environment, encompassing rivers, lakes, beaches, mountains and forests is a clear competitive advantage of the region, which continues to attract people to live and holiday. The communities of the region have expressed a strong desire to maintain or improve the natural environment as it contributes to liveability and underpins the success of many industries across the region.
- **Vibrant country living:** The region takes great pride in its rural heritage and continues to honour this through a genuine rural lifestyle. However, it has also committed to ensuring that this lifestyle is sustainable, helping to drive the perception of the region as providing high quality produce, reinforcing the importance of a 'clean, green environment' and providing a legacy for future generations.
- **Healthy and active lifestyles:** A clear benefit for both the communities of and visitors to the region of being surrounded by a beautiful environment is that it helps to promote more active and healthy lifestyles. As more and more people lead busy lives that are increasingly disconnected from nature and the outdoors, opportunities to easily access nature will become more attractive.

Destination Positioning



The positioning statement is uplifting, energising and inspiring.
It is not attribute focused (although reinforces the natural attributes of the region) nor intended as a tag line.

Experience Framework – Strategic Themes

1. Nature's Bounty

- Produce, food and drink
- High quality, accessible and more personalised experiences

2. Natural Adventure

- Healthy outdoor living
- Quality recreational opportunities

3. Contemporary Coast

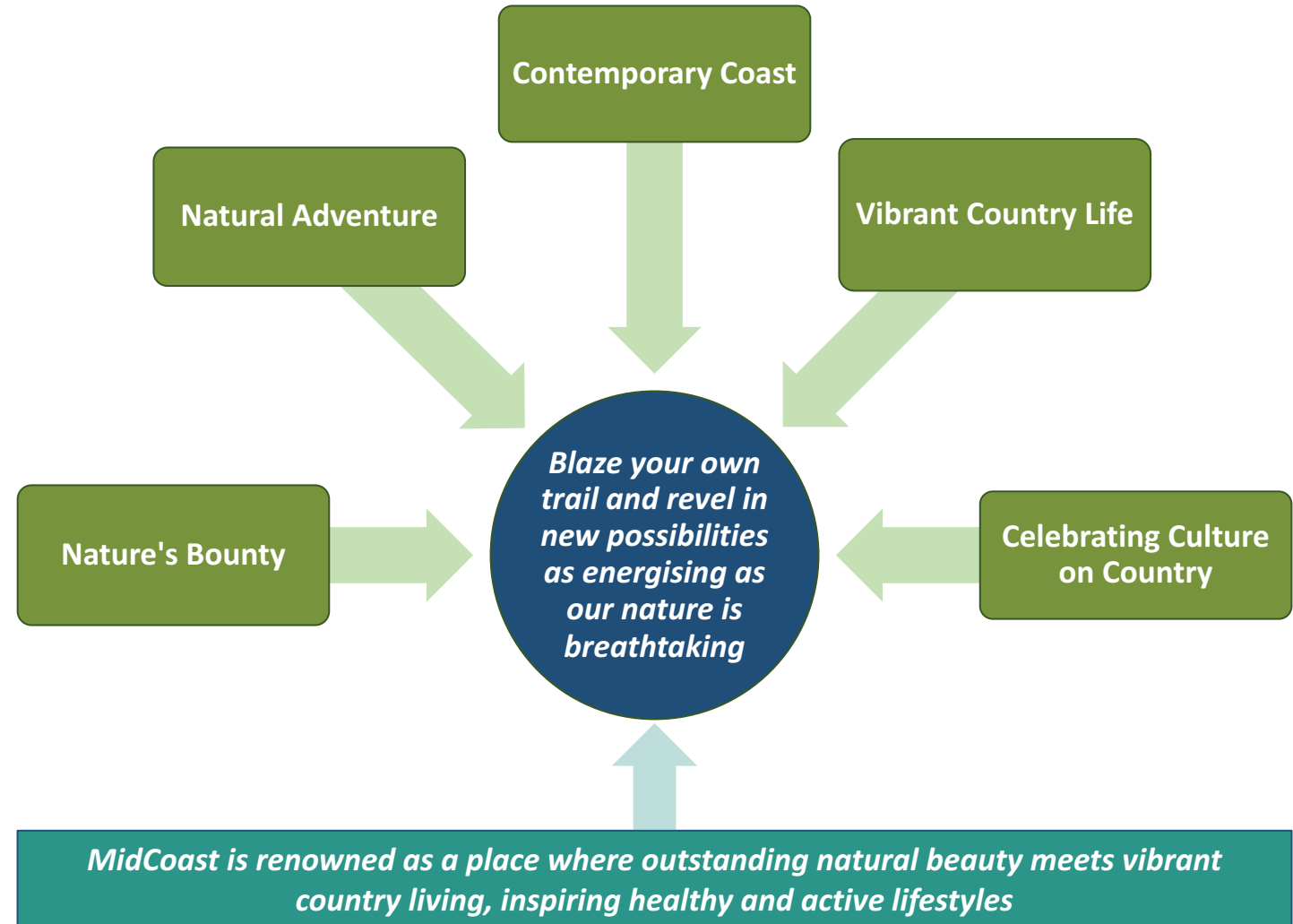
- Revitalising our places
- Exciting coastal experiences

4. Vibrant Country Life

- Revitalising our places
- Genuine country experiences

5. Celebrating Culture on Country

- Immersive Aboriginal cultural experiences
- Art and craft



5. Enabling Implementation

Key Considerations

Enabling implementation

In order to provide context for the priorities identified within this DMP, it is important to consider some of the critical issues with regard to implementation. A goal of this DMP is to identify short, medium and longer-term initiatives that would contribute to the growth of the visitor economy and strengthen economic development for the region. However, it is recognised that not all initiatives are easily implemented and would require a strong commitment from MCC, community and business support and in some cases, significant resources.

The short and medium-term priorities identified are more easily achieved, albeit with potential reallocation of existing resources or through adopting new procedures or practices. The longer-term initiatives are more ambitious or require further investigation or negotiation. They represent a significant repositioning for the region and would require additional resources, not all of which would be able to be funded by MCC. However, if implemented in a multi-year, staged approach, they would contribute significantly to the economic growth of the region.

Summary of key considerations for implementation of the DMP include:

- **Availability of resources**, including financial and human resources. The resourcing of enabling activities, such as support to grow networks, facilitate collaboration and build industry and Council's capacity, is just as critical as the funding of capital works for infrastructure. This will require a review of existing resources and potential reallocation to meet the needs of the future as well as identifying alternative or additional funding sources to supplement MCC budgets, such as the NSW Government's *Regional Tourism Fund* or *Rebuilding NSW Program*.
- **Not all initiatives identified in the DMP will be the sole responsibility of MCC** to implement or fund. However, notwithstanding probity considerations, the Council may be able to facilitate or encourage an outcome through its policy framework, in-kind support or other enabling function.

Enabling implementation

- **Need for collaboration** between MCC, communities, businesses and other key stakeholders across the region and beyond. Building and maintaining networks and ensuring ongoing communication with local communities and businesses is essential and requires a consistent and planned approach.
- **Accessibility to the experience offer** is critical, including to the rivers, lakes and waterways for kayaking or white-water rafting or trails for hiking and mountain biking. This may include the need for public easements or improving signage and trail markers.
- **Council's planning policies and processes** are essential to facilitate economic development, including incentives to attract the right type of investment. In a competitive environment in which many regions are actively working to attract new investment, MCC will need to communicate its vision, articulate its long-term direction and ensure it is reflected in the Council's planning policies, development application processes and decision-making. It is essential that the DMP is viewed as a **whole-of-Council plan**, which fosters collaboration and cooperation between all the Council's service areas.
- **Partners are critical to long-term success.** There will be a need to work closely with Destination NSW, the newly formed *Destination North Coast* Destination Network and other potential partners, such as the NSW National Parks & Wildlife Service (NPWS), Forestry Corporation of NSW (FC), Local Aboriginal Land Councils as well as other public and private sector organisations.
- Individual initiatives identified in the DMP link to other initiatives. That is, there is an opportunity to **consider how each experience development initiative can leverage or strengthen the appeal of other initiatives**. When considering the experience development agenda proposed in this DMP, there is value in considering the broader outcome achieved by looking for elements that integrate across themes or support specific strategies. This will assist with staging development priorities to maximise resources and grow the appeal of the destination.
- A key challenge for MCC is to deliver on the **State Government's agenda for the amalgamation of Councils**. The DMP provides an opportunity for Council to **build internal resources and collaboration** to ensure that the region's economy continues to grow and deliver on the State Government's priorities to build infrastructure, create jobs and enhance the visitor economy, including in regional NSW.

Enabling priorities

Description

The enabling priorities outlined below include a number of actions that would address some of the challenges or issues with regard to implementation of the DMP. However, this is not intended as an exhaustive list of actions required to facilitate all priorities identified throughout the DMP. It is essential that the **DMP is viewed as a whole-of-Council plan**, which fosters collaboration and cooperation between all of the Council's service areas.

Key actions

1. Review the Council's planning policies, processes and framework to identify opportunities for providing **incentives that attract the right type of investment in the visitor economy** or to activate and beautify precincts, main-streets and other facilities or amenities – for example, this could include opportunities to extend or expand on the existing *Vibrant Spaces* policy, which reduces regulation and is designed to encourage businesses to make better utilisation of outdoor areas for dining, seating, pop-up promotions and markets etc. It should also encourage and support a beautification program, for example integrating public art.
2. Develop a **Visitor Accommodation Strategy** – MCC should adopt a proactive approach to attracting investment in a more diverse range of visitor accommodation. This includes ecolodges, holiday parks, nature-based accommodation and adaptive reuse of heritage assets for boutique accommodation. The Strategy should identify priorities, opportunities for attracting investment and proposed reforms to the Council's planning policies and involve:
 - Audit of existing visitor accommodation to identify the style of accommodation as well as assessment and quantification of supply by style across key visitor nodes throughout the region - identify areas with an over or under supply as well as gaps and opportunities relating to the various styles or types of accommodation
 - Review of existing planning policies in relation to visitor accommodation and assessment of capacity of the policies to attract investment. For example, adaptive reuse of heritage assets or providing development approval incentives for certain types of accommodation such as sustainable buildings (for example, ecolodges)

Enabling priorities

Key actions continued

3. Review **land-use planning policies** in relation to opportunities to facilitate cross-tenure projects, such as the Great Lakes Great Walk and Aquatic Trails project. This should consider aspects such as:
 - Potential for re-zoning of some areas to enable community access or off-set requirements of new development proposals.
 - Access to waterways and rivers, especially in the hinterland, including easements across private land.
4. Identify **opportunities for grants or partnerships with other organisations** to enhance the funding of key initiatives, particularly in relation to marketing campaigns and product or experience development. This approach would involve:
 - Accessing the NSW Government's *Regional Tourism Fund* or other grants that offer matched funding (dollar for dollar), as was achieved in 2016/17 with the Tourism Demand Driver Infrastructure (TDDI) grant for the Great Lakes Great Walk and Aquatic Trails Network project. These grants can be utilised for tourism marketing or product development. Also consider the NSW Government's *Rebuilding NSW Program - Regional Growth – Environment and Tourism Fund (RGETF)*, which aims to increase tourist visitation by investing in regional environment and tourism infrastructure, particularly focusing on assets that will grow and further diversify NSW regional economies. Applications for 2017 closed in April. However, the fund may be available again in 2018. There are often conditions that apply to successful grant applicants.
 - Co-op marketing campaigns with the local tourism and hospitality industry, which provides partnership funding for the development and delivery of campaigns to market.
 - Encouraging private sector investment on Council-managed lands through appropriate probity processes.
5. Build **collaboration between MCC, communities, businesses and other key stakeholders** within and beyond the region, including through regular communication. Initiate an agreement with Destination NSW, the newly formed *Destination North Coast* Destination Network and other potential partners, such as the Local Aboriginal Land Councils, NPWS and FC. Refer to priority 7 in the *Growing Demand* section.
6. Identify **appropriate resources and opportunities for internal collaboration to support implementation** of the DMP.

6. Delivering Supply

Signature and supporting experiences

This section outlines the signature and important supporting experiences that align with the **Experience Framework and Strategic Themes** outlined above and would enable the destination to deliver on MCC's goals for the region, its unique positioning and competitive advantage in the tourism market place. It delivers on the MidCoast Tourism Gap Analysis provided in the Baseline Analysis and includes 'game changer' projects that require longer-term planning and investment.

Importantly, the signature and supporting experiences identified in this section would contribute to the opportunity to grow the region's visitor economy and contribute to the achievement of the Tourism 2020 target to double tourism expenditure by 2020.

Signature & supporting experiences



Strategic Themes	Signature & Supporting Experiences	Links & Value-Adds
Nature's Bounty	Soil to Sea Produce Event and Markets	Manning Valley Soil to Sea Produce Precinct
	Farm Gate Trail	Living Country Gloucester Dairy Factory Redevelopment
	Sharing our Produce program	Local events Capacity building initiative and network facilitation within the hospitality and local produce sectors

Signature & supporting experiences



Strategic Themes	Signature & Supporting Experiences	Links & Value-Adds
Natural Adventure	Great Lakes Great Walk & Aquatic Trails (game changer project)	Contemporary Coast Extend out to Barrington Tops and along the coast in stages
	Cycling touring trails (road & mountain biking)	Contemporary Coast Living Country
	Weekend Warriors' Event Series	Health & Well-being
	Mountain biking technical track in Forster	Nature's Child
	Teen Spirit Events	Nature's Child – focus on teenage events
	High Ropes Adventure Park (game changer project)	Nature's Child
	Junior Aquatic Trails Discovery	Nature's Child & Great Lakes Great Walk & Aquatic Trails
	From Secret Waterholes to Snow Flurries – natural events program	Nature-based and wildlife events – platypus, whales, fishing seasons (eg Black Bass and deep sea species), snow, high river flows
	Nature & Adventure Itineraries	Highlight existing nature-based and recreational experiences, including tracks and trails, fishing, cycling, kayaking, horse-riding, etc
	Outdoor Recreation and Sporting Events & Facilities	Create content, itineraries and support organised sporting events to encourage event participants to extend their stay or bring family and friends

Signature & supporting experiences



Strategic Themes	Signature & Supporting Experiences	Links & Value-Adds
Contemporary Coast	Smith's Lake Eco Village & markets (game changer project)	Great Walk and Aquatic Trails
	Great Lakes Ecolodge (game changer project)	Great Walk and Aquatic Trails
	Health & Well-being Event	Weekend Warriors Aboriginal Health & Well-being Retreat
	Sustainability Showcase: Centre of Excellence for the Environment & Wetlands in two locations: Smiths Lake and Cattai Wetlands (game changer project)	Smith's Lake Eco Village (co-located with the eco-village) and recognition of Cattai Wetlands
	Main Beach Strategy & Forster urban revitalisation (game changer project) – integrate planning for the visitor economy	Linking town centre with Main Beach and coastal walk; open public space; functions & events – in keeping with local character

Signature & supporting experiences



Strategic Themes	Signature & Supporting Experiences	Links & Value-Adds
Vibrant Country Life	Gloucester to Forster by Air Balloon	Contemporary Coast
	Gloucester Dairy Factory Redevelopment (game changer project)	Farm Gate Trail Soil to Sea Produce Event and Markets Adaptive reuse boutique accommodation
	Gloucester Visitor Hub (game changer project)	Services and local retail for visitors to Barrington Tops and hinterland
	Manning Valley Soil to Sea Produce Precinct (game changer project)	Farm Gate Trail Soil to Sea Produce Event and Markets
	World-class Equestrian Destination (game changer project)	Leverage country events program and race days, rodeos, horse-riding trails, beach riding and equestrian events
	Nabiac Agricultural Hub economic development initiative (game changer project)	Experience real country living – saleyards, rodeos, Agricultural Shows, etc
	Town Hall Akoostiks (activation for small towns and villages eg Stroud, Bulahdelah, Gloucester, etc)	Sustainable Futures Convention Leverage Wingham Akoostik & Gloucester Music Festivals Farm Gate Trail

Signature & supporting experiences



Strategic Themes	Signature & Supporting Experiences	Links & Value-Adds
Celebrating Culture on Country	Waters and Wetlands Tours	Great Lakes Great Walk and Aquatic Trails Profiling cultural tourism sites
	Dark Point Ecolodge or glamping experience (game changer project)	Great Lakes Great Walk and Aquatic Trails
	Develop a permanent contemporary, local Aboriginal Art Collection at Manning Regional Art Gallery	Leverage the extraordinary success of the Manning Regional Art Gallery and its Cultures of the Manning Festival – including an Aboriginal Art Prize as a category in the annual art prize competition
	Aboriginal Health & Well-being Retreat (game changer project)	Weekend Warriors Our Country Tours, Bush Tucker Dining and Natural Healing/Remedies ‘Day Spa’

Signature & supporting experience priorities

Description

The DMP process has identified a number of signature and supporting experiences aligned with the five strategic themes. Some of these experiences already exist and simply require a stronger or more coordinated approach to promotion while others are game changes that with investment over the longer-term could significantly assist to reposition the region as a destination of choice. The priorities below have been arranged to highlight key priorities for the more immediate actions required for the existing experience offer as well as for the game changer projects.

Key actions

1. Develop, initiate or call for proposals for **three new events**:
 - **‘Soil to Sea’ produce event or markets** to recognise and promote the diverse and seasonal produce or ‘nature’s bounty’ offered by the NSW Mid North Coast region and leverage the global trend relating to experience locally-curated food and drink experiences. This would raise the profile and contribution of the region’s agricultural sector. It would also provide insights into and an early ‘taste’ of the potential for the development of a Manning Valley Soil to Sea Produce Precinct (game changer project). This could involve or leverage existing markets or events that promote local produce, food and drink
 - **Health and well-being event**, potentially linked in the longer-term to the development of an Aboriginal Health & Well-being Retreat (game changer project)
 - **‘Town Hall Akoostiks’** music event, which leverages the *Wingham Akoostik Festival* and potentially the new *Grow your Own Festival* but creates an activation for the towns and villages of the MCC region, including Stroud, Bulahdelah and Gloucester. The event could be delivered over multiple weekends and involve local artists or high-profile artists from outside the region, potentially including ‘warm-up’ or ‘cool-down’ gigs by key performers in the *Wingham Akoostiks Festival*. Discussions and negotiations would first need to be conducted with *Wingham Akoostiks Festival* and *Grow your Own Festival* event producers

Signature & supporting experience priorities

Key actions continued

2. Initiate a **'Sharing Our Produce' capacity building and networking program** to encourage greater awareness, use and promotion of local produce, including food and drink
3. Undertake an **audit of the key nature-based assets, sporting facilities, recreational activities and events across the region**, including those delivered by tour operators or community groups – utilise information for itinerary creation and content (see following actions)
4. Create **day or multi-day itineraries** relating to strategic themes and appealing to target markets, which involve profiling accommodation, produce, product and experience providers. These should be incorporated into the MCC Content Strategy (see Priority 5 in the *Growing Demand* section below) and include:
 - Food and drink, including Farm Gate Trails
 - Nature and adventure, for example, cycling touring, bushwalking and kayaking trails, including 'Junior Discovery' trails and 'Waters and Wetlands Tours'
 - Outdoor recreation opportunities and sporting facilities, for example, from golf to rowing, mountain biking or surfing
 - Vibrant country living, for example saleyards, rodeos and other 'real' country experiences
 - Arts and culture, for example, from contemporary art through to Aboriginal cultural experiences
5. Develop a **calendar of events and position and promote event series**, such as a **Weekend Warriors' Series**. This may involve the linking or cross-promotion of events delivered by different third-party event producers and raise the profile of the region's commitment and capacity to deliver outstanding opportunities to enhance visitors (or the community's) health and well-being. This should include events targeting junior participants in line with the concept of 'nature's child' and leveraging the Junior Spirit concept (potentially expanded to a series dedicated to the 'Teen Spirit'), initiated by the former Forster Adventure Race event

Signature & supporting experience priorities

Key actions continued

6. Develop a **calendar of nature-based and wildlife events**, such as a 'From Secret Waterholes to Snow Flurries.' This should include major wildlife and seasonal events, such as the whale migration, the best time for platypus sightings and fishing seasons (eg, black bass and deep sea species). It should be dynamic to enable notification for events such as snow flurries and high river flows. A nature-based or adventure special-interest database should be created to enable communication with those interested and facilitate content development and sharing of content through social media platforms such as Facebook and Instagram
7. Implement the proposal for the development of a **mountain biking technical track in Forster**. This would enhance the 'nature's child' offering of the region and appeal to the active families' market
8. Investigate the opportunity for a third-party provider to offer a **Gloucester to Forster by air balloon experience**. While this could become a signature experience of the region, it would require the involvement and delivery by a professional air balloon tour provider as well as detailed logistical consideration, including take-off and landing points. The experience would offer spectacular views of the region and reinforce the 'Soil to Sea' concept
9. Develop a concept and detailed proposal for the creation of a **permanent contemporary Aboriginal Art Collection** at Manning Valley Regional Art Gallery. It would enhance the profile of regional artists while also assisting to attract exhibitions of Indigenous art from other regions of Australia or internationally. This proposal would leverage the extraordinary success of the Manning Regional Art Gallery and its *Cultures of the Manning Festival*. The proposal should include the inclusion of an Aboriginal Art Prize as a category in the annual art prize competition
10. Investigate the potential to increase or **enhance the sporting facilities available across the region**. While this action will deliver benefits for the local communities of the region, it also offers benefits to the visitor economy by facilitating sporting events that encourage increased visitation to the region. As noted above, a first step would be to identify and promote sporting and recreational facilities and events. This would also support the game changer project to position MCC as a world-class equestrian destination. Other key sports for which the region already has a competitive advantage include fishing, golf, hockey and rowing

Signature & supporting experience priorities

Game changer projects: *Summary of the game changer projects recommended for the MCC region*

- Great Lakes Great Walk and Aquatic Trails project, which involves developing an internationally significant Great Walk along a 100km stretch of coast between Forster and Hawks Nest, incorporating Myall Lakes and Booti Booti National Parks. It would be enhanced by aquatic trails extending from Port Stephens into Myall Lakes, Smiths Lake and Wallis Lake (recipient of the 2016/17 Tourism Demand Driver Infrastructure grant) – potential future extension of this initiative into the Hinterland/Barrington Tops World Heritage Area
- High Ropes Adventure Park, which could be developed with a private sector provider and/or NPWS or FC
- Smith's Lake Eco Village (linked to the Great Lakes Great Walk and Aquatic Trails project)
- Great Lakes Ecolodge – linked to and location to be identified through master planning of the Great Walk and Aquatic Trails project
- Centre of Excellence for the Environment and Wetlands, which would reinforce MCC's commitment to environmental sustainability
- Main Beach Strategy & Forster urban revitalisation, which should integrate planning for the visitor economy and tourism
- Gloucester Dairy Factory Redevelopment, which would be a significant adaptive reuse of quality heritage assets
- Gloucester Visitor Hub, which could be developed in collaboration with the local tourism and hospitality industry, NPWS and FC
- Manning Valley Soil to Sea Produce Precinct (linked to Taree urban revitalisation), which would offer benefits to the local communities and business (especially the Manning Valley agricultural sector) as well as visitors
- World-class Equestrian Destination, which would leverage race days, rodeos, horse-riding trails, beach riding and equestrian events
- Nabiac Agricultural Hub - economic development initiative with significant benefits and integrated planning for the visitor economy
- Dark Point Ecolodge or glamping experience (linked to the Great Lakes Great Walk and Aquatic Trails project – LALC, Aboriginal community and NPWS involvement required)
- Aboriginal Health & Well-being Retreat – potentially the first of its kind in Australia and involving production of native plants

Signature & supporting experience priorities

Game changer projects

The priorities for the game changer projects, which relate to the development of signature experiences, relate primarily but are not limited to master planning, feasibility assessment and partnership identification and agreements. These projects would significantly reposition the region as a high-quality nature-based and cultural tourism destination in Australia.

Key actions – Priority 11

1. Implement the **Great Lakes Great Walk & Aquatic Trails project master plan and feasibility assessment** in line with the 2016/17 Tourism Demand Driver Infrastructure (TDDI) grant – this process should deliver on Actions 5 and 6 outlined below
2. High-level **concept development** as well as the identification of key partners and project objectives – where this involves **urban revitalisation or strategic planning**, ensure visitor economy considerations are integrated into the master planning process
3. Identify **potential funding sources and key stages to be funded**, commencing with development of a Master Plan and Feasibility Assessment (initial phase)
4. Prepare and submit **funding applications**, in collaboration with project partners where appropriate. These applications should provide the broader context for the project, including how it delivers directly on Tourism 2020 and NSW Government priorities such as the NSW Visitor Economy Industry Action Plan and the NSW Aboriginal Tourism Action Plan. For example, the Great Lakes Great Walk and Aquatic Trails project identified opportunities for experience-based product development for a high-yield and fast growing niche market to contribute to the target of doubling tourism expenditure by 2020, which also delivers on the Aquatic and Coastal theme promoted by Tourism Australia and Actions 29C and 29E of the VEIAP, including the development of Great Walks in NSW. As part of this phase, prepare and seek endorsement of **agreements with partners**, including those from the private and/or public sector

Signature & supporting experience priorities

Game changer projects continued

Key actions – Priority 11

5. Subject to success in attracting funding for initial stages, prepare a **detailed Master Plan and Feasibility Assessment**, which involves detailed consultation with the community and stakeholders. This phase should address feasibility and identify infrastructure requirements and key links to the broader tourism and hospitality offer of the region. The Master Plan should also **outline a staged approach to implementation** that provides a clear roadmap for securing resources for capital works. It should also, where required such as the Great Lakes Great Walk and Aquatic Trails project and the creation of a world-class equestrian destination, involve the **mapping of existing and potential terrestrial and/or aquatic trails as well as identify land tenure arrangements and existing accessibility** or barriers thereto
6. Prepare a prospectus to **attract public and/or private sector investment** to implement the project in line with the endorsed Master Plan – this should include development of promotional collateral (images, short video and copy)

7. Growing Demand

Destination Branding, Marketing & Visitor Services

Destination Branding, Marketing & Visitor Services

Summary of the high priority destination branding, marketing and visitor services actions:

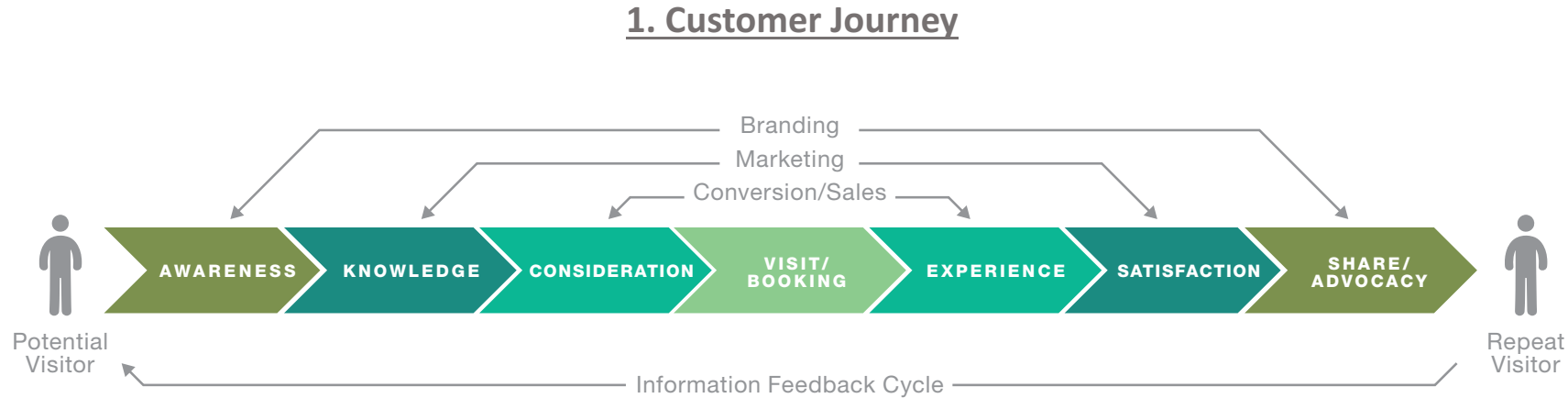
1. Endorse the proposed **destination brand architecture and positioning** outlined in the DMP and prepare a **Destination Brand Strategy & Guidelines**.
2. In order to better understand who comes to the MidCoast region and why as well as determining the best measures of performance of the region's visitor economy, MCC should undertake further **consumer research** and develop a simple yet robust **reporting dashboard**, which includes clear goals for the MCC visitor economy.
3. Prepare a **five-year destination Marketing Plan**, which includes clear tactics targeting various visitor segments and is structured or developed in consideration of the recommended marketing models outlined in the DMP (see below). It should integrate measurable objectives and set key performance indicators (KPI) and targets for evaluation of outcomes. A key outcome will be to initiate a domestic **marketing campaign** for the NSW Mid North Coast.
4. Engage a public relations (PR) agency to provide a **tactical marketing communications plan** for more immediate promotional activities, including PR and digital marketing, and facilitate some 'quick wins' for industry and key stakeholders.
5. Develop a **content strategy** and create content for multi-channel distribution (short videos, images and copy). The content strategy should include (but not be limited to) itineraries, the events program, seasonal calendar, regional highlights (such as wildlife and natural events) and signature experiences and products.

Destination Branding, Marketing & Visitor Services

6. Enhance **online and digital promotion**, in particular involving greater collaboration across the region. This is a high priority, including developing a new online structure and digital strategy, based on the visitor-facing positioning and destination brand architecture (refer to brand architecture below)
7. Facilitate **capacity building within industry and develop stronger networks** to improve the perception and promotion of produce, products and experiences in the region. Initiate networking events and capacity building sessions or seminars that value-add to local businesses. There is also an opportunity to adopt a new approach to the engagement of the industry and encourage greater participation in co-op marketing campaigns. In addition, MCC should encourage experience development or enhancement through packaging and bundling of products as well as the creation of multi-day itineraries.
8. Undertake a review of visitor services across the region and **develop a visitor services strategy**, which allocates resources to highest priority needs – this should adopt a multi-channel, visitor-centric approach to maximise the use of resources to achieve an increase in awareness and appeal of the destination within target markets.
9. Given the recent amalgamation between Gloucester Shire, Great Lakes and Greater Taree City councils as well as the commencement of international flights into Newcastle Airport, it is important to **raise awareness of the tourism potential within the region and for day visitors from surrounding places such as Newcastle**. This could be achieved through a ‘Discover Your Own Backyard’ (DYOB) styled campaign, the primary purpose of which is to target local communities who are hosts and key decision makers with regard to the Visiting Friends and Relatives (VFR) market as well as the providers of share economy accommodation.

Recommended marketing models

These marketing models should inform and guide the development of marketing strategies and tactics.

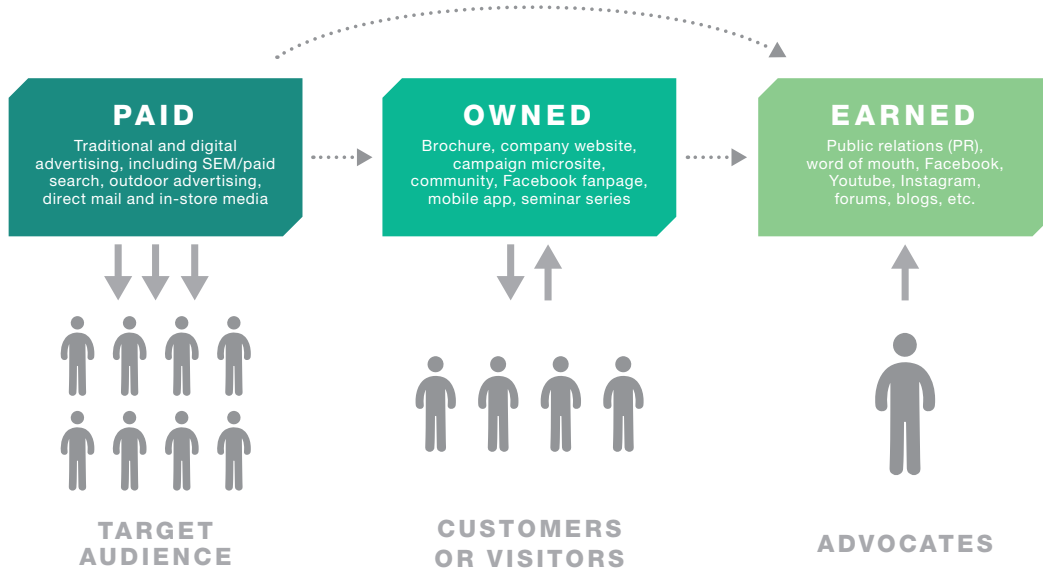


A customer-centric approach has long underpinned the success of products and experiences. Smart destinations also consider the customer journey to prioritise:

- Marketing efforts to shift potential visitors from awareness, through conversion and to create advocates of the place; and
- Partnerships and investment in new experiences or to revitalise existing assets to deliver on the promise of the destination.

A critical step is to investigate the customer journey as it relates to each market segment, across both domestic and international markets, to better understand the tactics required to reach, inspire, engage and create advocates for your destination. By creating advocates, MCC will be able to boost its marketing efforts through word of mouth, the most influential marketing tool (particularly as a result of social media).

Recommended marketing models



2. Paid, Owned, Earned Model

In today's disrupted media environment, it is critical to identify the right channels to reach the target audience for each communication activity. The importance of this model lies in the interaction and opportunities for leveraging each channel within the overall communications or marketing mix. Getting the balance right by identifying the right channels to reach the target market will maximise effectiveness within the available resources.

3. Reach, Inspire, Engage & Connect Model

Word of mouth has never been more important as an influence on consumer decision-making, especially in travel. With the continuing rise of social media and the increasing popularity of user-generated content and reviews, people seek information on where to go and what to experience from their mobile devices. To achieve real engagement, the stories of MCC must resonate with the target audience and the on-ground experiences must deliver on the promise of the destination. Images and video content should also be developed to initially inspire people to visit and then be shareable with their own peer group through social media.



Review of existing destination brands

Step 1: Review the three existing brands

- Great Lakes
- Manning Valley
- Gloucester

The review's goals were to establish:

- Level of awareness of each existing brand in key source markets, i.e. Sydney and Newcastle
- Brand architecture, including governance i.e how each brand is managed
- How the brand sits within the context of the MidCoast Council structure and positioning of MidCoast as a destination

The Baseline Analysis examined the existing three tourism brands **from the perspective of a potential visitor**. The DMP consultation process provided further insights into the marketing of each destination and the level of resources made available for each of the three destinations.

These insights inform the brand architecture recommendations and also provide the foundation for a number of actions identified in the DMP.



Summary of the findings from destination brand review

Key findings of the review of existing destination brands included:

- Due to limited resources, there has been a lack of marketing for each of these destinations into key source markets
- There is low awareness of Manning Valley, Gloucester and Great Lakes as holiday or short break destinations in the market place - this is not about the region's internal perception (for example, Manning Valley Naturally has been very visible within the region)
- When comparing the three sub-regions of MCC with its immediate competitor destinations (other North Coast and South Coast regions, eg Sapphire Coast and Coffs Harbour), as a general rule none of the MCC destinations have identified or executed their positioning well – for example, all three have adopted generic positioning, which is not based on detailed visitor insights
- All the destinations reviewed in the Baseline Analysis (including the competitor destinations) showcase nature as being their competitive advantage. However, even though each destination can rightfully claim nature, there is very little to differentiate one destination from another
- The customer proposition for each destination has been based on broad appeal across a number of audiences. This has lead to a very generic and weak proposition. Coffs Harbour and Clarence Valley are the only two destinations that appear to have a specific market in mind. Coffs Harbour broadly appeals to the family market and Clarence Valley is more focused on the active family market as opposed to the broader family market (or the more traditional beach holiday market).

Destination brand architecture

A very clear brand strategy and positioning provides the best opportunity to promote a destination. This is even more important when resources are limited. As a result, the architecture provides:

- A name that **clearly locates the destination** and reinforces the region as one destination (albeit offer diverse opportunities)
- A **positioning statement that differentiates the destination** from other destinations, including key competitors
- **Signature experiences** that deliver on the positioning and leverage the attributes of the region
- **Attributes or sub-geographical regions** where these experiences are delivered in a visitor-centric context (ie sub-regions make sense to visitors or potential visitors)

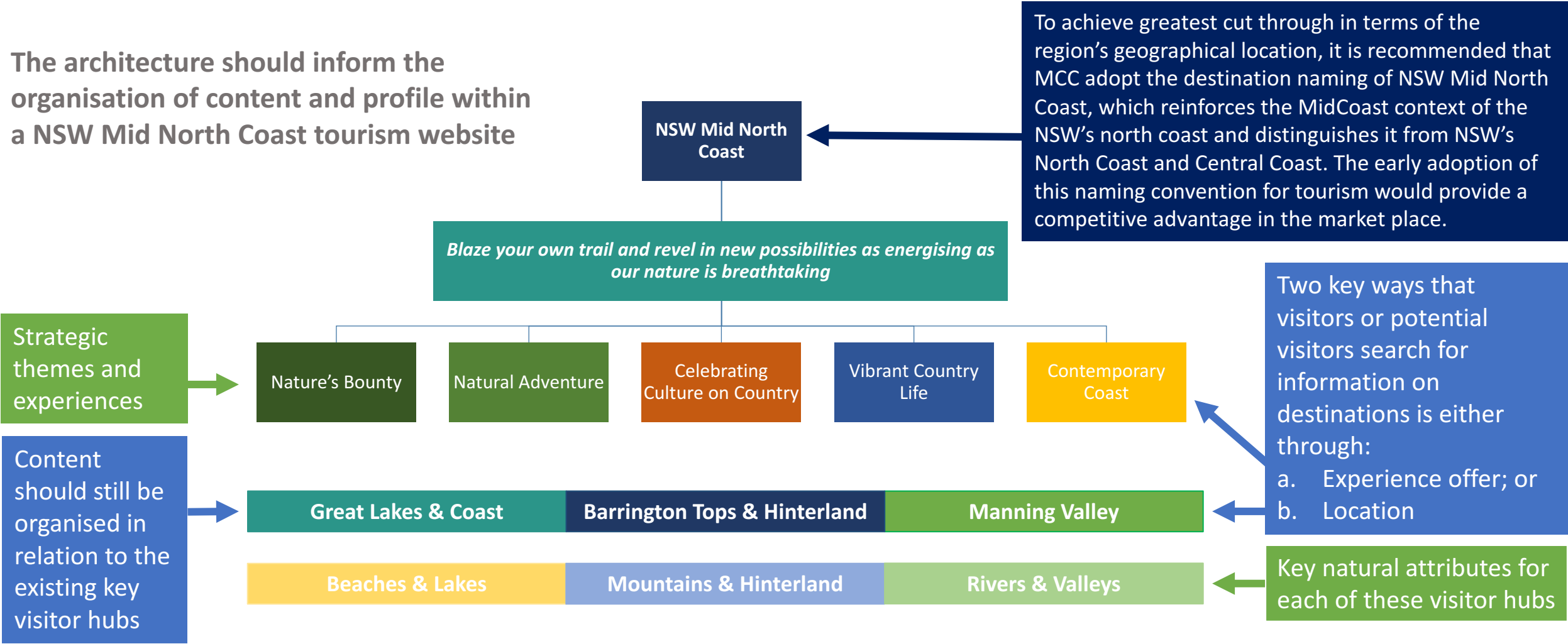
The brand architecture has been based on three principles:

1. **Customer-focused** – ensuring that the structure and names make sense to the visitor or potential visitor is paramount. You know where you live but do the people in your source markets? Have you made it as easy as possible for them to find you by an internet search or by prior geographic knowledge? Keep it simple to get the greatest cut-through.
2. **Collaboration** – working together will strengthen the offer and enable MidCoast to more easily develop partnerships beyond the region as a result of a single point of delivery (rather than across three separate, competing destination brands).
3. **Competitive advantage** – given the highly competitive tourism market, particularly in relation to many surrounding regions also identifying as nature-based destinations, it is critical that MidCoast is able to stand out from the crowd.

In addition, it is important to consider the resourcing impact for managing and promoting the destination. Managing three destination brands in the market place is expensive and would impact on resources – a collaborative approach will deliver a more sustainable business model and enable more effective sharing of resources.

Destination brand architecture

The architecture should inform the organisation of content and profile within a NSW Mid North Coast tourism website



Recommendation: Review Goggle Analytics over a three-month period, including setting Goggle analytic goals – that is, to find out who is searching and what for (for example, age, gender, geographical location). Google provides real-time statistical information to make informed decisions.

Destination branding, marketing & visitor service priorities

1. DEVELOP A DESTINATION BRAND STRATEGY & GUIDELINES

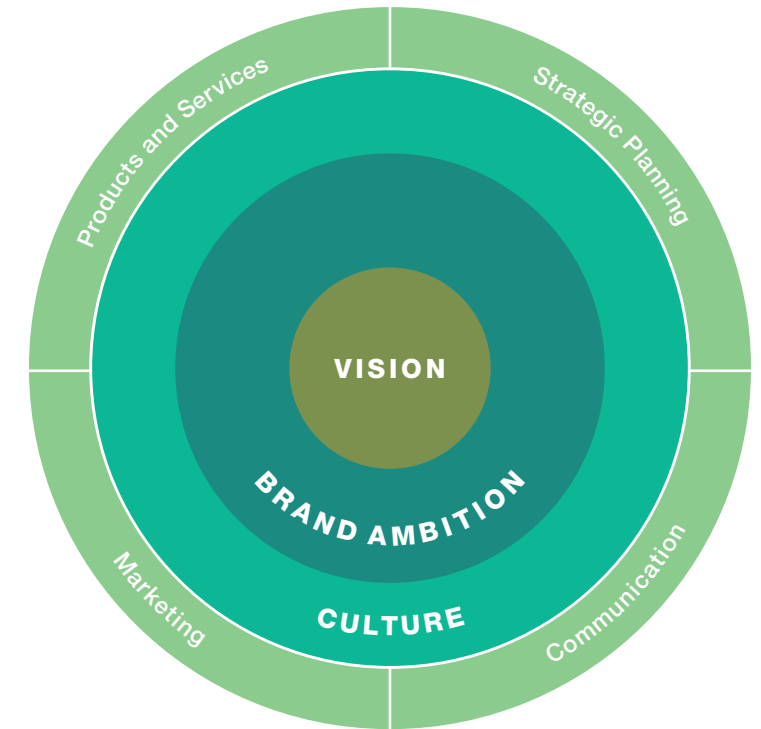
Description

A very clear brand strategy and positioning provides the best opportunity to promote a destination. At the heart of the brand strategy is the destination's vision, which together with the brand should guide strategic destination planning and product and experience development as well as providing consistency in communication and marketing activities.

Key actions

1. Endorse the proposed destination brand architecture and positioning outlined in the DMP as well as the proposed naming convention for tourism: NSW Mid North Coast
2. Develop a Destination Brand Strategy for MCC, which incorporates the vision for the region's visitor economy, its brand archetype, key target markets and positioning. It should identify the destination's brand values, emotional territory, attributes and personality, which together will provide the framework for establishing the region's competitive advantage in the tourism market place
3. Develop Brand Guidelines to ensure consistency and achieve greater cut-through in the market, including across copy, tone of voice and look and feel. This should also incorporate a tag-line for the region, deliver a destination logo for the NSW Mid North Coast and provide examples of creative expression
4. Encourage the continued use of *Manning Valley Naturally* industry-led branding for produce by the agricultural sector (and potentially other businesses of the Greater Taree City region)

Role of vision & branding



A brand is more than a logo – it sets the strategic direction for the organisation or destination. A destination brand should appeal to your target markets and may therefore be different to your community or other industry sector brands.

2. VISITOR RESEARCH & EVALUATION

Description

In order to better understand who comes to the MidCoast region and why as well as determining the best measures of performance of the region's visitor economy, MCC should undertake further consumer research and develop a simple yet robust reporting dashboard. These actions would inform the development of the MCC five-year Marketing Plan, provide enhanced reporting to MANEX and the new MidCoast Council and enable important insights for the MCC's tourism industry.

Key actions

1. Undertake domestic visitor research to identify the primary audiences for MCC and the motivations, expectations, barriers to travel and preferred channels of communication to reach target markets. Consider the use of third-party profiling tools, such as the Roy Morgan Helix Personas, which is a powerful consumer segmentation and data integration tool that combines sophisticated psychographic and behavioural data to classify the Australian population into Community Groups and further break it down into Persona Profiles using a combination of Roy Morgan Single Source data and other third party data sources
2. Continue to monitor international inbound statistic provided by Tourism Research Australia (TRA) and international trends identified by global tourism research agencies such as SKIFT
3. Implement specific consumer research, such as a Brand Tracker, to monitor changes in awareness and appeal of the destination and intention to visit – this should be done as a high priority to establish a benchmark for measuring future performance
4. Create a simple yet robust and reliable dashboard to evaluate outcomes achieved by the visitor economy, including identification of appropriate key performance indicators (KPI) linked to MCC's overall objectives or goals for tourism. For example, this should include but not be limited to visitor numbers (by source markets) and direct annual contribution to the region's visitor economy. Undertake initial analysis to determine the baseline for reporting future performance against each KPI and to inform future marketing strategies and tactics. *Note: sources for data for these performance measures may include TRA, Destination NSW or other third-party sources*

3. DEVELOP A 5-YEAR DESTINATION MARKETING PLAN

Description

Prepare a five-year destination Marketing Plan, which includes clear tactics targeting various visitor segments and is structured in consideration of the marketing models outlined in the DMP. It should also integrate measurable objectives and set targets for evaluation of outcomes. A key outcome will be to initiate a domestic marketing campaign for the NSW Mid North Coast, with a clear and unifying campaign idea that reinforces MCC's destination brand and builds awareness and appeal of the destination.

Key actions

1. Commence discussions with Destination North Coast (the new Network Destination) and Destination NSW on the initiative to develop an MCC destination Marketing Plan to ensure key partner considerations and opportunities are identified
2. Utilising the customer journey, 'Paid, Owned, Earned' and 'Reach, Inspire, Engage & Connect' marketing models, identify key actions to build awareness of and promote the region, including through PR (television, print and online media), travel media famils (including special interest publications) and influencers such as bloggers and vloggers
3. Utilise the destination positioning and strategic themes to identify existing signature products and experiences that can be promoted as lead products for the region
4. Undertake consultation with industry and key stakeholders to identify opportunities and gaps and clarify roles and responsibilities – the implementation will require collaboration between industry, MCC and partner organisations
5. Develop a domestic marketing campaign for the NSW Mid North Coast to provide a framework for consistency and to drive promotion of the region. Commence with a clear, unifying campaign idea, which should reinforce the MCC destination brand, be based on insights from the domestic target markets (addressing motivations, barriers and/or expectations) and be developed in collaboration with industry and regional partners

4. DEVELOP & IMPLEMENT A TACTICAL MARKETING COMMUNICATIONS PLAN

Description

A high priority for MCC, in particular following the amalgamation, is to develop and implement a tactical marketing communications plan. The purpose would be to provide continued promotion of the region and engage key industry stakeholders, which will facilitate 'quick wins' while a longer-term, strategic Marketing Plan is developed.

Key actions

1. Engage a public relations (PR) agency to provide a tactical marketing communications plan for more immediate promotional activities, including PR and digital marketing, and facilitate some 'quick wins' for industry and key stakeholders. This may also involve hosting travel media famils and broadcast television programs, such as Sydney Weekender, to continue raising awareness of the NSW Mid North Coast
2. As part of this process, develop a 12-month content calendar, incorporating organised events (arts and culture, sporting, etc), natural events, seasonal activities, highlights or produce, etc – this process should inform and assist with the development of the Content Strategy identified in Priority 5
3. Identify local ambassadors who are accessible and can help to lift the perception of the region through the PR campaign, including through social media platforms such as Facebook or Instagram – this could include local Aboriginal leaders, artists, artisans, farmers, wine-makers, restaurateurs, nature-lovers, local heroes or sporting identities

5. DEVELOP A CONTENT STRATEGY & CREATE CONTENT FOR MULTI-CHANNEL DISTRIBUTION

Description

In today's competitive tourism marketplace, high-quality and up-to-date content is critical to enhance destination awareness and appeal. It also encourages user-generated content and leverages marketing budgets by providing content that visitors (or potential visitors) can share with their peer group. A key consideration is the need to provide content for distribution through third-party and partner organisations, including Destination NSW on the Visit NSW website and social media platforms.

Key actions

1. Develop a Content Strategy and create content for multi-channel distribution (short videos, images and copy) – this includes itineraries, events, seasonal calendars, regional highlights (such as wildlife and natural events), signature experiences and products and local ambassadors. Ensure content is developed for Search Engine Optimisation (SEO).

Key elements include:

- Assess and prioritise gaps in existing content assets, including images, video and copy.
- Determine the most appropriate channels for content distribution to reach target markets – this is particularly important in relation to reaching nature and adventure-based travellers as well as those interested in more immersive cultural experiences, sporting events or art exhibitions as well as for providing content to partners such as Destination NSW
- Identify local ambassadors who are accessible and can help to lift the perception of the region – this could include local Aboriginal leaders, artists, artisans, farmers, wine-makers, restaurateurs, experience providers, local heroes or sporting identities. Local ambassadors are particularly effective for social media platforms, media interviews or to host travel media famils

6. ENHANCE ONLINE AND DIGITAL PROMOTION

Description

Enhance **online and digital promotion**, in particular involving greater collaboration across the region. This is a high priority, including developing a new **online structure and digital strategy**, based on the visitor-facing positioning and destination brand architecture (refer to brand architecture above). This is critical to provide the most contemporary and effective platform for promoting the NSW Mid North Coast region and enable the staged integration of the former three local government areas (Gloucester Shire, Great Lakes and Greater Taree City councils). The integration should be staged in a way to ensure that visitor information channels are not disrupted while a framework and digital strategy for MCC is developed.

Key actions

1. Review current websites and digital platforms with regard to the online and digital presence and content of the region
2. Develop an overarching framework for MCC that integrates the tourism platforms of the previous three local government areas amalgamated into MCC. This should enable the preparation of a Digital Strategy that provides clear guidance for the prioritisation, development, promotion and distribution of online and digital content and assets, including social media platforms
3. Implement the new online and digital presence in line with the recommended brand architecture and review Goggle Analytics over a three-month period, including setting Goggle analytic goals, to find out who is searching and what for (for example, age, gender, geographical location). The outcomes of this review should be feed into the development of the brand strategy – ongoing monitoring through Google Analytics, including performance of the region in relation to search engine optimisation (SEO) should be undertaken

7. FACILITATE CAPACITY BUILDING WITHIN INDUSTRY AND STRENGTHEN PARTNERSHIPS

Description

Facilitate **capacity building within industry and develop stronger networks** to improve the perception and promotion of produce, products and experiences in the region. By initiating networking events and capacity building sessions or seminars, MCC can provide forums that value-add to local businesses. There is also an opportunity to adopt a new approach to the engagement of the industry and encourage greater participation in co-op marketing campaigns. In addition, MCC should encourage experience development or enhancement through packaging and bundling of products as well as the creation of multi-day itineraries, which can be promoted in collaboration with event organisers, sporting associations or partner organisations.

Key actions

1. Initiate networking events and capacity building sessions or seminars for the tourism and hospitality industry within the region. This should include product development workshops that encouraging the packaging and bundling of products and experiences, involving accommodation, transport and/or tours as well as the development of multi-day itineraries. For example, nature-based adventures in collaboration with NPWS and private sector providers
2. Review the existing structure of the tourism associations or committees of Gloucester Shire, Great Lakes and Greater Taree City councils and develop an integrated and coordinated approach to industry engagement. The new approach should enable strategic advice and input from key industry players, reinforce the new destination brand, be structured around the key visitor nodes and staged in subject to availability of resources. It should enable the industry to participate in and contribute to marketing campaigns.
3. Foster participation of local businesses in the NSW Tourism Awards
4. Develop a cross regional event, such as 'Soil to the Sea' or 'Produce, Plate and Drink'
5. Consider developing a partnership agreement with NPWS and FC to articulate key opportunities and benefits of collaboration and clarify roles and responsibilities or involve them in the proposed new tourism association for MCC

8. DEVELOP A VISITOR SERVICES STRATEGY

Description

Providing visitor services can be resource intensive and may not necessarily meet the needs or expectations of visitors. However, visitor services can also enhance the experience for visitors through high-quality information and customer service. While the use of visitor information centres has generally been declining nationally over the last decade, there is a new trend indicating that they can become popular, particularly when linked to high-quality interpretation or genuine local knowledge. To ensure that MCC is delivering high-quality visitor services, it is recommended that MCC undertake a review of the current visitor services across the region and **develop a visitor services strategy**, which allocates resources to highest priority needs. This should adopt a multi-channel, visitor-centric approach to maximise the use of resources to achieve an increase in awareness and appeal of the destination within target markets. Initiatives that can assist in sharing the cost of the delivering face-to-face visitor services with partner organisations and/or the private sector should also be considered.

Key actions

1. Review visitor services across the region, including location of key visitor information centres, volunteer-based services, online and digital delivery of visitor information and published collateral (eg visitor guides) as well as signage and interpretation sites
2. Develop a Visitor Services Strategy, which drives consistency in the levels of service and allocates resources to highest priority needs. This should adopt a multi-channel, visitor-centric approach to maximise the use of resources to achieve an increase in awareness and appeal of the destination within target markets. The strategy should strike the right balance between visitor information and promotion of the region via online and offline channels as well as improving signage and interpretation
3. For visitor services staff, conduct information sessions on the new brand strategy and marketing plan as well as providing a famil involving visits and exposure to experiences, products or produce from all areas across the MidCoast region

Destination branding, marketing & visitor service priorities

9. BUILD AWARENESS OF THE TOURISM POTENTIAL WITH LOCAL COMMUNITIES AND BUSINESSES

Description

Given the recent amalgamation between Gloucester Shire, Great Lakes and Greater Taree City councils as well as the commencement of international flights into Newcastle Airport, it is important to raise awareness of the tourism potential within the region and for day visitors from surrounding places such as Newcastle. This could be achieved through a 'Discover Your Own Backyard' (DYOB) styled campaign, a primary purpose of which is to target local communities who are the hosts and key decision makers with regard to the Visiting Friends and Relatives (VFR) market. The international and domestic VFR markets continue to strengthen while there is also increasing demand for share economy accommodation. As a result, there is an opportunity to promote the region to local hosts or share economy accommodation providers and enhance advocacy of local activities, tours and produce, among other things. There are additional benefits of a DYOB campaign for MCC, including fostering civic pride and building loyalty within the communities of the region. It is recommended that MCC prioritise this campaign ahead of a domestic marketing campaign (outlined in Priority 3 above).

Key actions

1. Implement a *Discover Your Own Backyard* (DYOB) styled campaign – either by acquiring a three-year licence from Destination Melbourne (which initially developed the DYOB program) or alternatively developing an in-house content strategy and regional/local campaign to grow awareness of the region's tourism, hospitality and events offer with residents and businesses, including those based in Newcastle
2. As part of the implementation plan, utilise local ambassadors for the campaign and incorporate regular updates on the MCC website and social media platforms, provide local media PR activity as well as an e-newsletter to which local residents and businesses can subscribe

8. Summary of the key next steps

The next steps are:

1. MCC endorsement of the Destination Management Plan (DMP)
2. Commence implementation of the DMP in line with the DMP Action Plan
3. Develop the destination brand strategy and guidelines for MCC



9. Appendices



Appendices to the DMP

1. DMP Action Plan
2. Summary of the Baseline Analysis
3. Product & Experience Audit
4. Summary of Stakeholder Consultations

For further information or any inquiries regarding the DMP, please contact:

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