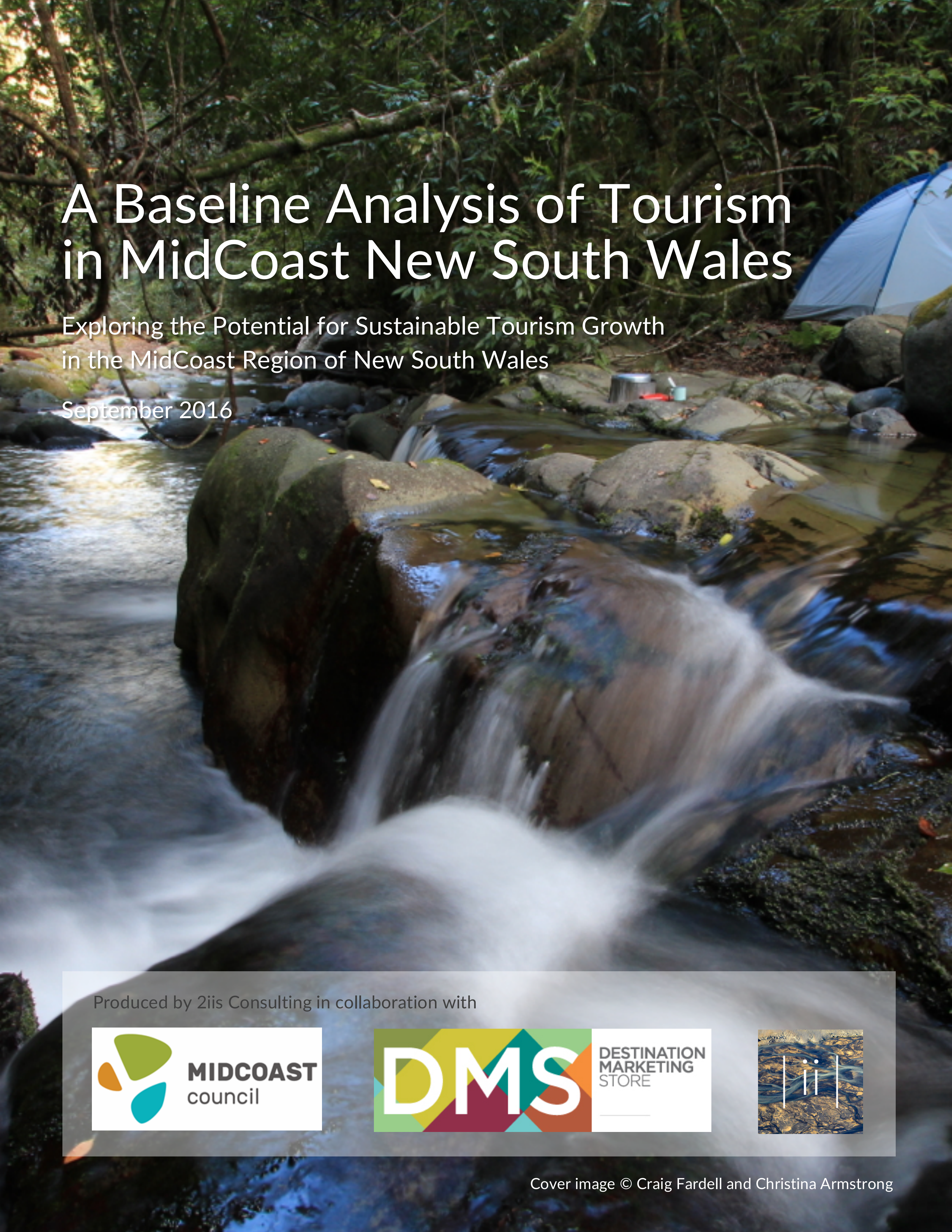

A Baseline Analysis of Tourism in MidCoast New South Wales

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

September 2016

Produced by 2iis Consulting in collaboration with

MIDCOAST council

DMS DESTINATION MARKETING STORE

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Produced by 2iis Consulting for MidCoast Council in collaboration with Destination Marketing Store (DMS).

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SECTIONS 1–2

A note on the Data in this Report

A wide range of data and base material is included in this baseline analysis – from a broad range of sources.

Because of the variety of both sources and years from which the data is sourced, caution should be taken when making direct comparisons between different Tourism regions, segments and overall trends.

The data should be viewed as being directional and informative rather than definitive as errors will certainly exist given the amount of data used. Some will also likely already be out–of–date due to the ongoing nature of Tourism data reporting and the fact that this report was compiled at the start of a financial year.

1 | FOREWORD

This baseline report is a key stage in the development of a comprehensive Destination Management Plan (DMP) for the MidCoast Region of New South Wales. The MidCoast Region is made up of the former Gloucester Shire, Great Lakes and Greater Taree City Councils and is sub–divided into 3 new sub–regions: Gloucester, Great Lakes and Manning. This report reflects this new structure created in May 2016.

This stage of the broader DMP project has been funded by the MidCoast Council following initial funding by Great Lakes Council for a baseline analysis of Great Lakes Tourism. It looks to assist the Region in sustainably growing the value and importance of Tourism to both local industry and the local community.

The long–term vision that the project is designed to support is that:
'The MidCoast Region successfully builds a strong, resilient Tourism Industry with dynamic and adaptive product and experience offerings that adapt to the needs of visitors and the community.'[1]

Developing the broader Destination Management Plan will provide both a long–term vision and a short–term action plan outlining some of the Tourism experiences, products and infrastructure required to meet the anticipated potential visitor needs for the Region. It will also provide some projections of the net economic benefit arising from implementing a structured Destination Management Plan and start to identify the foundational Tourism development areas that will need to be focused on.

This report looks to provide baseline data and analysis that will help highlight the most effective ways to lay these foundations, whilst also outlining some of the challenges likely to be faced. It also explores a range of case studies and some examples of best practice from other regions of Australia and selected locations in New Zealand to help inform an effective Destination Management Plan for the MidCoast.

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This **Baseline Analysis of Tourism in MidCoast New South Wales** report summarises the current state of Tourism and explores some of the opportunities for Sustainable Tourism Growth in the MidCoast Region over the next 15–20 years.

It was produced between August and September of 2016 for MidCoast Council and is based on some of the initial findings in the **Baseline Analysis of Tourism in the Great Lakes** produced for Great Lakes Council just prior to its amalgamation with Gloucester Shire and Greater Taree City Councils in May 2016.

It identifies a number of significant opportunities for the MidCoast 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.[2]

In exploring these various opportunities, a potential future for the MidCoast Tourism Industry has emerged that is quite different from the current state of Tourism in the three separate Regions of Gloucester, the Great Lakes and Manning. A future where Tourism makes full use of the Region's exceptional Natural Tourism assets much more effectively; where the overall Tourism mix is a much more balanced and sustainable one than what is in existence today; where the community is both engaged with and supported by the benefits of 'the right kinds of Tourism'; where over a quarter of the MidCoast economy is directly or indirectly supported by Tourism; and where 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 report.

There will, however, clearly be challenges in creating the kind of sustainable and growing Tourism industry described above by the end of the next decade. All the Regions that make up the MidCoast Region are currently heavily reliant on certain types of Domestic Tourism sourced primarily from Sydney and Regional New South Wales. It derives less than 1.2% of its Tourism revenue from International Visitors and its overall mix is heavily skewed towards mainstream, family Tourism. This last characteristic is likely to be one of the key causes of the 'hyper–seasonality' in the Great Lakes Region, with the Manning and Gloucester Regions also being affected to differing degrees, even if the concentration is much less marked.

Regional dispersal is also a challenge; with the coastal strip of Manning & the Great Lakes receiving the highest volume of overall tourist numbers by some margin and, whilst Gloucester receives relatively stable visitor numbers, these numbers are not growing – in part because of the challenges of encouraging more visitors to venture away from the coast. Changing this is something that appears to have been on the agenda in the three separate Regions for some time.

These, and a number of other challenges facing the Region's Tourism, are touched on throughout this report, and are covered in detail in the Sections on the Current State of Tourism in the Gloucester, Great Lakes and Manning Regions *(Sections 7–10)*, and also in the Summary of Tourism in the amalgamated MidCoast Region *(Section 11)*.

The amalgamation itself throws up an interesting opportunity; using it to drive a re–structuring of the Region's overall offering around its Tourism assets vs. the previous LGA Boundaries provides a unique opportunity to make better use of those assets and accelerate 'the right kind of growth' in both numbers and value. A conservatively estimated additional AUS $0.55 billion in overall value from Tourism appears to be the immediate economic benefit available to the MidCoast between 2017 and 2030 from the amalgamation.[3]

With more than 1,808kms^2 of National Parks, Nature Reserves, State Forests and protected areas, over 190km of coastline and iconic landscapes like the Barrington Tops, the Manning Coastline and unique Great Lakes Region, the MidCoast is clearly a Region with significant natural resources for Tourism.

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It already has a well–developed and significant Tourism industry delivering social, economic, environmental and community value to the Region. With over 1.86 million tourists delivering AUS $570.4 million in annual revenue, and contributing over 19.2% of the MidCoast's Gross Regional Product in 2015 (6.5% of the value of all MidCoast industry), it is one of the most important industries in the Region.[4]

By being clear on the Region's overall positioning and focusing more tightly on some of the emerging niche–Tourism trends (particularly Nature–based and Adventure Tourism), modelling to 2030 indicates that the MidCoast has the potential to attract 4.65 million visitors, spending over 8.65 million nights in the Region and generating AUS $1.55 billion in direct Tourism revenue.[5]

This overall MidCoast forecast is made up of the Gloucester Region growing from 180,000 to 450,000 visitors generating AUS $139 million (vs. AUS $51.4 million in 2014); the Great Lakes growing from 998,000 to 2.49 million visitors generating AUS $974 million (vs. AUS $359 million in 2014); and the Manning Region growing from 677,000 to 1.71 million visitors generating AUS $432 million (vs. AUS $160 million in 2014).[6]

See Section 14.1 for detailed modelling of the future MidCoast Tourism opportunity.

In identifying the overall opportunity for the MidCoast Region, this report explores some key trends in **Global and Regional Tourism** before analysing the current and forecast Tourism performance of **Australia, New South Wales** and **North Coast New South Wales** *(Sections 5 and 6)*. It then looks at the current state of Tourism in the **Gloucester, Great Lakes** and **Manning Regions** *(Sections 7–9)*, before providing a summary of Tourism in the MidCoast Region as a whole *(Section 10)*.

It then looks in detail at a number of key sectors of direct relevance to the Great Lakes including:

1) The Great Walks market; 2) Nature and Eco Lodges; 3) The Luxury market and its' connection to the Nature market; 4) Aboriginal/ Indigenous Tourism; 5) The Food and Wine market; 6) The redefinition of Backpacking & the growth of the 'Flashpacker' market; 7) Sport and Tourism; 8) Cycling Tourism; 9) The Women's Health and Wellbeing market; 10) The changing Youth market; and **11) Next Generation Grey Nomads.**

It also outlines some key characteristics of a number of other Tourism regions, including:

1) The Sapphire Coast, NSW; 2) The Coffs Coast, NSW 3) Kangaroo Island, SA; 4) Forrest, VIC; and **5) New Plymouth, NZ** that can provide some insights to help inform the future growth of Tourism in the MidCoast.

Taken together, these areas have helped identify **28 potential Growth Strategies** that are the most likely to drive sustained (and sustainable) Tourism growth, and set the MidCoast on the path to the strong, growing and balanced Tourism Industry described above.

These strategies are laid out in full in Section 14.2 and 14.3 and can be summarised as follows:

1) Maximise the opportunity the amalgamation offers to restructure the MidCoast Regional Tourism offering and fully open up the AUS $1.55 billion 2030 growth opportunity;
2) Set a long–term goal to become one of New South Wales' (and ultimately Australia's) leading destinations for Nature–based and Adventure–based Tourism (NABT);
3) In setting this NABT goal, recognise that the objective with existing mainstream Tourism in the MidCoast (particularly in the Manning and Great Lakes Regions) will be one of 'maintenance';
4) Be clear on the unique Tourism proposition(s) the MidCoast wants to own & build all activity around them;
5) Build the MidCoast Tourism brand(s) as synonymous with immersive Nature–based experiences over the long–term;
6) Fully leverage the natural assets of the Region – and consider hero experiences in each sub–Region;
7) Review the 3 current promoted Regions, and build a future structure around (potentially) 4 MidCoast Tourism Regions that better reflect available Tourism offerings & fully support a core NABT Positioning;
8) Start to build the necessary Nature–based infrastructure (with a particular initial focus on Trekking/ Walks, Cycling/ Mountain Biking and Kayaking/ Rafting);

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28 potential Growth Strategies for MidCoast Tourism | Continued.

9) Develop some NABT 'Hero Experiences' that act as draws to the Region;
10) Maintain base level promotion of the core Mainstream Tourism offerings in the MidCoast;
11) Be clear on the role of International Visitors (particularly the growing 'Flashpacker' & Luxury markets);
12) Review the Domestic Target markets based on the NABT positioning;
13) Explore the longer–term development of a broader 'Hinterland' Tourism offering;
14) Start to grow Aboriginal/ Indigenous Tourism offerings in key areas of the MidCoast Region;
15) Explore the potential for the Women's Health & Wellbeing/ Guided Walks/ Adventure Tourism niche markets;
16) Explore the potential for top–end/ unique accommodation and further incentivise the development of a range of NABT accommodation options;
17) Develop a strong local Food and Wine offering as a core strength of the MidCoast;
18) Undertake a comprehensive planning review of Forster Town Centre (including a Coastal Walkway feasibility) and consider similar for Taree;
19) Develop/ expand specific offerings for the growing 'Next Generation Grey Nomads' segment;
20) Consider expanding the Business Tourism offering in the Taree area;
21) Review the current events program and build a calendar around a future NABT positioning (including the development of 1 or 2 hero events);
22) Explore the potential for increased Sports facilities available for Tourism (including golf);
23) Leverage the new NSW Destination Network (and connect it with the NABT positioning);
24) Develop key partner relationships (particularly with NSW–NPWS and new North Coast Destination Network);
25) Be ambitious in seeking investment partners – the economic potential in the Nature–based and Adventure–based Tourism positioning is significant;
26) Invest in a stronger digital/ online Tourism marketing capability across the restructured MidCoast;
27) Don't ignore the need to address regulatory barriers & foster enabling conditions for Tourism growth;
28) Commit to a long–term investment view of 10–15 years vs. 3–5 years.

Heading the list above is the opportunity to restructure the MidCoast's Regional Tourism offering around 4 'Tourism Areas/ Regions'. This report identifies that the current Regional structure of 'Gloucester', 'The Great Lakes' and 'The Manning Valley' does not fully do justice to the Region's Tourism assets and limits potential future growth for a number of key Tourism sectors.

A draft future structure is proposed in Section 11.7 and summarised below as a starting point for discussion. It is included to help initiate the more detailed planning process that will be undertaken to develop the full DMP.

1) **Taree and the North Coast:** covering the Region to the East of Taree (predominantly the area between the Pacific Highway and the Coast) and running from Diamond Head to Black Head;
2) **Wingham and the Northwest:** covering the Region stretching from Wingham/ Krambach up to the North West and Curracabundi NP (i.e. made up of west of the Manning Region and north east half of Gloucester Region– potentially using 'Manning Valley' as it's descriptor);
3) **The Hinterland and Barrington Tops:** covering the southwestern half of the Gloucester Region, the area to the west of the Pacific Highway in the Great Lakes Region and potentially a small southwestern corner of the Manning Region (depending on extent of proposed 'Wingham and the Northwest' area);
4) **The Great Lakes:** covering the Eastern half of the former Great Lakes Council Area (east of the Pacific Highway and from Hawks Nest to Black Head).

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The report also identifies that, whilst there are key differences in the Tourism make–up of the 3 Regions, there is also much in common across the MidCoast as a whole. A summary of the differences in Gloucester, the Great Lakes and Manning, and then similarities across either the entire MidCoast, or in 2 of the Regions is included in Section 14 to help identify which Tourism segments can provide the greatest growth potential. This analysis was also used in developing the potential structure of the Region outlined above on page 5.

Sitting across many of the 28 potential Growth Strategies is the Nature–based and Adventure–based Tourism (NABT) opportunity. Targeting a clear leadership position in NABT would shift the overall mix of Tourism in the MidCoast to a more balanced model: more traditional mainstream Tourism (e.g. family beach holidays) would still have a role, but the growth would be in a number of higher–value/ higher–yielding Nature–based niche segments of Tourism. As well as driving strong economic growth, this would ensure the long–term protection of the natural–resource base that Tourism (and the broader Community) depends on. It would also better support the socio–cultural make–up of the MidCoast that is clearly important to the Community.

Looking at the overall value Tourism is forecast to be generating in the MidCoast in 2030, $695.3 million of that is estimated as being directly generated by Nature–based and Adventure–based Tourism, and, combined with Nature–based activities more broadly, could underpin approximately 80% of the total value of Tourism to the Region (AUS $1.24 billion).[7]

In considering these forecasts, it is no exaggeration to say that Nature–based and Adventure Tourism (NABT) is the single most important element for the entire MidCoast Region's future Tourism growth; although each current Region has a different level of potential for NABT growth, all have it as their primary growth opportunity. To achieve the level of growth outlined as possible by 2030, however, a structured, long–term approach to managing these Tourism sectors is clearly needed across the MidCoast as a whole. This is one of the primary objectives of the broader Destination Management Planning (DMP) process, with this Baseline Analysis providing some of the data based key inputs to assist in decision making.

Outside of the NABT opportunity, the report stresses the importance of maintaining the existing Tourism strengths of the Region (Mainstream and Family Tourism for example, along with the clear strength in Domestic Overnight stays), given they are forecast to deliver AUS $653 million in value by 2030.[8]

The opportunity represented by an expanded **'Hinterland'** is then explored (a key part of the reason for structuring the MidCoast with 2 areas across the west), along with 9 other 'Development Sectors':

1) Aboriginal/ Indigenous Tourism; 2) Cycling (Mountain Biking); 3) Women's Health & Wellbeing/ Adventure niche; 4) 'Rural & Heritage Tourism'; 5) 'Combination Adventure'; 6) Next Gen Grey Nomads; 7) 'Flashpackers'; 8) Coastal Walkway in Forster/ ANO Location; and **9) Business Tourism in & around Taree.**

Detail on each of these areas can be found in Sections 14.2 and 14.3.

Lastly, a comprehensive analysis of the current performance of the Gloucester, Great Lakes and Manning Valley Tourism Brands is included to help inform the overall Branding and Tourism promotion strategy for the MidCoast Region going forward *(Section 10).*

The list of 28 potential Growth Strategies outlined on the previous page is not meant to be read as an action list, but rather as an indication of the areas and initiatives that offer the strongest growth potential as identified by this Baseline Analysis. As well as Tourism growth, addressing these 28 areas effectively (or a number of them) will have significant economic, social, cultural, and environmental benefits for the entire MidCoast Community.

The economic benefits of developing the MidCoast Tourism Industry in the manner outlined above have been touched on, but the interconnected social, cultural and environmental benefits are of equal significance. The necessary Nature–based and Adventure Tourism investment, for example, will provide additional leisure infrastructure for the resident population, whilst also ensuring the nature and marine–based resources that other sectors of the economy depend on are protected.

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Making conscious decisions about the long–term mix of Tourism and focusing more on the Nature–based segment will also benefit the MidCoast community through attracting a greater proportion of lower–impact, more niche visitors who better reflect the overall make–up of the area. The type of Tourism infrastructure that will be needed to help develop some of the Tourism options indicated as growth areas will also assist with the overall promotion of healthy lifestyles for the local population.

The last point to make is based around the overall timeframe for the type of potential Tourism development identified. This baseline analysis identifies some clear growth opportunities, but more work will be needed to prioritise these and identify which operate within a short–term horizon and which are for the longer–term. Choices will need to be made about which areas to focus on and where investment should be targeted first.

As stated in the foreword, this report forms part of the first stage in the development of a comprehensive Destination Management Plan (DMP) for the MidCoast Region. It will be used extensively to inform the development of this DMP, as well as being an important input to the extensive stakeholder consultations that will be undertaken from this point forward.

In that respect, this report is very much a tangible starting point for what seems likely to be a project that will have significant and far–reaching positive impacts on Tourism in the MidCoast, and consequently the communities that are spread throughout the Region.

Made up as it now is of Gloucester, the Great Lakes and Manning Regions, The MidCoast is a unique area set within an inspiring and varied natural environment. The combined natural assets of the Region clearly have the potential to be stronger from a Tourism perspective than they were when structured within the 3 standalone Regions. As this report outlines, there are plenty of opportunities for these assets to be used more effectively in the future to help open up a much more balanced, growing and sustainable MidCoast Tourism industry.

Doing this will require investment, take time, and will need a number of challenges to be overcome. But the long–term benefits of doing so will be a more prosperous, resilient and vibrant community in the MidCoast Region, set within a productive and protected landscape and supported by a strong and growing Nature–based Tourism industry. An inspiring long–term vision that certainly seems like it will be worth the journey.

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SECTIONS 3–4

A note on the Regions covered in this Report

Gloucester, the Great Lakes and Manning are the three Regions analysed in this report; together they make up the MidCoast Council. They are referred to in a variety of ways throughut the following pages including Gloucester and the Gloucester Region; the Great Lakes and the Great Lakes Region; Manning, the Manning Region and the Manning Valley. All of these names refer to the Regions as detailed in Map 1 (Page 9).

3 | BACKGROUND[9]

'The most comprehensive local government reform in more than 100 years will result in 19 new councils beginning operations. Our plan to create stronger new councils in Sydney and regional NSW will be supported by NSW Government investment of about $500 million. We are ensuring our communities have stronger and more efficient councils, which will free up money for important projects such as local roads, parks, playgrounds and footpaths.'[10]

Mike Baird, NSW Premier. Launch of the 19 amalgamated NSW Councils, 12/05/2016

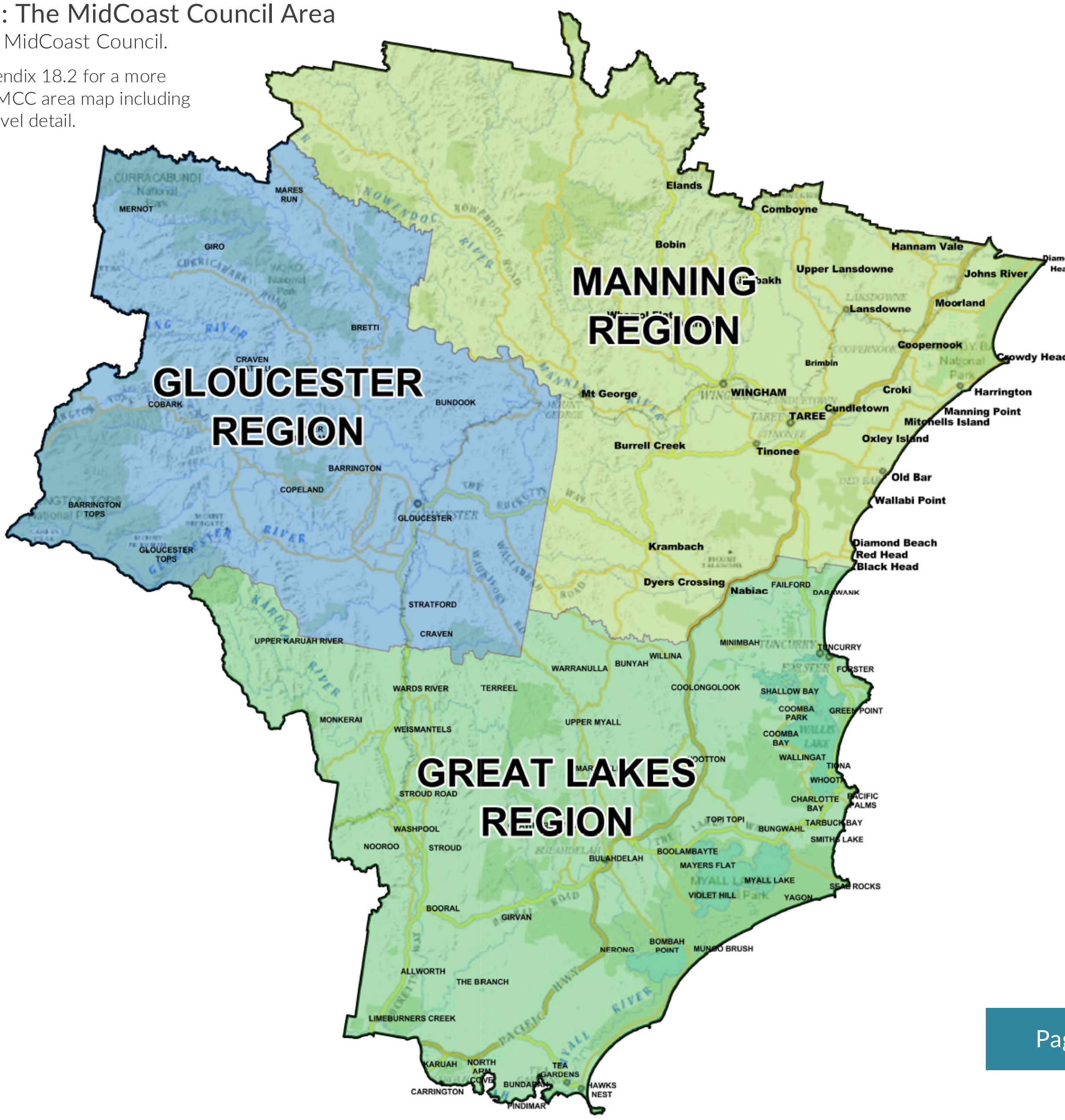
3.1 Overview of the MidCoast Region[11]

The MidCoast Region is defined by the new MidCoast Council boundaries as detailed in Map 1 below. MidCoast Council was formed by New South Wales Government proclamation in May 2016 through the merger of the former Great Lakes, Greater Taree and Gloucester Shire Councils and is located on the boundary of the Hunter and Port Macquarie–Hastings regions of New South Wales.

With a population of 90,433, the MidCoast Region covers 10,052 square kilometres, has 190 kms of coastline, 3,590 kms of road, 6,540 businesses and 29,426 local jobs.[12]

Map 1: The MidCoast Council Area

See Appendix 18.2 for a more detailed MCC area map including suburb level detail.



3.1 Overview of the MidCoast Region | Continued

Stretching from Hawks Nest and Tea Gardens in the south, to Diamond Head and Comboyne in the north; with Barrington Tops and Woko National Parks on the western boundary; and a range of settlements from the rural/inland towns of Gloucester, Bulahdelah, Nabiac, Taree and Wingham to coastal settlements including Forster Tuncurry, Diamond Beach, Harrington and Bluey's Beach; the MidCoast Region is defined by exceptional natural resources, the ocean, extensive national parks, a community–focused outdoor lifestyle and a well–established coastal and rural economy.

As can be seen from Table 1 below, the 3 former Shire Councils that have been amalgamated to form the MidCoast Council Area, whilst all being of a similar land area (2,950–3,729 sq. kms), can be separated loosely into 2 different categories: the more densely populated coastal strip made up of the former Great Lakes and Greater Taree Shire Councils (11.7 people/km^2), and the inland western area made up of the former Gloucester Shire Council (1.7 people/km^2).

This loose categorisation is reinforced by other key statistics with 94% of the population, 94% of private dwellings, 93% of local jobs, 89% of businesses, 79% roads and 72% of bridges (i.e. key infrastructure) also in the former Great Lakes and Greater Taree Shire Councils.

From a Tourism budget expenditure point of view, approximately $2.22 million is indicated in the respective operational plans for the 3 former Shire Councils, with 91% of that expenditure also coming from the Great Lakes ($966,000) and Greater Taree ($1,052,394). This expenditure includes the cost of Visitor Centres in the Region and it should also be noted that each former Council Area reports its budget differently, so these figures should be viewed as estimates rather than exact amounts.

Looking at Tourism Expenditure, the Great Lakes has performed strongest in recent years with $359 million in 2014, followed by Greater Taree ($159 million) and then Gloucester ($51 million). This is reinforced by the Return on Investment (ROI) achieved by each former Council Region at 1:371 for the Great Lakes (i.e. $371 generated for each $1 in Tourism expenditure), 1:254 for Gloucester and 1:151 for Greater Taree.

Table 1: Summary Statistics for new MidCoast Council Area *(a more detailed summary can be found in Section 11)*
Sources: MidCoast Council Combined 2016–2017 Operational Plan and Tourism Research Australia National Visitor Surveys.

KEY STATISTIC	MIDCOAST COUNCIL	FORMER GLOUCESTER SHIRE COUNCIL	FORMER GREAT LAKES SHIRE COUNCIL	FORMER GREATER TAREE SHIRE COUNCIL
Population	90.975	5,160	36,720	49,095
Area (sq. kms)	10,052	2,950	3,373	3,729
Number of Businesses	6,540	708	2,530	3,302
Local Jobs	29,426	1,963	11,066	16,397
Tourism Jobs (Direct & Indirect)	2,810	210	1,550	1,050
Total Private Dwellings	45,217	2,539	20,948	21,730
Road Length (kms)	3,575	757	1,092	1,726
No. of Bridges	542	150	201	190
Total Visitor Numbers	1.86 million	180,000	998,000	677,000
Total Tourism Expenditure	$569 million	$51 million	$359 million	$159 million
Estimated Tourism Budget*	$2.22 million	$201,093	$966,000	$1,052,394
Return on Investment (ROI)	1:255	1:254	1:371	1:151

* Tourism budgets are best estimates based on reported budgets in existing operational plans for 2015/16.

3.1 Overview of the MidCoast Region | Continued

Looking at the detail on the Gloucester, Great Lakes and Manning Regions in the following Sections (3.2 to 3.4), some clear overall observations can be made.

The Manning and Great Lakes Regions are noticeably more densely populated, driven mainly by their coastal location, with employment more focused around the service industries and some agriculture, versus Gloucester, which is a purer rural community supported much more significantly by agriculture and mining.

All 3 Regions skew older than both the regional and national average and all (to varying degrees) experience a relatively high incidence of young people leaving to find work in urban areas. This is common in pretty much every regional area of New South Wales, with people often returning later in life to raise their families.

From a Tourism point of view, the Gloucester Region is in some ways the simplest, dominated as it is by the attraction of the Barrington Tops. The Great Lakes has the lake system, National Parks and beaches as a focus whilst Manning Valley has a mix of coastal, natural environment and rural life/ food and drink at its' core. Full detail on the current and future Tourism offerings of the Regions can be found in Sections 7–10.

Table 2: Main Settlements and Places of Interest in the MidCoast Region

Source: Government of New South Wales (2016).

MAIN TOWNS, SUBURBS AND LOCALITIES
Alderley, Alderley Creek, Allworth, Back Creek, Bakers Creek, Barrington, Baxters Ridge, Belbora, Bennetts Head, Benny's Tops, Berrico, Bindera, Black Head, Blueys Beach, Bobin, Bohnock, Bombah Point, Boolambayte, Boomerang Beach, Booral, Bootawa, Booti Booti, Bowman, Bowman Farm, Bretti, Brimbin, Bucca Wauka, Bulahdelah, Bulby Brush, Bulga Forest, Bulliac, Bundabah, Bundook, Bungwahl, Bunyah, Bunyah Upper, Burgess Beach, Burraduc, Burrell Creek, Cabbage Tree Island, Caffrey's Flat, Callaghan's Creek, Caparra, Cape Hawke, Caramea, Carrington, Cedar Party, Cells River, Charlottes Bay, Clareval, Cobark, Coneac, Coolongolook, Coomba, Coomba Bay, Coopernook, Cooplacurripa, Copeland, Coralville, Corroboree Flat, Craven, Craven Plateau, Cravens Creek, Crawford River, Croki, Crowdy Bay NP, Crowdy Head, Cundle Flat, Cundletown, Cureeki Creek, Curricabark, Darawank, Dewitt, Dewrang, Diamond Beach, Dingo Forest, Dirty Creek, Dolly's Flat, Doon Ayre, Dumaresq Island, Dungog, Dyers Crossing, Elands, Elizabeth Beach, Failford, Faulkland, Fernhill, Firefly, Forbesdale, Forster, Forster Waters, Friendship Key, Gangat, Gereeba Island, Ghinni Ghinni, Giro, Girvan, Glen Ward, Glenthorne, Gloucester, Gloucester South, Gloucester Tops, Green Point, Halliday's Point, Hannam Vale, Harrington, Hawks Nest, Heatherdale, Hillville, Invergordon, Johns River, Johnsons Creek, Jones Island, Karaak Flat, Karuah, Kauthi, Khatambuhl, Kia Ora, Killabakh, Killawarra, Kimbriki, Kippax's, Kiwarrak, Knorrit Flat, Knorrit Forest, Koorainghat, Krambach, Kundibakh, Kundle Kundle, Langley Vale, Lansdowne Forest, Legge's Camp, Lime Kiln, Limeburner's Creek, Lower Bowman, Manning Point, Mares Run, Markwell, Marlee, Maudville, Mayer's Flat, Melinga, Milbrook, Mill Creek, Upper Minimbah, Mitchells Island, Mograni Creek, Mograni, Mondrook, Monkerai, Mooral Creek, Moorland, Moppy, Moto, Mount George, Mount Peerless, Mungo Brush, Myall Lakes, Myra, Nabiac, Nerong, New Forster, Newell's Creek, Nooroo, North Arm Cove, North Pindimar, Nugra, Nugramudgee, Number One, Old Bar, Oxley Island, Pacific Palms, Pampoolah, Pindimar, Pioneer Park, Pipers Bay, Pitlochry, Possum Brush, Purfleet, Rainbow Flat, Rawdon Vale, Red Head, Rocky Crossing, Rookhurst, Rosenthal, Saltwater, Sandbar, Seal Rocks, Smiths Lake, South Pindimar, Stewarts River, Stratford, Stratford South, Strathcedar, Stroud, Stroud Road, Sugarloaf Point, Tahlee, Tallwood's Village, Tamboy, Taravale, Tarbuck Bay, Taree, Taree South, Tea Gardens, Telegherry, Terreel, The Bight, The Branch, Tibbuc, Tinonee, Tiona, Tipperary, Titaatee Creek, Topi Topi, Tugrabakh, Tuncurry, Upper Bowman, Upper Karuah River, Upper Lansdowne, Upper Monkerai, Violet Hill, Waitui, Wallabi Point, Wallamba Island, Wallanbah, Wallingat, Wallingat River, Wallis Island, Wallis Lake, Wang Wauk, Wapra, Wards River, Warranulla, Washpool, Wattley Hill, Waukivory, Waukivory Upper, Weismantels, Wherrol Flat, Whoota, Willina, Winda Woppa, Wingham, Wirradgurie, Woko, Wootton, Yagon, Yagon Beach, Yarratt Forest, Yumbunga.
RIVERS AND OTHER WATERWAYS
Avon River, Barnard River, Barrington River, Bowman River, Coolongolook River, Cooplacurripa River, Crawford River, Curricabark River, Gloucester River, Karuah River, Mammy Johnsons River, Manning River, Myall Lakes, Myall River, Smiths Lake, Telegherry River, The Branch River, Wallamba River, Wallingat River, Wallis Lake, Wards River.
KEY NATIONAL PARKS
Barrington Tops, Booti Booti, Coorabakh, Curracabundi, Crowdy Bay, Ghin–Doo–Ee, Gloucester Tops, Myall Lakes, Wallingat, Woko.
OTHER SELECTED PLACES AND POINTS OF INTEREST
Broughton Island, Bucketts Way, Cape Hawke, Copeland Mine, Crowdy Head Lighthouse, Diamond Head, Ellenborough Falls, Green Point, Mitchells Island, Mograni Ranges, Oxley Island, Singing Bridge, Sugarloaf Point, Tahlee historic property, Tops to Myall Heritage Trail.

3.2 Gloucester Region

'The Gloucester Region … (will look to) … maximise the benefits of sustainable Tourism growth, whilst retaining its distinct rural character and appeal. It will do this through harnessing the strength of the visitor economy to sustainably grow all small business in Gloucester. The key outcome is … (intended to be) … an improved quality and number of Tourism facilities, products and operators … with the overall aim of Gloucester Tourism being to drive greater numbers of the targeted market segments to visit Gloucester and to encourage longer stays and higher spend with greater dispersal.' [13]

Gloucester Destination Management Plan 2015–18.

A) Overview of the Gloucester Region [14]

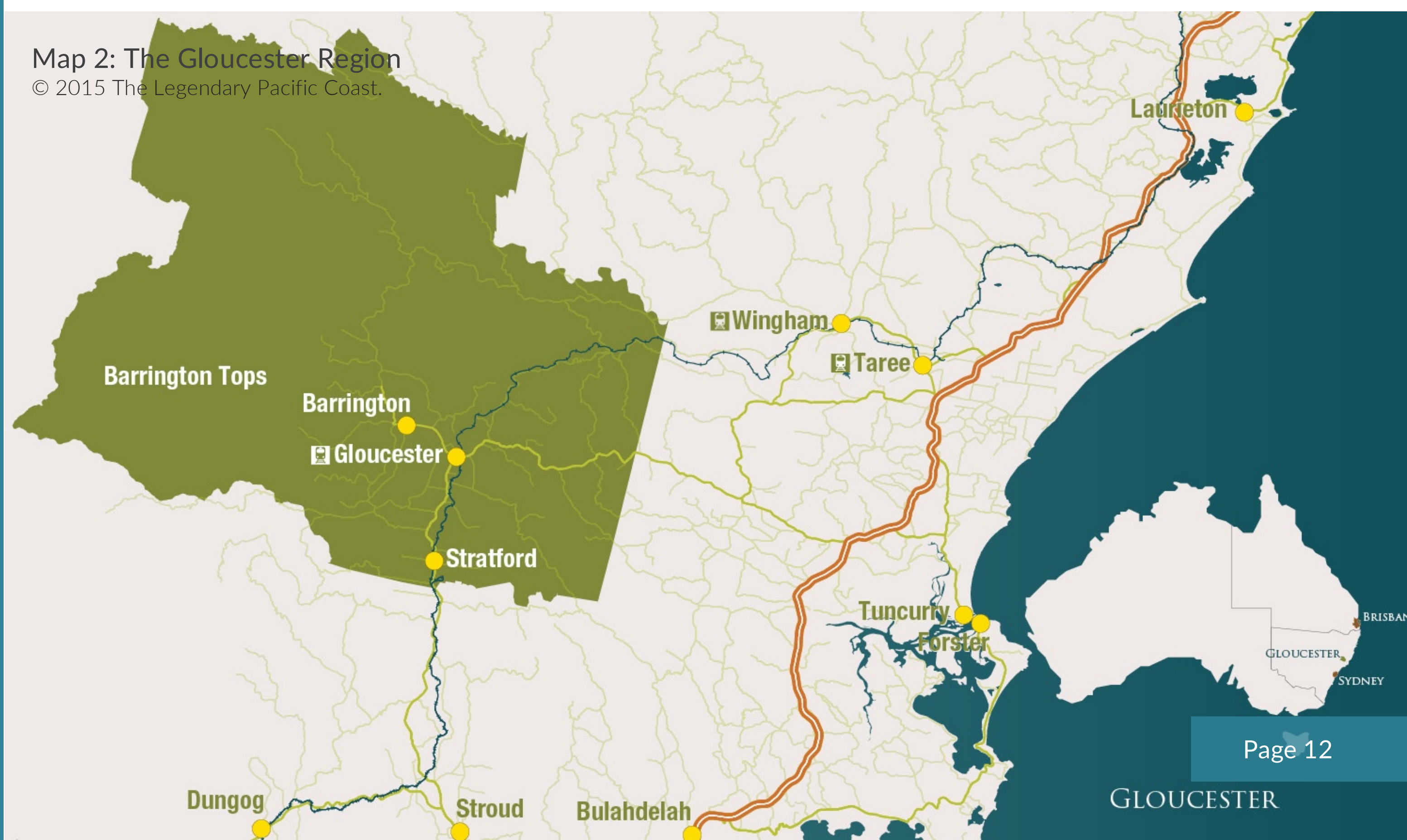
The Gloucester Region (formerly the Gloucester Shire Local Government Area) is located in the Mid North Coast and Upper Hunter regions of New South Wales, covers an area of 2,950 sq. kms and is home to a population of around 5,061 [15] (4,877 in the 2011 Census). It is a rural community located in a fertile valley bordered by the Bucketts and Mograni Ranges to the East and West.[16]

The Region stretches from the Stratford in the south; through Gloucester and Barrington; with the National Parks of Barrington Tops, Curracabundi and Woko making up the North and West of the Region. The main population is centred on Gloucester (pop. 2,336), with the remainder spread throughout small settlements (including Barrington, Bundook, Copeland, Craven and Stratford) and in rural areas.[17]

The township of Gloucester is the major commercial and urban centre of the Shire and also contains some light industrial areas. It is surrounded by almost 3,000 sq. kms of rugged terrain incorporating farmland, hills, forests, rivers and streams.[18]

A number of important river systems dissect the Region from west to east, rising in the Barrington Tops (a world heritage listed wilderness area that dominates the Tourism offering of the Region) and flowing eastward to the sea via the Manning River. The three principal rivers are the Avon, Barrington and Gloucester.

Part of the Region has been listed by the National Trust since 1975 as a declared 'significant heritage landscape' stretching from Booral in the south to Barrington in the north.



Map 2: The Gloucester Region

3.2 Gloucester Region | Continued

A) Overview of the Gloucester Region[19] | Continued

Agriculture is the largest industry sector of employment within the Gloucester Region. Current agriculture in the Region is dominated by beef cattle, dairy and non–cereal broad acre crops. Health and Social Assistance and Retail are also large sectors of employment within the shire. The Mining, Manufacturing and Agriculture, Forestry and Fishing sectors are the largest contributors to economic output in Gloucester.

Agricultural industries have traditionally formed the mainstay of Gloucester's economy and continue to provide a major source of employment and income for the Region (approximately 17% of employment and 11.5% of economic value in 2015), however *'new industries in Tourism, services and mining are clearly emerging'*.[20]

Mining for example currently represents some 9% of employment and 23% of economic value, with plans to increase activity significantly in the future (although there are clear community concerns about the negative impact this could have). There is a coal mine at Stratford, and whilst the timber industry has been declining, there are still a number of operating timber mills.[21]

Tourism currently employs 8% of the population (140 of 1,799 jobs), with this proportion forecast to increase.

The Gloucester district was originally home to a number of Indigenous Tribes and clans. These included the Biripi, who inhabited the area between Tuncurry, Taree and Gloucester; the Worimi & Wonnarua Peoples, who occupied the land between Barrington Tops and Forster in the north and Maitland and the Hunter River in the south; and the Gringai (a clan of the Worimi) whose lands are mostly in the Williams River in the Manning Valley.[22]

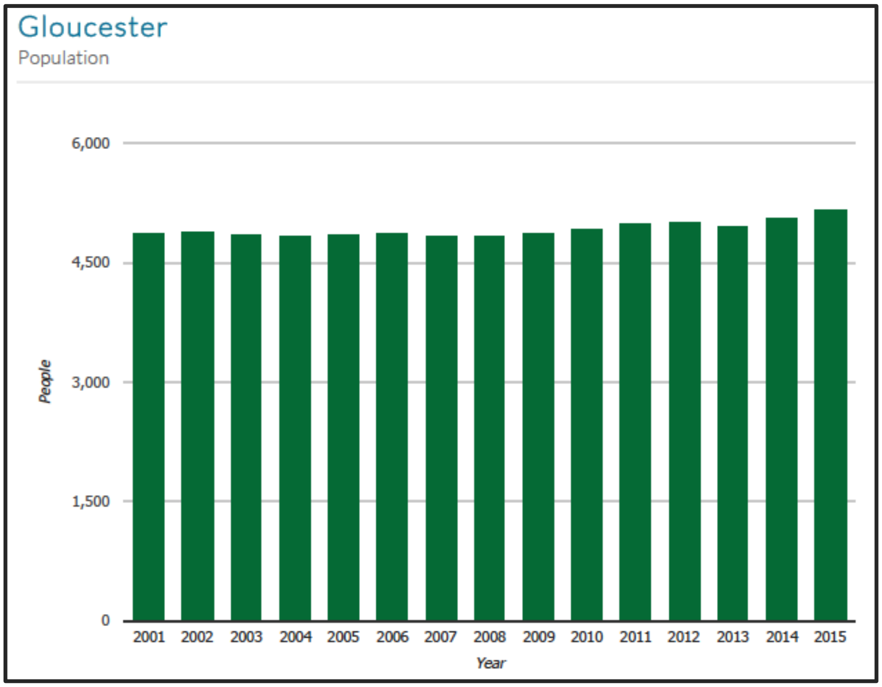
B) Basic Demographic Make–up of the Gloucester Region (resident population)

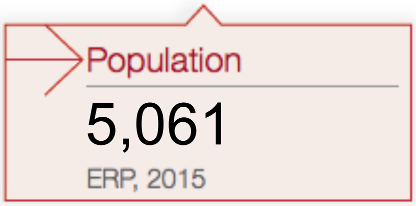
[Text and data sourced mainly from the 'Gloucester Shire Economic Profile' and current ABS Census Data]

At the 2011 census, there were 4,877 people in the Gloucester Region, of these 49.8% were male and 50.2% were female. Aboriginal and Torres Strait Islander people made up 4.7% of the population, which was significantly higher than the national and state averages of 2.5%.[23]

Graph 1: Estimated Resident Population, Former Gloucester Council area

Source: Australian Bureau of Statistics, Regional Population Growth, Australia (3218.0).





'The Census population of the Gloucester Council area in 2011 was 4,877, living in 2,000 dwellings with an average household size of 2.44.'

3.2 Gloucester Region | Continued

B) Basic Demographic Make–up of the Gloucester Region (resident population) | Continued

Estimated Resident Population (ERP) in 2015 was 5,061, a marginal increase of 3.7% from the 2011 census. However, population was 4,888 in 2001, so overall the Region has seen an increase of only 184 people in 15 years meaning it has, in effect, remained static. The population density is currently estimated at 1.7 people/km^2, by far the most sparsely MidCoast Region (13.1/km^2 in Manning and 10.8/km^2 in the Great Lakes).[24]

Population growth in the Gloucester Shire between the 2001 census and the 2006 census was 2.54%; and in the subsequent five years to the 2011 census, population growth has been 1.56%. When compared with total population growth of Australia for the same periods (5.78% and 8.32% respectively), population growth in the Gloucester Region was approximately one–third of the national average. The median income for residents within the Gloucester Shire was also significantly lower than the national average at AUS $30,544 (vs. AUS $47,736).[25]

The median age of people in the Gloucester Region is 50 years old, which, as with the MidCoast Region generally, is significantly higher than the national median of 37 years. Children aged 0–14 years make up 16.0% of the population and people aged 65 years and over make up 26.0% of the population. Of people in the area aged 15 years and over, 54.7% are married and 13.1% are either divorced or separated.[26]

At the 2011 census, the proportion of residents who stated their ancestry as Australian or Anglo–Saxon exceeded 86% of all residents (national average 65.2%). In excess of 66% of all residents in the Gloucester Shire nominated a religious affiliation with Christianity at the 2011 census, which was significantly higher than the national average of 50.2%.[27]

One final element worth noting is that compared with the Great Lakes in particular and, to a lesser extent, the Manning Region, Gloucester has been less attractive as a 'sea (or tree)–change' destination as that trend has developed in the wider Region over the last decade. Whilst this has clearly meant a lower number of people re–locating to the Region, it has enabled a strong sense of community to be maintained and there is a distinct rural character to this Region of the MidCoast Council Area that can certainly be used to enhance the Tourism offering in the future.

© Visit Gloucester | Gloucester Valley

3.3 The Great Lakes Region

'The Great Lakes will have a sustainable Tourism industry. The Region, as well as being known for world class waterways and family holidays, will have an unrivalled reputation for its wealth of authentic nature–based experiences, diverse landscapes, distinctive destinations and vibrant local culture, with a year–round program of events. Our accommodation, our food, our activities, our culture and our customer service will all add up to a visitor experience that creates lasting memories.' [28]

Great Lakes Tourism Vision 2030.

A) Overview of The Great Lakes Region [29]

The Great Lakes Region (formerly the Great Lakes Local Government Area) is located on the Mid North Coast of New South Wales, covering an area of 3,373 sq. km and is home to a population of around 36,720 [30] (34,430 in the 2011 Census). [31]

The Region stretches from the twin towns of Forster/ Tuncurry in the north; through Pacific Palms and Seal Rocks; to Hawks Nest and Tea Gardens in the south; and inland to Stroud. In addition, there are a number of other towns and villages within the Region, each with their own unique character, including Bulahdelah, Coolongolook, Nabiac, Smiths Lake and Stroud. The main population is centred on Forster/ Tuncurry and Tea Gardens/ Hawks Nest.

With 145 kilometres of coastline (76% of the MidCoast and close to a third of the total open coastline of the Hunter, Central & Lower North Coast Region), a vast unique triple lake system (Wallis, Smiths and Myall Lakes), and a hinterland ribboned by streams and rivers, the Great Lakes is a Region defined by water.

This creates a spectacular environment which, as well as unspoilt lakes and rivers, is characterised by beaches, National Parks, mountain ranges, hinterland and flora & fauna that together provide for a lifestyle that many residents and tourists enjoy year–round. The Great Lakes is also the largest producer of the Sydney Rock oyster on the East Coast of Australia.

The Region boasts nine National Parks (including Booti Booti, Ghin–Doo–Ee, Myall Lakes, Wallingat and part of the Barrington Tops National Park), which, along with a number of State Forests, cover over half of the Region and stretch from the coast in towards the Great Dividing Range in the west.

Map 3: The Great Lakes Region
© 2015 The Legendary Pacific Coast

3.3 The Great Lakes Region | Continued

A) Overview of the Great Lakes Region [32] | Continued

The Great Lakes district was originally home to the Biripi, who inhabited the area between Tuncurry, Taree and Gloucester, and the Worimi, who occupied the land between Barrington Tops and Forster in the north and Maitland and the Hunter River in the south.[33]

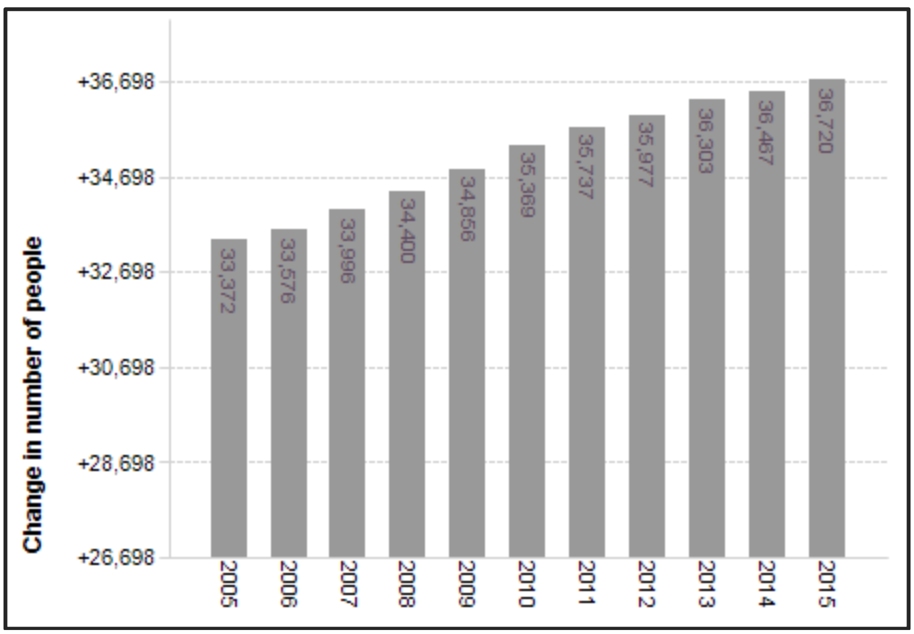
B) Basic Demographic Make–up of the Great Lakes (resident population)

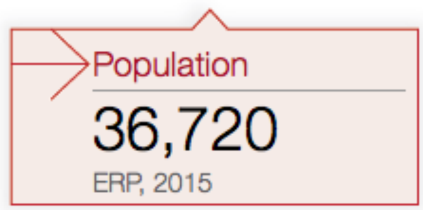
[Text sourced mainly from the 'Great Lakes 2030: Community Strategic Plan 2013–2030']

The Great Lakes Region has experienced significant population growth over the last 10 years. Retirees and 'sea' and 'tree' changers and their families have been strongly represented in this growth. Recent population projections suggest that this trend will continue into the foreseeable future; growth is estimated to increase by an average of 1.42% per year between 2013–2031.[34]

Graph 2: Estimated Resident Population, Former Great Lakes Council area

Source: Australian Bureau of Statistics, Regional Population Growth, Australia (3218.0).





'The Census population of Great Lakes Council area in 2011 was 34,427, living in 21,005 dwellings with an average household size of 2.18.'

The population characteristics of the Great Lakes are similar to many regional east coast New South Wales councils, with a significantly higher proportion of retirement aged people, and a lower proportion of young people. However, in comparison to regional New South Wales, the Great Lakes has a significantly higher proportion of people in the older age groups (60+ years). The regional percentage is 24.5% aged 60 and over, with the Great Lakes figure representing well over one–third of the population at 39.5%.[35]

Between 2006 and 2011 the area's population increased by 5.1% to reach a population density of 10.8 people/km^2 (vs. 13.1/km^2 for Manning and 1.7/km^2 for Gloucester). The age groups which represented the largest areas of growth were empty nesters/retirees (60 to 69), seniors (70 to 84) and elderly (85 and over), being illustrative of the area's significant retirement migration.[36]

These growth areas and the area's higher proportion of people in the older age groups is also indicative of the lower number of households made up of couples with children, being 18% of households compared with 27% in regional New South Wales.[37]

The lower proportion of young people is also a result of the limited availability of tertiary education and employment opportunities locally, meaning that many young people who wish to further their studies and early careers have to leave the area. This is also a common trend in regional coastal areas.

3.3 The Great Lakes Region | Continued

B) Basic Demographic Make–up of the Great Lakes (resident population) | Continued

At present 83.3% of the Great Lakes' population is Australian born, with 3.1% identifying as being Aboriginal or Torres Strait Islander (vs. 2.5% nationally). English is the main language spoken by 97.8% of the population and 3.38% of the population is from a non–English speaking background. [38]

Although agriculture remains an important contributor to local economic activity, the Great Lakes can no longer really be considered a 'rural–based' Region. A combination of retirees and people seeking a 'sea' or 'tree' change has seen a transformation into a self–described 'lifestyle Region'.

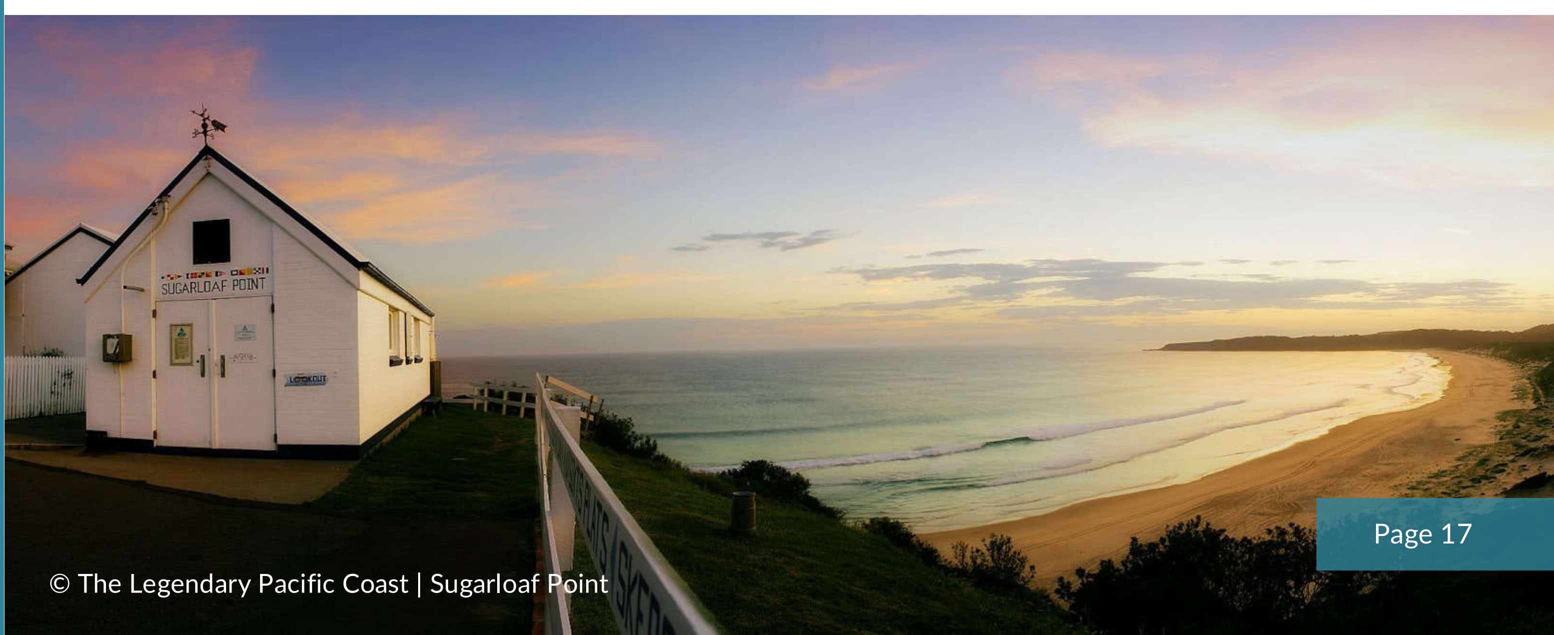
According to the 2011 Australian Bureau of Statistics (ABS) Census, the majority of jobs in the Great Lakes (around 46%) were generated from 'In–person Services' – including retail, accommodation and food services, health care and social assistance, education and training. A further 20% of jobs came from 'Goods Producing Industries' including agriculture, forestry and fishing, manufacturing and construction and a further 16% come from 'Knowledge and Business Services'. A much smaller proportion of employment was generated from 'Goods Related Industries' including wholesale trade, transport, postal and warehousing. [39]

The majority of the recent growth in jobs has been in the population–driven services of health care and social assistance; with mining, retail and education & training also seeing some increases. The industry sector with the largest loss of jobs in the same census period was construction.

Reflecting the population and industry structure of the former Great Lakes Local Government area relative to the broader region and New South Wales, the Great Lakes has a higher incidence of part–time employment (especially in 'in–person' services and Tourism) and much lower overall workforce participation rates. This is explained in part by the significant proportion of the resident population who have retired, in addition to the attraction of residents seeking a 'sea' or 'tree' change, and to move out of the traditional workforce.

At the 2011 Census, the local unemployment rate was 8.3% compared with 6.1% for regional NSW. Unemployment, especially amongst young people, remains an important concern for the community. The Great Lakes continues to have one of the highest unemployment rates amongst Local Government Areas within the Hunter Region. The most recent unemployment figures for the Great Lakes are comparable to other coastal local government authorities. [40]

The 2011 Census also revealed approximately 19% of employed residents worked outside of the Great Lakes, the majority in neighbouring Greater Taree (7.2%), followed by Port Stephens and Newcastle to the south. The Census also showed 19.5% of workers in the Great Lakes came from outside the area, the majority of 12.4% being from Greater Taree. The figures show approximately 793 people travel from the Great Lakes to Taree to work and 1,156 travel from Taree to the Great Lakes for work. [41]



© The Legendary Pacific Coast | Sugarloaf Point

3.4 Manning Region

'(Our Vision is) … to make the Manning Valley the visitor location of choice for our target markets and key growth markets.

(Our Mission is) … to promote the Manning Valley as a desirable destination for visitors so as to create economic, environmental, social and cultural benefits to the whole community through the development, implementation and performance monitoring of the Destination Management Plan (DMP).

This DMP provides the framework for the development and management of our Manning Valley… naturally™ visitor destination'.[42]

Manning Valley Destination Management Plan and Mission 2014.

A) Overview of the Manning Region[43]

The Manning Region (formerly the Greater Taree City Local Government Area) stretches over 3,753 sq. kms from John's River in the north to Bunyah and the Wang Wauk River in the south and up to 100 kms inland towards Nowendoc; it is bounded to the east by a 50 km coastal strip from Crowdy Bay to Hallidays Point.

In 2015 it was home to a population of around 48,905[44] (44,736 in the 2011 Census).[45]

The Manning Region is a predominantly rural area with only a small portion of this land area (2%) taken up with urban, residential, industrial and commercial use. Some 32% of the land is currently cleared and 2% is covered by water (including *'the only double delta river system in Australia'*).[46]

Much of the cleared rural land is used for timber and agriculture, with dairy and beef production being the main agricultural pursuits. In more recent years there have been an increasing number of viticulture industries.

Natural assets are a key component of the Region, with the majority (over 65%) of land devoted to the Region's ten National Parks & Reserves, a number of State Forests, stunning surf beaches spread across 45 kilometres of pristine coastline and a wide range of natural vegetation.

The largest town is Taree, followed by Wingham, with other major population centres being Old Bar, Harrington and Hallidays Point; in total there are 28 seaside and hinterland towns and villages in Manning.

Map 4: The Manning Region

© 2015 The Legendary Pacific Coast.

3.4 Manning Region | Continued

A) Overview of the Manning Region[47]

The Manning Region's three largest industry sectors are Health Care and Social Assistance (2,704 people or 19.3% of the workforce), the Retail Trade (2,098 people or 15.0%) and Manufacturing (1,379 people or 9.9%). In combination these three industries employ 6,181 people, or 44.2% of the total workforce.

Tourism employs an estimated 839 people, or 6.1% of the total workforce; in contrast to Gloucester, Agriculture only employs 673 people, or 4.9% and mining is insignificant with 39 jobs (less than 0.3%). Of the 13,984 people who work in the Manning Region, 12,586 or 90.0% also live in the area

The Greater Taree City/ Manning Valley district was originally home to the Biripi people, who inhabited the area between Tuncurry, Taree and Gloucester.

B) Basic Demographic Make–up of the Manning Region (resident population)

[Text sourced mainly from the 'Manning Valley Community Plan 2010–2030' and 'Manning Valley Destination Management Plan 2014]

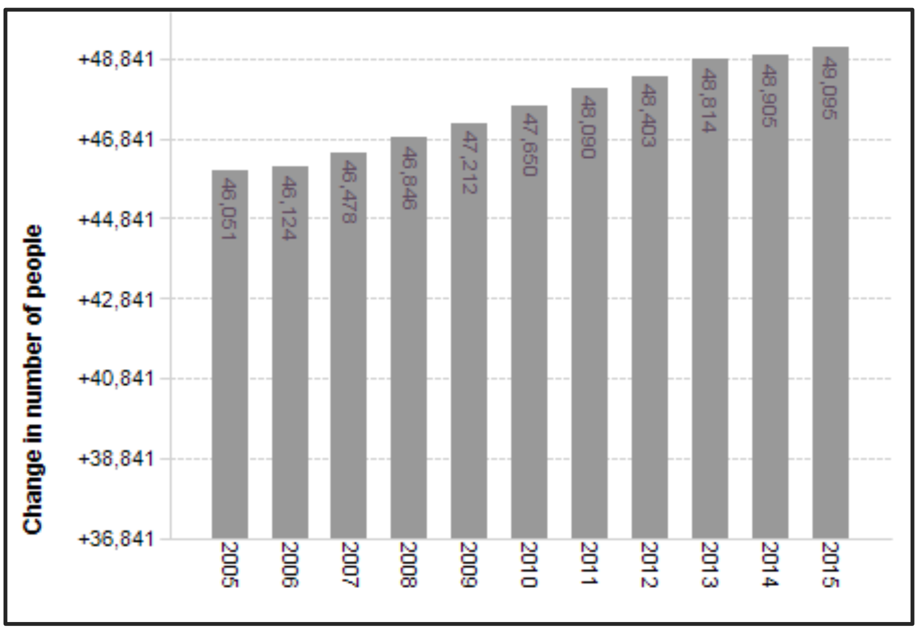
The Manning Region has both the highest overall population and also the highest population density at 13.1 people/km^2 (vs. 10.8/km^2 for the Great Lakes and 1.7/km^2 for Gloucester).[48]

Over the past five years the population of the Manning Valley has increased by 1,870 persons, or an average rate of 0.8%, which is marginally lower than the level for the Lower Mid North Coast (1.1%) and New South Wales (1.3%) over the same period. This rate is also lower than the Great Lakes (1.4%) and Gloucester Regions (1.5%).[49]

The population is forecast to grow by just over 1% per year – reaching some 65,000 by the year 2030.[50]

Graph 3: Estimated Resident Population, Former Greater Taree City Council area

Source: Australian Bureau of Statistics, Regional Population Growth, Australia (3218.0).



Population

48,905

ERP, 2015

'The Census population of the Greater Taree City Council area in 2011 was 44,736, living in 18,941 dwellings with an average household size of 2.36.'

The demographics of the Manning Region are similar to other regional coastal areas, including the Great Lakes. The majority of residents were born in Australia and have English as their first language. There is a higher proportion of older residents and a lower proportion in the 20–30s age group – the median age is 46 years, some nine years higher than the national median.[51]

3.4 Manning Region | Continued

B) Basic Demographic Make–up of the Manning Region (resident population) | Continued

In 2015, 48.7% of the population were male and 51.3% were female, children aged 0–14 years made up 18.6% and people aged 65 years and over made up 22.5% of the population. Of people in the area aged 15 years and over, 50.0% were married and 14.8% were either divorced or separated.[52]

Almost identical to Gloucester, at the 2011 Census, the proportion of residents who stated their ancestry as Australian or Anglo–Saxon exceeded 83% (national average was 65.2%). In excess of 62% of all residents had nominated a religious affiliation with Christianity.[53]

As with both the Great Lakes and, to a lesser extent, Gloucester, many young people leave the Manning Valley for jobs and educational opportunities in urban centres, though some will return in later years to raise their families and reconnect with the community they grew up in.[54]

In keeping with the area's predicted population growth, there will be a steady increase in housing over the next 20 years, with an additional 5,000 homes expected, mostly in existing urban centres. The area has a higher than average rate of home ownership, with 43% of residents owning their own home and a further 27% paying off a mortgage. Most dwellings (75%) are single houses, however, there is increasing demand for alternative styles of housing.

The Manning Region has a higher proportion of singleperson households (25%) and this is expected to increase as the population ages.[55]

The Manning Region also has a significant Indigenous population, with some 1,927 people, or 4.3% of the population, identifying as being of Aboriginal or Torres Strait Islander descent (double the national average). It is a comparatively young indigenous community, with the median age being only 18 years.[56]

© Visit Manning Valley | Wagyu Beef Farming, Manning Valley

3.5 The MidCoast Council Area Amalgamation

A 2015 review of local government boundaries by the NSW Government Independent Pricing and Regulatory Tribunal recommended the merger of a number of adjoining councils throughout New South Wales.

In the initial proposal, the Great Lakes Council and Greater Taree City Council were not included in any amalgamation proposals, while Gloucester Shire was originally proposed for merging with Dungog Shire. However, an alternate proposal to amalgamate the Gloucester, Great Lakes and Greater Taree councils was submitted by Gloucester Shire Council in March 2016 and an independent review recommended this approach be taken. This led to the establishment of the MidCoast Council on 12th May 2016.[57]

MidCoast Council was one of 19 newly formed councils which resulted from the mergers announced in May; visit www.strongercouncils.nsw.gov.au for more details on local government reform in New South Wales.

This amalgamation could impact future Tourism in the Region in a number of ways. In fact, the decision to expand the initial Baseline Analysis of Great Lakes Tourism to include both the Gloucester and Manning Regions to provide a wholistic view of the MidCoast is one tangible example of the changes that lie ahead.

Whilst two obvious downsides to the amalgamation rest in the potential for MidCoast Tourism development and promotion to become too Regionally focused (and therefore less targeted) and for it to lose some of the nuances of each sub–Region, overall there appear to be significantly more potential benefits than downsides.

One of the major positives is led by the geography of the new expanded MidCoast Region, which will enable the Region's Tourism offerings to be structured more around what will attract tourists, rather than being limited by the artificial boundaries of the three former Local Government Areas.

There is also a clear opportunity for more efficient Tourism promotion across the Region and for some of the elements that are working well in each of the three sub–Regions to be shared across the MidCoast.

Whilst it is not possible with the data available to accurately forecast what the net economic benefit to the Region of the amalgamation will be from a Tourism perspective, a conservative indicative estimate identifies an additional AUS $0.55 billion in overall value from Tourism as the immediate economic benefit available to the MidCoast between 2017 and 2030 from the amalgamation.[58]

Other, more specific, potential impacts of the amalgamation are included in Sections 8–11 as relevant.

© Great Lakes Tourism | Entrance to Wallis Lake, Forster Tuncurry

3.6 Looking Ahead to 2030

A 10 to 15–year timeframe to 2025/30 is a good starting point for a project of this nature. This will allow for the necessary infrastructure developments and longer–term investments to be implemented and for the benefits they create for the MidCoast community to take hold.

2030 also aligns with the majority of Tourism data from key sources like the UN World Tourism Organisation (UNWTO), World Travel and Tourism Council (WTTC) and Tourism Research Australia – and the longer–term forecasts that have been made regarding the potential for MidCoast Tourism growth in this report.

3.7 The Need to be Clear on the Current State of MidCoast Tourism

Even with a 10 to 15–year timeframe as a starting point, driving significant, sustainable growth across the MidCoast Region is an ambitious project. To be successful it will need a long–term commitment from the MidCoast Council and the relevant Tourism promotion bodies, and some significant investments from the public and private sectors. The recent creation of the NSW Destination Networks is also highly relevant.

Because of the level of commitment and investment needed, it is essential to understand as much as possible about the current state of Tourism in the MidCoast Region and, as well as laying out the growth opportunities, explore any barriers or challenges to this growth that the Region will need to address.

Understanding the current landscape and looking to relevant examples of best practice will help ensure the decisions taken and investments made now will have the greatest chance of success in achieving the various Tourism–related development goals of the MidCoast Council.

This baseline report looks to provide as much clarity about the current and potential future state of MidCoast Tourism as possible, within the resource limitations of the overall project.

© Brent Purcell | Barrington Tops National Park

4 | THE OPPORTUNITY

There is a clear opportunity for some long–term decisions to be made that will open up the potential role Tourism could play in supporting sustainable economic, social and community development in the MidCoast Region. The key will be in how this opportunity is translated into reality.

The MidCoast Region possesses some significant natural assets for Tourism that, whilst being used to some degree currently, are certainly not being managed to their greatest potential. Part of this stems from the strong competition for tourists from areas like Byron Bay, Jervis Bay, Coffs Harbour & Port Stephens – all of which are generally better known destinations than the MidCoast Region. It also stems from simply not fully understanding all the opportunities that currently exist for Tourism in the MidCoast Tourism – something that is clearly at the centre of the need for this expanded baseline analysis.

As well as the need to develop a more comprehensive Destination Management Plan, there is also a clear opportunity to segment and differentiate the Region's Tourism offering more clearly than is currently the case. The various Tourism positionings currently in use in the Gloucester, Great Lakes and Manning Valley Regions have been successful to different degrees, but even the Manning Valley…naturally™ positioning does not fully do justice to the natural assets on offer; there is significant potential upside from addressing this area.

To start exploring the various opportunities, and how best to start accessing them, this report first takes a look at the Global Tourism market and the trends most relevant to the MidCoast Region. It then analyses Tourism in Australia, New South Wales and North Coast New South Wales Tourism, before focusing on the the MidCoast Region itself.

Within the MidCoast, detailed analysis has been undertaken of the current state of Tourism in the Gloucester, Great Lakes and Manning Regions as well as a look at overall MidCoast Tourism. A separate Section then looks in more detail at current Tourism positionings and branding, before future potential is outlined.

This 'baseline' is then supplemented by selected examples and case studies from a number of Tourism sectors and regions that can provide further detailed insights to help inform the future growth of Tourism in the MidCoast Region.

This analysis has helped identify **28 Future Tourism Growth Opportunity Areas** and **28 Potential Growth Strategies** that appear to have the greatest potential to drive sustained (and sustainable) Tourism growth, whilst setting the MidCoast on the path to the strong, growing and balanced Tourism Industry outlined in the conclusions of this report.

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SECTION 5

Global Trends in Tourism

5 | GLOBAL TRENDS IN TOURISM

5.1 Tourism as a Driver of Economic Progress

As one of the fastest growing economic sectors in the world and with its close links to development, the last 50 years have seen Tourism recognised as a key potential driver of socio–economic progress throughout the world.

According to the United Nations World Tourism Organisation (UNWTO), 2015 saw Tourism make up 9% of global GDP, over 9% of global employment (equivalent to over 200 million people worldwide) and more than US $1.5 trillion of global exports.

Graphic 1: Why Tourism Matters [Source: UNWTO, Tourism Towards 2030]

In 80% of all countries Tourism is one of the five top export earners, and in 60 countries it is the number one source of foreign income.[59] The Tourism industry is a significant employer in many parts of the world, generating 9% of jobs worldwide and directly employing 4.6% of the overall workforce in Australia.[60]

There has been a growing focus on more sustainable forms of Tourism in the past decade, driven in part by it being called out as one of the key factors to help achieve the UN's Millennium Goals (MDGs).

'Tourism, one of the world's top job creators and a lead export sector, especially for developing countries, can play a significant role in the achievement of MDG 1: eradication of poverty, MDG 3: gender equality, MDG 7: environmental sustainability and MDG 8: global partnerships for development.'

Source: UNWTO. Tourism and the Millennium Development Goals. 2010

5.2 The Global Tourism Market: strong growth forecast to 2030

Despite occasional downturns, Tourism over the last 65 years has seen virtually uninterrupted growth.

International tourist arrivals have increased from 25 million globally in 1950, to 278 million in 1980, 527 million in 1995, and 1,133 million in 2014. After growth of 4.3% in 2014, 2015 was forecast to see slightly slower tourist arrivals growth, estimated at 3.7%.[61]

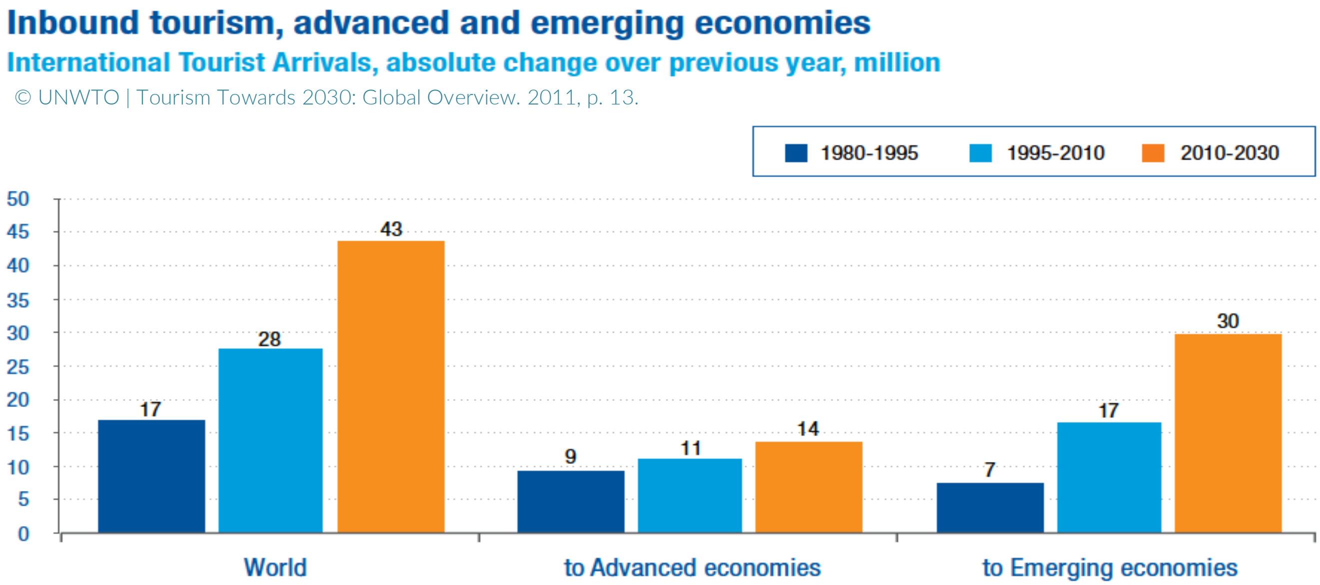
Similarly, international Tourism receipts earned by destinations worldwide have increased from US $2 billion in 1950 to US $104 billion in 1980, US $415 billion in 1995 and US $1,245 billion in 2014.[9]

According to the UNWTO's long term forecast Tourism Towards 2030, international arrivals are expected to reach nearly 1.6 billion by the year 2020 and are expected to increase by 3.3% a year globally between 2010 and 2030 to reach 1.8 billion by that year. In terms of expenditure, International Tourism is forecast to continue its strong growth, albeit at a slightly lower rate, and reach US $1,998 billion by 2030.

5.2 The Global Tourism Market: strong growth forecast to 2030 | Continued

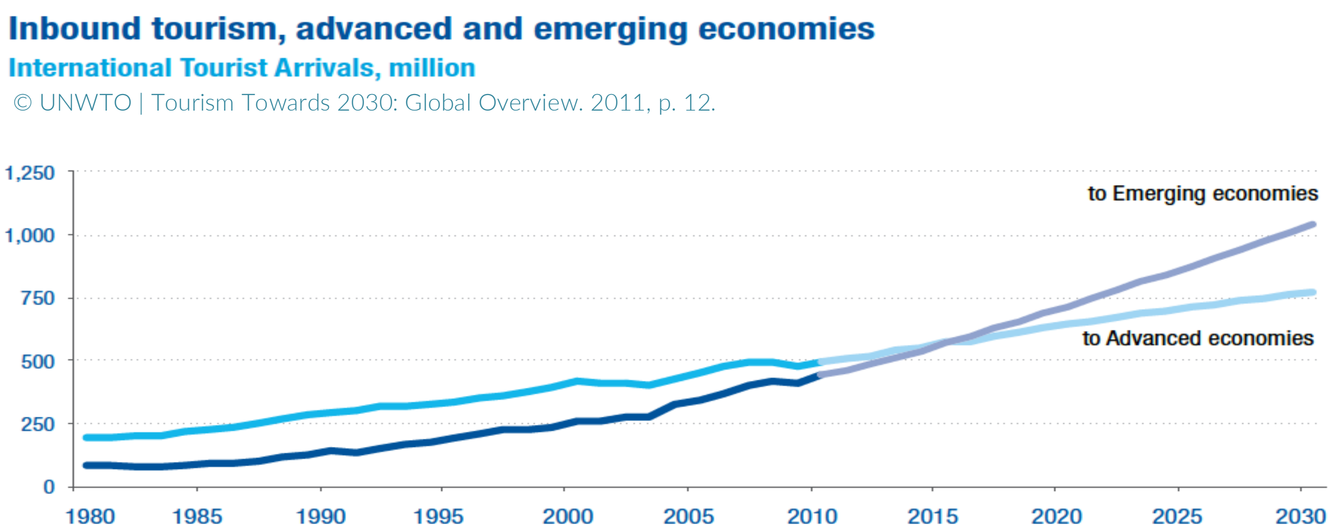
Between 2010 and 2030, arrivals in advanced destinations are forecast to increase at +2.2% a year, half the rate of those in emerging economies at +4.4% a year (*Graph 4*). The overall market share of advanced economies decreased from 70% in 1980 to 55% in 2014, and is expected to reach 43% by 2030. Given its unique geographic location, Australia is forecast to continue to benefit from the significant growth trends in the emerging economies in the Asia Pacific and Oceanic regions.[62]

Graph 4: Average Growth Rates in Advanced and Emerging Economies to 2030
Source: UNWTO, Tourism Towards 2030



In actual tourist numbers, this means emerging economies will overtake advanced economies somewhere between 2015–18, and by 2030 will receive the equivalent of over 1 billion international tourist arrivals. Over the same time period, advanced economies will see their total tourist arrivals exceed 750 million as their rate of growth remains relatively steady (*Graph 5*).

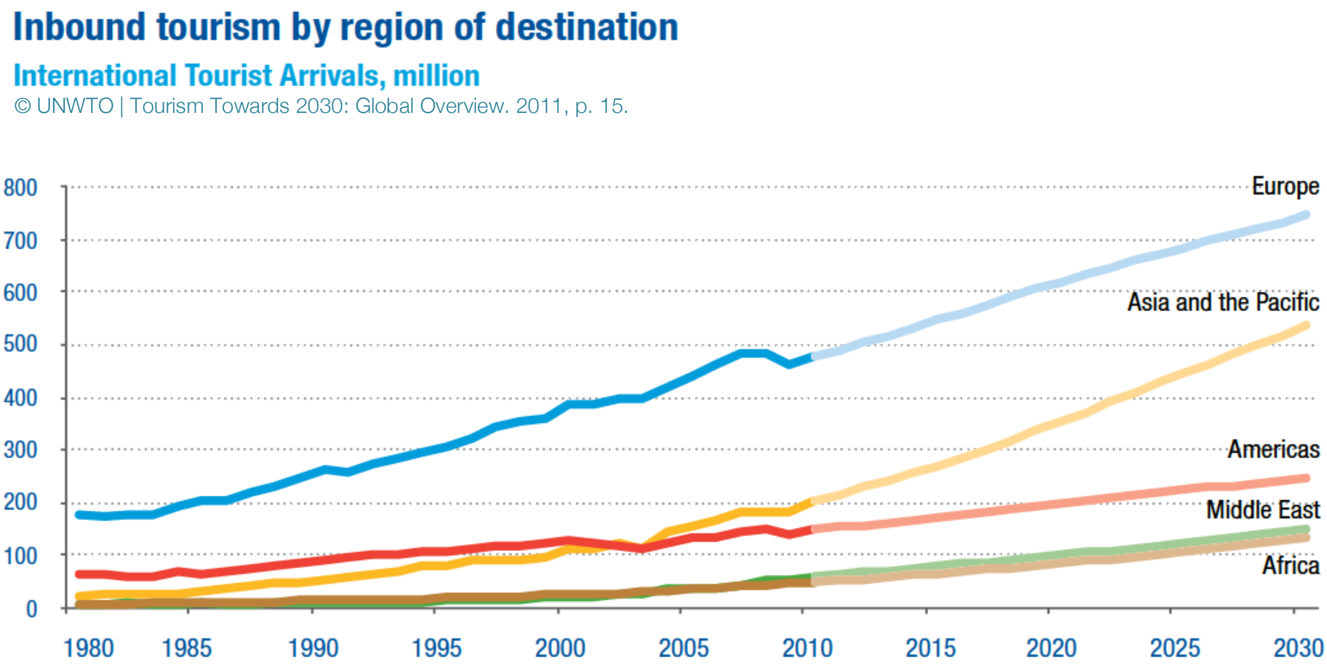
Graph 5: Growth in Inbound Tourism in Emerging and Advanced Economies
Source: UNWTO, Tourism Towards 2030



5.2 The Global Tourism Market: strong growth forecast to 2030 | Continued

Looking at Asia and the Pacific specifically, Tourism growth is forecast to be the fastest of any region – and this is before taking into account domestic Tourism, which is also growing. 2030 will see the Asia and the Pacific region, at 535 million arrivals, in clear second place after Europe at 744 million. The Americas (248 million), Middle East (149 million) and Africa (134 million) make up the other forecasts for total international arrivals in 2030 (*Graph 6*).[63]

Graph 6: Tourist Arrivals to Main Regions of the World, forecast to 2030
Source: UNWTO, Tourism Towards 2030



5.3 Global Growth Drivers and Socio–economic Forces Influencing Tourism

There are 2 primary drivers behind the existing and forecast growth in global Tourism:

1) **Continued expansion of the middle classes worldwide**, leading to increased disposable income for Tourism. According to the OECD, the global middle class is predicted to increase from 1.8 billion in 2009 to 3.2 billion by 2020 and 4.9 billion by 2030. The bulk of this growth is forecast to come from Asia with the region representing 66% of the global middle–class population and 59% of middle–class consumption by 2030, compared to 28% and 23% respectively in 2009.[64]
2) **Forecast Global GDP Growth Rates**, driving overall economic growth and supporting the growth of the middle classes. World Bank forecasts indicate that over the next 3 years, overall GDP growth is expected to rise moderately, to 3.0 percent in 2015, and average about 3.3 percent through 2017. In developing countries, growth is projected to gradually accelerate, rising from 4.4 percent in 2014 to 4.8 percent in 2015 and 5.4 percent by 2017. High–income countries are likely to see GDP growth of 2.2 percent in 2015–17, up from 1.8 percent in 2014.[65]

There is also a set of social and economic forces influencing Tourism over the medium to long–term, most of which are broadly accepted to be consistent throughout the world.

Graphic 2: Global Socio–Economic Forces Influencing Tourism

Source: The Association of Southeast Asian Nations. ASEAN Tourism Marketing Strategy (ATMS) 2012–2015.

CLIMATE CHANGE	UNCERTAINTY & TURBULENCE	COST OF FUEL AND ITS AVAILABILITY	GROWTH OF LOW-COST CARRIERS	CONSUMER PREFERENCES & BEHAVIOUR	CHANGING DEMOGRAPHICS
INFLUENCE OF THE ASIAN TRAVELLER	TERRORISM AND NATURAL DISASTERS	RAPIDLY GROWING VISITOR NUMBERS	RAPID PACE OF URBANISATION	NEW METRICS OF SUCCESS	OPEN SKIES

Whilst it is not possible to analyse each of these 12 trends in this report, there are 6 that have particular relevance to the MidCoast Destination Management Plan:

1) **Climate Change:** this will influence the viability of certain destinations and change travel behaviour, but will also have a positive benefit for destinations that are clearly based on sustainability.
2) **Consumer Preferences and Behaviour:** the pace of change is becoming more rapid in mass Tourism, but of particular relevance here is the rapid growth in the number of consumers seeking Nature and Adventure–based experiences. This consumer preference is also markedly more stable with regards to propensity to travel.
3) **Influence of the Asian Traveller:** the trend for Asian consumers to become more mobile as their income levels increase and to seek more adventurous experiences is likely to have a strong influence on the growth of Nature/ Adventure–based Tourism growth in Australia.
4) **Rapidly Growing Visitor Numbers:** this is no longer viewed as a wholly positive development given the significant negative impacts this can bring to economic, cultural and social environments. Sustainable development is more and more viewed as essential for the long–term health of Tourism globally.
5) **Uncertainty and Turbulence:** whether from economic instability, the threat of terrorism or the increasing prevalence of natural disasters (particularly in Australia and the South East Asian region), Tourism will be influenced by these events with Tourism patterns becoming less certain. The increasing likelihood of drought/ bushfires and intense tropical storms/ cyclones will have a particular impact in Australia, including the MidCoast region.
6) **New Metrics of Success:** heritage protection, environmental stewardship and poverty reduction are more and more being viewed as essential parts of overall Tourism development. The 1st two of these metrics are of relevance in the MidCoast when looking at future development.

5.4 Emerging Global Trends in Visitor Motivations and Behaviour

There are a number of relevant emerging trends in visitor motivations and behaviour that need to be considered when exploring long–term Tourism growth for the MidCoast.

Graphic 3: Emerging Trends in Visitor Motivations and Behaviour

Source: The Association of Southeast Asian Nations. ASEAN Tourism Marketing Strategy (ATMS) 2012–2015.

EXPERIENTIAL TRAVEL	THE GREEN MOVEMENT	TOURISM AS EXPERIENCE	THE DEMAND FOR PUBLIC PROGRAMMING	THE CREATIVE INDUSTRIES
THE REDEFINITION OF BACKPACKING	THE 3 NEW S's	INCREASING IMPORTANCE OF NICHE/ INTEREST/ ACTIVITY BASED TOURISM	THE GROWNG TREND OF CITIES AS ATTRACTIONS	VOLUNTOURISM

As with the socio–economic trends, it is not possible to analyse each of these 10 trends in detail, but a number of them have particular relevance:

1) **Experiential Travel:** this is about both getting away from the traditional sites and experiencing 'travel we live' rather than 'travel we look at'. Interestingly it is also growing in popularity in emerging economies because of the greater benefits it has for a local population.
2) **The Green Movement:** this growing trend continues to move towards the mainstream and has clear relevance for the core areas of potential growth in the MidCoast.
3) **The Redefinition of Backpacking:** two parts of this particular trend are relevant:
   a) The continuing trend for backpackers to be more environmentally aware and make travel decisions based on this motivation; and
   b) The rise of the 'Flashpacker' – tourists in their 30s and 40s with more disposable income, but still looking for authentic experiences. This type of tourist aligns closely with the overall target market for key parts of the MidCoast, particularly the Great Lakes and Manning Regions.
4) **Increasing Importance of Niche/ Interest/ Activity–based Tourism:** again, this trend is clearly relevant; as is the important role the Internet has played in making this type of more sophisticated segmentation profitable. This should be taken into consideration – particularly as the Tourism set–up in the MidCoast Region is integrated which will open up the potential for clearer segmentation of potential Tourism segments for development and target markets for promotion.
5) **Voluntourism:** this area is growing at a rapid rate and involves people looking to integrate into a new culture, give back, pass on their skills, enjoy a rewarding experience etc.
6) **The Demand for Public Programming:** festivals, cultural activities, sports events (e.g. local running races) and conferences are an increasing focus for tourist's travel patterns and motivations. This ties in with the potential for signature event in the MidCoast.

More detail on each of these trends, and their likely influence on Tourism, is available on pages 14–17 of the 'ASEAN Tourism Marketing Strategy (ATMS) 2012–2015' document available for download here:
[http://www.asean.org/?static_post=asean-tourism-marketing-strategy-2012-2015-2]

5.5 Tourism in the Asia Pacific and Oceania

The Asia Pacific region now accounts for 30% of the US $1,246 billion global Tourism market by value, making it the second largest region after Europe (41%).

In 2014, Asia and the Pacific grew strongly, welcoming 263 million international tourists, 14 million up from 2013 (+5%). The region earned US $377 billion in Tourism receipts, up by US $16 billion over 2014, (+4% in real terms). *See Graphic 4 below and Table 3 on page 31 for more detail*.

Graphic 4: UNWTO International Tourism Global Summary 2014
Source: UNWTO Tourism Highlights 2015.

The Asia Pacific also has the second highest spend per arrival at US $1,430 vs. the Americas (US $1,510), Middle East (US $970), Europe (US $870) and Africa (US $650). The global average spend in 2014 was US $1,100 per arrival.[66]

Looking ahead to 2030, extremely strong growth is the overarching theme, with Asia and the Pacific forecast to gain the most new arrivals of any region. New international tourist arrivals are projected to increase from 204 million in 2010 to 535 million in 2030 (+331 million, +162%).[67]

Overall expenditure will also continue rising, with the Asia Pacific region predicted to see the fastest growth in inbound expenditure over the next five years.[68]

5.5 Tourism in the Asia Pacific and Oceania | Continued

In terms of the reasons behind travel, leisure, recreation and holidays will remain the pre–dominant category with 54% of all international arrivals to the Asia Pacific in 2030. Travel for visiting family and relatives (VFR), health, religion and other purposes will represent 31%, business and professional travel the remaining 15%.[69] The overall share between these 3 categories is not forecast to shift dramatically.

Tourism in Oceania

After several years of gradual decline (–2.8% from 2010–12), Oceania, where Australia is categorised by the UNWTO, showed growth of +2.4% in 2013 and strong growth of +7.2% in 2014. This growth in 2014 was driven by Australia as the major destination in the region (received 8% more international visitors). Among the smaller island destinations, Palau (+34%) recorded the highest growth, fuelled by a surge in Chinese tourists.[70]

Oceania welcomed 13.2 million international tourists in 2014[71], earning US $44.8 billion in tourist receipts, a 3.6% share of the global market (*Table 3*).

Table 3: International Tourist Receipts/ Value (2010–2014)
Source: Data as collected by UNWTO May 2015 | © UNWTO, Tourism Highlights 2015.

	International Tourism Receipts Local currencies, constant prices (% change)				Market share (%)	Receipts (US$) (billion)		Receipts (US$) per arrival
	11/10	12/11	13/12	14*/13	2014*	2013	2014*	2014*
World	**4.6**	**3.9**	**5.1**	**3.7**	**100**	**1,197**	**1,245**	**1,100**
Advanced economies¹	**5.8**	**3.7**	**5.7**	**3.2**	**65.5**	**784**	**815**	**1,320**
Emerging economies¹	**2.5**	**4.4**	**4.0**	**4.6**	**34.5**	**413**	**430**	**840**
By UNWTO regions:								
Europe	**5.0**	**1.9**	**4.2**	**3.6**	**40.9**	**491.7**	**508.9**	**870**
Northern Europe	2.6	3.3	7.6	5.3	6.5	74.8	80.8	1,130
Western Europe	4.0	2.9	2.2	1.5	13.7	167.1	171.1	980
Central/Eastern Europe	6.5	4.4	3.5	-0.8	4.6	60.3	57.7	480
Southern/Medit. Europe	6.2	-0.4	4.8	6.2	16.0	189.5	199.2	930
- of which EU-28	4.2	1.5	3.9	3.7	33.9	405.3	422.6	930
Asia and the Pacific	**8.6**	**6.7**	**8.6**	**4.1**	**30.3**	**360.7**	**376.8**	**1,430**
North-East Asia	9.2	8.0	9.3	5.1	15.9	184.9	198.1	1,450
South-East Asia	13.3	10.7	10.8	0.4	8.6	108.2	106.8	1,100
Oceania	-3.6	-1.9	2.4	7.2	3.6	42.9	44.8	3,390
South Asia	11.9	-0.6	6.4	7.8	2.2	24.7	27.2	1,590
Americas	**4.6**	**4.7**	**4.7**	**3.1**	**22.0**	**264.2**	**274.0**	**1,510**
North America	5.1	5.0	5.1	2.2	16.9	204.5	210.9	1,750
Caribbean	-0.8	1.6	4.0	6.1	2.2	25.4	27.1	1,210
Central America	7.4	8.3	3.4	7.5	0.8	9.4	10.2	1,060
South America	5.3	4.0	3.2	5.7	2.1	24.9	25.8	900
Africa	**2.3**	**6.0**	**2.6**	**2.9**	**2.9**	**35.5**	**36.4**	**650**
North Africa	-5.5	8.2	-1.0	3.4	0.8	10.2	10.6	530
Subsaharan Africa	5.8	5.1	4.0	2.8	2.1	25.3	25.9	720
Middle East	**-15.6**	**0.9**	**-6.9**	**5.7**	**4.0**	**45.2**	**49.3**	**970**

As with the broader Asia Pacific region, future growth in Southeast Asia and the Pacific/ Oceania is forecast to be strong. The World Travel and Tourism Council (WTTC), for example, estimates that travel and Tourism's total contribution to the region's GDP will grow by 5.6% per annum to 2025 (2nd fastest globally after South Asia), with the sector's total contribution to employment increasing by 2.7% per annum over the same period.[72]

5.5 Tourism in the Asia Pacific and Oceania | Continued

Some final comments on the drivers behind the fast rate of Tourism growth forecast for Asia Pacific and Oceania.

Alongside the upwards growth trend in international travel, the Asian sector in general has been growing rapidly due both to the rise in the domestic/ regional market noted above (made possible by strong economic growth with a corresponding increase in disposable income and leisure time), but also due to the general easing of travel restrictions and overall liberalisation of air transport (the 'Open Skies' policy being one example).

The final key driver worth mentioning has been the ongoing development of low cost carriers throughout the Asia Pacific region driving costs down to the majority of countries.[73]

All of these factors open up increasing demand opportunities for international tourists for Australia, and therefore opportunities for regions like the MidCoast to build their profiles for some of these markets.

5.6 Domestic Tourism: Global and Regional Trends to 2025

Whilst the majority of the global Tourism industry is more heavily focused on international Tourism statistics, the domestic Tourism market is also an important area to consider when looking at the MidCoast Region.

Overall the total size of domestic Tourism was estimated at over 5.5 billion trips globally in 2014 (against 1.1 billion international trips).[74] This equates to US $3,642 billion in overall value (*Table 4*), almost 3 times larger than the US $1,245 billion in value of the International market as noted at the start of this section (p. 13).

As outlined in Table 4, the global domestic Tourism market is forecast to grow by 3.8% per annum to 2025 when it will reach an overall value of US $5,465 billion; over this time its share of GDP will decline slightly from 4.7% to 4.1%.

The Asia Pacific region's domestic Tourism market is forecast to grow ahead of the global trend, at 5.0% per annum. This will see the Asia Pacific's domestic Tourism market grow from US $1,163 billion to US $2,001 billion, whilst overall share of GDP will decline over the same time period, from 5.0% to 4.0%.

Oceania's domestic Tourism market is forecast to grow from US $185.6 billion to US $259.2 billion, a growth rate marginally below the global average at 3.3% per annum. Overall share of GDP will increase marginally from 11.0% to 11.3%.

Table 4: Domestic Tourism: Size and Growth (2014–2025)

Source: World Travel and Tourism Council (WTTC). Travel and Tourism Economic Impact 2015, Southeast Asia and Oceania.

REGION/ SCALE	Current Domestic Tourism			Forecast Domestic Tourism		
	2014		2015	2025		
	US $ Billion (Value)	% of Total GDP	Forecast Growth (%)	US $ Billion (Value)	% of Total GDP	Growth * (%)
Worldwide	3,642.1	4.7	+3.7	5,465.0	4.1	+3.8
Asia Pacific	1,162.7	5.0	+5.8	2,001.0	4.0	+5.0
Oceania	185.6	11.0	+3.3	259.2	11.3	+3.1

*2015–25 annualised real growth adjusted for inflation.

5.7 Nature–based Tourism: a fast–growing, high value & resilient global segment

Nature–based Tourism is often called out as the fastest growing Tourism segment globally, has inherently higher–value per visitor than more mainstream forms of Tourism, and is notably more resilient to the periodic downturns that impact Tourism due to economic, societal, health or environmental reasons.

Underpinning all this is its much lower overall impact on the communities and environments of host countries and a real potential for it to help accelerate a country's economic development over a sustained period of time.

With that in mind, it is surprising that there have not been more in–depth studies of the overall value and potential of Nature–based Tourism; or even just a greater volume of segmented data available from Tourism bodies like the UNWTO and WTTC, and development bodies like the World Bank and Asian Development Bank.

From the data that is available, however, the overall potential for nature–based, eco and/or adventure Tourism to help grow a country or region's Tourism sector, whilst simultaneously reducing the negative economic, environmental and societal impact of the more mainstream types of Tourism, is clearly significant.

Given the increasing pressures that many parts of the world are under from impacts like climate change, over–population and declining natural resources, the potentially pivotal nature of Nature–based Tourism in addressing or preparing for some of these future risks is also apparent.

Over the past two decades, both Nature and Adventure–based Tourism have developed to be part of the fastest–growing segments within the Tourism industry. As far back as 2004, for example, Nature–based Tourism was estimated to be growing three times faster than the Tourism industry as a whole.[75]

The combined annual growth rate of Nature–based and Adventure Tourism is estimated to be between 10–30% by the UNWTO and WTTC, with its overall share of the world Tourism and travel market currently estimated at between 20–25%.[76] By 2035 this share is conservatively forecast to grow to between 35–45%.[77]

Table 5: Current and Forecast Value of Nature–based and Adventure Tourism (2015 vs. 2030)
Sources: UN Statistics Division, UN World Tourism Organisation, World Travel and Tourism Council, Tourism Research Australia.

REGION/ SCALE	Estimated Value in 2015			Forecast to 2030*		
	Total Tourism Market (US$)	Nature/ Adventure–Based Tourism		Total Tourism Market (US$)	Nature–based & Adventure Tourism	
		20% Share (US$)	25% Share (US$)		35% Share (US$)	45% Share (US$)
Global	$1,246 billion	$249 billion	$311.5 billion	$2,214 billion	$775 billion	$996 billion
Asia Pacific	$377 billion	$75.5 billion	$94.3 billion	$670 billion	$234.5 billion	$301.5 billion
Australia	$82.5 billion	$16.5 billion	$20.6 billion	$223.9 billion	$78.5 billion	$101 billion

*2030 forecast is modelled on UN, WTTC and Tourism Research Australia data. Given the wide variety of variables, it should be taken as indicative only.

Looking at the estimated current size of Nature/Adventure–Based Tourism in Table 5 above, it is clear that, as well as being a rapidly growing segment, this is already an established market – even if the exact numbers should be viewed with caution because of the current lack of segmented global data.

5.7 Nature–based Tourism | Continued

At somewhere between US $16.5 billion–US $20.6 billion in value, this places the size of the total Australian Nature/ Adventure–Based Tourism market as already equivalent to Victoria's domestic and International Tourism markets combined (estimated at US $20.6 billion in December 2015).[78]

Looking ahead to 2035, the upper estimated range of US $101 billion would make the Nature/ Adventure–based Tourism sector larger than Australia's current combined international and domestic Tourism industries. To put it mildly, there is clearly potential available to be unlocked.

Alongside this total value is the increased economic value generated for the host country by each Nature–based Tourist – because they tend to stay longer and spend more. This means some of the challenges with mass Tourism growth outlined in section 11.5 can be significantly mitigated.

Again, broad–based data is not readily available, but one credible study in 2009 by Tourism Research Australia found that an international Nature–based Tourist spent AUS $5,898 per trip compared to the average international tourist spend of AUS $3,614 per trip – a 63% increase. This is mainly attributable to the greater length of stay at 42 nights vs. 21 on average. Australia also commands a high proportion of Nature–based Tourists, at 64% of the total number of international visitors.[79]

To put it even more mathematically bluntly, this means you can deliver the same economic return with approximately 40% less tourists at a Nature–based destination than a more traditional destination – and this additional economic value is before you factor in the extra social, environmental and cultural capital generated by the fact that Nature–based Tourists tend to travel with a much lighter social, ecological and cultural footprint.

A final area of significance with regards to Nature/Adventure–based Tourism is its overall 'resilience' to the traditional shocks that regularly cause downturns in the global Tourism industry (e.g. economic downturns, regional/ country instability, significant health scares, terrorism attacks).

Because of the demographics and underlying motivations of Nature/Adventure–based Tourists, they tend to be much more willing to travel independently, put up with a greater degree of hardship to reach a destination and generally take on more risk when it comes to travelling to 'less safe' destinations.

This means that they are more likely to see their travel plans through when more traditional tourists cancel, are often the first to travel to areas affected by natural or man–made disasters when they are made accessible again, and are much less put–off by heightened travel risks in general.

Again, this further reinforces the overall value in having a greater proportion of Nature–based and Adventure Tourists in any region's international and domestic Tourist base.

Note

*Definitions of some of the various types of Tourism can be found in **Appendix 18.1**, including the Tourism definitions used as the basis of this report.*

5.8 Coastal and Marine Tourism: a snapshot

One final section of Tourism to take a quick look at from a global perspective prior to looking at Australia and New South Wales in more detail, is Coastal and Marine Tourism.

It is estimated that 85% of all Tourism worldwide takes place in coastal areas, generating an estimated US $1,050 billion in annual revenues in 2014.[80] Coastal and marine Tourism is by far the largest segment of the global Tourism market.

Given the nature of Australia's Coastline, it can be assumed that it actually receives a greater proportion of people visiting for coastal and marine Tourism than other parts of the world. But even at the global average of 85%, that still equates to over 5.6 million international visitors travelling to Australia and 70.7 million domestic trips being made for marine and coastal Tourism purposes. Taken together, they generated an estimated AUS $86.5 billion in revenue in 2015.[81]

Obviously, this includes all forms of Tourism activity, from traditional 3S's Tourism (sun, sea and sand) to niche Tourism activities like 'eco–voluntourism'.

Looking closer at Nature–based Tourism activities, especially reef–based activities, it is estimated that every year, millions of tourists travel to tropical resort destinations to experience the beauty and vibrancy of coral reef ecosystems.[82] For example, 2 million people visit Australia's Great Barrier Reef alone (earning US $1.4 billion in Tourism revenue),[83] and an estimated 6 million+ people engage in scuba diving and 20 million+ in snorkelling every year. A large proportion of these divers and snorkelers actively seek out coral reef ecosystems.[84]

Underpinning all this value generated, and to support the desire by a large and growing, number of people to travel to, and enjoy, coastal and marine environments, is the overarching need to ensure Tourism development in coastal and marine areas is part of Integrated Coastal Zone Management.

As the United Nations World Tourism Organisation (UNWTO) puts it in their 2015 report on the role of Tourism in supporting Goal 14 of the UN's Sustainable Development Goals (SDGs):

'Coastal and maritime Tourism, Tourism's biggest segments, [....], rely on healthy marine ecosystems. Tourism development must be a part of Integrated Coastal Zone Management in order to help conserve and preserve fragile marine ecosystems and serve as a vehicle to promote a blue economy, in line with Target 14.7: "by 2030 increase the economic benefits to SIDS and LDCs from the sustainable use of marine resources, including through sustainable management of fisheries, aquaculture and Tourism".'

Source: UNWTO 2015 Tourism and the Sustainable Development Goals.

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SECTION 6

Australia, New South Wales and North Coast New South Wales Tourism Trends

Note: Additional data released in August 2016

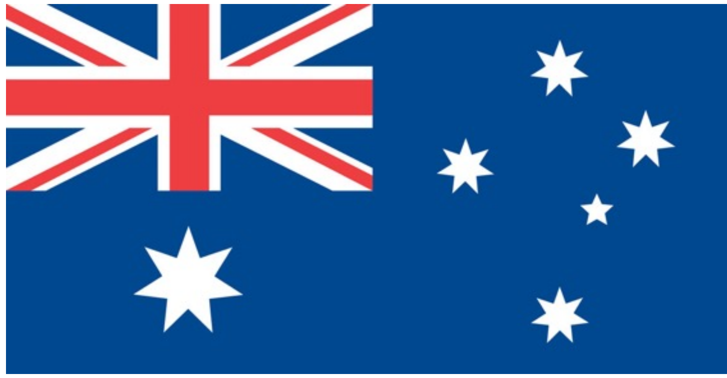
Since the drafting of this report, some additional data was released by Deloitte in August 2016 that is of particular relevance to the MidCoast Region *(Deloitte's 'Tourism and Hotel Market Outlook; August 2016')*.

Some of the key outtakes of the Deloitte report are included as Appendix 18.15 (p.241), however in summary this latest data strongly reflects the forecasts in this Baseline Analysis with the growth trends clearly supporting regional tourism.

As outlined later in this report, the MidCoast region is well placed to capitalise on these trends and growth patterns.

6 | AUSTRALIA, NSW & NORTH COAST NSW TOURISM TRENDS

6.1 An Overview of Australian Tourism



Key Statistics

Source: UN Data/ United Nations Statistics Division unless indicated.

Size:	7.69 million sq. km
Population:	23,490,736 (est. 2014)
Population in 2031 (Est.):	30,501,192 (+36.5%) [85]
Population density:	3.1 per sq. km
GDP per Capita:	US $57,913 (AUS $74,442)
International Tourists:	6.9 million (2015)
Domestic Overnight Visitors:	252 million (2015)
Estimated value of Tourism:	AUS $107.1 billion per annum. Tourism Research Australia (TRA).
Global Tourism Ranking	11 (Size) | 86 (Growth). World Travel and Tourism Council (WTTC).

Map 5: Australia, highlighting main regions and centres of population

6.1 An Overview of Australian Tourism

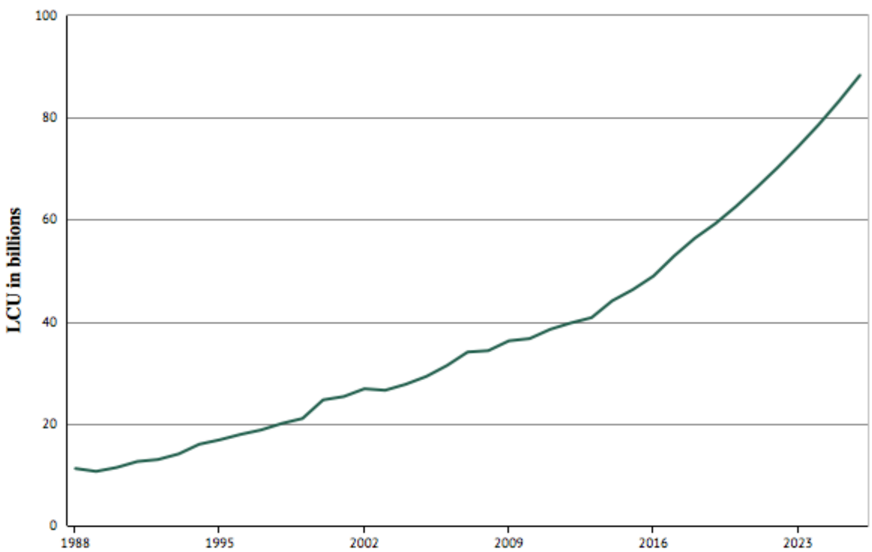
A) The Importance of Tourism in Australia

WTTC Tourism Ranking: 11$^{/184}$ (Size) | 80$^{/184}$ (Growth) **WEF Travel & Tourism Competitive Index:** 7$^{/140}$

Ranked at number 11 out of the 184 countries currently evaluated by the World Travel and Tourism Council (WTTC), and 7th out of 140 in the World Economic Forum's Travel and Competitive Index, Australia is a country whose Tourism industry significantly over–performs on a global basis. It has also been growing over the last decade to AUS $46.3 billion in value in 2015 and is predicted to continue this growth for the coming decade, to reach an overall value in terms of direct contribution to GDP of AUS $88.3 billion in 2026 (*Graph 7*). In the last decade this growth has varied from +0.8% to 8.4% per annum without a single year of decline.[86]

Graph 7: Australian Travel and Tourism Direct Contribution to GDP (AUS $)

Source: World Travel and Tourism Council, 2015.



Date	Value	Change, %
2015	46.3	4.97 %
2014	44.1	8.10 %
2013	40.8	2.60 %
2012	39.7	3.26 %
2011	38.5	4.97 %
2010	36.7	1.19 %
2009	36.2	5.64 %
2008	34.3	0.78 %
2007	34.0	8.41 %
2006	31.4	7.35 %
2005	29.2	5.55 %
2004	27.7	

2014–15 saw 6.6 million international visitors to Australia with a spend of AUS $33.4 billion (+190% vs. 2005), and 83.2 million domestic overnight visitors with a spend of AUS $55.4 billion (+4% vs. 2013–14). This made up the total Tourism industry potential of AUS $88.8 billion (+6% vs. 2013–14), and, together with domestic day trips (AUS $18.3 billion), total visitor spend of AUS $107.1 billion (+5% vs. 2013–14). *Table 6 & Graphic 5 overleaf*.

The estimated total value of Tourism to Australia's GDP is 10.8%, ahead of the global average of 9%, this has been declining steadily however from a high of 14.2% in 2005.[87]

Table 6: Selected Australia Tourism Metrics (2005–15)

Sources: The World Bank, World Travel and Tourism Council and Tourism Australia statistics.

Est. Value of Tourism (% GDP)	WTTC Rank		Visitor Arrivals (2005)	Visitor Arrivals (2015)	Growth Rate (%/10yrs)	Target Arrivals (Per/ yr.)	Spend/ Visitor (AUS $ 2015)	Contribution to GDP in 2026 (AUS $)
	Size	Growth						
10.1% (2014)	11 (184)	80 (184)	5.5 million	6.6 million	+20%	9 million (2020)	$3,479	$325.8 billion

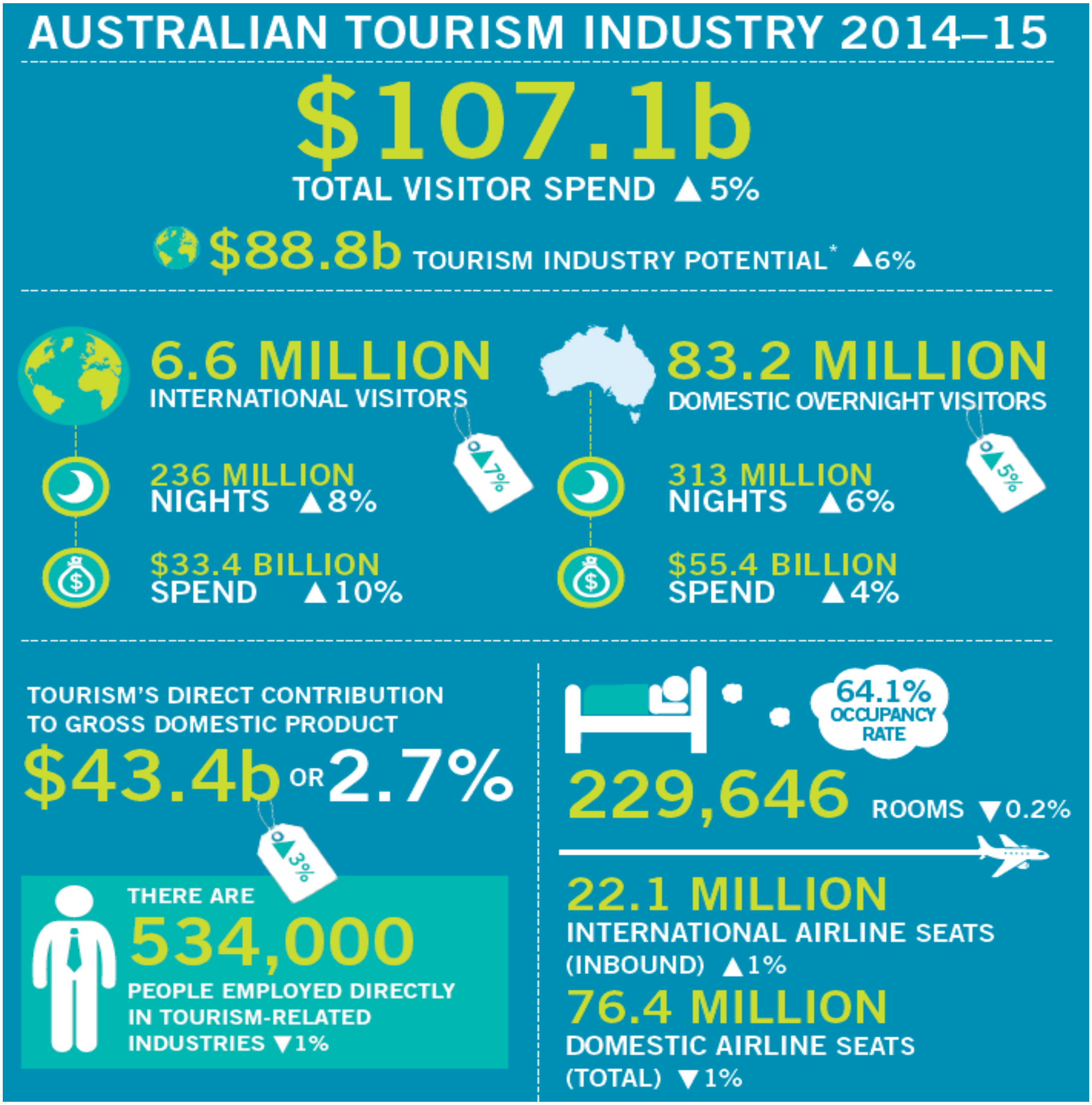
International Tourism Expenditure			Domestic Tourism		Current Estimated Govt. Tourism Budget[88] (AUS $ – 2015)
2005	2015	Growth Rate	# of Visitors	Expenditure AUS $	
AUS $11.5 billion	AUS $33.4 billion	+190%	252 million (2015)	$73.7 billion (2015)	$138.9 million (Government) $37.7 million (Revenue)

6.1 An Overview of Australian Tourism

A) The Importance of Tourism in Australia | Continued

Graphic 5: Summary of the state of the Australian Tourism Industry (2014/15)

Source: Tourism Research Australia 2015.



From a broader economic point of view, Australia is the world's 12th–largest global economy and in 2014 had the world's fifth–highest per capita income.[89] The service sector of that economy, including Tourism, education, and financial services, accounts for about 70% of GDP. Agriculture and natural resources account for only 3% and 5% of GDP respectively, but contribute substantially to export performance. Construction, healthcare, financial services, manufacturing and professional services/ public administration/ education account for the bulk of the remaining 22%.[90]

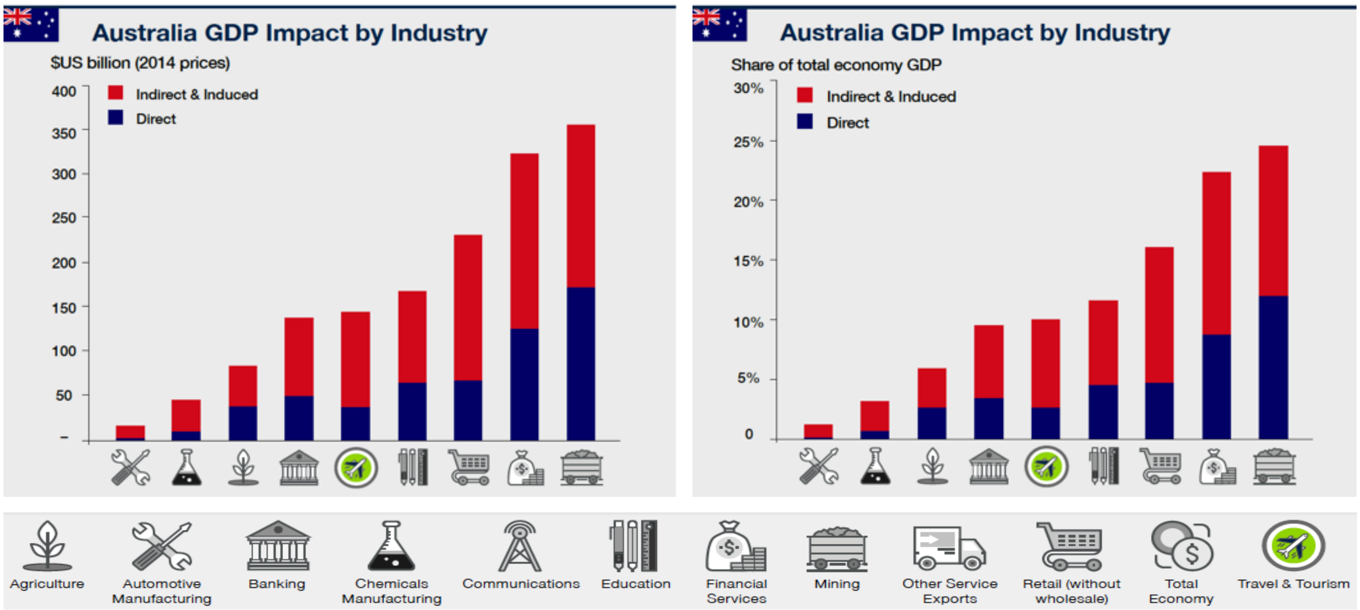
6.1 An Overview of Australian Tourism

A) The Importance of Tourism in Australia | Continued

Tourism is the 5th most important industry in Australia when it comes to both value and share of GDP. It ranks behind mining, financial services, retail and education, but ahead of banking, agriculture, chemicals manufacturing and automotive manufacturing *(Graphic 6)*.

Graphic 6: Tourism GDP Impact by Industry (2014)

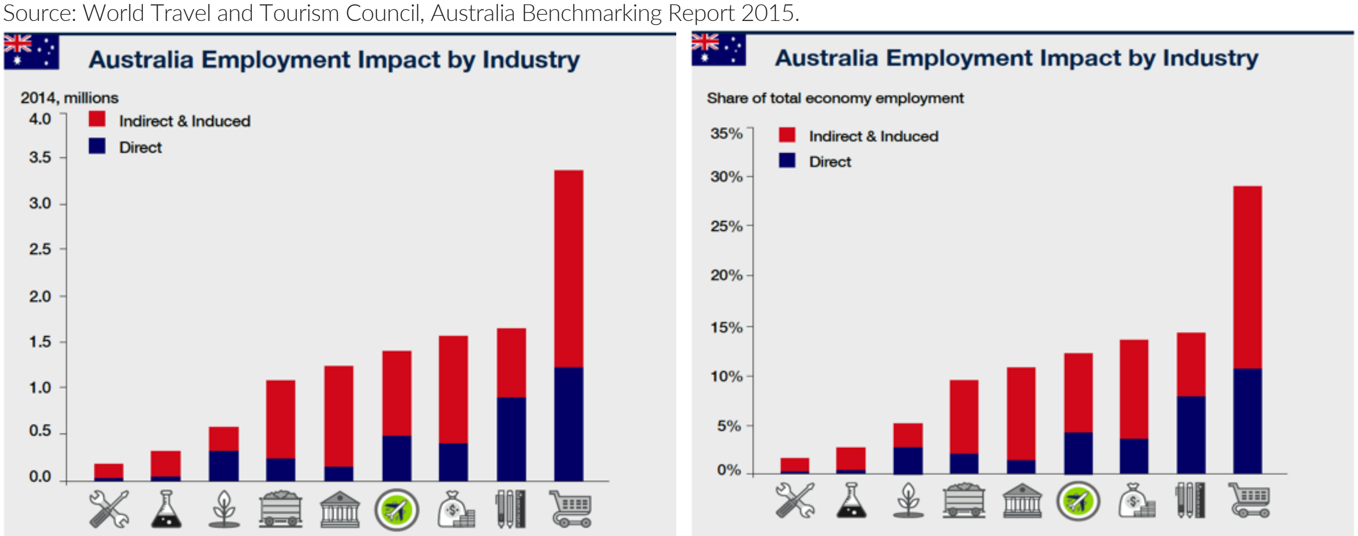
Source: World Travel and Tourism Council, Australia Benchmarking Report 2015.



The Tourism industry directly employed 534,000 people in 2014, approximately 4.6% of the total labour market.[91] Including indirect and induced jobs it employed 1.4 million and was the 4th most important sector after retail, education and financial services *(Graphic 7)*. For every job directly in the Tourism sector, nearly two jobs are created on an indirect or induced basis, making its linkages stronger than in the agriculture, retail, and education sectors.[92]

Graphic 7: Employment Impact of Tourism (2014)

Source: World Travel and Tourism Council, Australia Benchmarking Report 2015.



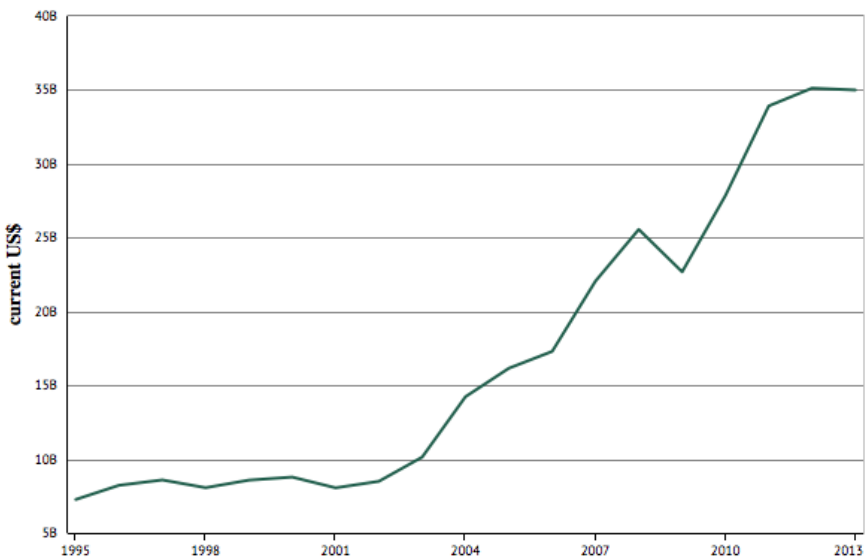
At an average annual growth rate of 2.9% over the next decade, Tourism is forecast to grow ahead of the overall economy (+2.4%) and ahead of all industry sectors apart from banking and financial services.[93]

6.1 An Overview of Australian Tourism

B) Australia's International Tourism Market: a snapshot

International Tourism expenditure makes up around 31% of the total tourist market[94] and was worth AUS $33.4 Billion in 2015 *(Table 6, p.38)*. Expenditure growth rates have fluctuated over the last decade or so from –11% in 2009 to +40% in 2004, however the overall trend has been upwards (+190% in total between 2005–15). The relatively substantial year–on–year fluctuations are caused by a number of factors, but are particularly impacted by global macro–economic conditions and exchange rate fluctuations *(Graph 8)*.

Graph 8: Australia International Tourism Expenditure (2002–13)
Source: The World Bank, WDI Indicators, October 2015.



Date	Value	Change, %
2013	34,998,000,000	-0.35 %
2012	35,122,000,000	3.56 %
2011	33,916,000,000	21.78 %
2010	27,851,000,000	22.80 %
2009	22,680,000,000	-11.26 %
2008	25,557,000,000	15.89 %
2007	22,052,000,000	27.52 %
2006	17,293,000,000	7.06 %
2005	16,153,000,000	13.56 %
2004	14,224,000,000	40.35 %
2003	10,135,000,000	19.32 %
2002	8,494,000,000	

From 2004 onwards, the number of international arrivals has risen steadily to 6.4 million in 2013 according to the World Bank *(Graph 9)*, with 9 million the target for arrivals in 2020.[95] Growth rates for tourist arrivals have fluctuated similarly to expenditure, varying between –1.96% in 2003 and +9.88% in 2004 with an overall growth rate of +20% between 2005 and 2015 *(Table 6, p.38)*, placing it in the top third of all countries for Tourism growth according to the most recent World Travel and Tourism Council rankings.

Graph 9: Australia International Tourism Arrivals (2002–13)
Source: The World Bank, WDI Indicators, October 2015.

Date	Value	Change, %
2013	6,382,000	5.80 %
2012	6,032,000	4.52 %
2011	5,771,000	-0.33 %
2010	5,790,000	5.46 %
2009	5,490,000	-1.72 %
2008	5,586,000	-1.03 %
2007	5,644,000	2.02 %
2006	5,532,000	0.60 %
2005	5,499,000	5.45 %
2004	5,215,000	9.88 %
2003	4,746,000	-1.96 %
2002	4,841,000	

6.1 An Overview of Australian Tourism

B) Australia's International Tourism Market: a snapshot | Continued

Spend per international visitor was AUS $3,479 (US $2,785) in 2015, against the Asia Pacific average of AUS $1,835 (US $1,430) and Global average of AUS $1,409 (US $1,099). This relatively high average spend is driven mainly by the average length of stay (36.2 days in 2015), overall higher than average cost of Tourism and high cost of travel to and within Australia. Given these factors, the tourists attracted to Australia tend to also have higher disposable income levels that also increases the average spend level.[96]

Looking at Australia's split between Leisure and Business travel, Leisure travel spending (international and domestic) generated 83.5% of direct Travel & Tourism GDP in 2014 (AUS $93.4 billion), compared with 16.5% for business travel spending (AUS $18.4 billion).

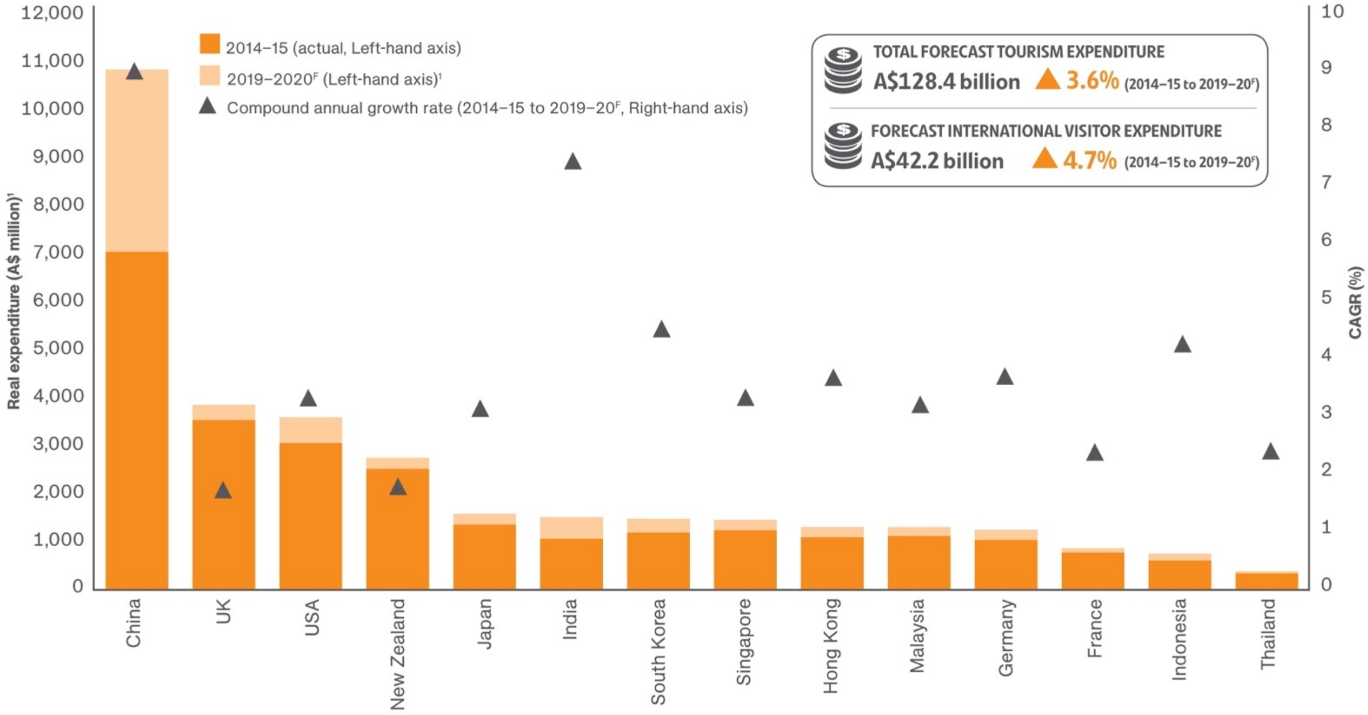
Business travel spending was forecast to grow by 6.2% in 2015 to AUS $19.6 billion, and rise by 3.3% per annum to AUS $27.0 billion by 2025. Leisure travel spending is expected to grow by 3.4% in 2015 to AUS $96.6 billion, and rise by 3.3% pa to AUS $133.5 billion in 2025.[97]

In terms of Australia's key source markets, at twice the size of the next largest market, China is the clear leader and in 2015 generated almost AUS $7 billion in real expenditure (AUS $10.8 billion forecast by 2020, +9%).

The UK is the 2nd most significant market at AUS $3.5 billion in 2015 (AUS $3.9 billion in 2020, +2%); USA 3rd at AUS $3.0 billion (AUS $3.6 billion in 2020, +3%); New Zealand 4th at AUS $2.5 billion (AUS $2.7 billion in 2020, +3%); and Japan in 5th at AUS $1.4 billion (AUS $1.6 billion in 2020, +2%).

The next 9 most significant markets ranged in value between AUS $1.2 billion and AUS $0.25 billion in 2015; in descending order of importance they were India, South Korea, Singapore, Hong Kong, Malaysia, Germany, France, Indonesia and Thailand.[98] *Graph 10.*

Graph 10: Australia, Source Countries of International Tourism Arrivals: forecast & actual spend (2014–20)
Source: Tourism Research Australia, Tourism Forecasts 2015.



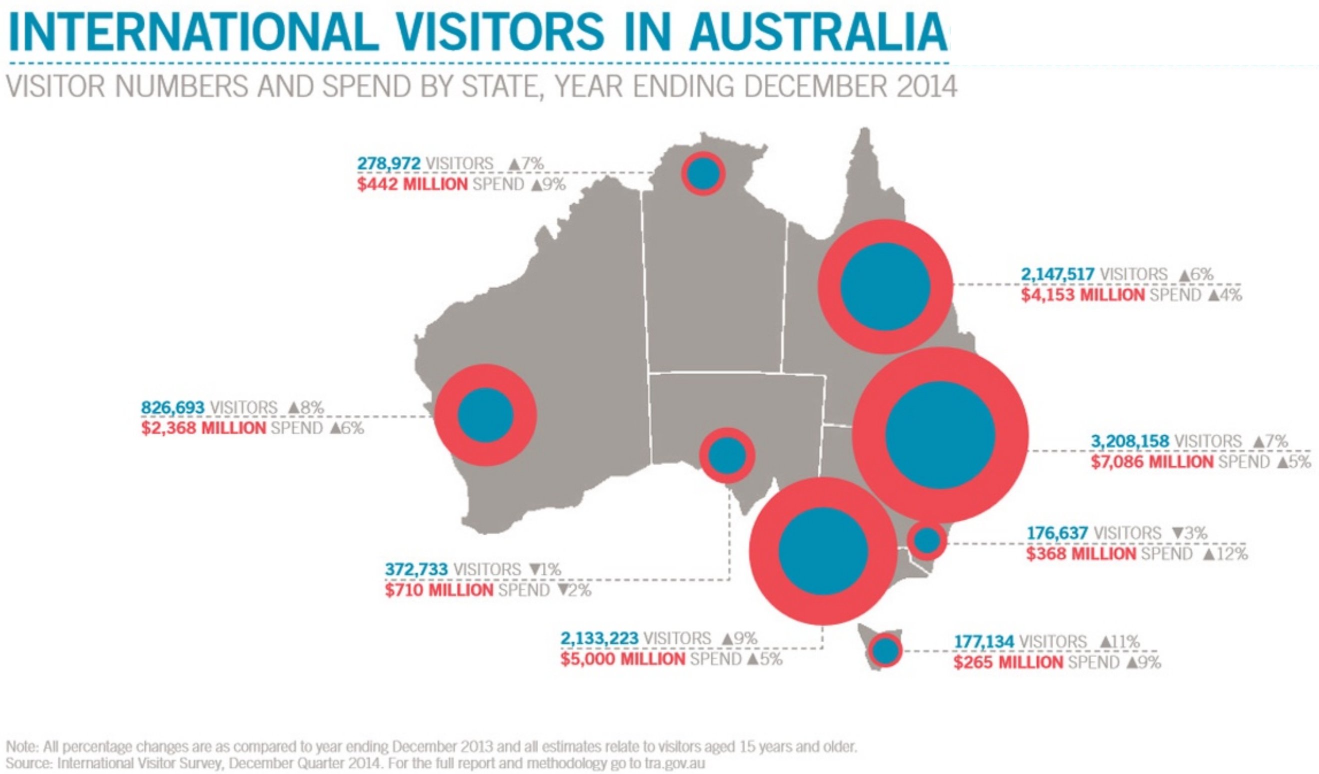
6.1 An Overview of Australian Tourism

B) Australia's International Tourism Market: a snapshot | Continued

Looking at the geographic spread of international visitors to Australia by State and Territory, New South Wales receives the highest number at 3,208,158 (34.4% of the total) at a value of AUS $7.1 billion. Victoria is 3rd in terms of number with 2,133,223 visitors (22.9%), but 2nd in terms of value at AUS $5.0 billion. Queensland is 2nd terms of number with 2,147,517 visitors (23.0%) and 3rd in terms of value at AUS $4.2 billion.

Western Australia is 4th with 826,693 visitors (8.9% of the total), at a value of AUS $2.4 billion; South Australia 5th with 372,733 visitors (4.0% of the total), at a value of AUS $0.7 billion; Northern Territory 6th with 278,972 visitors (3.0% of the total), at a value of AUS $0.45 billion; Australian Capital Territory is 8th in terms of number with 176,637 visitors (1.9% of the total), but 7th in terms of value of AUS $0.37 billion; and Tasmania 7th in terms of number with 177,134 visitors (1.9%), but 8th in terms of value at AUS $0.27 billion. *Graphic 8 below.*

Graphic 8: Australian International Visitor numbers and spend by State (2014)
Source: Tourism Research Australia 2015.



Looking ahead, international Tourism growth is expected to continue through to 2019–20, driven by strong growth in China and India in particular. Leisure travel will likely be the main driver behind the increase in arrivals, up 5.6% to 7.5 million arrivals in 2015–16, and then +4.9% per annum to reach 9 million by 2020.[99]

China, New Zealand, UK, US and Singapore, Australia's top 5 markets, are expected to continue to grow, contributing 59% of total growth (+1.1 million arrivals) to 2019–20.[100]

Average expenditure per arrival is expected to decrease marginally over the period, from AUS $4,735 to AUS $4,708, despite an increase in average length of stay from 35.4 nights to 37.2 nights.[101]

With the increasing popularity of options like Airbnb, the share of visitor nights spent in Hotels, Motels and Serviced Apartments are expected to decrease slightly from 11.1% in 2014–15 to 10.5% in 2019–20.[102] Total expenditure is forecast to reach AUS $42.2 billion in 2020 (+4.7% per annum).[103]

6.1 An Overview of Australian Tourism

C) Australia's Domestic Tourism Market: a snapshot

2015 saw 252 million domestic Tourism trips at a value of AUS $73.7 billion, making up 69% of Australia's total Tourism market. Domestic Tourism is forecast to reach 366 million trips by 2020 at a value of AUS $86.2 billion, although its total share of the market is declining gradually to 67% as international Tourism continues to grow more rapidly and therefore drive a greater proportion of overall Tourism growth (*Table 7*).

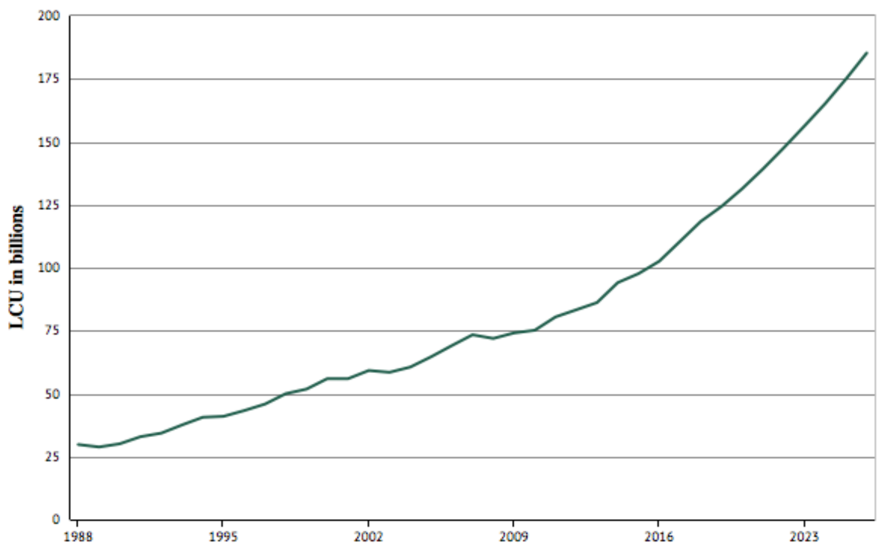
Table 7: Australia Domestic Tourism Metrics (2015–20)
Source: Tourism Research Australia, State of the Industry 2015.

COUNTRY	Current Domestic Tourism				Forecast Domestic Tourism			
	2015 [Overnight + Day Trips]				2020 [Overnight + Day Trips]			
	# of Nights (AUS$)	Expenditure (AUS$)	% of Total Market	Growth (%)	# of Nights (AUS$)	Expenditure (AUS$)	% of Total Market	Growth (%)
Australia	252 million	$73.7 billion	69%	+4.0% (vs. 2014)	366 million	$86.2 billion	67%	+3.0% (per annum)

Over the longer–term, domestic Tourism has been growing steadily and has increased by +51% since 2005 at an average rate of +5.1% per annum (compared with +190.5% and +19% per annum for international Tourism). During that time 2008 was the only year that saw a decline (–2% mainly due to the Global Financial Crisis), with every other year showing an increase of between +1.4 to +9.2%. *Graph 11*.

The World Travel and Tourism Council forecasts that Australia's domestic Tourism growth rate will increase over the coming decade and that domestic Tourism will reach a total value of AUS $185.3 billion by 2026.[104] This is potentially optimistic given it doesn't factor in economic downturns particularly effectively, but relatively strong growth is certainly likely even if the rate and overall value is below that predicted by the WTTC.

Graph 11: Australia Domestic Travel and Tourism Expenditure in AUS $ (2004–15)
Source: World Travel and Tourism Council Data, 2016.



Date	Value	Change, %
2015	97.6	3.78 %
2014	94.1	9.21 %
2013	86.1	3.44 %
2012	83.3	3.52 %
2011	80.4	7.03 %
2010	75.2	1.44 %
2009	74.1	3.05 %
2008	71.9	-1.99 %
2007	73.4	6.23 %
2006	69.0	6.87 %
2005	64.6	6.75 %
2004	60.5	

Looking at the split between domestic day trips and domestic overnight trips, day trips make up the higher number of actual trips at 169 million in 2014–15 (vs. 83.2 million for overnight), but provide substantially lower value at AUS $18.3 billion (vs. AUS $55.4 billion for overnight).[105]

6.1 An Overview of Australian Tourism

C) Australia's Domestic Tourism Market: a snapshot | Continued

Domestic Overnight Tourism is split between travelling for a holiday (36.4 million trips, 44%), Visiting Friends and Relatives (29.5 million trips, 35%) and business (17.3 million trips, 21%). Most recent growth was driven by a marked increase in business travel (+15.8% in 2014–15), with Visiting Friends and Relatives (VFR) also increasing (+5%), set against travel for a holiday showing a very marginal decline/ remaining flat (–0.6%).[106] The VFR travel increase was strongly driven by the growth in self–drive, with an additional 1.4 million self–drive visitors accounting for 96% of the total increase.[107]

Domestic overnight trips to regional Australia increased 6.4% to 52.4 million trips, accounting for 76% of total growth in 2014–15. Just over half of visitor expenditure was spent outside of the capital cities, although average spend per night remained higher in capital cities at $242 vs. $141 in regional destinations.[108]

Domestic Day Tourism is made up of travelling for a holiday (77.4 million trips, 46%), VFR (23.8 million trips, 14%), business (17.4 million trips, 10%), with the remaining half comprised of 'Other Reasons' which includes employment, education and for medical reasons (50.4 million trips, 30%).[109]

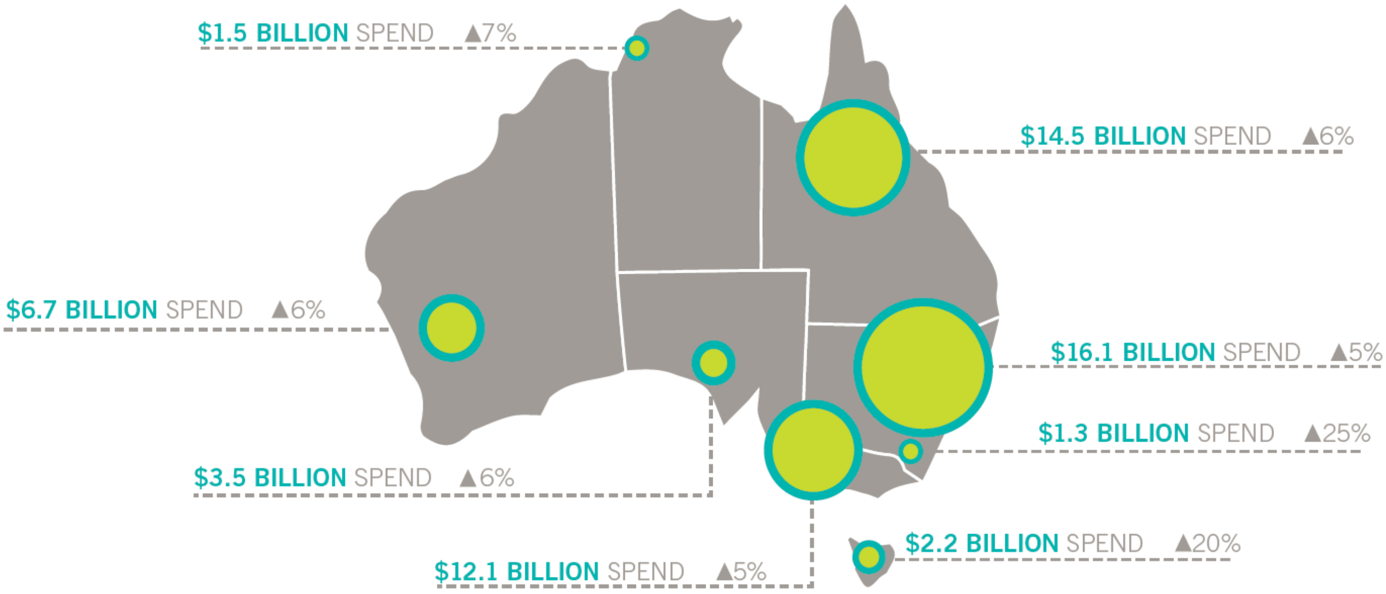
The vast majority of domestic day travel occurred within a visitor's own state or territory, with intrastate trips accounting for almost 95% of all day trips in 2014–15. Western Australia recorded the strongest growth in day travel (+14.2%), followed by Tasmania and Victoria (+5.2% and +3.3%, respectively).[110]

More than half of day trips in 2014–15 were to regional Australia (95.8 million trips, 57%), also accounting for more than half of total day trip expenditure (58%, or AUS $10.7 billion).[111]

Looking at the split by **State and Territory**, New South Wales receives the greatest number of domestic tourists with a value of AUS $16.1 billion, followed by Queensland (AUS $14.5 billion), Victoria (AUS $12.1 billion), Western Australia (AUS $6.7 billion), South Australia (AUS $3.5 billion), Tasmania (AUS $2.2 billion), Northern Territory (AUS $1.5 billion) and the Australian Capital Territory (AUS $1.3 billion).

Every State/ Territory showed an increase in 2014–15, with large increases in Tasmania (+20%) and the ACT (+25%), but 75% of the growth coming from core markets of New South Wales, Victoria and Western Australia. *Graphic 9.*

Graphic 9: Domestic Overnight Expenditure by State/ Territory (2015)
Source: Tourism Research Australia, Travel by Australians 2015.



6.1 An Overview of Australian Tourism

C) Australia's Domestic Tourism Market: a snapshot | Continued

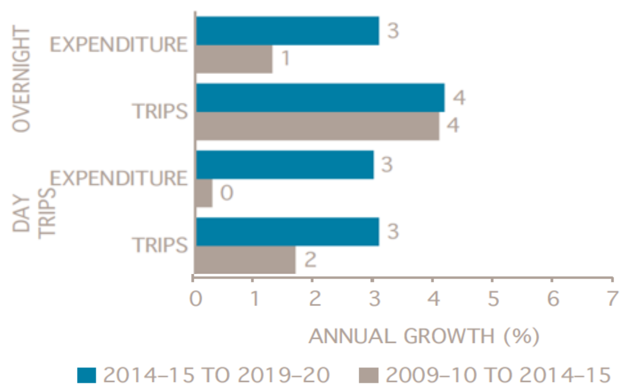
Looking ahead, Domestic Tourism is expected to increase over the coming 5–year period to 2019–20, driven by growth in both the overnight and day trip sectors. The forecast indicates growth will be at an overall higher rate for both overnight and day trips than past 5–year trends (*Table 8, below*).[112]

Number of nights are expected to grow from 313 million to 324 million nights in 2015–16 (+3.5%) and then at an annual rate of +3.2% per annum to 2019–20. Expenditure will increase at a marginally lower rate from AUS $73.7 billion to AUS $76.7 billion (+3.4%) in 2015–16 and +3.0% per annum to AUS $86.2 billion in 2019–20.[113]

Day trips are forecast to increase 3.6% in the short term from 169 to 175 million, continuing the recovery after recent declines, and then grow at a rate of 3.1% per annum to reach 197 million in 2019–20. Day trip expenditure growth is forecast at +3.0%, going from AUS $18.3 billion to AUS $21.2 billion by 2019–20.[114]

Table 8: Australia Domestic Tourism Growth Forecast (2014–20)
Source: Tourism Research Australia, State of the Industry 2015.

	2014–15 TO 2015–16	5 YEARS TO 2019–20
Nights	324 million ▲ 3.5%	366 million ▲ 3.2% p.a.
Expenditure	$76.7 billion ▲ 3.4%	$86.2 billion ▲ 3.0% p.a.



Note

*See **Appendix 18.3** for detailed forecasts of tourist visitor numbers broken down by State/ Territory and purpose of visit (International + Domestic).*

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6.1 An Overview of Australian Tourism

D) Australia's Overall Approach to Growing the Tourism Sector

Australia has a well–developed and established approach to growing the sector, with significant annual investment from Government and partners (AUS $176.6 million in 2015–*Table 6, p. 38*), and a comprehensive National, State and Regional Tourism governance and promotion infrastructure.

This structure extends from Tourism Australia, through State and Territory Tourism bodies to Regional and Local bodies like the recently launched NSW Regional Destination Networks.

At the National and State level, **'Tourism 2020'** was developed to respond to ongoing challenges and emerging opportunities for the Australian Tourism industry. Providing a framework for growth, **'Tourism 2020'** was designed to *'assist Tourism businesses remain competitive into the future in a dynamic global environment.'*[115]

Tourism ministers from the Australian and state and territory governments identified four policy priorities under the **'Tourism 2020'** framework. These are to:

1) **Encourage high–quality Tourism experiences, including Indigenous Tourism;**
2) **Limit the tax, red tape and other regulatory burden industry faces;**
3) **Undertake coordinated and effective marketing campaigns to drive demand;**
4) **Work with industry to support the development of Tourism infrastructure that can drive demand.**

In 2014, National and State Tourism Ministers approved a **'Tourism 2020 Implementation Plan (2015–2020)'**, developed in consultation with industry outlining the key actions needed to assist industry reach its potential.

Tourism 2020 Targets and Key Proposed Reforms

To reach the Tourism 2020 target of doubling overnight domestic and international visitor expenditure to between $115 and $140 billion, the **'Tourism 2020'** framework identified the need for:

1) **High impact, effective and coordinated international Tourism marketing campaigns;**
2) **Facilitation of the existing development pipeline to deliver quality rooms to meet our target of 6,000 to 20,000 new rooms by 2020;**
3) **An additional 2.8 million more inbound seats by 2020** (equates to approximately 110 more A380 flights per week);
4) **An additional 2 million international arrivals and 14 million domestic visitors taking an Australian holiday.**

In early 2014, over 160 industry leaders along with Australian, state and territory governments were consulted to identify key reforms necessary to assist the Tourism industry to achieve the **'Tourism 2020'** target.

The key reforms identified and agreed against the 4 policy areas were:

1) **Increase cross portfolio collaboration within all levels of Australian Governments to plan and drive reform of the visitor economy;**
2) **Improve visa arrangements to make Australia's visitor visas easier, quicker and more competitive;**
3) **Improve aviation capacity and customer experience to improve access and flexibility to meet demand in the Tourism transport environment;**
4) **Develop a skilled Tourism workforce to better service the visitor economy;**
5) **Integrate national and state Tourism plans into regional development and local government planning to generate effective infrastructure to service regional communities, services to the visitors and encourage private investment in Tourism infrastructure;**
6) **Identify partnerships, efficiencies and opportunities to increase marketing spend to drive demand for travel to Australia and improve conversion.**

6.1 An Overview of Australian Tourism

E) Current Tourism Marketing Campaign

EXPERIENCE WHY THERE'S NOTHING LIKE AUSTRALIA

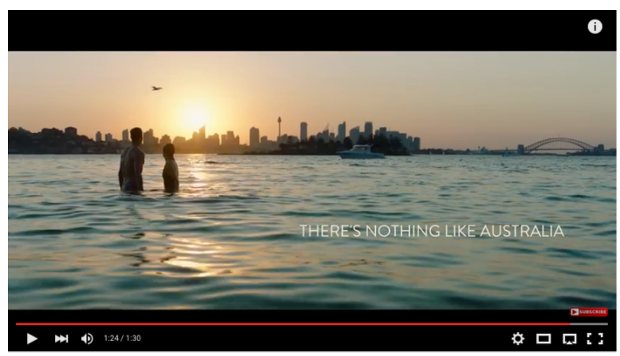
'There's nothing like Australia' is Tourism Australia's latest global consumer marketing campaign. In 2015–16 the campaign continues the focus on Australia's strengths in food and wine (main campaign focus in 2014–15), as well as placing a renewed focus on the country's world class aquatic and coastal experiences–both major decision making factors in Australia's key International Tourism markets.

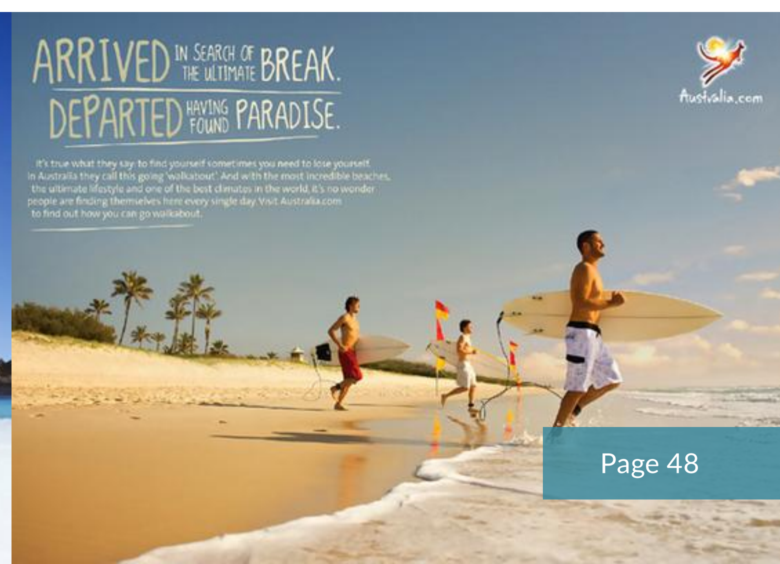
This focus on aquatic and coastal experiences is underpinned by the fact that two out of three international visitors enjoy Australia's aquatic or coastal environments in some way. While the country has historically been known for world–class natural beauty, *'there is still an opportunity to promote the breadth, depth and quality of the natural offering'*.[116]

The AUS $40 million multi–platform campaign includes a range of new **'There's nothing like Australia'** marketing materials highlighting examples of what is unique about Australia's aquatic and coastal offering, including:

1) **New technology and digital assets**, including VR and 360° mobile that can be viewed on multiple platforms and provides compelling content for media and distribution partners.
2) **A new broadcast ad** directed by Baz Luhrmann highlighting examples of Australia's world class aquatic and coastal product and experiences to be used in broadcast, cinema and digital channels.
3) **New print and digital executions**, including interactive and rich media digital advertising banners.
4) **Online video content and short films**, including a three–part documentary series of the Great Barrier Reef filmed by David Attenborough, expected to air early in 2016 across more than 130 countries.
5) **New consumer, media and trade itineraries**.

Tourism Australia's Aquatic and Coastal ad can be viewed here: https://www.youtube.com/watch?v=vUF7ja9ehIs





6.1 An Overview of Australian Tourism

E) Current Tourism Marketing Campaign | Continued

Looking in more detail at some of the motivations underpinning the current campaign, there are a number of overarching factors that are particularly relevant to this project, starting with the fact that *'70% of international visitors enjoy aquatic and coastal experiences as part of their trip to Australia'*.[117]

At the top level, the top 3 emotional factors that influence choice of destination are:

1) **Good food, wine and local produce;**
2) **World class beauty and natural environments;** and
3) **World class coastlines, beaches and marine wildlife.**

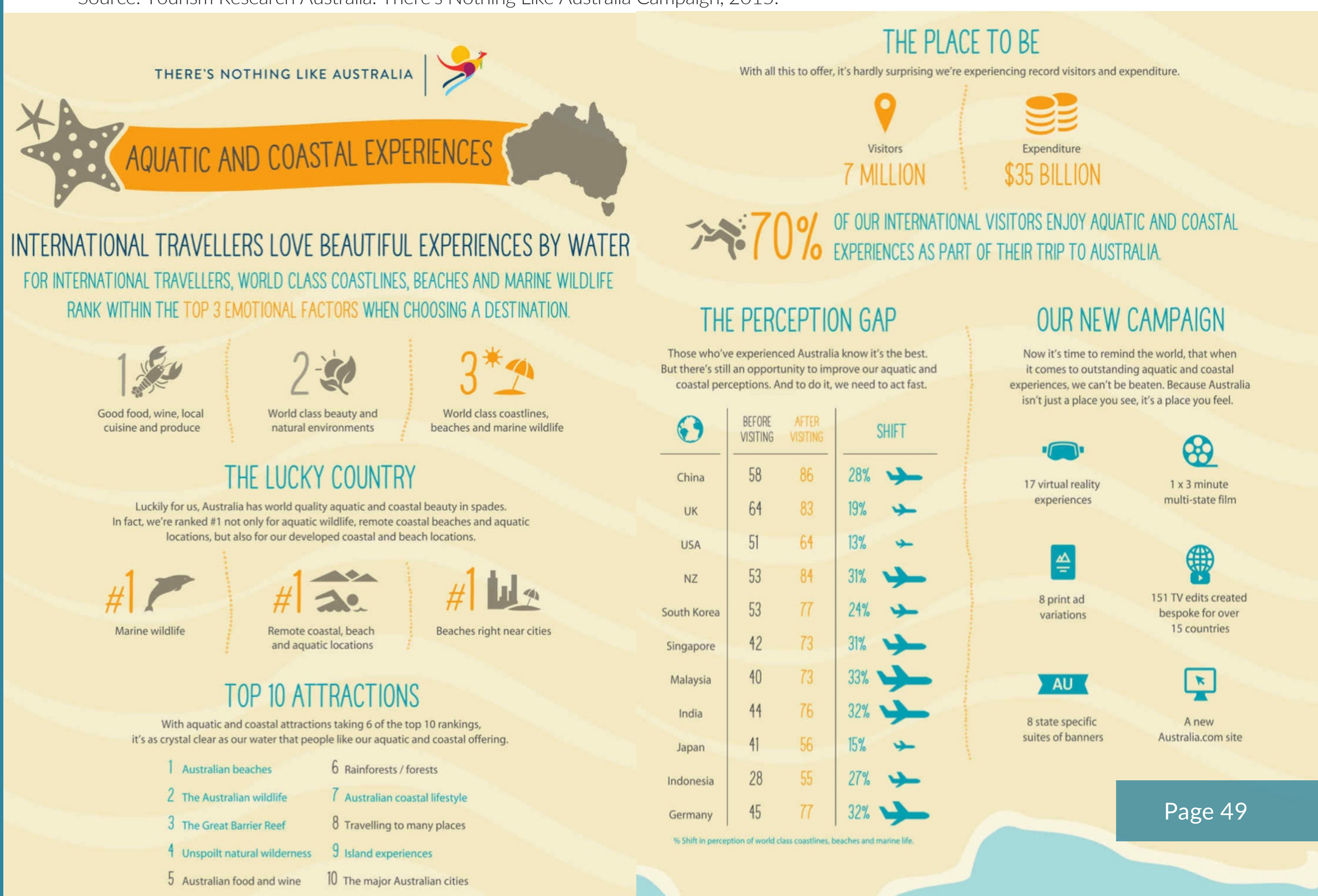
The MidCoast Region's performance in these areas will be more closely examined in Sections 7–11, but there would seem to be some overall opportunities to improve the perception of the region's food, wine and local produce in particular, as well as bringing to life the natural environment and natural coastline more effectively.

Looking at the top 10 attractions for visitors in Graphic 10 below, six of the ten clearly provide top–level opportunities for the MidCoast Region:

1) Beaches, 2) Australian wildlife, 3) Unspoilt natural wilderness, 4) Rainforests/ forests, 5) Australian coastal lifestyle and 6) Island experiences.

The key in exploiting these opportunities will be in identifying the current performance of the MidCoast Region set against the key competitive regions that are also offering similar experiences against these motivations.

Graphic 10: Aquatic and Coastal Experiences Infographic
Source: Tourism Research Australia. There's Nothing Like Australia Campaign, 2015.



6.1 An Overview of Australian Tourism

F) Key Promoted Regions | www.australia.com

Australia is promoted in a number of ways. At the entry level for visitors interested in exploring the country, they are offered with looking at **'Places to Go/ Places to Visit'**, **'Things to Do'** or **'Plan your Trip'**.

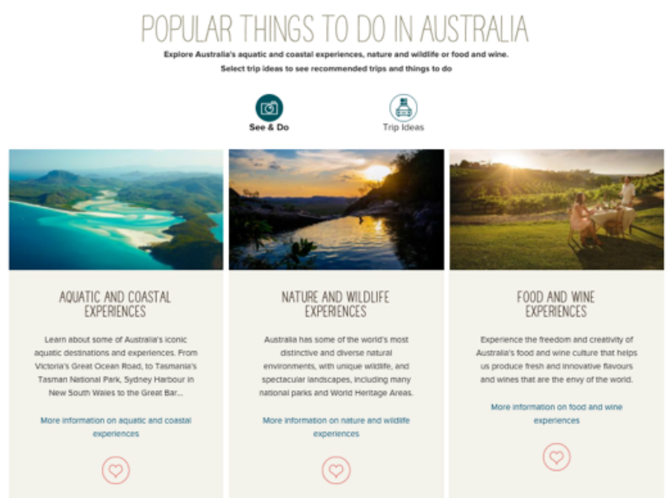
'Places to Visit' leads with key Capital Cities (Sydney, Melbourne, Brisbane and Perth) above the States and Territories before offering Adelaide, Alice Springs, Broome, Cairns, Canberra, Darwin, Gold Coast, Hobart and Regional Cities as secondary entry points.

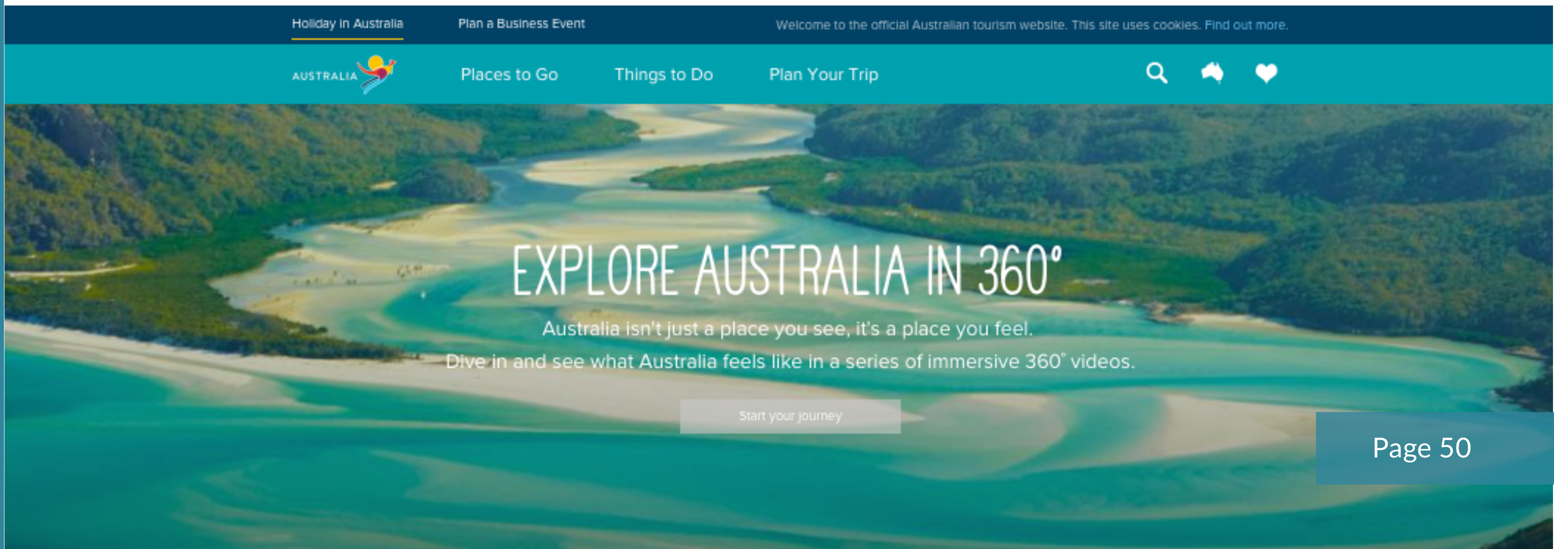
Attractions is the next way of promoting the country within 'Places to Visit', with the Great Barrier Reef, Great Ocean Road, Red Centre and Kangaroo Island as leads, followed by Blue Mountains, Byron Bay, Flinders Ranges, Fraser Island, Freycinet, Gippsland, Kakadu, Namadgi National Park, Tasmanian Wilderness, The Australian Alps and The Kimberley as secondary entry points.

In terms of **'Things to Do'**, 'Aquatic and Coastal Experiences', 'Nature and Wildlife Experiences' and 'Food and Wine Experiences' are the clear leads with 'The Outback' and 'Top 10 Things to do in Our Cities' as the next level.

Following this, **'Popular Itineraries'** are listed which start with 'Self–drive Holidays' then 'Coastal Itineraries', 'Trips Ideas for 3 Weeks', '48 Itineraries', 'Walks and Treks you can take' and 'Three Day Itineraries'.

'Plan Your Trip' has general information for traveling to Australia.





6.1 An Overview of Australian Tourism

G) Specific Tourism Australia programs | www.tourism.australia.com

There are also 3 key Industry Programs that look to focus on specific areas[118]:

1) Best of Australia Program
'The Best of Australia Program aims to foster areas of untapped competitive advantage for Australia focusing on world class Australian special interest Tourism experiences that drive consumer travel behaviour. This program supports the Tourism 2020 goal by encouraging industry to become more marketable, profitable, and resilient in an ever increasing competitive environment.'

2) Indigenous Tourism Champions Program
'The Indigenous Tourism Champions Program (ITCP) is a collaborative national program instigated by Tourism Australia and Indigenous Business Australia with significant involvement and support from the State and Territory Tourism Organisations. The ITCP selectively markets export ready businesses offering experiences delivered by Aboriginal people.'

3) National Landscapes Program
'Australia's National Landscapes Program is a joint initiative between Tourism Australia and Parks Australia. The Program aims to promote Australia's world class, high quality visitor experiences, increase the value of Tourism to regional economies, enhance the role of protected areas in those economies, and build support for protecting our natural and cultural assets.'

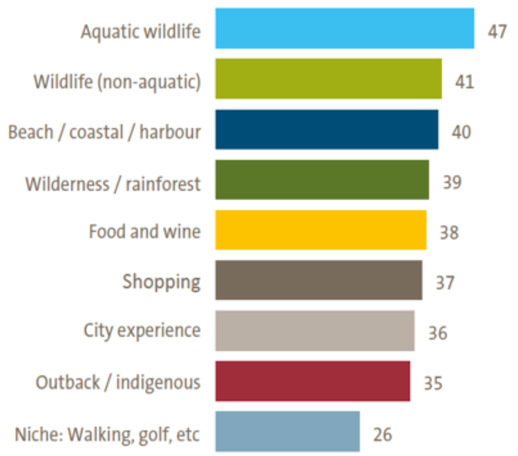
H) Main Reasons for Travel to and within Australia

The main reasons for travel to and within Australia are for Holidays, Visiting Friends and Relatives (VFR), Business and 'Other' (Education, Employment and for Medical reasons). *See International & Domestic Section for specific breakdowns.*

Looking at the Holidays and VFR segments specifically, 70% will visit a coastal location and 69% (4.5 million people) will take part in some form of nature–based activity.[119] Australia is the highest rating destination when it comes to *'world class beauty and natural environments'*, ahead of Hawaii, New Zealand, Canada and Switzerland.[120]

Recent research undertaken by Tourism Australia identified the top 5 most appealing Australian experiences as 'aquatic wildlife' (47%), 'wildlife (non–aquatic' (41%), 'beach/ coastal/ harbour' (40%), 'wilderness/ rainforest' (39%) and 'food & wine' (38%).

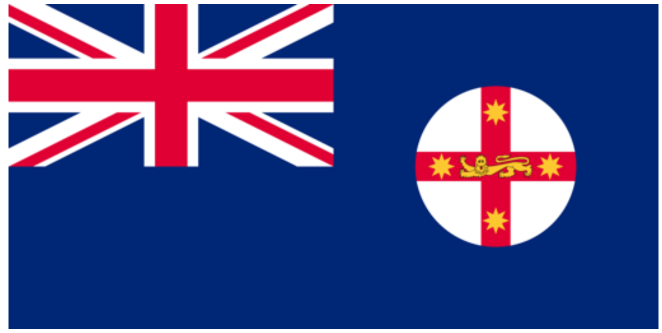
Graph 12: Most Appealing Experiences
Source: Tourism Australia 2015.



6.2 New South Wales Tourism Overview

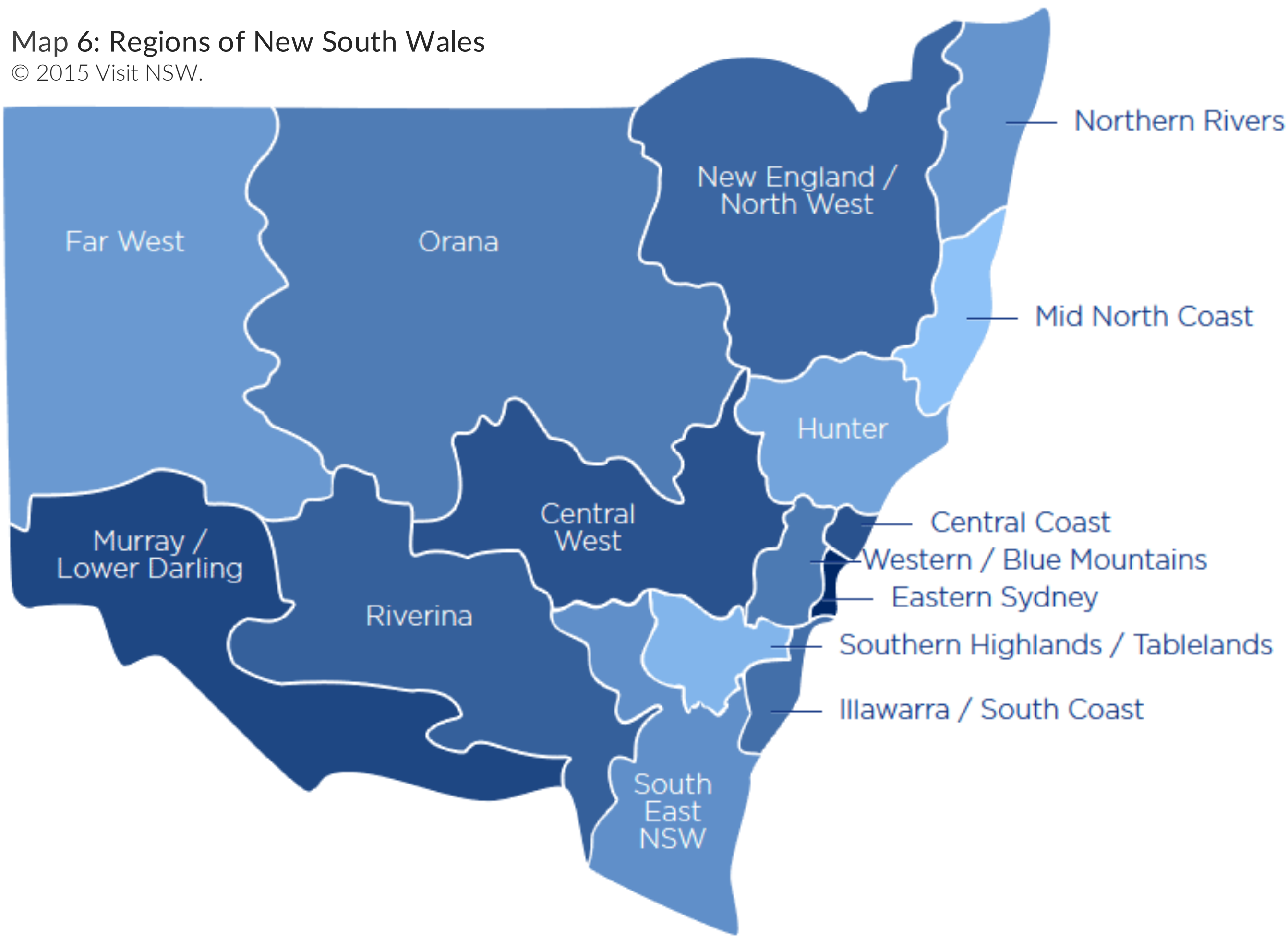
Key Statistics

Source: Australian Bureau of Statistics unless otherwise stated.



Size:	809,444 sq. km
Population:	7,565,500 (est. 2014)
Population in 2036 (Est.):	9,700,350 (+25.8%) [121]
Population density:	23.6 per sq. km
Gross State Product per Capita:	AUS $67,841 | 3rd
International Tourists:	3.2 million (2015)
Domestic Overnight Visitors:	28 million (2015)
Estimated value of Tourism:	AUS $30.6 billion per annum (Visit NSW, September 2015).
State/Territory Tourism Ranking:	1st (VIC 2nd, QLD 3rd, WA 4th, SA 5th, NT 6th, ACT 7th, TAS 8th).

Map 6: Regions of New South Wales
© 2015 Visit NSW.



A) The Importance of Tourism in New South Wales

New South Wales is Australia's leading State for Tourism, with 31.5 million international and domestic overnight visitors in 2015 (+4.6% vs 2014), spending 176.8 million visitor nights in the State (+8.1%) and generating AUS $24.6 billion in overnight visitor spend (+9.6%).[122]

This equates to 34% of Australia's total number of domestic and international tourists, 31% in terms of nights and 30% in terms of spend (*Graphic 11, p. 54*).

6.2 New South Wales Tourism Overview

A) The Importance of Tourism in New South Wales | Continued

In 2013–14, the direct and indirect Tourism contribution to Gross State Product (GSP) in New South Wales was equal to $29.7 billion (31.9% of the total national Tourism contribution to GSP).

Tourism's contributions account for 6.0% of the total NSW GSP, placing it at a similar level of importance at a State level to its importance nationally; it sits below financial services (12.0% of GSP), professional services (7.5%), manufacturing (7.3%) and healthcare (6.2%); but ahead of construction (5.1%), public administration (4.9%), education (4.6%), retail (4.3%), mining (2.7%) and agriculture (1.6%).[123]

There are an estimated 90,875 Tourism businesses in NSW (34% of the total in Australia). 63% are in Sydney and 37% are in Regional NSW.[124]

They employ 159,000 directly (30% of total) and 113,000 indirectly (29%). The 272,000 total employed in Tourism, equates to 7.8% of NSW's total workforce of 3.5 million (1 in every 13 jobs).[125]

The total Tourism consumption in the State is $34.9 billion with a gross value add of AUS $12.8 billion.[126]

Table 9: Impact of Tourism on the NSW Economy
Source: Destination NSW, Tourism Performance Scorecard 2015.

TOURISM CONTRIBUTION TO NSW ECONOMY	2013/14	NSW % of AUSTRALIA
JOBS (DIRECT)	159,000	30%
JOBS (INDIRECT)	113,000	29%
TOURISM BUSINESSES	90,875	34%
TOURISM CONSUMPTION ($B)	$34.9	31%
TOURISM GROSS VALUE ADDED	$12.8	32%

B) Current Tourism Performance in New South Wales

3.5 million of the overnight visitors to New South Wales are International (11%) vs. 28 million Domestic (89%); although the total spend from International visitors is 34% of the total (AUS $8.4 billion) and proportion of visitor nights even higher at 48% (84.9 million nights).[127]

Domestic Day Trip visitors make up 64% of the total number of visitors to New South Wales at 55.4 million, but only account for 20.0% of the total spend (AUS $6.1 billion).[128] International visitors are 4.0% of the total and Domestic Overnight almost a third at 32.2%.

Total Tourism expenditure was AUS $30.6 billion in 2015, an increase of 9.0% vs. 2014. This expenditure was 23.0% of the total National Tourism spend, with the State receiving a visit from 54.7% of International visitors (36.1% share of visitor nights) and 33.6% of Domestic overnight visitors (36.1% of nights). *Table 10.*

Table 10: Selected New South Wales Tourism Metrics (2014–15)
Sources: Tourism Research Australia and Destination New South Wales.

National Rank (Expenditure)	Total Expenditure (Domestic + International)	% of National Total	Total Visitors	Market Share (% of National Tourism)		Total Employment (Direct & Indirect)	
				Domestic	International	Total	% Jobs
1 (8)	$30.6 billion (2015)	30.0% (2015)	86.9 million (2015)	33.6% visitors 29.3% nights (2015)	54.7% visitors 36.1% nights (2015)	272,000 (2015)	7.8% (2015)

International Visitors				Domestic Overnight				Domestic Day Trips		
Visitor #	Nights	Spend	+/– (Spend)	Visitor #	Nights	Spend	+/– (Spend)	Visitor #	Spend	+/– (Spend)
3.5 (2015)	84.9 million (2015)	$8.4 billion (2015)	+19.2% (vs. '14)	28 million (2015)	91.9 million (2015)	$16.1 billion (2015)	+5.1% (vs. '14)	55.4 million (2015)	$6.1 billion (2015)	+7.0% (vs. '14)

6.2 New South Wales Tourism Overview

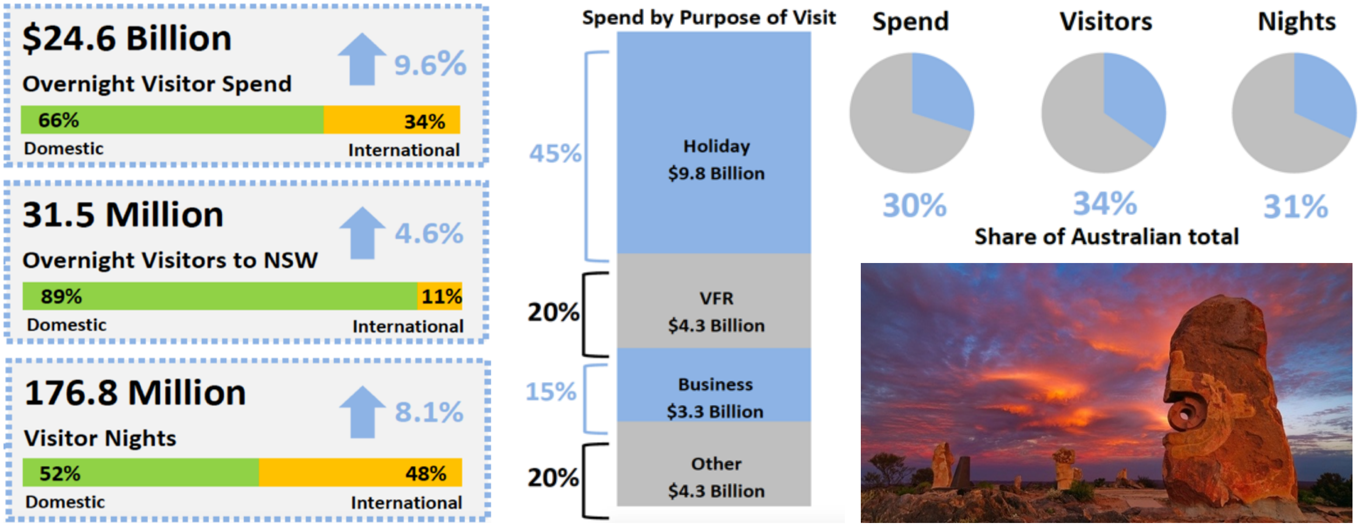
B) Current Tourism Performance in New South Wales | Continued

All types of visitors showed significant growth in spend in 2015. International visitors increased the most at +19.2%, followed by Domestic Day Trips (+7.0%) and then Domestic Overnight (+5.1%). These increases were partly in response to the more favourable exchange rate conditions and improving global economy, but there also appeared to be some general underlying growth. *Table 10, p.53.*

The main reason for visiting New South Wales is for the purpose of a holiday, generating AUS $9.8 billion (45% of the total), followed by Visiting Friends and Relatives (AUS $4.3 billion, 20%), 'Other' which includes education, employment and medical reasons (AUS $4.3 billion, 20%), and then business (AUS $3.3 billion, 15%). *Graphic 11.*

Graphic 11: Summary Statistics for New South Wales Tourism (2015)

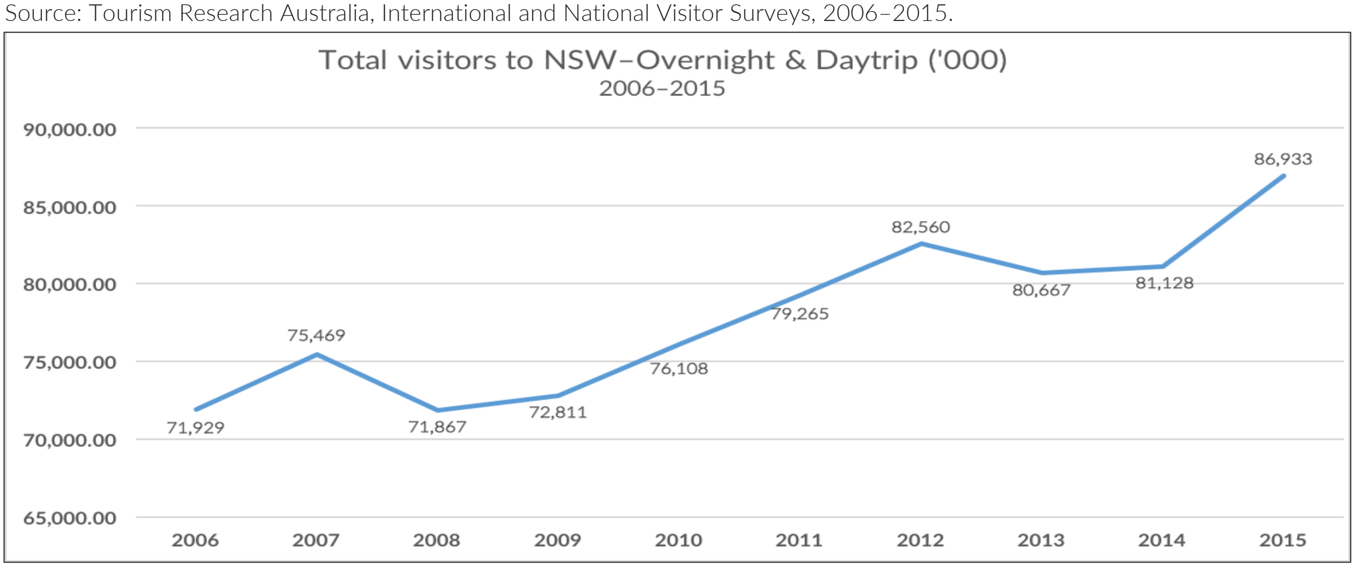
Source: Destination NSW, NSW Visitation Statistics, December 2015.



The source of international tourists for New South Wales is similar to Australia as a whole, although there are some key differences. The dominance of China, for example is even more pronounced; at AUS $2.3 billion (+39.6% vs. 2014), the value of Chinese Tourism is more than 3 times that of the next largest source market (the UK at AUS $739 million, + 11.4%). The top 3 is completed by the USA at AUS $660 million (+19.7%). *Table 11, overleaf.*

Graph 13: Tourism Growth in New South Wales (2006–2015)

Source: Tourism Research Australia, International and National Visitor Surveys, 2006–2015.



6.2 New South Wales Tourism Overview

B) Current Tourism Performance in New South Wales | Continued

Whilst the top 3 are identical in NSW to Australia as a whole, South Korea is the 4th most important in NSW at AUS $522 million (+24.3%) vs. 7th most important nationally. The other key differences are Japan being 8th most important vs. 5th nationally and Malaysia not making the top 10 in New South Wales (replaced by Germany, 11th most important nationally).[129]

All countries have shown increases in 2015 (between +5.9% for Singapore and +39.6% for China), with the exception of Japan which has declined markedly (–16.5%). The average length of stay for international visitors was 25.1 nights.[130]

The majority of domestic Tourism visitors came from within NSW (38.9% from Regional NSW and 27.5% from Sydney, total 66.4%), followed by Victoria (11.8%) and Queensland (11.7%). The average length of stay in NSW for domestic overnight visitors was 3.2 nights.[131]

Regional New South Wales receives the majority of visitors (20.2 million, 64%), while Sydney has a higher share of visitor nights (97.2 million, 55%) and spend (AUS $14.3 billion, 58%).[132]

Looking at the regional breakdown of Tourism expenditure, Sydney not surprisingly takes a significant share at AUS $16.5 billion in 2015; a year on year increase of +13.9% vs. 2014.[133]

The North Coast of New South Wales, where the MidCoast is situated, is the 2nd most important region after Sydney with a 13.8% of the market in terms of expenditure (AUS $3.4 billion).[134] This Region is comprised of both the Northern Rivers and the Mid–North Coast (*see Map 6, p. 52*).

The Hunter (AUS $2.3 billion), South Coast (AUS $2.2 billion) and Central NSW (AUS $1.3 billion) make up the top 5 regions, with the other 8 regions all receiving under AUS $1.0 billion in expenditure.

Table 11: Top 10 Source Markets for NSW

Source: Destination NSW, Tourism Performance Scorecard 2015.

TOP 10 SOURCE MARKETS	EXPENDITURE ($M)	CHANGE ON YE Dec 2014
China	2,300	39.6%
UK	739	11.4%
USA	660	19.7%
Korea	522	24.3%
New Zealand	487	7.7%
India	298	79.6%
Hong Kong	282	22.4%
Japan	256	-16.5%
Singapore	249	5.9%
Germany	207	13.3%

Table 12: NSW Tourism Spend by Region

Source: Destination NSW, Tourism Performance Scorecard 2015.

BY REGION	EXPENDITURE ($M)	CHANGE ON YE Dec 2014
Sydney	16,465	13.9%
North Coast NSW	3,420	5.4%
South Coast	2,263	3.7%
Hunter	2,319	7.3%
Central NSW	1,327	3.5%
Central Coast	917	25.8%
New England NW	757	-0.7%
The Murray	660	5.8%
Capital Country	606	-10.8%
Snowy Mountains	481	-11.3%
Riverina	556	-10.0%
Blue Mountains	572	11.9%
Outback NSW	181	-14.7%

In terms of recent growth, Central Coast (+26%), Sydney (+14%) and Blue Mountains (+12%) all experienced double digit increases in 2015, whilst Outback NSW (–15%), Snowy Mountains (–11%), Capital Country (–11%) and the Riverina (–10%) all declined significantly.

As a final metric of current performance, International spend per trip was $2,415 per person (+11.8% vs. 2014), significantly below the national average of $3,479 (–30%). Domestic overnight spend per trip was flat at $573 per person (+0.7%) and day trip spend declined marginally, –1.8% to $109 per person.

Note

More detail on New South Wales current Tourism Performance can be found in the 2015 Scorecard included in ***Appendix 18.4****.*

6.2 New South Wales Tourism Overview

C) Future Tourism Performance in New South Wales

With regards to future Tourism performance in NSW, total Tourism is forecast to rise by 3.7% per annum and reach 244.5 million visits by 2024/25. This actually represents a developing decline in growth rate from +4.0% p.a. between 2009/10–2014/15 to +4.3% p.a. between 2014/15–2019/20 then +3.2% p.a. between 2019/20–2024/25 (*Table 13, below*).

Overall growth will be higher in Sydney (+4.3%) vs. the rest of the State (+3.1%), with both exhibiting the same developing decline in growth rate trend described above.[135]

Table 13: Total Visitor Nights in New South Wales by Purpose of Visit (2005–2025)
Source: Tourism Research Australia, State and Territory Breakdowns 2015.

Australian Government
Austrade

TOURISM RESEARCH AUSTRALIA

TOTAL VISITOR NIGHTS IN NEW SOUTH WALES

	Purpose of visit				Holiday		VFR[a]		Business		Other		All purpose		
	Holiday	VFR[a]	Business	Other[c]	Capital city	Rest of state	Capital city	Rest of state	Capital city	Rest of state	Capital city	Rest of state	Capital city	Rest of state	State total
	'000														
2005-06	54 692	41 591	14 417	25 382	19 249	35 443	19 591	22 000	8 838	5 578	19 712	5 670	67 391	68 691	136 082
2006-07	61 047	41 860	15 577	23 849	22 584	38 463	20 319	21 541	9 692	5 885	18 598	5 251	71 193	71 140	142 333
2007-08	58 643	40 163	14 388	25 085	21 557	37 086	18 721	21 441	8 536	5 852	19 549	5 536	68 363	69 914	138 280
2008-09	60 041	37 684	12 957	28 703	23 161	36 880	17 968	19 717	7 089	5 869	23 164	5 540	71 382	68 005	139 386
2009-10	60 806	38 810	12 776	26 711	24 183	36 622	18 512	20 298	7 369	5 407	20 836	5 875	70 900	68 203	139 103
2010-11	61 330	43 331	14 861	29 630	23 876	37 454	21 940	21 391	8 618	6 242	22 970	6 660	77 404	71 747	149 151
2011-12	58 831	44 916	14 362	31 485	22 040	36 790	22 855	22 061	7 696	6 667	25 264	6 220	77 856	71 738	149 593
2012-13	62 998	44 041	15 402	32 238	24 360	38 637	22 027	22 014	8 090	7 312	25 871	6 367	80 348	74 330	154 679
2013-14	62 514	50 721	15 216	33 662	25 545	36 970	26 277	24 445	8 312	6 905	26 376	7 286	86 510	75 605	162 113
2014-15	63 216	51 850	17 769	36 598	26 341	36 876	26 947	24 903	9 855	7 914	29 092	7 506	92 235	77 198	169 433
2015-16	64 545	54 010	19 039	40 635	27 013	37 532	28 238	25 773	10 434	8 605	32 392	8 243	98 076	80 153	178 229
2016-17	67 189	56 608	20 794	42 974	28 558	38 631	29 871	26 737	11 151	9 642	34 241	8 732	103 821	83 743	187 564
2017-18	69 682	58 946	22 426	44 459	30 034	39 648	31 417	27 529	11 872	10 555	35 418	9 041	108 741	86 772	195 514
2018-19	72 060	60 894	23 614	45 897	31 414	40 646	32 631	28 263	12 441	11 173	36 600	9 297	113 086	89 379	202 465
2019-20	74 484	62 639	24 756	47 308	32 864	41 619	33 707	28 932	12 995	11 761	37 798	9 510	117 365	91 822	209 187
2020-21	76 937	64 349	25 931	48 775	34 321	42 616	34 770	29 579	13 548	12 383	39 054	9 721	121 693	94 298	215 992
2021-22	79 319	65 965	27 147	50 274	35 772	43 547	35 774	30 191	14 100	13 047	40 339	9 935	125 985	96 720	222 706
2022-23	81 818	67 612	28 418	51 836	37 286	44 532	36 798	30 814	14 672	13 746	41 678	10 158	130 434	99 249	229 684
2023-24	84 440	69 296	29 748	53 461	38 880	45 559	37 848	31 448	15 266	14 483	43 074	10 386	135 068	101 877	236 945
2024-25	87 155	71 007	31 138	55 155	40 545	46 610	38 914	32 093	15 881	15 257	44 532	10 623	139 872	104 583	244 455
	Year-on-year change (%)														
2011-12	-4.1	3.7	-3.4	6.3	-7.7	-1.8	4.2	3.1	-10.7	6.8	10.0	-6.6	0.6	0.0	0.3
2012-13	7.1	-1.9	7.2	2.4	10.5	5.0	-3.6	-0.2	5.1	9.7	2.4	2.4	3.2	3.6	3.4
2013-14	-0.8	15.2	-1.2	4.4	4.9	-4.3	19.3	11.0	2.7	-5.6	2.0	14.4	7.7	1.7	4.8
2014-15	1.1	2.2	16.8	8.7	3.1	-0.3	2.6	1.9	18.6	14.6	10.3	3.0	6.6	2.1	4.5
2015-16	2.1	4.2	7.1	11.0	2.6	1.8	4.8	3.5	5.9	8.7	11.3	9.8	6.3	3.8	5.2
2016-17	4.1	4.8	9.2	5.8	5.7	2.9	5.8	3.7	6.9	12.1	5.7	5.9	5.9	4.5	5.2
2017-18	3.7	4.1	7.9	3.5	5.2	2.6	5.2	3.0	6.5	9.5	3.4	3.5	4.7	3.6	4.2
2018-19	3.4	3.3	5.3	3.2	4.6	2.5	3.9	2.7	4.8	5.9	3.3	2.8	4.0	3.0	3.6
2019-20	3.4	2.9	4.8	3.1	4.6	2.4	3.3	2.4	4.5	5.3	3.3	2.3	3.8	2.7	3.3
2020-21	3.3	2.7	4.7	3.1	4.4	2.4	3.2	2.2	4.3	5.3	3.3	2.2	3.7	2.7	3.3
2021-22	3.1	2.5	4.7	3.1	4.2	2.2	2.9	2.1	4.1	5.4	3.3	2.2	3.5	2.6	3.1
2022-23	3.2	2.5	4.7	3.1	4.2	2.3	2.9	2.1	4.1	5.4	3.3	2.2	3.5	2.6	3.1
2023-24	3.2	2.5	4.7	3.1	4.3	2.3	2.9	2.1	4.0	5.4	3.4	2.3	3.6	2.6	3.2
2024-25	3.2	2.5	4.7	3.2	4.3	2.3	2.8	2.0	4.0	5.3	3.4	2.3	3.6	2.7	3.2
	5-year average annual growth rate (%)														
2009/10-2014/15	0.8	6.0	6.8	6.5	1.7	0.1	7.8	4.2	6.0	7.9	6.9	5.0	5.4	2.5	4.0
2014/15-2019/20	3.3	3.9	6.9	5.3	4.5	2.4	4.6	3.0	5.7	8.2	5.4	4.8	4.9	3.5	4.3
2019/20-2024/25	3.2	2.5	4.7	3.1	4.3	2.3	2.9	2.1	4.1	5.3	3.3	2.2	3.6	2.6	3.2
	10-year average annual growth rate (%)														
2014/15-2024/25	3.3	3.2	5.8	4.2	4.4	2.4	3.7	2.6	4.9	6.8	4.3	3.5	4.3	3.1	3.7

Numbers shaded are forecasts.

As the survey methodology for the NVS changed in 2014, domestic tourism data before and after 2014-15 are not strictly comparable. This has particularly impacted on business visitors.

[a] Visiting friends and relatives

[c] 'Other nights' includes education, employment and 'nights in transit'

n.a. Data not available due to ABS' change to its historical data series for Overseas Arrivals and Departures

6.2 New South Wales Tourism Overview

C) Future Tourism Performance in New South Wales | Continued

International Tourism Growth in NSW

Over the next decade (2014/15 to 2024/25), overall international Tourism growth in NSW is forecast to be +4.7%, slightly below the national growth rate of +4.9%. Growth will be highest in South Australia (+6.0%), followed by Queensland (+5.6%), the Australian Capital Territory (+5.4%), Tasmania (+5.2%), Victoria (+5.1%), Western Australia (+5.0%) and the Northern Territory (+4.9%).[136] The New South Wales regions (+4.9%) will grow marginally faster than Sydney (+4.7%).[137]

Visiting for a Holiday will grow the fastest (+5.2%) followed by Education/ Medical/ Other (+4.6%), Visiting Friends and Relatives (+4.4%) and Business (+3.5%).[138]

The international markets that are expected to deliver strong growth include China (+7.7% per annum), India (+6.3%), Indonesia (+5.2%), South Korea (+5.0%), Malaysia (+4.8%) and Singapore (+4.2%).[139]

Domestic Tourism Growth in NSW

Domestic Tourism growth in NSW to 2024/25 is forecast to be just under two thirds the growth rate of the international market at +2.8% (the national growth rate is also forecast at +2.8%). Highest growth is expected in Queensland (+3.0%), followed by Western Australia & the Northern Territory (both +2.9%), the Australian Capital Territory (+2.8%), Tasmania (+2.7%), Victoria (+2.6%) and South Australia (+2.5%). Domestic Tourism in Sydney (+3.0%) will grow marginally faster than the regions (+2.7%).[140]

Business (+6.4%) will be the key driver of domestic growth, followed by Visiting Friends and Relatives (+2.4%) Visiting for a Holiday (+1.8%) and Education/ Medical/ Other (+1.0%).[141]

The main source areas for domestic Tourism are expected to remain at above 60% from within New South Wales, with Victoria and Queensland remaining the most important States at between 10–15% each.[142]

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6.2 New South Wales Tourism Overview

D) New South Wales' Overall Approach to Growing the Tourism Sector

New South Wales' Tourism development is the responsibility of Destination NSW [www.destinationnsw.com.au] who are the lead government agency for the New South Wales Tourism and major events sectors.

As mentioned in Section 6.1(D), the States and Territories were involved in the creation of 'Tourism 2020' in collaboration with Tourism Australia and this forms a core part of the overall approach to Tourism development in the State.

Much of New South Wales strategy is also based on data collected by Tourism Australia and Tourism Research Australia.

Destination NSW describe their role as being *'to market Sydney and NSW as one of the world's premier Tourism and major events destinations; to secure major sporting and cultural events; to work in partnership with Business Events Sydney to win major international conventions and incentive travel reward programs; to develop and deliver initiatives that will drive visitor growth throughout the State; and to achieve the NSW Government's goal of doubling expenditure within the State's visitor economy by 2020 (and reach a value of $36.6 billion).'* [143]

3 main strategic plans have been developed that together seek to promote the sustainable growth and development of Tourism in NSW:

1) Visitor Economy Industry Action Plan

   In the four years leading up to 2016/17 the NSW Government planned to invest $500 million to fund the implementation of a new Tourism and events strategy.

   A 'Visitor Economy Taskforce' was established to develop the strategy, which aimed to double Tourism expenditure to NSW by 2020. The plan produced included 48 recommendations and 171 associated actions under 7 Strategic Imperatives:
   a) Increase Visitation; b) Grow Physical Capacity; c) Renew and Revitalise Destinations; d) Improve the Visitor Experience; e) Increase Visitor Spend; f) Make New South Wales More Competitive; and g) Change of Mindset.

   Full detail on the 'Visitor Economy Industry Action Plan' can be found via the following link:
   [http://www.industry.nsw.gov.au/invest-in-nsw/industry-opportunities/tourism/industry-action-plan-tourism]

2) China Tourism Strategy 2012–20

   The 'China Tourism Strategy' seeks to guide business development and consumer marketing activity for the Chinese Tourism market between 2012–2020.

   The strategy is intended to ensure *'New South Wales keeps pace with the rapid expansion of geographic source markets within China and the changing travel preferences of maturing consumer segments. A key objective of the strategy is to protect NSW's leadership position. While the China market is continuing to grow, so too is the competitor threat from other destinations. NSW currently attracts 60% of all Chinese visitors to Australia.'*

   Full detail on the 'China Tourism Strategy' can be found via the following link:
   [http://www.destinationnsw.com.au/about-us/strategies-and-plans/china-tourism-strategy]

3) Aboriginal Tourism Action Plan 2013–2016

   The vision of the 'Aboriginal Tourism Action Plan' is to *'support existing and emerging NSW Aboriginal Tourism experiences, products and businesses that will lead to economic and social benefits for Aboriginal people, both as operators and employees'*.

   Full detail on the 'Aboriginal Tourism Action Plan' can be found via the following link:
   [http://www.destinationnsw.com.au/about-us/strategies-and-plans/aboriginal-tourism-action-plan]

6.2 New South Wales Tourism Overview

E) Key Promoted Regions | www.visitnsw.com and www.sydney.com

Similar to Australia, New South Wales is promoted in two main ways. At the entry level for visitors interested in exploring the State, they are offered with looking at **'Explore the Regions/ Destinations'** and **'Things to Do'** alongside options for arranging the logistics of a trip.

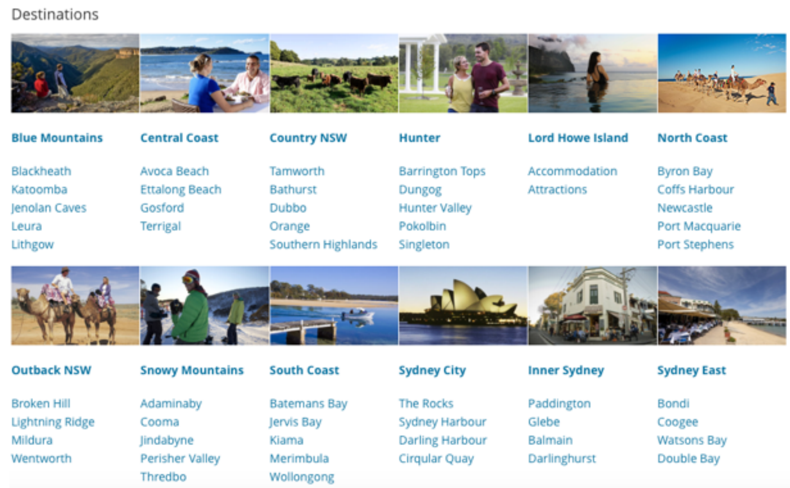
'Destinations' leads with key 9 key areas: The Blue Mountains, Central Coast, Country NSW, Hunter, Lord Howe Island, North Coast, Outback NSW, Snowy Mountains, South Coast and Sydney City, Inner Sydney and Sydney East.

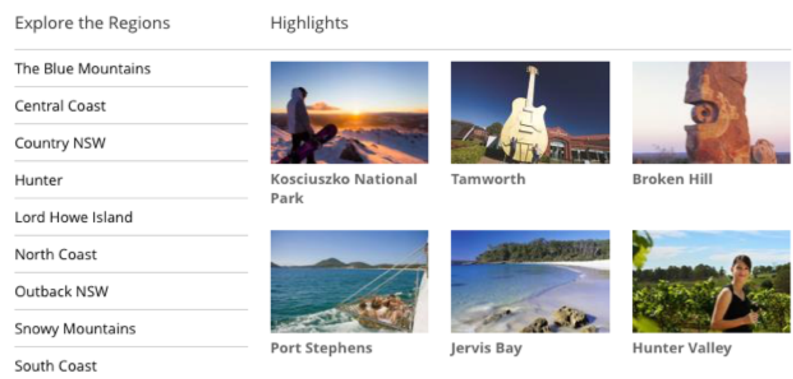
Events also feature fairly prominently although the featured calendar at the time of review was fairly low–level (vs. Sydney NYE, Tamworth etc.)

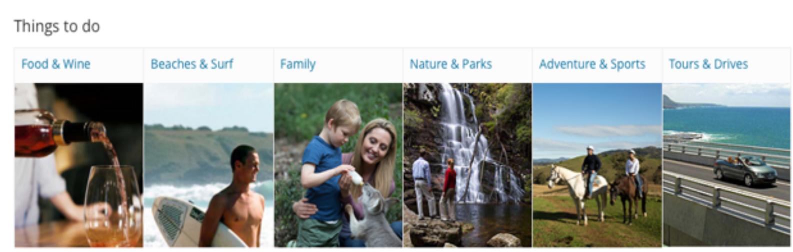
In terms of **'Things to Do'**, 'Food & Wine', 'Beaches & Surf', 'Family', 'Nature & Parks' 'Adventure & Sports' and 'Tours & Drives' are the clear leads with 'Aboriginal Culture', 'Arts & Culture' and 'Tours' included on the next level.

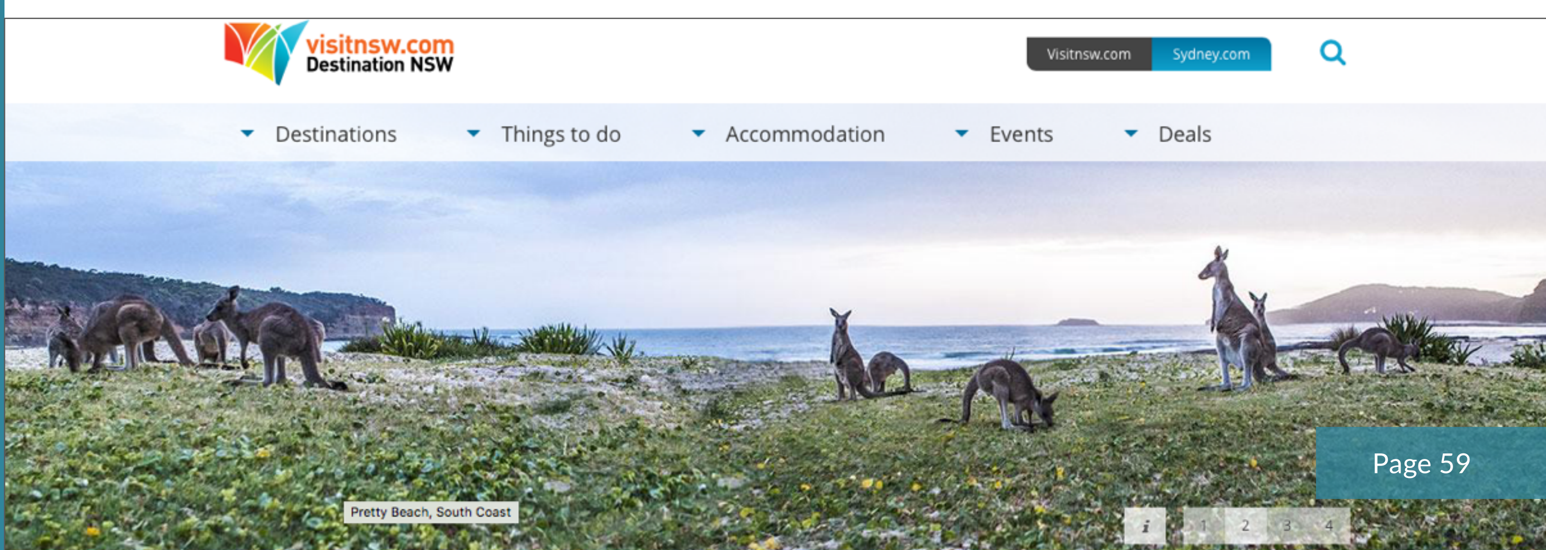
Some general promotion of Nature–based activities is also prominent. Swimming, snorkelling, diving, kayaking, surfing, hiking, bushwalking, river rafting and paddling are all mentioned, as is the general natural environment and *'easily accessible National Parks'*. The Hunter wine region is the main lead for premium food experiences.

The other general information is focused on accommodation options and some travel agent deals and general travel links.









6.2 New South Wales Tourism Overview

F) New South Wales Marketing Approach | www.destinationnsw.com.au

Destination NSW markets destinations, events, experiences and holiday offers to trade and consumer audiences in international and domestic markets with the aim of *'attracting more visitors to the state, increasing length of stay and encouraging higher levels of expenditure'*.[144]

Domestic Marketing

In domestic markets integrated marketing campaigns are run throughout the year. They feature brand advertising, retail campaigns with industry partners, publicity, digital direct marketing and special promotions.[145]

Separate campaigns are developed for Sydney and NSW regional destinations–images from the recent 'Sydney in Summer/ Winter', 'It's ON! in Wollongong' and 'Visit South Coast' campaigns are included on this page.

There is a focus on the State's geographic and climatic diversity, with the fact that *'only NSW can offer outback, country, alpine, coastal, island and tropical regions'* viewed as a competitive advantage.[146]

To market the state to potential visitors, Destination NSW has aligned the diverse regions into eight regional holiday zones:
1) Short Breaks from Sydney; 2) North Coast of NSW; 3) South Coast of NSW; 4) Outback NSW; 5) Country NSW; 6) Snowy Mountains; 7) Lord Howe Island.

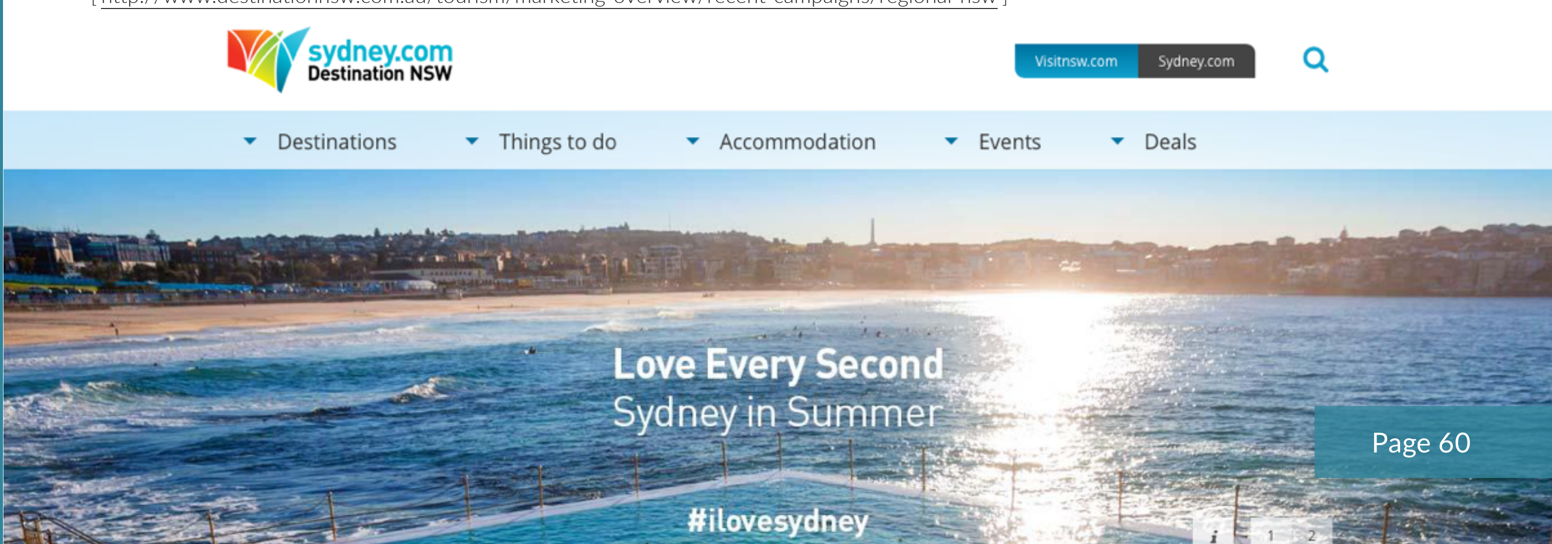
These zones are then marketed in conjunction with the State's key experiences:
1) Nature and National Parks; 2) Beaches and Surf; 3) Food and Wine; 4) Arts, Heritage and Culture; 5) Regional Events and Festivals.

In the past, Destination NSW also invested in partnership campaigns managed by the State's 12 regional Tourism organisations and their supporting partners and plans similar investment via the new Regional Destination Networks launched in July 2016

Domestic audiences include just about every age and life stage ranging from youthful backpackers; to luxury seeking escapists; to families; and caravanning seniors.[147]

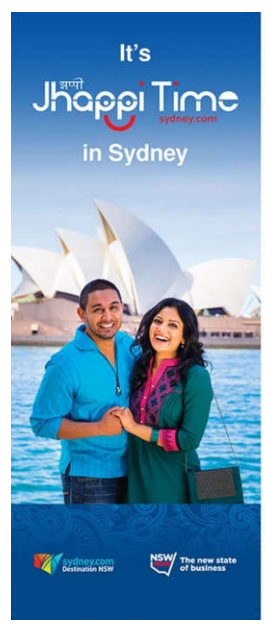
Key target markets are Sydney, regional NSW and the ACT, south east Queensland and regional Victoria.[148]

A 'Guide to Regional NSW' was also produced recently, available here:
[http://www.destinationnsw.com.au/tourism/marketing-overview/recent-campaigns/regional-nsw]



6.2 New South Wales Tourism Overview

F) New South Wales Marketing Approach | Continued



International Marketing

International markets are seen as strategically important as they have the greatest potential for significant growth in visitor arrivals and expenditure.

The emphasis is on *'cooperative retail advertising with wholesalers, travel agents, airlines and Tourism Australia. Destination appeal is further boosted through publicity campaigns and special digital, social media and event promotions.'*[149]

International audiences are known to have quite limited knowledge of what to do and see in Australia, but to be motivated by nature experiences and iconic destinations such as Uluru, the Great Barrier Reef and Sydney.

To use this strong consumer interest in Sydney to attract more visitors to the State, the primary focus in international markets has therefore been to promote the city and close surrounding regions such as the Hunter Valley and Blue Mountains. This has recently been done primarily under the 'Love Every Second' campaign tagline (examples on this page).

Promotional activity is also undertaken to support major coastal touring routes and areas of outstanding natural appeal including alpine, coastal and tropical regions. The drive along the 'Legendary Pacific Coast' that goes through the MidCoast Region is one such coastal touring route.

The primary international holiday target audience is broad and is stated as *'professionals aged 25–54 earning above average income and living in major cities. Compared to the average consumer these 'experience seekers' are individuals who spend more and like to engage with local people and lifestyle'*. Other important audience segments are youth (including backpackers), working holiday visitors and education visitors.[150]

A number of sectors have also been singled out as particularly important. These include 'food and wine' (as per the national focus on this market), 'youth', 'cruise' and 'Aboriginal Tourism'. Trade development and consumer marketing activities are specifically targeted at these sectors.[151]

There is also significant investment in developing a compelling event schedule for Sydney and regional NSW, and then marketing it to domestic and international audiences.

Destination NSW has seven overseas offices which coordinate marketing activity for key markets: 1) China; 2) Japan; 3) the UK and parts of Europe; 4) North America; 5) New Zealand; 6) India; and 7) South East Asia.[152]

Targeted campaigns in specific markets have also been undertaken, with the 'It's Jhappi time in Sydney!' in India a recent example.

Current Annual Budget

The total budget for Destination NSW in 2014–2015 was $136.8 million, comprised of Government grants from NSW Treasury ($123.9 million), contributions received from industry and other parties to participate in marketing activities ($11.3 million) and other income ($1.6 million).[153]

6.3 North Coast New South Wales Tourism overview

Key Statistics | Northern Rivers and Mid–North Coast combined

Source: Australian Bureau of Statistics unless otherwise stated.

Size:	35,799 sq. km
Population:	595,816 (est. 2014)
Population growth rate:	+8.8% (2005–15)
Population density:	14.2 per sq. km
Gross Regional Product (GRP):	AUS $48,569 per capita[154]
International Tourists:	295,000 (2015)
Domestic Visitors:	11.17 million (2015)
Estimated value of Tourism:	AUS $3.42 billion per annum (Tourism Research Australia)
State Tourism Ranking:	2 [13] (Sydney 1, South Coast 3, Hunter 4, Central NSW 5, New England NW 6, Murray 7).

THE LEGENDARY PACIFIC COAST
SYDNEY TO BRISBANE, AUSTRALIA

A) The Importance of Tourism to North Coast NSW

This section looks at Tourism in the North Coast of New South Wales, a region made up of the Mid North Coast and Northern/ Northern Rivers Regions.

The MidCoast is situated in the Mid North Coast Region, however it is necessary to look at the North Coast as a whole because that is both how the Tourism data has been reported to date, and also how visitors tend to have the area promoted to them.

In 2014, the total output of Tourism in North Coast NSW was estimated at $2.35 billion,[155] generating just under 5% of the region's total output.*

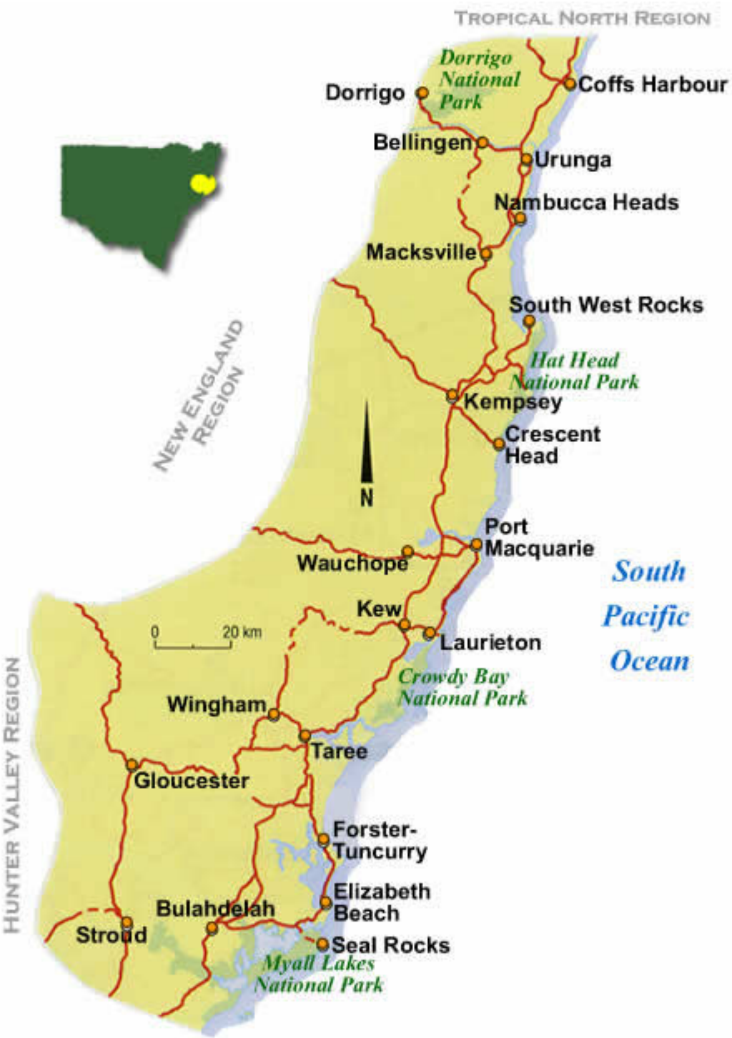
This equates to a total value of Tourism to the region of $3.42 billion in 2015 making it the 6th most important sector after manufacturing, construction, ownership of dwellings, health care & social assistance and retail.[156]

In terms of employment, 13,250 were directly employed by Tourism in 2015, 7.8% of the total region's workforce of 169,117 (*Table 14)*. This makes Tourism the 4th most important employer after health care & social assistance, the retail trade and education & training. There are an estimated 6,904 Tourism businesses.[157]

Exact figures for indirect employment are not readily available, but based on New South Wales average indirect employment ratio, an estimated 8,900 are also employed indirectly leading to a total of 22,150 (13.1% of the workforce).[158]

Total Tourism has continued its gradual recovery over the last 12 months, following a sharp decline post the Global Financial Crisis in 2008.[159]

Map 7: North Coast New South Wales Region
© 2015 Australian Travel and Tourism Network.



* *Output represents the gross revenue generated by businesses/organisations in the Tourism sectors in Mid North Coast NSW and Northern Rivers.*

6.3 North Coast New South Wales Tourism Overview

B) Current Tourism Performance in North Coast NSW

The North Coast Tourism sector received AUS $3.42 billion in 2014 from domestic and international visitors combined (flat, or –0.5% vs. 2009–10. The majority of this revenue came from domestic overnight visitors at AUS $2.5 billion (72.2% of the total), followed by domestic day trips (AUS $762 million, 22.3%) and the remainder from international visitors (AUS $185 million, 5.5%). This placed the region 6th out of the 76 available national Tourism Region Profiles and 1st in Regional NSW.[160] *These and following figures from Table 14.*

The region received 11.5 million visitors in 2015, a decline of –2.6% on 2011–12 numbers. The bulk of this decline was driven by a significant drop in domestic day trips (–11.0%, from 7.2 million to 6.4 million), which was in part offset by increases in domestic overnight visitors (+8.5%, from 4.3 million to 4.8 million) and international visitors (+12.2%, from 262,905 to 295,000). The region placed 4th for domestic overnight visitors (international and day trip data not readily available) and 1st in Regional NSW.

In terms of visitor nights, domestic overnights reached 17.6 million in 2015 (85% of the total), with international nights making up the remainder with 3.2 million.

North Coast NSW receives a comparatively high share of domestic visitors to regional NSW, 24.0% of domestic visitors (26.6% of nights) and a particularly high share of international visitors at 42.8%, although the lower share of nights (22.5%) indicates these are mainly for short stays and whilst in transit up or down the coast.

Table 14: Selected North Coast NSW Tourism Metrics (2014–15)

Sources: Tourism Research Australia, Regional Development Australia and Australian Bureau of Statistics (ABS) Tourism Satellite Account.

Regional Rank (Expenditure)	Total Expenditure (Domestic + International)	% of North Coast GRP	Total Visitors	Market Share (of Regional NSW)		Total Employment (Direct & Indirect)	
				Domestic	International	Total	% Jobs
6 (76)	$3.42 billion (2015)	13.4% (2014)	11.5 million (2015)	24.0% visitors 26.6% nights (2015)	42.8% visitors 22.5% nights (2015)	22,150 (2015)	13.1% (2015)

International Visitors				Domestic Overnight				Domestic Day Trips		
Visitor #	Nights	Spend	+/– (Visitor #)	Visitor #	Nights	Spend	+/– (Visitor #)	Visitor #	Spend	+/– (Visitor #)
295,000 (2015)	3.14 million (2015)	$185 million (2015)	+8.0% (vs. '14)	4.8 million (2015)	17.6 million (2015)	$2.5 billion (2015)	+2.4% (vs. '14)	6.4 million (2015)	$762 million (2015)	+16.5% (vs. '14)

The visitor/ population ratio is another useful indicator of the health of Tourism in the region. This has improved markedly since 2009–10, going from 8.7 visitors/ head of population to 10.6 (+1.9pts, + 22%). The region ranks at 30th, which, whilst clearly below expenditure and visitor number performance, is an average performance vs. significantly down due to the fact that this metric is skewed considerably by some of the more remote regions with very low population densities.[161]

Of the other key metrics in Table 15 overleaf, room numbers have declined by –10.7% since 2012/13 which, coupled with the high ranking of 8 and increasing overnight visitors, indicates that there may have been some oversupply in the market. Partly due to the decline in room numbers, occupancy rates have increased +5.5% to 57.6% whilst Revenue per Available Room (RevPAR) has increased significantly ahead of inflation by +14.0% to $84.5, indicating the region is receiving slightly higher value tourists (probably due to the double digit increase in international tourists).[162]

6.3 North Coast New South Wales Tourism Overview

B) Current Tourism Performance in North Coast NSW | Continued

From an aviation point of view, there has been an almost 20% increase in seat availability (+18.4% to 848,000), set against a comparatively small decline in utilisation (–3.2%). Looking at the trend over the past 6 years it appears that supply was roughly in line with demand until 2013–14, but there may now be a marginal oversupply until demand is driven up again.[163]

Table 15: North Coast Tourism Performance (2009/10–2014/15)

Sources: Tourism Research Australia, Tourism Supply and Demand Time Series 2014–15, North Coast NSW.

KEY METRIC	2009–10	2010–11	2011–12	2012–13	2013–14	2014–15	+/–	Rank | 76
Tourism Expenditure ($M)	3,300	2,991	3,146	3,270	3,329	3,281	–0.5%	6
Total Domestic Overnight Visitors ('000)	4,397	4,608	4,325	4,617	4,879	4,771	+8.5%	4
Total Domestic Day Trip Visitors ('000)	–	–	7,194	6,000	5,500	6,400	–11.0%	–
Total International Visitors (Total)	–	–	262,905	270,200	273,100	295,000	+12.2%	–
Visitor/ Population Ratio	8.7	8.6	8.6	8.6	10.3	10.6	+1.9 (+22%)	30
Accommodation–Rooms (Number)	–	–	–	8,703	7,542	7,768	–10.7%	8
Accommodation–Occupancy (%)	–	–	–	54.6	54.6	57.6	+5.5%	18
Accommodation–RevPAR ($)	–	–	–	74.1	78.4	84.5	+14.0%	24
Aviation–Seats Available ('000)	716	750	742	797	835	848	+18.4%	15
Aviation–Seat Utilisation (%)	69.1	67.6	69.2	67.2	67.6	66.9	–3.2%	17

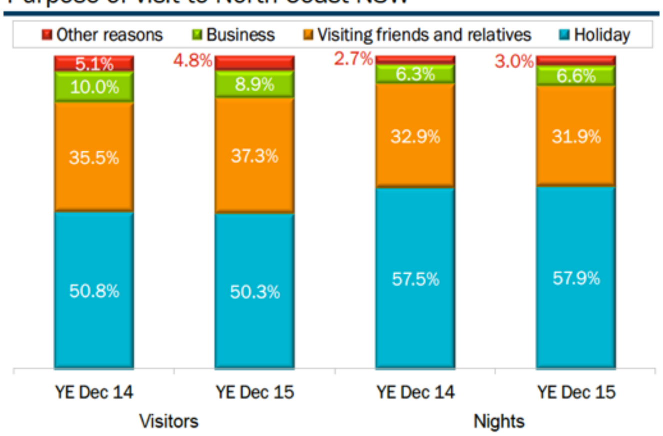
Domestic Overnight Travel: Additional Metrics

Looking at Graphic 12 below, 'Holiday' (50.3%, –1.0% vs. 2014) was the largest purpose of visit for visitors to the region, followed by 'visiting friends and relatives' (37.3%, +7.6%) and 'business' (8.9%, –8.9%). 'Holiday' (57.9%, +0.7%) was also the largest purpose in terms of nights in the region, followed by 'VFR' (31.9%, –3.2%) and 'business' (6.6%, +5.2%).[164]

Graphic 12: Purpose of Visit to North Coast NSW and Origin of Travel

Sources: Destination NSW, Travel to North Coast NSW Region Year ended December 2015.

Purpose of visit to North Coast NSW



Origin

	Share of visitors		Share of nights	
Origin	YE Dec 14	YE Dec 15	YE Dec 14	YE Dec 15
Regional NSW	37.8%	37.8%	35.1%	33.3%
Sydney	26.1%	24.3%	30.4%	27.6%
Total intrastate	63.9%	62.1%	65.5%	60.9%
Queensland	28.0%	28.9%	21.1%	24.3%
Victoria	4.8%	5.5%	8.3%	8.7%
ACT	1.3%	1.5%	2.0%	1.9%
Other interstate	2.1%	2.0%	3.1%	4.1%
Total interstate	36.1%	37.9%	34.5%	39.1%

6.3 North Coast New South Wales Tourism Overview

B) Current Tourism Performance in North Coast NSW | Continued

Domestic Overnight Travel: Additional Metrics | Continued

In terms of source markets, 2015 saw a general trend for growth in interstate travellers (37.9%, + 5% vs 2014), although the majority of visitors are still intrastate (62.1%, –3%).[165]

Regional NSW (37.8%, +2.6% vs. 2014) was the largest source of visitors to the region in 2015, followed by Queensland (28.9%, +5.7%), Sydney (24.3%, –4.8%), Victoria (5.5%, +17.3%) and the ACT (1.5%, +19.4%).[166]

Regional NSW (33.3%, –5% vs.2014) was the largest source market in terms of nights in the region, followed by Sydney (27.6%, –9.2%), Queensland which showed significant growth (24.3%, +15.4%), Victoria (8.7%, +4.9%) and the ACT (1.9%, –5.9%).[167]

The most popular activities undertaken in the region are 'Eat out, dine at a restaurant or cafe' (62.0%), followed by 'go to the beach' (48.8%) and 'visit friends and relatives' (46.7%).

The largest age group of visitors to the region was '15 to 29 years' (25.4%), followed by '50 to 59 years' (17.2%) and '30 to 39 years' (16.8%).

Average spend/ night in 2015 for domestic overnight trips was AUS $141, down marginally (–1.0%) on 2014 with a total spend/ visitor of AUS $520.83 vs AUS $571 for New South Wales as a whole.[168]

Domestic Day Trips: Additional Metrics

'Holiday' (55.4%, +25.3%) was the main reason for domestic day trips to the region, followed by 'visiting friends and relatives' (19.7%, –12.3%) and 'business' (8.3%, +44.7%).

Average spend/ trip in 2015 was AUS $120, up by +13.3% on 2014 (vs. AUS $109 for New South Wales).[169]

International Overnight Travel: Additional Metrics

'Holiday' (81.7%, +8.7%) was the largest purpose of visit for international visitors to the region, followed by 'visiting friends and relatives' (15.1%, +1.0%) and 'business' which declined by almost a third, but off a very small base (1.7%, –28.2%).[170]

Table 16: Source markets for International Visitors to North Coast NSW
Sources: Destination NSW, Travel to North Coast NSW Region Year ended December 2015.

Share of international visitors to North Coast NSW region						
Rank	Individual market	YE Dec 14	YE Dec 15	Origin region	YE Dec 14	YE Dec 15
1	United Kingdom	20.8%	22.9%	Europe	61.4%	60.0%
2	Germany	13.0%	11.8%	North America	14.5%	14.0%
3	New Zealand	10.7%	9.8%	Asia	8.9%	10.8%
4	USA	8.5%	8.1%	New Zealand & Oceania	11.5%	10.7%
5	Canada	6.0%	5.9%	Other Countries	3.6%	4.5%

The United Kingdom (22.9%) was the region's largest individual source market of visitors, followed by Germany (11.8%), New Zealand (9.8%), USA (8.1%) and Canada (5.9%). Europe still provides the majority of visitors (60.0%), but is gradually declining in importance as the Asian influence increases (10.8%, +21%). North America (14.0%) and New Zealand/ Oceania (10.7%) are the other lead regions after Europe. *Table 16.*

6.3 North Coast New South Wales Tourism Overview

B) Current Tourism Performance in North Coast NSW | Continued

Domestic Overnight Travel: Additional Metrics | Continued

The most popular form of accommodation was 'Friends or relatives property' (26.8%), followed by 'rented house, apartment, flat or unit' (22.5%).[171]

The largest age group of visitors to the region was '15 to 29 years' (54.3%) in 2015, followed by '30 to 39 years' (13.3%) and '50 to 59 years' (11.7%).[172]

Average spend/ night in 2015 was AUS $59, up by +3.7% on 2014 with total spend/visitor AUS $627.[173]

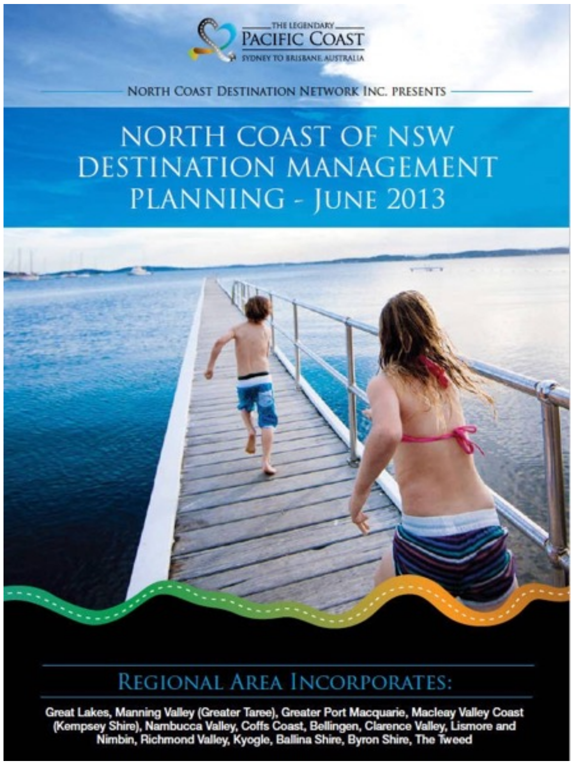
C) Overall Approach to Growing North Coast NSW Tourism | www.ncdn.com.au

Tourism marketing in North Coast NSW was, until July 2016, coordinated by the North Coast Destination Network (NCDN) as the peak Regional Tourism Organisation which managed the destinations situated on the North Coast of New South Wales *'in partnership with the fourteen Local Government Associations, fourteen Local Tourism Associations, direct industry operators, non–direct stakeholders, Destination New South Wales, Tourism Australia and other State and Federal Government agencies.'* [174]

The purpose of the NCDN was to *'create a collaborative capacity across the Mid North Coast and Northern Rivers regions in which multiple stakeholders have agreed to join together around shared Tourism objectives to create a self–sustaining model that increases awareness, preference and conversions for all destinations from Great Lakes in the south to The Tweed in the north.'*[175]

In 2013, a 'North Coast Destination Management Plan (NCDMP)' was created to provide a roadmap to help achieve doubling overnight visitor expenditure by 2020 as laid out in the New South Wales Tourism plan mentioned previously.

This plan was a fairly comprehensive document that laid out the Tourism plan for the region.



The full NCDMP can be viewed via this link:
[http://www.ncdn.com.au/about-us/strategic-plans]

THE LEGENDARY PACIFIC COAST SYDNEY TO BRISBANE, AUSTRALIA

Historical Vision of the NCDMP

'The region will have a sustainable Tourism industry working cohesively throughout the region, delivering a diverse array of consistently high quality experiences throughout the year that encourages traditional and new Tourism markets to spend more and stay longer in the region.'

'The short term outlook for the North Coast Destination Network and partners will be to focus on initiating and implementing a succession of effective cooperative marketing campaigns and developing/enhancing key experiences identified in the gaps. The long–term future growth of the North Coast will be seen to integrate with (as opposed to inundate) the natural, social and economic values of the region, and will play a pivotal role in retaining the unique character of both the Northern Rivers and Mid North Coast regions.'

The natural and cultural assets that underpin the success of the industry will be protected and showcased through best practice approaches to ensure that the needs of the region's residents & the Tourism industry share a common vision.'[176]

Note
A touring map of The Legendary Pacific Coast detailing key stop-offs in the region can be found in ***Appendix 18.5****.*

6.3 North Coast New South Wales Tourism Overview

C) Overall Approach to Growing North Coast NSW Tourism | www.ncdn.com.au | Continued

Mission of the NCDMP to mid–2016

'Facilitate regional and local product/experience development and marketing of the North Coast of NSW through leading the region's Tourism industry and partners, creating and nurturing members, strategic alliances, fostering regional collaboration and provide opportunities for the industry to develop skills and acquire knowledge.' [177]

Top–Level Goals

To assist the North Coast of New South Wales achieve its overall vision for Tourism, the following goals were identified for July 2013–June 2015 (estimated timeframe). The plan has not been updated at this point and it is unclear of the timing for this to take place, so it is assumed the following are still in place:

Goal 1:

'Increase total visitor expenditure by 7% each year for next three financial years, benchmarked on 2012–13.' (Total Domestic Overnight Expenditure; Total International Overnight Expenditure & Total Daytrip Expenditure).

Goal 2:

'To develop/enhance a minimum of 10 product/event experiences across the region to address the region's identified asset gaps and the changing needs of visitors in key domestic overnight markets each year over the next three financial years.'

Goal 3:

'Source/increase investment to address key infrastructure and non–product development needs.'

One of the other main initial agreements reached by the North Coast Destination Network was that the marketing for all the destinations in the region would would be run under a single 'umbrella brand': 'The Legendary Pacific Coast'.[178]

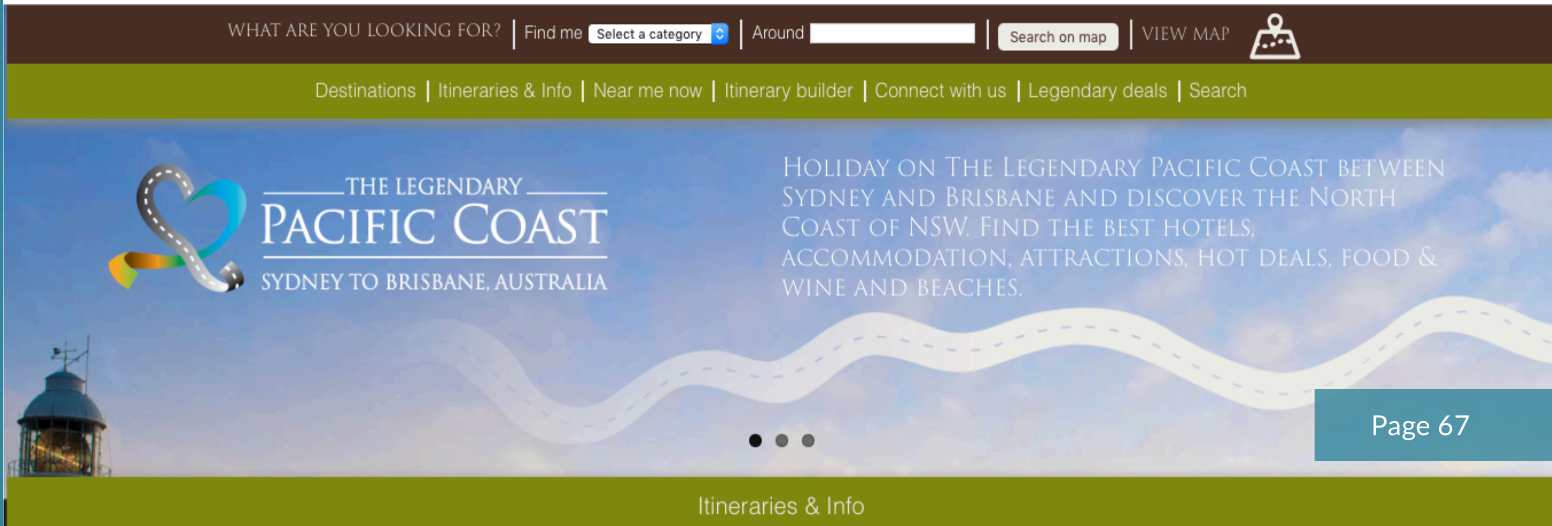
D) North Coast NSW Marketing Approach to mid–2016 | www.pacificcoast.com.au

The North Cost Destination Network (NCDN) coordinated all the regions Tourism marketing through 'The Legendary Pacific Coast (TLPC)' brand, with www.pacificcoast.com.au the consumer site for Tourism in the region.

Domestic Marketing

Throughout the year, the NCDN ran domestic markets integrated marketing campaigns under the TLPC consumer brand. They featured brand advertising, tactical campaigns with industry partners who were members of TLPC, publicity and media films, digital direct marketing and special promotions.

With 90% of visitors to all the North Coast destinations accessed through the Pacific Highway and dominated by self–drive as a mode of transport, the program aimed to *'increase visitation and spend to multiple local areas'*.



6.3 North Coast New South Wales Tourism Overview

D) North Coast NSW Marketing Approach | www.pacificcoast.com.au | Continued

Domestic Marketing | Continued

There was also an attempted focus on the development and promotion of a series of trails, i.e. 'nature–based', 'food and wine', 'arts', 'surfing', 'cultural and heritage', and 'aboriginal stories' that were promoted on the website and through industry partnerships.

International Marketing

International Tourism promotion was also under the TLPC brand (recognised simply as the **'Sydney to Brisbane Drive'** in some markets).

One of the key activities was a partnership with Destination New South Wales to make TLPC **'Australia's number one international touring drive'**. Tourism Australia also supported the development of TLPC as one of **'Australia's Greatest Journeys'**.

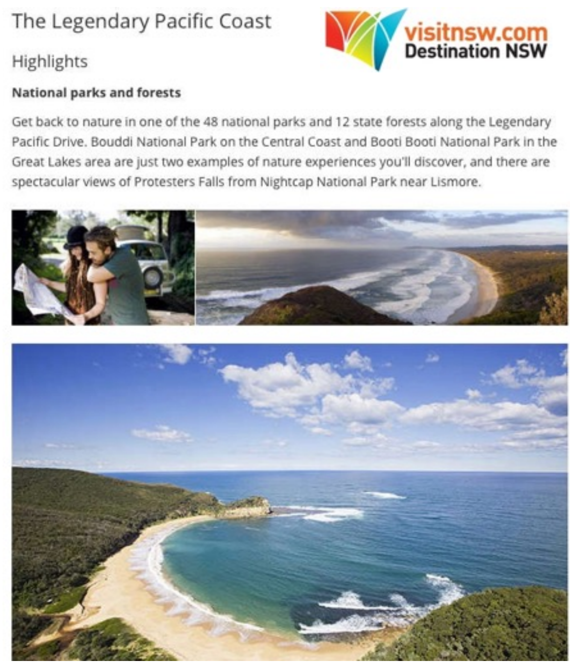
There were 2 key international strategies:

1) **'Market Penetration'**
   Western markets including UK, New Zealand and the US where a continued market presence was desired as well as an identified need to maintain relationships with key travel distributors.
2) **'Market Development'**
   Rapidly developing Eastern markets like Singapore, Malaysia and China. The aim here was to try and find ways to benefit from the rapid growth in these markets (both current & forecast).

Estimated Budget | 2013/14

The NCDN's budget for regional Tourism promotion was AUS $1.5 million, with AUS $920K spent on domestic marketing, AUS $215K on international marketing, AUS $50K on an awards program and the remainder on operational expenditure. This budget was derived from a mixture of State Government, Membership and commercial income.

View a sample film from NCDN here:
[https://www.youtube.com/watch?v=SdwNEfn-1Fk&list=PLHBd-ZQKD5P6uVykCIprww2_NFnz6LOSL]



© The Legendary Pacific Coast | Booti Booti National Park, New South Wales

6.3 North Coast New South Wales Tourism Overview

E) Key Promoted Regions | www.pacificcoast.com.au & www.visitnsw.com/destinations/north–coast

The Pacific Coast website provided a slightly less structured approach than either the Tourism Australia or Destination NSW sites. The region was promoted initially through **'Destinations'** and **'Itineraries & Info'**. There are a number of ways to also get access to standard planning & booking help.

'Destinations' led to a list of all the regions with no real prioritisation of destination. See the image at the far right of this page for the complete list.

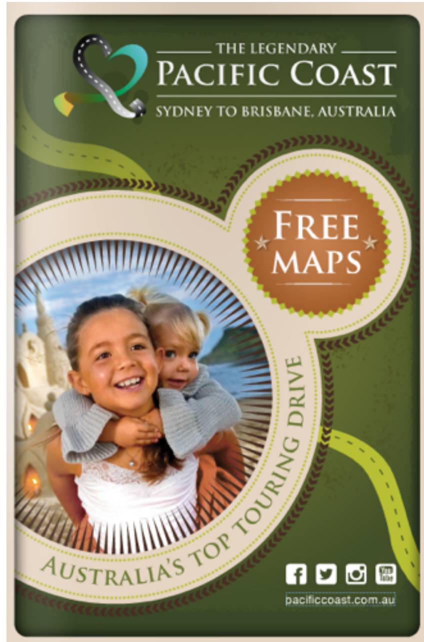
'Itineraries & Info' was more structured with 8 categories identified: 'Top Things to Do', 'Tourist Drives', 'Suggested Itineraries', 'Touring Guide', 'Aboriginal Stories', 'Getting Here & Around', 'Experience Trails' and 'Legendary Deals'.

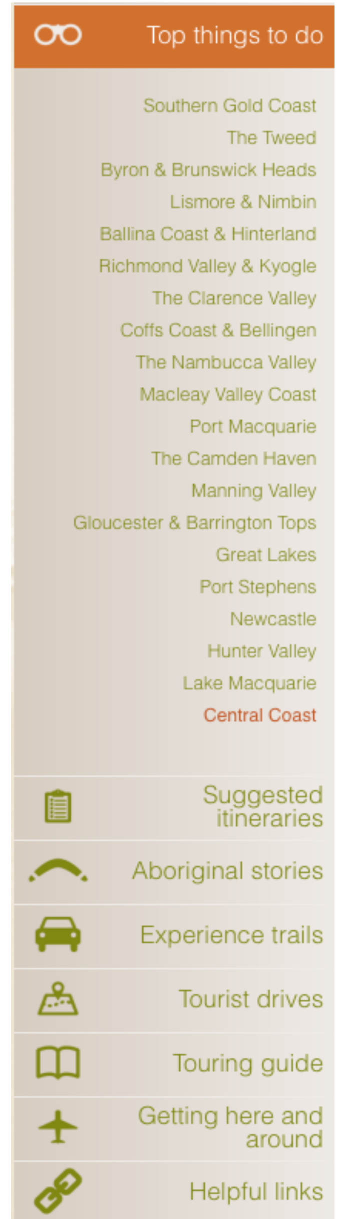
The '**Experience Trails**' identified some of the key Tourism offerings/ experiences that are popular with the target audiences: 'Backpacker & Working Holiday Trail', 'Coastal & Aquatic Trail', 'Food & Wine & Farmer's Gate Journey', 'Legendary Kids Trail', 'Legendary Surfing Safari', 'National Parks & State Forests Nature Trail' and 'Whale Watching Trail'.

The other general information was focused on accommodation options, some travel agent deals and general travel links.

A comprehensive touring guide was also available:
[http://pacificcoast.com.au/itineraries-and-trails/touring-guide/]

The site itself was actually fairly challenging to use , with some basic functionality lacking. A simple map was not easily available, for example, and the lack of a simple structure and hierarchy made navigation of the information challenging compared with the National & NSW Tourism sites.





6.3 North Coast New South Wales Tourism Overview

F) Future New South Wales Regional Destination Networks (RDNs)

Whilst the North Coast Destination Network Regional Tourism Organisation (RTO) was effective in some ways, it also had a range of structural issues and did not always effectively service the MidCoast Region.

It was not the only RTO with these issues and in 2015 the NSW Government initiated a review into the existing model of NSW RTOs. As a result of this review, a new structure of 6 Regional NSW Destination Networks (RDNs) has been created as of July 2016 *(see Map 8 below)*:

1) Riverina Murray, 2) Southern NSW, 3) North Coast (Including Lord Howe Island), 4) Country & Outback NSW, 5) Sydney Surrounds North and 6) Sydney Surrounds South.

MidCoast makes up the Southernmost end of the North Coast RDN, which has 14 regions in total:

1) MidCoast, 2) Port Macquarie–Hastings, 3) Kempsey, 4) Nambucca, 5) Bellingen, 6) Coffs Harbour, 7) Clarence Valley, 8) Richmond Valley, 9) Kyogle, 10) Lismore, 11) Ballina, 12) Byron, 13) Tweed and 14) Lord Howe Island.

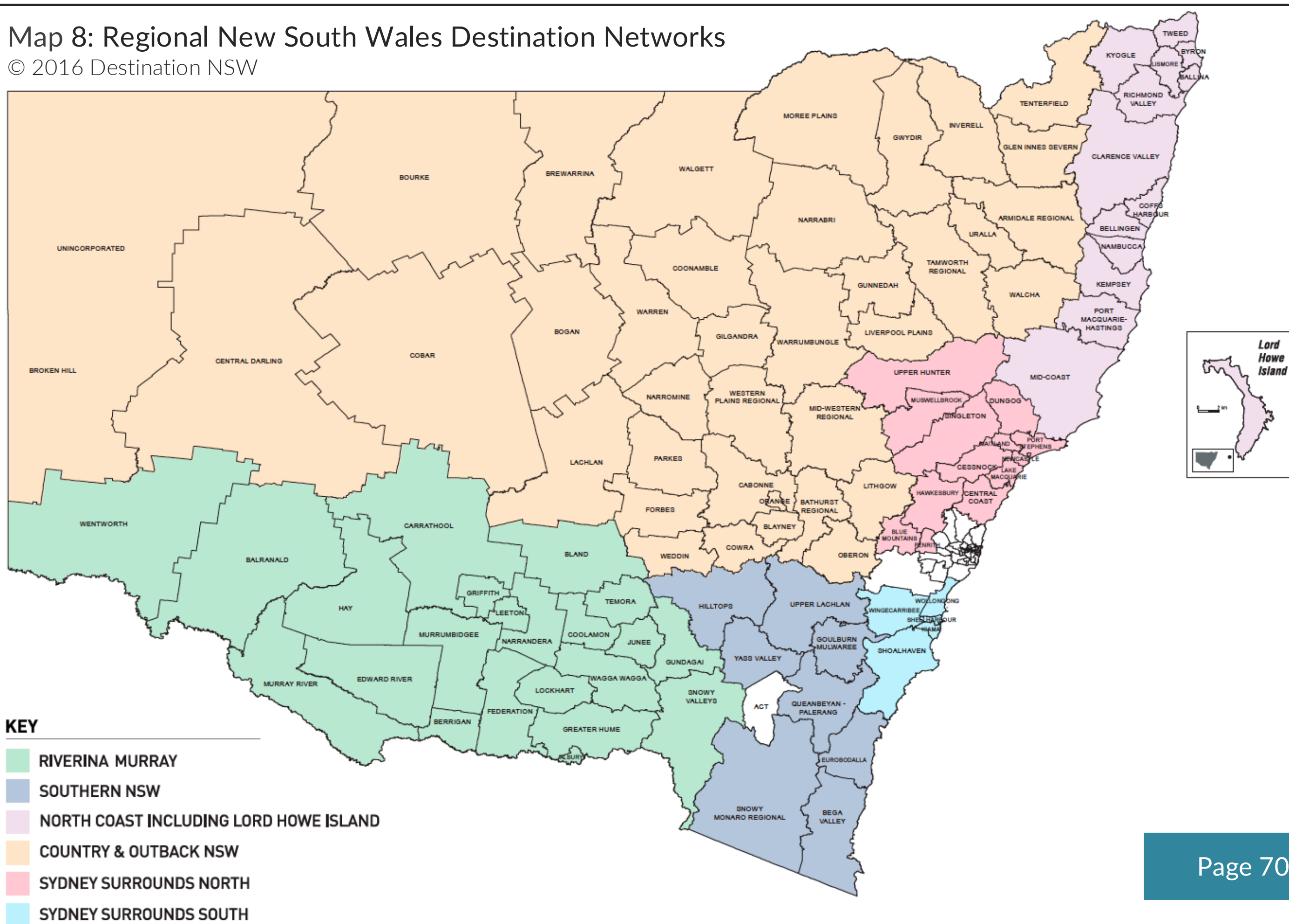
This restructure has obvious implications for the MidCoast Region, not all of which are clear at present given the announcement is still recent at the time of writing this report. However, given some of the findings in this report relate to the need for improved Tourism Marketing and Infrastructure in key areas, at the very least the potential availability of funding and the potential for more co–ordinated marketing campaigns will be worth pursuing.

The NSW Government announced in July 2016 that it would invest $43 million over four years in a major overhaul in the way regional and rural areas attract visitors, including the creation of the new Destination Networks outlined above. A chart detailing roles and responsibilities for key stakeholders (including local Tourism Organisations and Councils) is included as Appendix 18.8. More information can be found via the following links:

www.destinationnsw.com.au/our-industry/destination-networks

www.destinationnsw.com.au/wp-content/uploads/2016/07/Regional-Destination-Networks.pdf

Map 8: Regional New South Wales Destination Networks



SECTIONS 7–10

7 | Current State of Tourism in the Gloucester Region

8 | Current State of Tourism in the Great Lakes Region

9 | Current State of Tourism in the Manning Region

Note

Detailed Tourism data for the Gloucester, Great Lakes and Manning regions is currently limited, with Destination New South Wales' Local Government Area Profiles making up a large proportion of the readily accessible source data.

In the Great Lakes this is being partly remedied through some in–house data collection by Great Lakes Tourism that commenced in the summer of 2015/16: a selection of the draft findings are included in this report.

In the Gloucester and Manning Regions, additional data has been sourced from a variety of different reports and some additional in–house reporting undertaken by Gloucester Tourism and Manning Valley Tourism.

The main consequence of this lack of data has been the need to make broader assumptions and to base some of the forecasts contained in the following sections on other comparable data sets, including broader New South Wales trends.

7 | CURRENT STATE OF TOURISM IN THE GLOUCESTER REGION

7.1 An Overview of Tourism in the Gloucester Region

Key Statistics

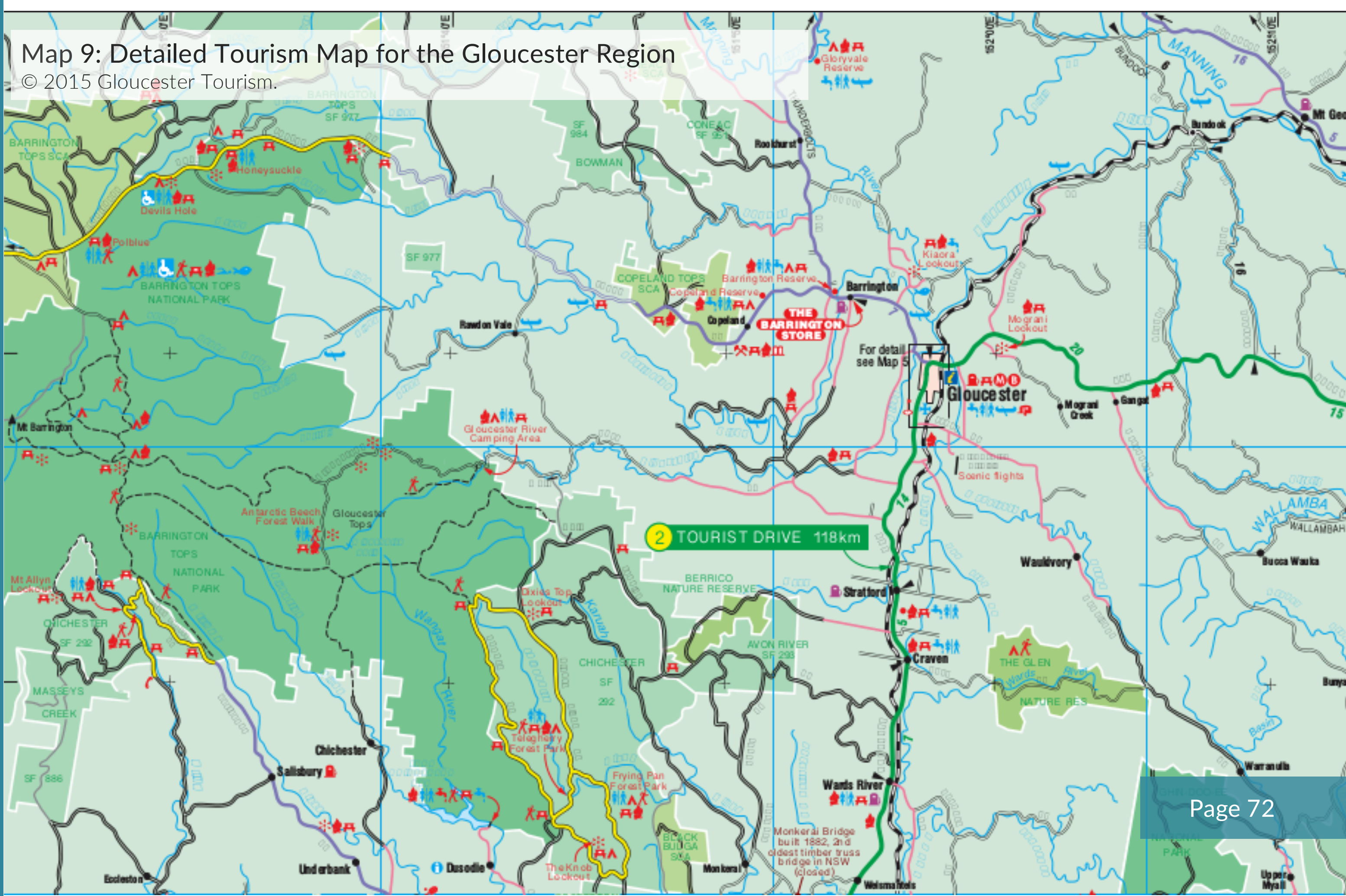
Source: Australian Census data/ Australian Bureau of Statistics unless indicated.

Size:	2,950 sq. km
Population:	5,061 (est. 2016)
Population in 2036 (Est.):	4,850 (–3.3%) [179]
Population density:	1.7 per sq. km
Gross Regional Product (GRP):	AUS $51,570 per capita[180]
International Tourists:	1,000 (2014)
Domestic Visitors:	179,000 (2014)
Estimated value of Tourism:	AUS $51.4 Million per annum
North Coast NSW Ranking:	14 [15]

© Brent Purcell | Barrington Tops National Park

The Gloucester Region is a scenic self–drive destination located just an hour off the Pacific Coast touring route in the mid north coast hinterland. The Region's biggest Tourism drawcard is the World Heritage listed Barrington Tops wilderness, which draws visitors to the area for nature–based experiences (for both wellbeing and 'adventures'). Gloucester is the main settlement (by a considerable margin), with Barrington, Bundook, Copeland, Craven and Stratford the other main centres of population.

The Town of Gloucester itself is blessed with a stunning location at the foot of 'the remarkable Bucketts Mountains' and retains a 'small country town' appeal which is clearly also an important draw for visitors.[181]



Map 9: Detailed Tourism Map for the Gloucester Region
© 2015 Gloucester Tourism.

7.2 The Importance of Tourism to the Gloucester Region

With 180,000 visitors in 2015 staying for more than 268,000 nights and spending AUS $51 million annually, the Gloucester Region ranks 14th out of the 15 Local Government Areas that make up North Coast NSW. It is significantly smaller than either the Great lakes (AUS $359 million, 5th) or Greater Taree/ Manning (AUS $160 million, 8th). *Table 17.*

Coffs Harbour ranks 1st overall, followed by Port Macquarie–Hastings, Byron, Tweed and then the Great Lakes. Clarence Valley follows closely after the **Great Lakes**, and is in turn followed by Ballina, Kempsey, **Greater Taree (Manning)**, Lismore, Richmond, Nambucca Valley, Bellingen, **Gloucester** and then lastly Kyogle.

Whilst second from bottom, Gloucester receives over twice as much Tourism revenue as Kyogle, the bottom ranked region (AUS $51 vs. AUS $24 million), whilst only receiving +54% more visitors.[182]

With an estimated 81 Tourism businesses (12% of the total of 678) and approximately 140 individuals directly employed in Tourism (7.8% of the total workforce of 1,799) and a further 129 indirectly employed to take the total to 210 (11.7% of total employment),* the Tourism Industry is the 7th most important employer in the Region.[183]

Table 17: Performance of North Coast NSW LGAs: Gloucester
Source: TRA, International & National Visitor Surveys 2014.

LOCAL GOVERNMENT AREAS (LGAs)	TOTAL VISITORS (2014)	TOURISM EXPENDITURE (2014)	RANK
Coffs Harbour	1,598,000	$433 million	1
Port Macquarie–Hastings	1,453,000	$423 million	2
Byron	1,376,000	$426 million	3
Tweed	1,444,000	$357 million	4
Great Lakes	998,000	$359 million	5
Clarence Valley	927,000	$299 million	6
Ballina	620,000	$181 million	7
Greater Taree (Manning)	677,000	$160 million	8
Kempsey	496,000	$171 million	9
Lismore	623,000	$116 million	10
Richmond	299,000	$76 million	11
Nambucca Valley	259,000	$75 million	12
Bellingen	223,000	$57 million	13
Gloucester	180,000	$51 million	14
Kyogle	129,000	$24 million	15

It sits below 'Agriculture, Forestry & Fishing' (304 employed), 'Healthcare and Social Assistance' (204), 'Retail Trade' (195), 'Accommodation & Food Services' (159), 'Mining' (155) and 'Education & Training' (147); and ahead of 'Manufacturing' (118), 'Public Administration & Safety' (109) and 'Construction' (102).[184]

From the point of view of economic contribution, at AUS $12.85 million per annum Tourism provides approximately 4.4% of the AUS $293.8 million in value added by all industry and 19.7% of Gross Regional Product (GRP), putting it below the Great Lakes Region (10.7% of industry and 30.3% of GRP), but ahead of the Manning Region (3.7% of industry and 10.5% of GRP).[185]

Tourism is particularly important in Gloucester as the Region's employment mix continues to change from primarily agricultural to a mix of mining and more service–based industries. Tourism is currently growing and, given there is some community concern about the growth of mining at present *(see Section 3.2)*, is likely to need to increase in importance still further in the coming decades to support a greater proportion of local employment.

The influx of 180,000 visitors per year to an area with a population of just over 5,000 clearly has a marked impact on the community; although the seasonality of visitors to Gloucester is nowhere near as severe as the Great Lakes, so the December/ January period is not as highly pressured. Despite this more even spread of visitors, the community is still affected both socially and environmentally (as well as economically) by the type and volume of Tourists the Region attracts.

If the intention is to grow the overall number over time, then particular care needs to be paid to the types of visitor targeted for growth to ensure they fit with long–term community aspirations.

* It should be noted that Tourism data is not reported separately in the ABS statistics, so the Gloucester figures have been estimated based on North Coast NSW data. This means these figures should be viewed as estimates only.

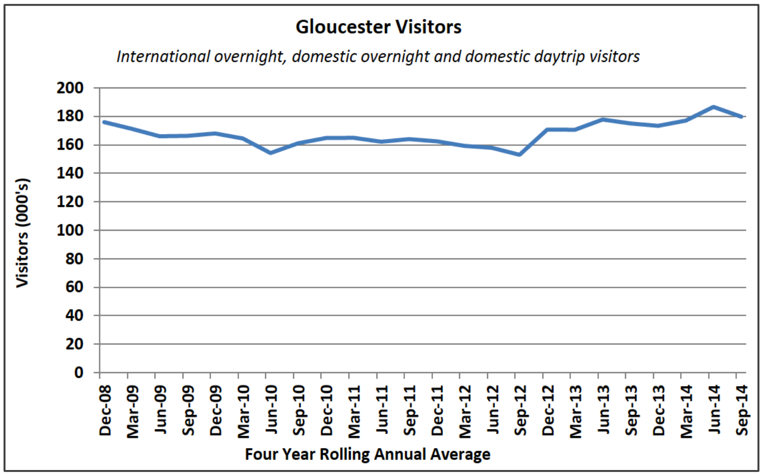
7.3 Current Tourism Performance in the Gloucester Region

A) Overall Performance

In terms of overall Visitor numbers, the Gloucester Region saw a gradual decline from approximately 177,000 at the start of 2009 to just under 158,000 in mid 2010. Visitor numbers were then flat to September 2012, before increasing to their current level of 180,00 (with a slight peak in June 2014 of over 186,000). *Graph 14*.

Visitors to the Region are more or less exclusively from domestic markets; almost 99.5% of the total (179,000) in the latest visitor figures (*Table 18)*. Sydney and Regional New South Wales make up an estimated 91.6% of Domestic Overnight Stays (88,000) – note that data numbers are too low to accurately estimate inter–state percentage splits with total numbers at 8,000 (8.3% of total).[186]

Graph 14: Gloucester Shire LGA Visitor Trend (2008–14)
Source: TRA, International & National Visitor Surveys 2008–15.



Other key overall characteristics include a high proportion of people visiting for a holiday (64%), 28% of people Visiting Family and Friends and only 8% visiting for other reasons (including Business). [187]

Not surprisingly the natural environment and rural setting (of the township of Gloucester in particular) are primary motivators for visiting. Lead activities tend to be outdoors focused: Visiting national parks 21% (+12pts vs. NSW state average of 9%); Bushwalks/rainforest walks 31% (+21pts vs. NSW state average of 10%); and general sightseeing 28% (+3pts vs. NSW state average of 25%).[188]

According to the current Gloucester Destination Management Plan (DMP), the Region has 'broad appeal to travelling families as well as child–free travelling couples and groups; luxury or deluxe experiences are limited.' [189]

Certain visitor demographics are also highlighted as being key to both Gloucester and the broader region, with the following target markets making up 63% of visitors to the Hunter Region:

1) **'Compatriots'** (mostly family groups);
2) **'Peer group Travellers'** (seeking a fun experience with friends);
3) **'Wanderers & True Travellers'** (taking time to explore and discover)'. [190]

A key issue also outlined in the recent DMP is the current skew of visitor spending to low cost nature–based holidays in the Region. This is likely driven by the majority of accommodation and experience offerings in the Region being historically more at the budget end with top–end/ luxury accommodation in particular highlighted as a gap in the offering currently (of the 6,000 accommodation beds available each night, over 80% are for camping and caravanning). [191]

Seasonality is the least marked of the 3 Regions studied, with an estimated 20–25% visiting in December and January. This is mainly due to the proximity of the Barrington Tops vs. being a coastal location so visitors remain attracted to the Region in winter and through the shoulder seasons (albeit in lower monthly numbers).[192]

Note: It would be informative to dig deeper into the trends in numbers between 2008–10 and 2012–15 to try to understand the specific drivers behind these changes. This was outside the immediate scope of this part of the project.

Note

*Additional detail from the full Local Government Area Tourism Profile for Gloucester can be found in **Appendix 18.10**.*

7.3 Current Tourism Performance in the Gloucester Region | Continued

B) International Visitors

Whilst representing only 0.5% of the current Tourism mix (1,000), International Visitors were estimated to have generated AUS $364,000 per annum in 2014 (0.7%). They spent 6,000 nights in the Region with an average stay of 5.5 nights and average spend per stay of AUS $364, behind both the Manning Valley (AUS $390) and the Great Lakes (AUS $617). *Table 18 and Destination NSW LGA Profiles 2014.*

95% of international visitors to the Region are estimated as coming for the purpose of a holiday, with a large proportion assumed to be attracted by the Barrington Tops National Park.[193]

Key markets for the Region as a whole (data not available for Gloucester specifically) have been identified as including the USA, UK, New Zealand, Germany and other countries in Europe. It is assumed a small number of Asian Tourists also visit (including from China and South Korea), but this cannot be fully validated.

There appears to be some opportunity to increase yield from International Tourists, potentially relatively simply by just encouraging a higher proportion of them to travel inland to visit Gloucester/ Barrington Tops NP. Increasing the number by just 500 would yield an estimated additional AUS $200,000 for the Region's economy.

C) Domestic Day Trip Visitors

45.6% of visitors to the Gloucester Region are Domestic Day Trip visitors (82,000), generating an estimated AUS $8 million per annum in 2014 (15.7%). They spent an average of $100 per trip (slightly below the NSW State average of $106) *Table 18*. Outdoor activities, visiting National Parks and VFR were the main reasons for visiting.[194]

D) Domestic Overnight Visitors

53.3% of visitors to the Gloucester Region are Domestic Overnight Visitors (96,000), generating an estimated AUS $43 million per annum in 2014 (84.3%). They spent 262,000 nights in the Region with an average stay of 2.7 nights and average spend per stay of AUS $445 (below the NSW State average of $574). *Table 18.*

34% of Domestic Overnight Visitors (526,500) currently originate from Sydney and 57% from regional NSW (91% of the total), with the remaining 9% assumed to be mainly from other major State Capitals (Brisbane, Canberra and Melbourne mainly) and the southern Queensland coast (accurate data unavailable).[195]

64% of Visitors come for the purpose of a holiday and 28% to Visit Friends or Relatives (VFR). The key activities are to eat out at restaurants, Visiting Friends & Relatives, bushwalking or rainforest walks, general sightseeing and visiting National or State Parks, highlighting the current importance of food and access to the natural environment to the visitor economy.[196]

Table 18: Selected Gloucester Tourism Metrics (2014/15) *

Sources: Tourism Research Australia, Regional Development Australia and Australian Bureau of Statistics (ABS) Tourism Satellite Account.

Regional Rank	Total Expenditure (Domestic + International)	% of Total LGA GRP	Total Visitors	Change +/– (Since 2008)	Market Share (of North Coast NSW)		Total Employment (Direct & Indirect)	
					Domestic	International	Total	% Jobs
14 (15)	$51.4 million (2014)	19.5% (2014)	180,000 (2014)	+1.1% (Visitor #)	2.0% visitors 1.5% nights (2014)	0.34% visitors 0.18% nights (2014)	210 (est.) (2015)	11.7% (est.) (2015)

International Visitors			Domestic Overnight			Domestic Day Trips	
Visitor #	Nights	Spend	Visitor #	Nights	Spend	Visitor #	Spend
1,000 (2014)	6,000 (2014)	$364,000 (2014)	96,000 (2014)	262,000 (2014)	$43 million (2014)	82,000 (2014)	$8 million (2014)

** Majority of Gloucester data is based on a 4 year rolling average to end September 2014. Note change in visitor numbers from 2013 to 2014 is an estimate only as 2013 LGA data is not comparable with 2014 data (based on different data sets).*

7.3 Current Tourism Performance in the Gloucester Region | Continued

E) General Visitor Analysis [Following data taken from the Gloucester Destination Management Plan 2015–18] [197]

A selection of additional tables and statistics are included here from the Gloucester DMP that provide further insight into the current state of Gloucester's Tourism industry.

Table 19 identifies a number of specific consumer segments and their source markets that have been called out by Gloucester Tourism as either already significant or with significant potential. They range from motorbike riders seeking out the renowned touring routes of the area on day or weekend trips, 'grey nomads' touring the Region, 'compatriots' looking for a camping break and free independent travellers looking for outdoor activities both in National Parks and around Gloucester.

Tables 19–23: Additional Gloucester Visitor Data (2014/2015)

Source: Gloucester Council (Wendy Hughes & Thomas Davey). *'Gloucester Destination Management Plan 2015–18'.*

19| SOURCE MARKET	Consumer Segment	Reason for Visit
Sydney, Regional NSW	'Compatriots'.	Families and groups for scenic driving routes, camping, outdoor activities.
NSW, QLD, VIC	'True Travellers' / 'Grey Nomads' / 'Wanderers'.	Scenic driving routes, camping, outdoor activities.
Sydney, Regional NSW	'Peer Group Travellers'.	Scenic driving routes, camping.
Europe, North America	Free Independent Travellers.	National Parks, scenic driving routes, outdoor activities.
Sydney, Regional NSW	Motorbike riders.	Groups of motorbike enthusiasts for scenic driving routes.
Hunter, Central Coast, Sydney	School Groups.	National Parks, outdoor education activities
Newcastle, Mid north coast	Day–trippers.	Seasonal sporting and cultural events, Gloucester Farmers Market, main street shopping.

Table 20 looks at the make–up of travel party; those with children (31%, +4pts), traveling as a couple (28%, +2pts) and 'wanderers without children' (24%, +9pts)are the lead groups all above the NSW average. Table 21 looks at purpose of visit, with the lack of business travel evident and 'Holiday' by far the most important (64%, +22pts vs. NSW average), followed by VFR at 28% (–9pts vs. New South Wales average).

20| TRAVEL PARTY	Gloucester LGA	NSW Average
Travelling with children	31%	27%
Travelling as a couple	28%	26%
Wanderers without children	24%	15%
Travelling alone	N/A	26%
Business associates	N/A	4%

21| PURPOSE OF VISIT (Domestic O/N)	Gloucester LGA	NSW Average
Holiday	64%	42%
Visiting friends or relatives	28%	37%
Business	N/A	17%
Other	N/A	6%

Looking at accommodation demand (Table 22), the dominance of camping/ caravanning is clearly apparent with 4,821 of the 5,973 available beds (81%), followed by self–contained (532, 9%), resorts/retreats (4.5%) and motels (4%). Looking at Top 5 activities, bushwalking is significantly above the NSW average (31%, +10pts), as is visiting National/ State Parks (21%, +9%); VFR (31% vs.49%) and eating out (40% vs. 58%) are also key activities but are significantly below state averages.

22| ACCOMMODATION	Total Beds	Beds in Gloucs.
Self-contained / self-catering	532	143
Bed & Breakfast	61	21
Motel	235	235
Resort / retreat	261	0
Lodge	63	0
Caravan /camping	4,821	2,000
Total Beds	**5,973**	**2,399**

23| TOP 5 ACTIVITIES	Gloucester LGA	NSW Average
Bushwalks & rainforest walks	31%	10%
Visit National or State Parks	21%	9%
General sightseeing	28%	25%
Visit friends & relatives	31%	49%
Eating out	40%	58%

7.3 Current Tourism Performance in the Gloucester Region | Continued

F) Key Tourism Assets of the Gloucester Region

Ten key assets of the Gloucester Region have been identified as important for attracting visitors, with the Barrington Tops NP (and other Parks and Reserves), clearly called out as the main reason for visiting.

It is interesting that the Bucketts Way is called out as the second key asset given it is one of 3 primary access routes into Gloucester; underlining that the Region is heavily (perhaps over–) reliant on this source of tourist traffic which will needs careful management into the future.

It is also notable that boutique and high–end/ luxury accommodation are absent as assets; as are health/ yoga retreats (which would seem to be well–suited to the area – and could be one way to increase overall yield), and more top–end food and wine offerings.

Table 24: Key Assets for Tourism in the Gloucester Region

Source: Gloucester Council (Wendy Hughes & Thomas Davey). *'Gloucester Destination Management Plan 2015–18'.*

ASSET	DESCRIPTION	CONSUMER APPEAL
1| **Barrington Tops and surrounding National Parks, forests, reserves and Conservation Areas; the Bucketts Mountains.**	World Heritage listed wilderness area, part of 'Gondwana Rainforests of Australia World Heritage Area'; Copeland Tops SCA; Mountain Maid; scenic mountains overlooking the Gloucester township.	The major attraction to the Gloucester Region; a world–recognised destination for domestic plus international visitors; ideal for low cost nature–based Tourism and 21st century experiential travel; scenic beauty so close to the township.
2| **Tourist Drive #2 (Bucketts Way) plus Thunderbolts Way.**	Scenic loop off the Pacific Highway; plus scenic route from Newcastle to the Queensland border.	Additional scenic rural experience for road users of The Legendary Pacific Coast route; plus alternate scenic route to New England and Queensland. Scenic vistas at every turn making a beautiful entrance to the Gloucester Region.
3| **Camping, Caravaning and RV destinations.**	Camp Cobark, Poley's Place, The Steps, Gloucester Holiday Park, campsites at Bretti, Woko and 10 camping areas within Barrington Tops and Gloucester Tops.	Low cost Nature–based holidays.
4| **Outdoor Adventure Activities.**	Bushwalking, horse riding, kayaking, canoeing, mountain biking (incl. Steps MTB Park), abseiling, orienteering, fishing, gold mine heritage tours.	Guided and unguided outdoor adventures on the rivers or mountains.
5| **Impressive Sporting Facilities.**	Gloucester District Park including the Recreation Centre, Olympic Pool & Hydrotherapy Complex, Gymnasium, Tennis Club, Croquet Club, Bowling Club.	Sporting activities for all tastes and skills: hockey, rugby union and touch football, cricket, athletics, netball, tennis, croquet, basketball, badminton, volleyball, gym, squash and bowls.
6| **Café culture and boutique–style shopping on a relaxed main street.**	Award–winning Roadies Café, Perenti Café, The Fox Den Café & other businesses.	Gourmet food, great coffee and country town ambience for visitor shopping.
7| **Farm stays and farm tours.**	Trudgalong Farm Tours, Ashmar Farm Stays, Hillview Herb Farm, Essentially Barrington etc.	Quintessential rural farm experiences with real farmers and food growers.
8| **Gloucester Farmers Market.**	Monthly markets dedicated to locally grown fresh produce.	Local meat, fruit, vegetables, eggs, honey, cheeses, breads, olive oils, wines, live poultry, plants, crafts, preserves etc.
9| **Gloucester Gallery.**	An active cultural scene for the creative arts.	A year full of events, festivals exhibitions, shows and performances.
10| **Wildlife.**	Existing recognition of being platypus country; the Gloucester Region also has every iconic Australian animal living in their natural habitats; easy access to Devil Ark (Tasmanian Devil breeding program).	Koala, platypus, kangaroo, wallaby, echidna, perentie, wombat and birds of all kinds. Tasmanian Devils at Devil Ark is a unique experience on the mainland.

7.3 Current Tourism Performance in the Gloucester Region | Continued

G) General Observations and Main Settlements/ Parks

Although there is no specific quantitative analysis available on the relative strengths of each asset, it would appear that the basis for a growing, strong, resilient, rural, outdoor and nature–based Tourism offering is in place.

There are obviously Tourism experience and infrastructure gaps that need addressing (many of which are highlighted in Gloucester's DMP), with minimal local capacity to invest heavily in accelerating growth and/ or opening up new markets. However, there is at least some basic infrastructure in place for many of the Tourism opportunities that appear to have potential for strong growth and a small number of businesses have already started to try to develop some of them (particularly in the Nature and Adventure–based areas).

As a final element of background detail on the make–up of the Gloucester Region, a summary of the main towns, villages and key localities is included below, along with National Parks, SCAs and Nature Reserves.

Table 25: Main Settlements and Parks in the Gloucester Region
Source: Government of New South Wales.

MAIN TOWNS, VILLAGES, PARKS AND LOCALITIES OF THE GLOUCESTER REGION (2015)
KEY SETTLEMENTS AND SITES OF INTEREST Barrington, Barrington Tops, Barrington River, Berrico, Bretti, Buccan Buccans (Bucketts Mountains), Bundook, Callaghans Creek, Carson's Lookout, Copeland, Copeland Mine, Craven, Devil Ark, Faulkland, Gangat, Giro, Glen Ward, Gloryvale Reserve, Gloucester, Gloucester Tops, Kia–Ora Lookout, Lions Scenic Walk, Mograni Lookout, Mountain Maid Gold Mine, Mount Peerless, Pitlochry, Rawdon Vale, Rocky Crossing, Rookhurst, Scone Road, Stratford, The Steps, The Bucketts Ways, Thunderbolts Way, Tibbuc, Tiri, Upper Bowman, Waukivory, Woko.
SELECTED NATIONAL PARKS, STATE CONSERVATION AREAS AND NATURE RESERVES Barrington Tops NP, Barrington Tops SF, Berrico NR, Billabong Park, Black Bulga SCA, Bowman SF, Bretti NR, Bucketts Scenic Walk, Camels Hump NR, Chichester State Forest, Coneac SCA, Copeland Tops SCA, Curracabundi NP, Gloucester District Park, Gloucester Tops NP, Monkerai NR, The Glen NR, Woko NP.

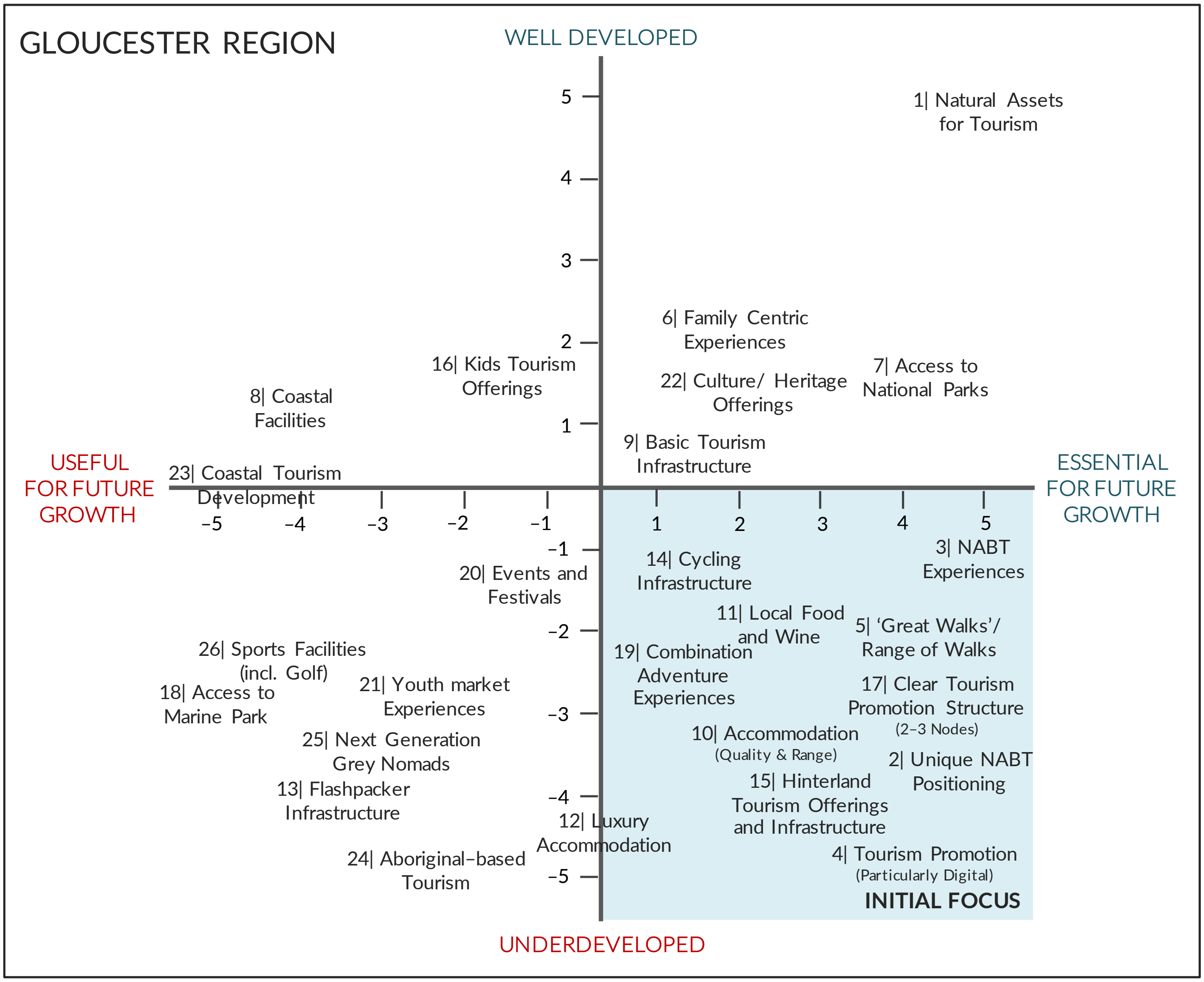
7.3 Current Tourism Performance in the Gloucester Region | Continued

H) Indicative Gap Analysis for the current Gloucester Tourism offering

To summarise some of the current gaps in the Gloucester Tourism industry, an initial summary gap analysis has been undertaken, whilst acknowledging that there are some clear deficiencies in the available data.

The following graphic looks at 26 key components and identifies the main areas of weakness that will need addressing to open up the growth opportunities in Gloucester identified in the latter part of this report.

Graphic 13: Gap analysis of key components of Gloucester Region Tourism
Analysis by 2iis Consulting based on Baseline Analysis and DMS Field Visits April–August 2016.



Looking at the gap analysis matrix above, the bottom right quadrant is where the main suggested areas for development can be found. The components there include the overall 'Tourism Promotion (particularly digital)', 'Unique NABT Positioning', 'Clear Tourism Promotion Structure', 'NABT experiences', 'Great Walks/ Range of Walks', 'Accommodation' (quality/ range generally and Luxury specifically), 'Local Food & Wine', and 'Hinterland Tourism Offerings and Infrastructure'.

Those in the top right are those that are essential for future Tourism growth, but are already relatively well developed. They will still need focus and investment, but are less of a priority than the bottom right quadrant.

NOTE: DETAIL ON THE FUTURE GROWTH POTENTIAL FOR TOURISM IN THE GLOUCESTER REGION CAN BE FOUND IN SECTION 14.

7.4 Overall Approach to Growing Tourism in the Gloucester Region | www.visitgloucester.com.au

Gloucester Tourism consists of a small team of part–time employees and volunteers who are responsible for the marketing, management and development of Tourism in the Gloucester Region with a particularly restricted budget (due to being in an overall low council income area up till recently with high infrastructure costs).

Gloucester Tourism states its' overall vision as being ***'that the Gloucester Region maximises the benefits of sustainable Tourism growth, whilst retaining its distinct rural character and appeal. It does this through harnessing the strength of the Visitor Economy to sustainably grow all small business in Gloucester.'*** [198]

Overall Direction for the Gloucester Community and Tourism's Role

Gloucester has an overall Community Strategic Plan that identifies Tourism as a key component in *'Direction 3: Creating a strong economy'*. The key goal outlined within this direction directly relevant to Tourism is to achieve 'an improved quality and number of Tourism facilities, products and operators.' [199]

This Destination Management Plan sits underneath this Community Strategic Plan, with the overall aim of Gloucester Tourism stated as being: 'To drive greater numbers of the targeted market segments to visit Gloucester and to encourage longer stays and higher spend with greater dispersal.' [200]

Both the overall direction and aim are fairly general statements that do not directly specify the type of Tourism or exact target segments to be focused on. Nature–based and Adventure–based Tourism and lower impact types of Tourist activity (e.g. rural–based holidays) are implicit in the vision, but are not clearly laid out as the primary focus areas.

[See the full Destination Management Plan here: http://visitgloucester.com.au/wp-content/uploads/2016/01/Gloucester-Destination-Management-Plan-2015-18-at-20Jan2016.pdf]

[More on the Community Plan: http://midcoast.gloucester.nsw.gov.au/council/community-strategic-plan--ip-r-/community-strategic-plan]

7.4 Overall Approach to Growing Tourism in the Gloucester Region | Continued

Summary of Gloucester Tourism's Current Objectives

Gloucester's Destination Management Plan 2015–18 outlines core objectives against 3 time horizons:

1) Short Term

'Short term objectives focus on continuing improvements to communication & product development tasks: refreshing & updating collateral; encouraging more social media conversations; developing a program of special events (sporting, cultural, food & unique fun events); leveraging marketing activities of key partners such as the Legendary Pacific Coast; developing an experiential trails strategy; identifying & assisting with improvements to product offerings; strengthening the industry voice to champion Gloucester's visitor economy; & evolving the Visitor Information Centre.' [201]

2) Medium Term

'Medium term objectives: targeting special interest markets; developing regional partnerships and building professionalism within the local industry.' [202]

3) Long Term

'Long term objectives focus on increasing the depth and diversity of experiences in Gloucester and ensuring the visitor economy is self–sustaining.' [203]

'Gloucester's Current Destination Footprint'

The DMP also includes a succinct summary of how the current Tourism destination footprint is defined:

"The destination footprint for the Gloucester Region has its boundaries where travellers notice a change from coastal hinterland or rugged mountains to pretty rural scenery. It's "where the beauty starts" and already has a long established name: 'The Vale of Gloucester'.

This Region has been listed by the National Trust since 1975 as a declared 'significant heritage landscape' stretching from Booral in the south to Barrington in the north. The listing title has also been amended to 'The Stroud–Gloucester Valley, incorporating the Vale of Gloucester.'

In the south and east, the Key Destination Footprint extends beyond Gloucester's LGA boundary to include historic Stroud and Booral (60km south of Gloucester), Krambach (40km east of Gloucester), and the escarpment at Barrington Tops in the west.

Key destinations/villages within LGA:	*Gloucester township, Barrington, Copeland, Barrington Tops, Gloucester Tops, Carson's Lookout, Mountain Maid Gold Mine, Rocky Crossing.*
Key destinations/villages outside LGA:	*Stroud, Moonan Flat, Devil Ark (Tomalla), Krambach.*
Road approaches to Gloucester:	*Approach from south & east via the Bucketts Way (Tourist Drive #2), from north via Thunderbolts Way (Gloucester to Goondiwindi) and from the west via the Scone–Barrington Tops Forest Road."* [204]

© David Hayes | The Bucketts Way

7.4 Overall Approach to Growing Tourism in the Gloucester Region | Continued

The Gloucester Township [205]

Gloucester itself is well–located in a picturesque location at the foot of the Buccan Buccans (Bucketts Mountains) with a main street that has more or less held on to its 'small rural country town' appeal.

With the Barrington Tops as the major draw for visitors to the Region, the intent is for Gloucester to then *'increase the length of their stay by fully servicing their needs'*–a stated intent that perhaps undersells the attributes of Gloucester and its surrounds. [206]

Situated at the centre of the Bucketts Way, the second–oldest official Tourist Drive in New South Wales, Gloucester also looks to maximise the benefits of the through–traffic heading to and from regional New South Wales and the Queensland border. Close to the key markets of Newcastle, Central Coast and Sydney, it is currently popular for short breaks, day trips and school holidays.

The roads running out of Gloucester are also regarded as some of the best for motorbike touring in New South Wales – a notable niche where Gloucester outperforms the remainder of the MidCoast Council Area.

Identified Gloucester Brand Values [207]

15 Brand Values have been identified as underpinning the overall positioning of Gloucester (centred on the township, but some are relevant more broadly). As with the key assets identified earlier, there is no quantitative data on whether these brand values currently have resonance with visitors and some, like the 'extensive accommodation choices for any budget', do not fully match up with the lack of luxury/ top–end accommodation identified elsewhere in the DMP. These brand values could be an area to start tracking in the future.

1) A remarkable setting at the foot of the Buccan Bucccans (the Bucketts Mountains);
2) Easily accessed by road and by rail, in a location handy to major centres;
3) Thriving rural heritage with a strong sense of community;
4) A comprehensive range of shopping options on a relaxed main street;
5) Cafes, wineries, pubs and clubs for all tastes and all seasons;
6) Extensive accommodation choices for any budget;
7) Impressive sporting facilities for all skills and abilities;
8) World heritage nature nearby for adventure and wellbeing;
9) Pristine rivers for swimming, paddling and platypus habitat;
10) Beautiful and productive farmlands providing food for the state;
11) Scenic drives that will change your outlook and maybe your life;
12) An emerald–green network of national parks, forests and conservation areas;
13) A year–long agenda of unique and entertaining events;
14) A farmers' market that inspires other markets;
15) A wonderful place to live, work and play.

© Ian Miller | The Bucketts Mountains

7.4 Overall Approach to Growing Tourism in the Gloucester Region | Continued

Gloucester's Unique Selling Proposition

Gloucester Tourism's long–established tagline is: **Gloucester – Basecamp for Barrington Tops.**

As the closest town to World Heritage listed Barrington Tops, this tagline has clearly benefitted the Region's Tourism. However, despite the view expressed in the current DMP that it is *'perfect for 21st century Tourism – it conjures images of clean green adventure, discovery of places and self–discovery too; It offers the promise of experiences not offered elsewhere and so fits perfectly with the focus on experiential Tourism promoted by Destination NSW and Tourism Australia..'*, [208] it does have some weaknesses.

A key weakness is that it possibly makes Gloucester's Tourism promotion too focused on the Barrington Tops, which means broader development opportunities for Gloucester and the surrounding rural areas are not prioritised and/ or invested in sufficiently. This is looked at in more detail in Section 10 *('Gloucester, Great Lakes and Manning Tourism Brands')* – note that this observed weakness does not necessarily mean moving entirely away from this positioning, but potentially broadening it to including other aspects of the Gloucester Region's tourism offering.

Gloucester–Barrington Tourism Membership Program

Gloucester Tourism runs a structured Membership Program that, for a base fee of $150 per annum for Tourism Businesses, offers a range of benefits mainly centred around Tourism promotion, networking and capacity building. It was updated for the 2014–15 year to include a 'Promotions Pack' (helping Tourism businesses with online promotion) and 'Events Club' (helping promote members' events). There were 97 member businesses in 2014–15.

[See the Membership Prospectus here: http://visitgloucester.com.au/wp-content/uploads/2015/03/G-BT-Tourism-prospectus-2014-15.pdf]

Gloucester Tourism Budget 2014–15 and Tourism Visitor Infrastructure

Until the amalgamation, Gloucester Tourism was primarily funded by the Gloucester Council, with a Budget in 2014–2015 of AUS $201,000 against AUS $141,00 in net reported actual expenses.[209]

Around AUS $14,000 is also received annually via the Gloucester Tourism Membership Program.

There is a single Visitor Information Centre in the centre of Gloucester Township and staffing consists of: a Tourism Manager (part–time paid position), a Tourism Promotion Officer (part–time paid position), an Events Liaison Officer (part–time paid position), Volunteers to staff the Visitor Information Centre (23 in total) and a Chair & Secretary of 'Tourism Advancing Gloucester' (volunteer positions).

Key Identified Risk to Future Tourism Development in the Gloucester Region

A number of lower–level risks are identified in the DMP, but the main risk appears to rest in the potential for significant expansion in open–cut coal mining and Coal Seam Gas exploration and extraction. This has been at the centre of widespread community concern and is clearly a genuine risk to any Nature–based or Adventure–based Tourism proposition that might be focused on in the future.

There is some anecdotal evidence that the perception that the development is already of high environmental impact is having a noticeable impact on Tourism to the Region. [210]

7.5 Key Promoted Gloucester Tourism Offerings | www.visitgloucester.com.au

The Visit Gloucester website starts by welcoming visitors to 'Gloucester New South Wales, basecamp for Barrington Tops world heritage wilderness.'

Alongside 'Latest News' which features strongly on the homepage, it leads with 'Accommodation', 'Eating Out', 'Shopping' and 'Activities'.

Overall, this means neither the Region as a whole, nor the major locations in Gloucester are 'heroed', and the overall creative and structure of the homepage are not as strong or compelling as they could be. That said, some of the key images at the head of the page are striking (the platypus and food images for example).

The 'Latest News' also prevents a clear impression of what's on offer in the Region being communicated and there is no real sense that this is a leading Nature–based Tourism destination in the state.

Unlike the Manning Valley and Great Lakes, Gloucester does not call out key areas of the Region that have something particular to offer visitors, but focuses more on describing the activities and service offerings available. This, in reality, makes the overall approach feel weaker.

One area that does come across strongly is the food, wine and cultural offering, with the Farmers' Markets and potential for local produce clearly a part of the offering.

The most structured section is probably the 'Activities' page which highlights 'Entertainment', 'Galeries & Museums', 'National Parks & Conservation Areas', 'Outdoor Adventure', 'Picnics & Play Areas', Sports', 'Tours & Walks' and 'Wineries'

'Outdoor Adventure' is also relatively structured, however it also illustrates another general problem with the current approach. At the moment the section only promotes individual Tourism businesses, rather than outlining what is available from an overall Tourism Experience point of view as well as recommending some Tourism providers.

Once potential visitors start exploring the site, the 'Visitor Info/ Maps' section provides some fairly detailed guides on 'Scenic Drives', Walks', 'Things to Do' and 'Activities', although, again, there is nothing on the Region as a whole.

The Gloss GLOUCESTER
What makes Gloucester shine!

7.5 Key Promoted Gloucester Tourism Offerings | www.visitgloucester.com.au | continued

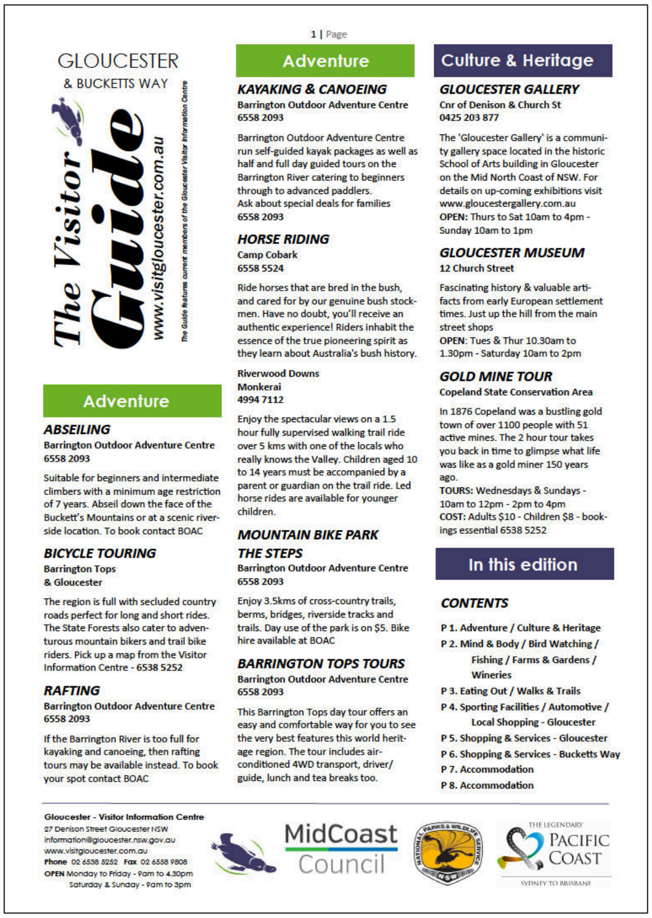
It is interesting to note that, in spite of the positioning of the entire destination being about the Barrington Tops, there is actualy minimal detailed information about them on the main Visit Gloucester web site. Detailed content on this is available on www.barringtontopstourism.com.au, but there is certainly an opportunity to build the core website more around this if the future positioning remains the same or similar.

Outside of the website, the other main initial entry point for Tourism information is 'The Gloucester & Buckett's Way Visitor Guide'. This guide does provide some useful detailed information, but is a very functional piece of material, which does mean it compares unfavourably with both the Manning Valley and Great Lakes Visitor Guides.

Given it is such a central piece of collateral for promoting Gloucester, it could definitely better bring the Region to life visually as well as provide some stronger maps (the digital maps on the site are also less clear than they could be).

From a Tourism offering point of view, the guide leads with 'Adventure', followed by 'Culture & Heritage', 'Mind and Body', 'Fishing', 'Birdwatching', 'Wineries', 'Eating Out', 'Walks and Trails' before ending with 'Shopping & Services'.

See the current Gloucester Visitor Guide here:
[http://visitgloucester.com.au/wp-content/uploads/2016/08/The-Visitor-Guide-7.2016.pdf]



1 | Page

GLOUCESTER & BUCKETTS WAY

The Visitor Guide

www.visitgloucester.com.au

The Guide features current members of the Gloucester Visitor Information Centre

Adventure

ABSEILING
Barrington Outdoor Adventure Centre
6558 2093

Suitable for beginners and intermediate climbers with a minimum age restriction of 7 years. Abseil down the face of the Buckett's Mountains or at a scenic river-side location. To book contact BOAC

BICYCLE TOURING
Barrington Tops & Gloucester

The region is full with secluded country roads perfect for long and short rides. The State Forests also cater to adventurous mountain bikers and trail bike riders. Pick up a map from the Visitor Information Centre - 6538 5252

RAFTING
Barrington Outdoor Adventure Centre
6558 2093

If the Barrington River is too full for kayaking and canoeing, then rafting tours may be available instead. To book your spot contact BOAC

Adventure

KAYAKING & CANOEING
Barrington Outdoor Adventure Centre
6558 2093

Barrington Outdoor Adventure Centre run self-guided kayak packages as well as half and full day guided tours on the Barrington River catering to beginners through to advanced paddlers. Ask about special deals for families
6558 2093

HORSE RIDING
Camp Cobark
6558 5524

Ride horses that are bred in the bush, and cared for by our genuine bush stockmen. Have no doubt, you'll receive an authentic experience! Riders inhabit the essence of the true pioneering spirit as they learn about Australia's bush history.

Riverwood Downs
Monkerai
4994 7112

Enjoy the spectacular views on a 1.5 hour fully supervised walking trail ride over 5 kms with one of the locals who really knows the Valley. Children aged 10 to 14 years must be accompanied by a parent or guardian on the trail ride. Led horse rides are available for younger children.

MOUNTAIN BIKE PARK THE STEPS
Barrington Outdoor Adventure Centre
6558 2093

Enjoy 3.5kms of cross-country trails, berms, bridges, riverside tracks and trails. Day use of the park is on $5. Bike hire available at BOAC

BARRINGTON TOPS TOURS
Barrington Outdoor Adventure Centre
6558 2093

This Barrington Tops day tour offers an easy and comfortable way for you to see the very best features this world heritage region. The tour includes air-conditioned 4WD transport, driver/guide, lunch and tea breaks too.

Culture & Heritage

GLOUCESTER GALLERY
Cnr of Denison & Church St
0425 203 877

The 'Gloucester Gallery' is a community gallery space located in the historic School of Arts building in Gloucester on the Mid North Coast of NSW. For details on up-coming exhibitions visit www.gloucestergallery.com.au
OPEN: Thurs to Sat 10am to 4pm - Sunday 10am to 1pm

GLOUCESTER MUSEUM
12 Church Street

Fascinating history & valuable artifacts from early European settlement times. Just up the hill from the main street shops
OPEN: Tues & Thur 10.30am to 1.30pm - Saturday 10am to 2pm

GOLD MINE TOUR
Copeland State Conservation Area

In 1876 Copeland was a bustling gold town of over 1100 people with 51 active mines. The 2 hour tour takes you back in time to glimpse what life was like as a gold miner 150 years ago.
TOURS: Wednesdays & Sundays - 10am to 12pm - 2pm to 4pm
COST: Adults $10 - Children $8 - bookings essential 6538 5252

In this edition

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Gloucester - Visitor Information Centre
27 Denison Street Gloucester NSW
information@gloucester.nsw.gov.au
www.visitgloucester.com.au
Phone 02 6538 5252 Fax 02 6558 9808
OPEN Monday to Friday - 9am to 4.30pm
Saturday & Sunday - 9am to 3pm

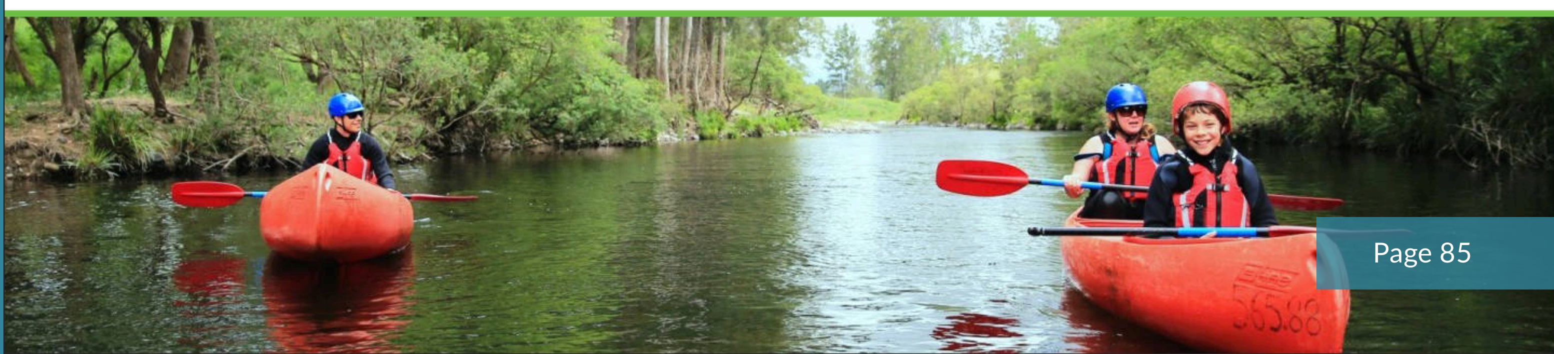
MidCoast Council

THE LEGENDARY PACIFIC COAST SYDNEY TO BRISBANE

Whilst many of the Tourism materials promoting Gloucester reviewed during this project are doing the functional job they were designed to do, overall they do not appear to be 'selling' the Region as effectively as they could. The lack of structure around the experiences available and overview of Gloucester's key Tourism regions are particularly critical areas to address.

Given that Gloucester is now part of the wider Mid Coast Council, reviewing how Manning Valley & Great Lakes have approached structuring some of their materials (admittedly with larger budgets) would seem like an ideal starting point. Examples of the Manning & Great Lakes' Tourism materials can be found in Sections 8 and 9 of this report.

Visit Gloucester and World Heritage Barrington Tops



7.5 Key Promoted Gloucester Tourism Offerings | www.visitgloucester.com.au | continued

Tourism in the Gloucester Region is currently very focused on the township of Gloucester, with minimal clear structure for the overall Tourism offering other than it being a base for access to the Barrington Tops NP. This is clearly limiting for future development and diversification of the current Tourism experience offerings.

The following table outlines some initial thoughts on the potential for a more structured approach to future Tourism development around up to 4 'nodes', with 2–3 probably being optimal.

Table 26: Potential future Gloucester Tourism Nodes [FOR COMPLETION DURING THE DMP PROCESS]
Initial proposal based on this baseline analysis.

#	POTENTIAL NODE	KEY SETTLEMENTS	INDICATIVE TOURISM OPPORTUNITIES
1	'Gloucester' Rural Centre	Gloucester, Barrington, Bundook, Copeland, Pitlochry.	Family holidays; Couples; Local Food & Wine; Farmers Markets; Grey Nomads; Rural Life; National Parks access, NABT; Heritage (e.g. gold mining)Great Walks Potential?; Festivals and Cultural Events.
2	'Barrington Tops NP'	Berrico, Faulkland, Glen Ward, Moppy, Rawdon Vale, Rocky Crossing.	NABT; Mountain Biking; Kayaking; Great Walks?; National Parks access; Health Retreats.
3	'Rookhurst and the Northwest Hinterland to Thunderbolts Way'	Rookhurst, Bretti, Giro, Gloryvale, Tibbuc, Woko.	Rural Life; Local Food & Wine; Farm breaks; Cycle–Touring; National Park access; River–based activities?
4	'Stratford and the Southeast Hinterland to Stroud' (The Bucketts Way)	Stratford Craven, Bangat, Waukivory, (Stroud).	Local Food and Wine offering; access to NABT in the Barrington Tops; Heritage offering; Cycle Touring and Mountain Biking.

* Note that names used for Potential Nodes are indicative only.

The above are suggested as indicative only and are intended to promote discussion and will be developed further during the remainder of the Destination Management Process.

How the Gloucester Region is structured for future Tourism development will also very much depend on the outcomes of the work that needs to be undertaken to segment the overall MidCoast Region and how this affects Gloucester. More detail on a potential structure for the MidCoast as a whole is included in Section 11.

© Barrington Outdoor Adventure Centre | The Barrington River

7.6 Nature–based Tourism in the Gloucester Region | All data from Table 27 unless specified

Given the existing base of Nature Nature–based and Adventure–based Tourism in the Gloucester Region, alongside the clear potential for further development, it is worth quantifying the current value as accurately as possible, before exploring its likely future growth.

Current estimates place the value of Nature–based and Adventure–based Tourism (NABT) in Australia at between AUS $16.5 billion and AUS $20.6 billion; in New South Wales at between AUS $6.1 billion and AUS $7.7 billion; and in North Coast New South Wales at between AUS $0.68 billion and AUS $0.86 billion.

An estimated 4.1 million International Visitors to Australia, along with approximately 15.5 million Domestic Day and 15 million Domestic Overnight visitors undertook some form of Nature–based activity in 2015.[211]

Modelling to 2030 predicts a value of NABT of up to AUS $101 billion for Australia, AUS $37.35 billion for New South Wales and AUS $4.2 billion for North Coast New South Wales. The overall question here is what proportion of this potential market the Gloucester will be able (or wants) to capture.

Table 27: Current and Forecast Value of Gloucester Nature–based and Adventure Tourism (2015 vs. 2030)
Sources: UN Statistics Division, Tourism Research Australia and Destination NSW.

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**

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

The current value of NABT in the Gloucester Region is estimated at between AUS $10.2 million and AUS $12.8 million. It is forecast to grow to between AUS $48.7 million and AUS $62.6 million by 2030.

This forecast potential value for Nature–based Tourism in the Gloucester Region makes it the single largest opportunity for the Region out to the end of the next decade; a characteristic of not just Tourism in Gloucester, but in the Great Lakes and, to a slightly lesser degree, in the Manning Region as well.

The 'Natural Tourism Assets' (or 'Natural Capital for Tourism') available to the Gloucester and broader MidCoast Region are mentioned throughout this report; it is no exaggeration to say they are the most important component of Gloucester and the MidCoast Regions' future Tourism growth.

It is difficult to accurately calculate the level to which these assets are currently being effectively used for Tourism in Gloucester, but somewhere between 10–20% could be an indicative range (i.e. $6.2 million).

A structured, long–term approach is clearly needed to manage these natural assets to ensure the $62.6 million forecast value from NABT and almost AUS $140 million in forecast value from all Tourism is realised (and therefore fully benefits the 5,000 strong Gloucester community).

7.6 Nature–based Tourism in the Gloucester Region | Continued

To conclude this section on Tourism in Gloucester, it is worth considering the walks currently available.

The following table provides a sample of walks in or near Gloucester as an initial introduction into the current level of development of walks in the Region. One immediate observation is that there is not a readily accessible comprehensive list of the walks on offer in the Region, with a variety of sources (including www.nationalparks.nsw.gov.au) having to be used to find suitable examples for this report.

Table 28: A Selection of Current Walks in the Gloucester Region
Source: NSW National Parks and Wildlife Service.

#	WALK	LOCATION	CATEGORY	DESCRIPTION
1	'Burraga Swamp walking track'	Barrington Tops National Park	1 Hour Walk	Burraga Swamp walking track is an adventurous walk offering rainforest and remote wilderness with spectacular scenic views in Barrington Tops National Park, near Chichester State Forest. 2km return.
2	'Gloucester Falls Walking Track'	Barrington Tops National Park	Easy 1 ½ Hour Walk	Short and easy Gloucester Falls walking track, with waterfall views, scenic lookouts, and birdwatching opportunities, makes for a great family day trip to Barrington Tops National Park.
3	'Cliff Face Track'	Woko National Park	2 Hour Walk	Cliff Face track provides a challenging walk through the best of Woko National Park, with dramatic scenic views towards the escarpment above.
4	'Aeroplane Hill Walking Track'	Barrington Tops National Park	2 ½ Hour Walk	Aeroplane Hill walking track offers scenic views, wildlife, and wetlands in the sub–alpine region of Barrington Tops National Park, between Scone and Gloucester. 6km one way.
5	'Gloucester Tops Circuit'	Barrington Tops National Park	½ Day Walk	Walk through open snow gum woodland to the Andrew Laurie lookout, along the Gloucester Tops circuit. Look out for swamp wallabies and grey kangaroos along the way. 8km loop.
6	'Basin Loop/ Hidden Treasure Track'	Copeland Tops SCA	½ Day Walk	Basin Loop Track continues from Hidden Treasure Track to form a longer walk with scenic views of Copeland Tops State Conservation Area via historic Old Copeland Road. 7km Loop.
7	'Mountaineer–Glowang trail'	Barrington Tops National Park	1 Day Walk (12 Hours)	Moderate Mountaineer–Glowang trail, near Wangat Road, offers scenic mountain views across Gloucester Tops wilderness in Barrington Tops National Park, between Gloucester and Dungog.
8	'Link trail – Gloucester Tops to Careys Peak'	Barrington Tops National Park	1–2 Day Walk	Offers a moderate walk or mountain bike trail & scenic views from Gloucester Tops to Barrington plateau, in Barrington Tops National Park. 38km Return.

There are clearly a range of walks available, but, compared with the scale associated with 'Great Walks', they are generally short and most are under a day in length. There are clearly options available for longer walks in the Barrington Tops NP, but they are not readily communicated at present (which presents a short–term opportunity that could easily be rectified).

As part of the long–term Nature–based Tourism opportunity in Gloucester and the broader MidCoast Region, developing suitable treks, walks and, potentially Great Walks will be necessary. There may even be the potential to link some of these walks right across the Region whether as multi–day hikes, one day walks or 'hub–and–spoke' type walks.

See Section 8.6 for examples of walks in the Great Lakes, Section 9.6 for Manning Region walks and Section 13.1 for further insights into the growing 'Great Walks' market and examples of a number of single day, multi-day and guided walks in New South Wales.

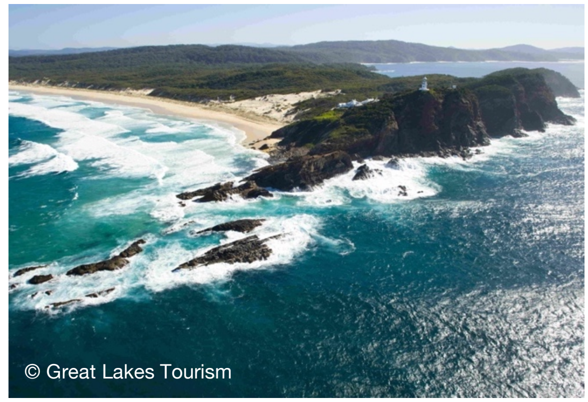
8 | CURRENT STATE OF TOURISM IN THE GREAT LAKES

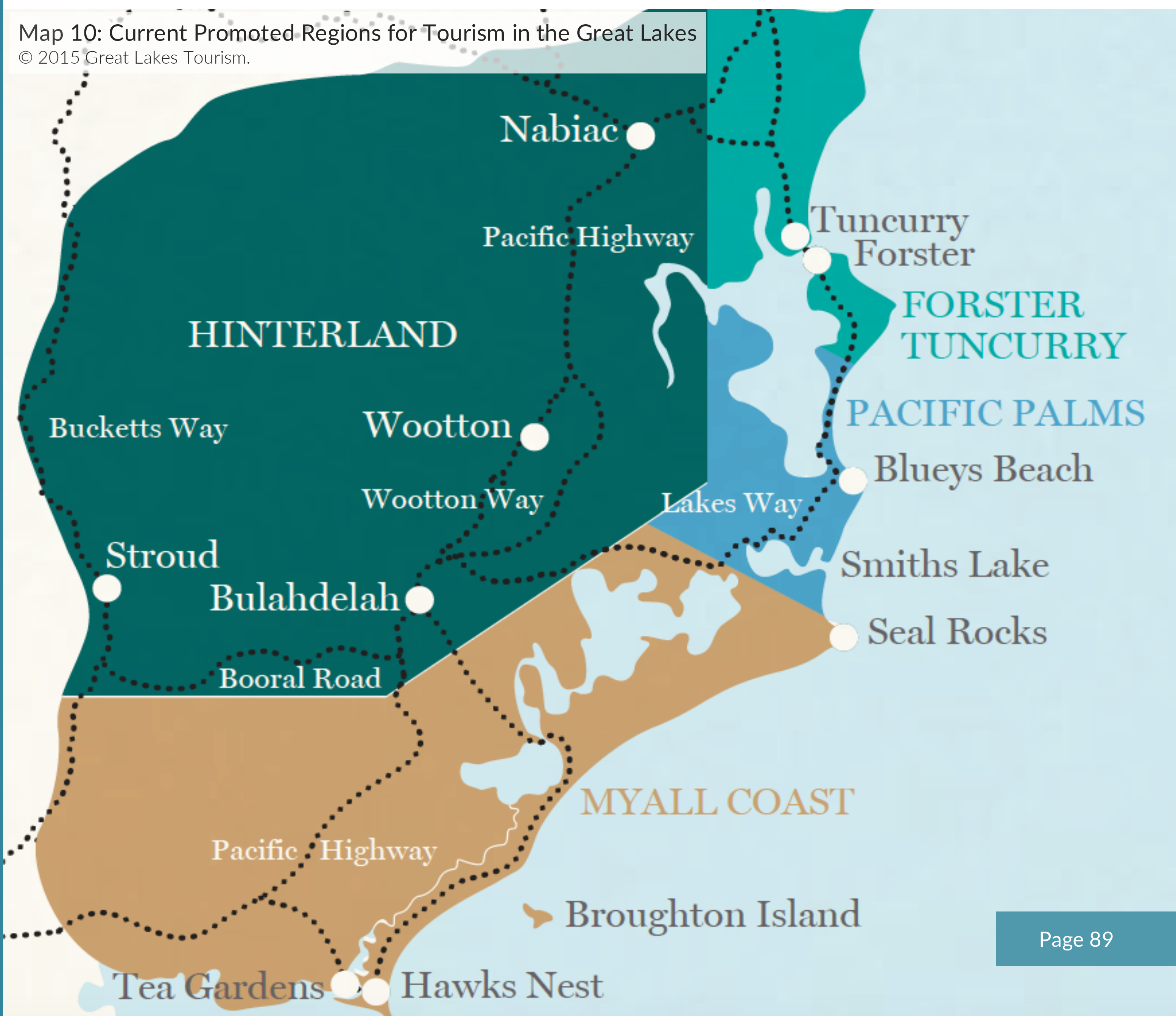
8.1 An Overview of Tourism in the Great Lakes

Key Statistics

Source: Australian Census data/ Australian Bureau of Statistics unless indicated.

Size:	3,373 sq. km
Population:	36,720 (est. 2016)
Population in 2036 (Est.):	45,850 (+24.3%) [212]
Population density:	10.9 per sq. km
Gross Regional Product (GRP):	AUS $32,298 per capita[213]
International Tourists:	12,000 (2014)
Domestic Visitors:	986,000 (2014)
Estimated value of Tourism:	AUS $359 Million per annum
North Coast NSW Ranking:	5 [15]





Map 10: Current Promoted Regions for Tourism in the Great Lakes
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8.2 The Importance of Tourism to the Great Lakes

With just under one million visitors in 2015 staying for more than 2.3 million nights and spending $359 million annually, the Great Lakes ranks 5th out of the 15 Local Government Areas that make up North Coast New South Wales. *Table 29.*

The Great Lakes actually ranks 4th for Tourism expenditure, but Tweed receives almost 450,000 more visitors annually and only AUS $2 million less in Tourism revenue, hence its placing above the Great Lakes in this analysis.

Coffs Harbour, Port Macquarie–Hastings, Byron and Tweed are the regions (previous LGAs) that rank ahead of the Great Lakes.

With regards to the new MidCoast Council Area, the Great Lakes is clearly ahead of both the Manning (+126%) and Gloucester (+494%) Regions.

With an estimated 391 Tourism businesses (16% of the total of 2,479) and approximately 925 individuals directly employed in Tourism (7.8% of the total workforce of 11,830) and a further 625 indirectly employed to take the total to 1,550 (13.1% of total employment),* the Tourism Industry is one of the major employers in the Region.[214]

Table 29: Performance of North Coast NSW LGAs: Great Lakes

Source: TRA, International & National Visitor Surveys 2014.

LOCAL GOVERNMENT AREAS (LGAs)	TOTAL VISITORS (2014)	TOURISM EXPENDITURE (2014)	RANK
Coffs Harbour	1,598,000	$433 million	1
Port Macquarie–Hastings	1,453,000	$423 million	2
Byron	1,376,000	$426 million	3
Tweed	1,444,000	$357 million	4
Great Lakes	998,000	$359 million	5
Clarence Valley	927,000	$299 million	6
Ballina	620,000	$181 million	7
Greater Taree (Manning)	677,000	$160 million	8
Kempsey	496,000	$171 million	9
Lismore	623,000	$116 million	10
Richmond	299,000	$76 million	11
Nambucca Valley	259,000	$75 million	12
Bellingen	223,000	$57 million	13
Gloucester	180,000	$51 million	14
Kyogle	129,000	$24 million	15

It sits alongside the ‘Retail Trade’ (1,546 employed) and ‘Healthcare and Social Assistance’ (1,537), and ahead of ‘Accommodation and Food Services’ (1,201), and ‘Construction’ (1,138).[215]

From the point of view of direct economic contribution, at AUS $166.96 million per annum Tourism provides approximately 10.7% of the AUS $1,549.73 million in value added by all industry and 30.3% of Gross Regional Product (GRP), putting it clearly ahead of both the Gloucester (4.4% and 19.7%) and Manning (3.8% and 10.5%) Regions when it comes to the overall importance of Tourism.

Tourism is important not just because of the employment and significant revenues it provides, but also the development it stimulates in the Region that directly benefits the local residents in terms of the access it facilitates to coastal areas and the natural environment, and other leisure activities that would not be as economically viable without a strong Tourism industry.

The highly seasonal influx of almost 1 million visitors per year to an area with a population of under 37,000 also has a marked impact on the community, with the types and numbers of visitors at different times of the year influencing the character of the Region and its communities. This is an important underlying consideration when considering the type of Tourism growth to focus on. With the Tourism population often outnumbering the locals, developing the ‘wrong kind of Tourism’ could easily have a detrimental impact on the Great Lakes, just as successfully growing the types of Tourism that best suit the Great Lakes’ Community aspirations will have significant positive social, cultural and environmental impacts to overlay the economic ones.

Lastly, it is also clear that Tourism development that encourages and promotes healthy lifestyles whilst leveraging the natural environment is a strongly desired long–term direction for the Region.

* It should be noted that Tourism data is not reported separately in the ABS statistics, so the Great Lakes figures have been estimated based on North Coast NSW data. This means these figures should be viewed as estimates only.

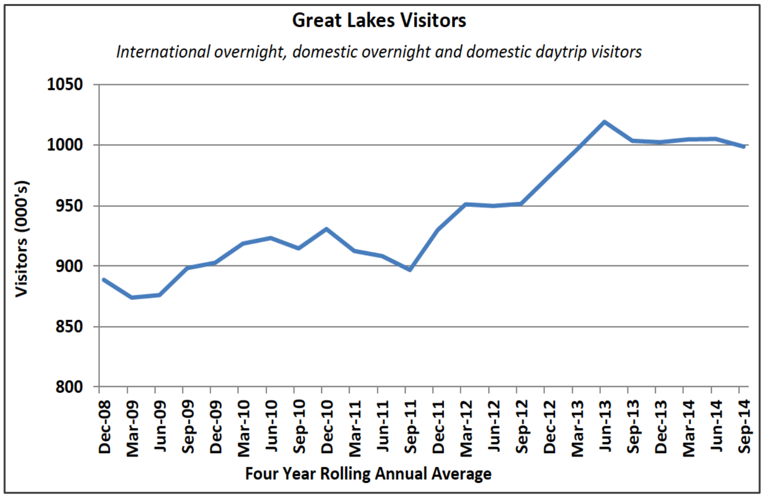
8.3 Current Tourism Performance in the Great Lakes

A) Overall Performance

In terms of overall Visitor numbers, the Great Lakes saw a steady increase from approximately 875,000 at the start of 2009 to over 1,020,000 in mid 2013 before a slight decline to the 2014 estimated annual visitor number of 998,000. 2010 to 2011 also saw a fairly marked decline in overall numbers. *Graph 15*.

Graph 15: The Great Lakes Visitor Trend (2008–14)

Source: TRA, International & National Visitor Surveys 2008–15.



Visitors to the Region are more or less exclusively Domestic based; 98.8% (986,000) of the total in the latest visitor figures (*Table 30*), with Sydney and Regional New South Wales making up an estimated 92% of that (907,000).[216]

Other key overall characteristics include a high proportion of family holidaymakers, high percentage of return visitors, high concentration of tourists staying in Forster Tuncurry, Hawks Nest and Pacific Palms and a large VFR market. Not surprisingly beaches and the natural environment are the primary motivators for visiting.[217]

Seasonality is particularly high with 60–80% of annual visitation estimated as occurring in the months of December and January.[218]

The reason for the gradual decline since 2013 is not clear, although it does reflect the North Coast New South Wales overall performance trend, which has also showed a slight decline in numbers and expenditure. There the downward trend was mainly through a reduction in Day Trip Visitors which may also be the main driver in the Great Lakes *(Table 30, p. 92)*.

B) International Visitors

Whilst representing only 1.2% of the current Tourism mix (12,000), International Visitors were estimated to have generated AUS $3.0 million per annum in 2014. They spent 54,000 nights in the Region with an average stay of 4.5 nights and average spend per stay of AUS $617, ahead of both the Manning Valley (AUS $390) and Gloucester (AUS $364). *Table 30 and Destination NSW LGA Profiles 2014.*

77% of international visitors to the Region are coming for the purpose of a holiday, with a large proportion assumed to be attracted by the surfing, beaches and Lakes.[219]

Key markets have been identified as including the USA, UK, New Zealand, Germany and other countries in Europe. It is assumed a small number of Asian Tourists also visit (including from China and South Korea), but no data appears available to fully validate this currently.[220]

There appears to be an overall opportunity to increase yield from International Tourists while also extending the length of stay, particularly as a proportion of the overall average length of stay in Australia.

C) Domestic Day Trip Visitors

40.2% of visitors to the Great Lakes are Domestic Day Trip visitors (401,000), generating an estimated AUS $44 million per annum in 2014 (12.3%). They spent an average of $110 per trip (the same as the NSW State average) *Table 30*. Water and coastal activities, a day out with the family/ kids and VFR were the main reasons for visiting the Great Lakes.[221]

Note

Additional detail from the full Local Government Area Tourism Profile for the Great Lakes can be found in ***Appendix 18.11****.*

8.3 Current Tourism Performance in the Great Lakes | Continued

D) Domestic Overnight Visitors

58.6% of visitors to the Great Lakes are Domestic Overnight Visitors (585,000), generating an estimated AUS $312 million per annum in 2014 (86.9%). They spent 2.32 million nights in the Region with an average stay of 4.0 nights and average spend per stay of AUS $533 (marginally below the NSW State average). *Table 30.*

90% of Domestic Overnight Visitors (526,500) currently originate from Sydney or regional NSW, with Brisbane/ Southern Queensland and Melbourne other small, but important, source markets.[222]

67% of Visitors come for the purpose of a holiday and 27% to Visit Friends or Relatives (VFR). The key activity is to visit the beach, highlighting the current importance of the Region's coastline to the visitor economy.[223]

As noted above for International Visitors, there appears to be an overall opportunity to increase yield.

Table 30: Selected Great Lakes Tourism Metrics (2014/15)*

Sources: Tourism Research Australia, Regional Development Australia and Australian Bureau of Statistics (ABS) Tourism Satellite Account.

Regional Rank	Total Expenditure (Domestic + International)	% of Total LGA GRP	Total Visitors	Change +/– (Since 2008)	Market Share (of North Coast NSW)		Total Employment (Direct & Indirect)	
					Domestic	International	Total	% Jobs
5 (15)	$359 million (2014)	10.7% (2014)	998,000 (2014)	+12.1% (Visitor #)	12.2% visitors 13.2% nights (2014)	4.1% visitors 1.7% nights (2014)	1,550 (est.) (2015)	13.1% (est.) (2015)

International Visitors			Domestic Overnight			Domestic Day Trips	
Visitor #	Nights	Spend	Visitor #	Nights	Spend	Visitor #	Spend
12,000 (2014)	54,000 (2014)	$3.0 million (2014)	585,000 (2014)	2.32 million (2014)	$312 million (2014)	401,000 (2014)	$44 million (2014)

** Majority of Great Lakes data is based on a 4 year rolling average to end September 2014. Note change in visitor numbers from 2013 to 2014 is an estimate only as 2013 LGA data is not comparable with 2014 data (based on different data sets).*

E) General Visitor Analysis [Following data taken from the draft Great Lakes Tourism Summer Visitor Survey 2016] [224]

A recent Summer Visitor Survey has been undertaken in the Great Lakes and, whilst findings are yet to be finalised, a number of charts from the draft survey are included here to provide additional insights into the current Tourism market. The respondents were mainly Australian residents (97%) and overnight visitors (96%).

Tables 31–39: Selected Great Lakes Visitor Survey Data (Draft, 2016)

Source: Wray Sustainable Tourism Research and Planning, Draft Great Lakes Tourism Summer Visitor Survey 2016.

31| PLACE OF RESIDENCE	%
Sydney	44
Regional NSW	48
Brisbane	2
Regional Queensland	3
Melbourne	.5
Regional Victoria	.5
Other*	6

* Northern Territory and Canberra

32| AGE	%
15 to 24 years	6
25 to 34 years	13
35 to 44 years	24
45 to 54 years	30
55 to 64 years	18
65+ years	9

33| MAIN PURPOSE OF TRIP	%
Holiday	71
Visiting friends and relatives	21
Daytrip visit (visiting for the day but not staying in the Great Lakes)	4
Stop-over (travelling to/from another destination)	1
Other	3

The place of residence data in Table 31 mirrors the data in Section 7.3 (A) with 92% originating from Sydney or Regional NSW and a small proportion from Brisbane (2%), Regional Queensland (3%) and Melbourne (0.3%).

92% are either visiting for a holiday (71%) or to visit Friends and Relatives (21%). The age of visitors skews slightly older than the regional average, with 81% over 35 years of age and 54% aged 25–54. *Tables 31, 32 & 33.*

8.3 Current Tourism Performance in the Great Lakes | Continued

E) General Visitor Analysis [Following data taken from the draft Great Lakes Tourism Summer Visitor Survey 2016]

34| TRAVEL PARTY	%
Adult couple	22
Family group (parent/s and children with oldest child aged 6 to 14 years)	22
Family group (parent/s and children with oldest child aged 15+ years)	16
Friends or relatives travelling together with children	16
Family group (parent/s and children with oldest child aged 5 years or less)	10
Friends or relatives travelling together without children	7
Travelling alone	4
Other (please specify)	3

35| TRANSPORT TYPE	%
Private car	96
Hire car	2
Air	.5
Bus or Coach	.5
Rail	0
Other	1

Adult couples and family groups with children aged 6–14 make up 44% of the total number of visitors (22% for each group), with family groups with older teenagers and friends or relatives with children the next largest groups (both 16%). Family groups with under 5 year olds make up 10% of visitors, followed by friends or relatives without children (7%) and lastly solo travellers (4%).

98% travel to the Region by car (96% private car, 2% hire car), with only 0.5% travelling by Air (assumed mainly interstate travellers) and 0.5% by Bus or Coach (assumed mainly backpackers). *Tables 34 and 35.*

36| PLACE OF STAY	%
Forster	38
Hawks Nest	15
Tuncurry	14
Pacific Palms (Elizabeth, Blueys, Boomerang Beaches)	10
Smiths Lake	5
Tea Gardens	4
Seal Rocks	3
Myall Lakes National Park	2
Nabiac	1
Bulahdelah	0
Other*	8

*Other places included Blackhead, Green Point, Hallidays Point, Krambach and Taree.

37| ACCOMMODATION TYPE	%
Rented Holiday House/Apartment	33
Commercial Camping/ Caravan/ Holiday Park	23
Home of a friend/relative	22
Motel/Hotel/Resort	9
Own property	7
B&B/Guesthouse	.5
Non-commercial Camping/Caravan area (e.g. National Park, Private Property)	1.5
Other*	4

*Other responses mainly related to day-trip visitors that were not staying overnight

38| LENGTH OF STAY	%
1 night	8
2 nights	5
3 nights	6
4 to 7 nights	42
8 to 15 nights	24
15+ nights	15

39| TRIP EXPENDITURE	$0 %	$1 to $500 %	$501 to $1000 %	$1001 to $2000 %	$2001 to $3000 %	$3,001+ %
Accommodation	31	16	18	20	9	6
Takeaways & restaurant meals	4	71	17	7	1	0
Groceries for self-catering	6	64	24	5	1	0
Alcohol	21	67	9	2	0	1
Retail shopping	15	67	15	3	0	0

In terms of main places stayed, Forster (38%), Hawks Nest (15%), Tuncurry (14%) and Pacific Palms (10%) together make up 77% of the total, with a further 14% in Smiths Lake (5%), Tea Gardens (4%), Seal Rocks (3%) and Myall Lakes National Park (2%). A third of people rented their accommodation, with camping (23%) and staying with friends/ relatives (22%) completing 78% of the total. Length of stay was mainly 4 nights or more (81%), with a relatively high number staying for more than 2 weeks (15%). Accommodation and food make up the bulk of expenditure for those spending $501 or more. *Tables 36–39.*

Further detail can be found in the full '*Great Lakes Summer Survey* 2016' (currently in draft form only).
[Undertaken by Wray Sustainable Tourism Research and Planning, in collaboration with Great Lakes Tourism.]

8.3 Current Tourism Performance in the Great Lakes | Continued

F) Some additional data from the *'Forster Tuncurry Visitor Profile and Satisfaction Survey 2011'*. [225]

Some final insights into the current make–up of the Great Lakes Tourism industry can also be found in the survey undertaken by Tourism research Australia in 2011.

Looking at the current preferred visitor attractions (*Graph 16*), Wallis Lake is a clear favourite at 47% with Smiths and Myall Lakes also in the top 6.

Coastal lookouts, National Parks and Seal Rocks complete the top 6.

The Hinterland is noticeably unrepresented in this chart with only Stroud being mentioned (at only 1%). This indicates regional dispersal is low at the moment with minimal visitation away from the coast.

Looking at Visitor expectations for the expected experience in the Great Lakes (*Graph 17*), 'Relaxation and Rejuvenation', 'Spend quality time with partner/ family/ friends', 'Tour around and explore', 'Nature–based experiences' and 'Something the kids would enjoy' make up the top 5.

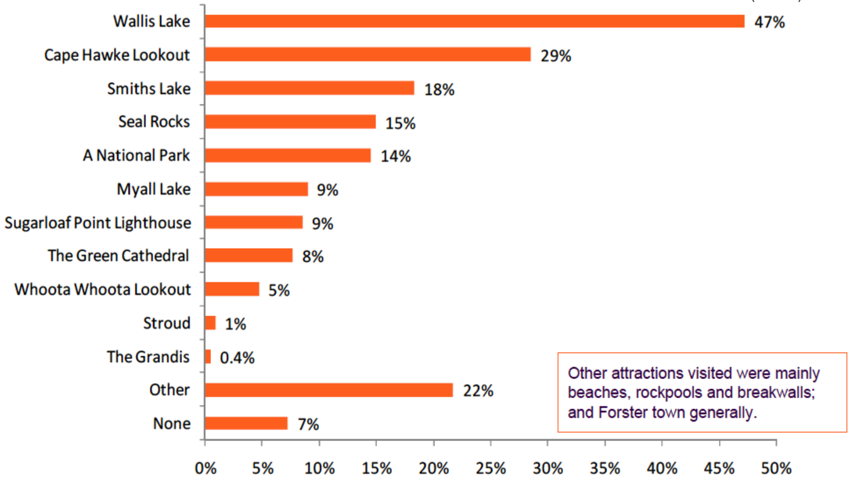
'Nature–based experiences' is in 4th at 68% (+11pts vs. benchmark) reflecting the strong Natural assets within the Region and 'Something the kids would enjoy' at 66% (+35%) clearly shows the current strength of the Great Lakes as a safe, family–friendly destination.

Food and wine is a key expectation for tourists to the Region, but, as the gap analysis below shows *(Graphic 15, p. 96)*, one that is not being fully met with current offerings.

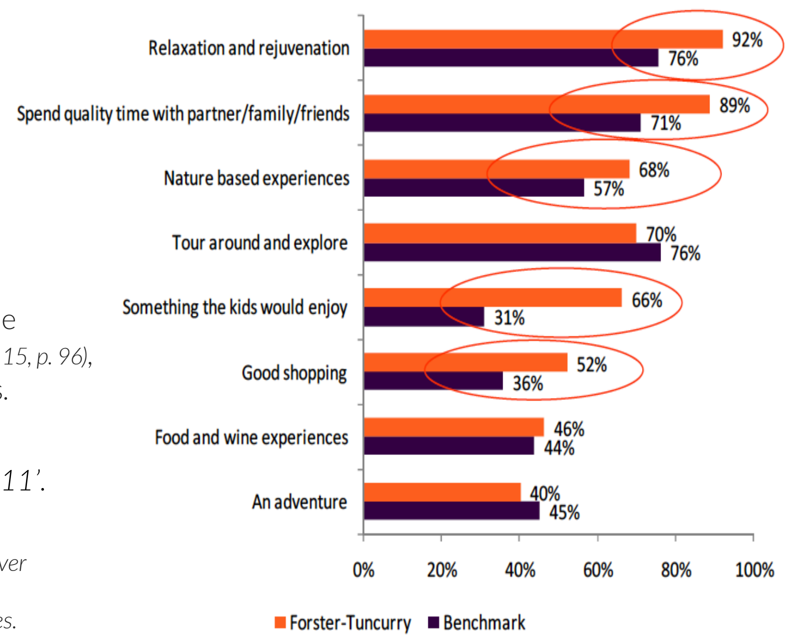
Further detail can be found in the full *'Forster Tuncurry Visitor Profile and Satisfaction Survey 2011'*. [Undertaken by Tourism Research Australia].

Note: this survey was focused on Forster Tuncurry so, although over 50% of visitors stay there, the results can be assumed to skew towards the northern Great Lakes area in terms of actual % figures.

Graph 16: Most visited attractions in the Great Lakes (2011)
Source: Tourism Research Australia (TRA).



Graph 17: Main experiences expected by the Great Lakes Visitors (2011)
Source: Tourism Research Australia (TRA).



G) Regional Dispersal of Tourism in the Great Lakes

Encouraging regional dispersal has been called out as a mid–term objective for the Great Lakes as Tourism, as well as being extremely seasonal, is also highly concentrated on key sections of the coastline.

The challenge this represents is clearly shown in Graphic 14 overleaf which illustrates the concentration of visitors around Forster and Tuncurry in particular.

8.3 Current Tourism Performance in the Great Lakes | Continued

G) Regional Dispersal of Tourism in the Great Lakes | Continued

Currently only Forster (93%) and Tuncurry (80%) receive visits from more than 25% of Tourists, with Pacific Palms the only settlement receiving greater than 20%.

Bulahdelah (19%), Elizabeth Beach (15%), Nabiac (14%), Seal Rocks (11%) and Boomerang Beach (11%) are then the only settlements receiving between 10–20%.

Aside from Bulahdelah, no settlement in the Western 80% of the Great Lakes receives visitors in any real volume. Tea Gardens at 2% is the highest, followed by Hawks Nest and Wootton with 1% and Stroud with only 0.4%.

The challenge in looking to change this will require focus, investment and a long–term view.

As a further indication of the make–up of the Great Lakes, a summary of the main towns, suburbs and localities is included below.

Graphic 14: Great Lakes Towns Stopped at During Visit

Source: TRA, Forster Tuncurry Visitor Profile & Satisfaction Survey 2011.

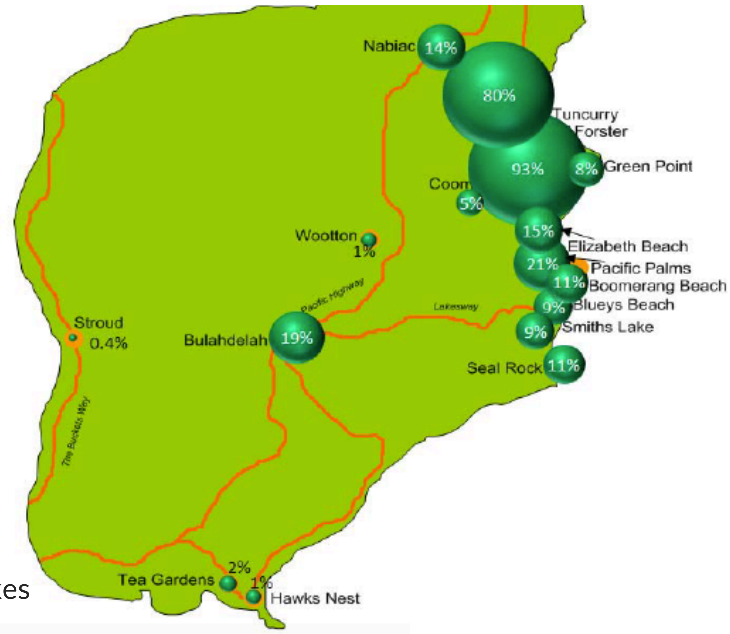


Table 40: Main Settlements and Parks in the Great Lakes

Source: Government of New South Wales.

MAIN TOWNS, VILLAGES, PARKS AND LOCALITIES OF THE GLOUCESTER REGION (2015)
KEY SETTLEMENTS AND SITES OF INTEREST Alderley, Alderley Creek, Allworth, Bennetts Head, Blueys Beach, Bombah Point, Boolambayte, Boomerang Beach, Booral, Booti Booti, Broughton Island, Bulahdelah, Bulby Brush, Bundabah, Bungwahl, Bunyah, Bunyah Upper, Burgess Beach, Burraduc, Cape Hawke, Carrington, Charlottes Bay, Clareval, Coolongolook, Coomba, Coomba Bay, Coomba Park, Craven, Crawford River, Cureeki Creek, Darawank, Dewrang, Dirty Creek, Dungog, Elizabeth Beach, Failford, Fernhill, Forster, Forster Keys, Forster Waters, Friendship Key, Gereeba Island, Girvan, Green Point, Hawks Nest, Johnsons Creek, Karuah, Legges Camp, Lime Kiln, Limeburners Creek, Markwell, Mayers Flat, Milbrook, Mill Creek Upper, Minimbah, Monkerai, Mungo Brush, Myall Lakes, Myall Upper, Nabiac, Nerong, New Forster, Newells Creek, Nooroo, North Arm Cove, North Pindimar, Nugra, Nugramudgee, Pacific Palms, Pindimar, Pioneer Park, Pipers Bay, Rosenthal, Sandbar, Seal Rocks, Smiths Lake, South Pindimar, Stroud, Stroud Road, Sugarloaf Point, Tahlee, Tamboy, Tarbuck Bay, Tea Gardens, Telegherry, Terreel, The Branch, Tiona, Topi Topi, Tuncurry, Upper Karuah River, Upper Monkerai, Violet Hill, Wallamba Island, Wallingat, Wallingat River, Wallis Island, Wallis Lake, Wards River, Warranulla, Washpool, Wattley Hill, Weismantels, Whoota, Willina, Winda Woppa, Wootton, Yagon, Yagon Beach.
SELECTED NATIONAL PARKS, STATE CONSERVATION AREAS AND NATURE RESERVES Booti Booti NP, Bulahdekah SF, Darawank NR, Ghin–Doo–Ee NP, Karuah NR, Mills Island NR, Myall Lake, Myall Lakes NP, Myall River SF, Nerong SF, Port Stephens Great Lakes Marine Park, Smiths Lake, Wallamba NR, Wallingat NP, Wallingat SF, Wallis Lake, Wang Wauk SF.

© Great Lakes Tourism | Broughton Island

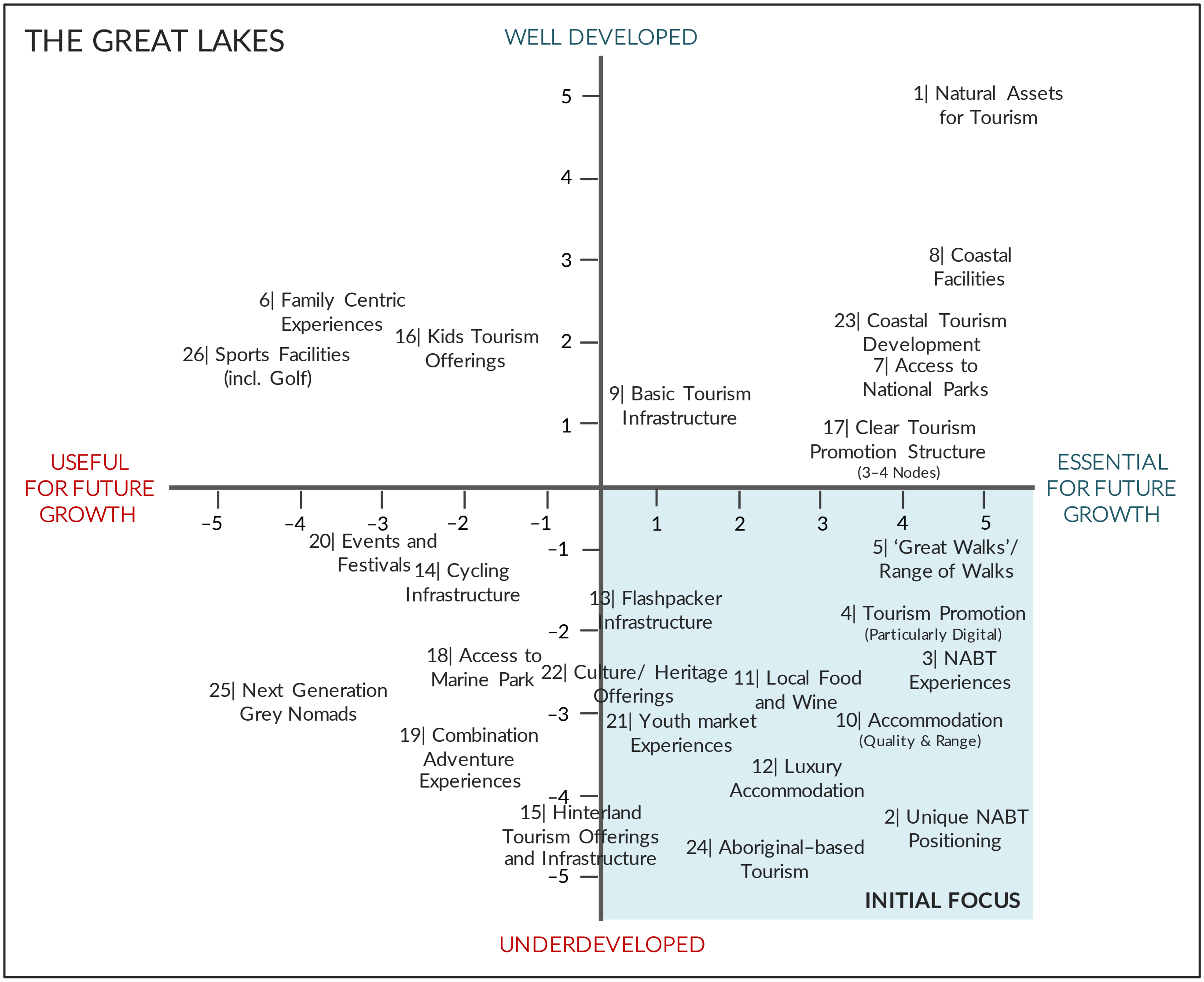
8.3 Current Tourism Performance in the Great Lakes | Continued

H) Indicative Gap Analysis for the current Great Lakes Tourism offering

To summarise some of the current gaps in the Great Lakes Tourism industry, an initial summary gap analysis has been undertaken, whilst acknowledging that there are some clear deficiencies in the available data.

The following graphic looks at 26 key components and identifies the main areas of weakness that will need addressing to open up the growth opportunities in the Great Lakes identified in the latter part of this report.

Graphic 15: Gap analysis of key components of Great Lakes Tourism
Analysis by 2iis Consulting based on Baseline Analysis and DMS Field Visits April–August 2016.



Looking at the gap analysis matrix above, the bottom right quadrant is where the main suggested areas for development can be found. The components there include the overall 'Nature and Adventure–based Tourism (NABT) Positioning', 'NABT experiences', 'Great Walks' 'Accommodation' (quality/ range generally and Luxury specifically), 'Local Food & Wine', 'Flashpacker' infrastructure and the 'Hinterland'.

Those in the top right are those that are essential for future Tourism growth, but are already relatively well developed. They will still need focus and investment, but are less of a priority than the bottom right quadrant.

The top left quadrant includes those offerings that are still important for growth, but are more a case of maintaining an existing strength. Families and Kids Tourism offerings are the 2 components here.

NOTE: DETAIL ON THE FUTURE GROWTH POTENTIAL FOR TOURISM IN THE GREAT LAKES REGION CAN BE FOUND IN SECTION 14.

8.4 Overall Approach to Growing Tourism in the Great Lakes | www.greatlakes.org.au

Great Lakes Tourism (GLT) consists of a small dedicated team within Great Lakes Council, responsible for the marketing, management and development of Tourism in the Great Lakes area. It has overarching objectives to *'increase visitation, yield and regional dispersal'*.[226]

GLT states its' overall aspiration as being to *'develop a continuous, relevant and holistic destination management process that involves all its stakeholders and allows the Great Lakes as a destination to respond to the market, whilst growing the value and importance of Tourism to our industry and local communities.'*[227]

The destination management process (DMP) is recognised as essential for building *'a strong, reliant Tourism Industry… (in the Great Lakes)… with dynamic and adaptive product and experience offerings that adapt to the needs of visitors and … (the)… community'.* [228]

Vision for the Great Lakes Community

The Great Lakes has an overall Community Strategic Plan that outlines the future vision for the community in 2030 as 'a unique and sustainably managed environment balanced with quality lifestyle opportunities created through appropriate development, infrastructure and services'.[229]

[See the full plan here: http://www.greatlakes.nsw.gov.au/Council/Our-Strategies#GreatLakes2030]

Vision for Great Lakes Tourism

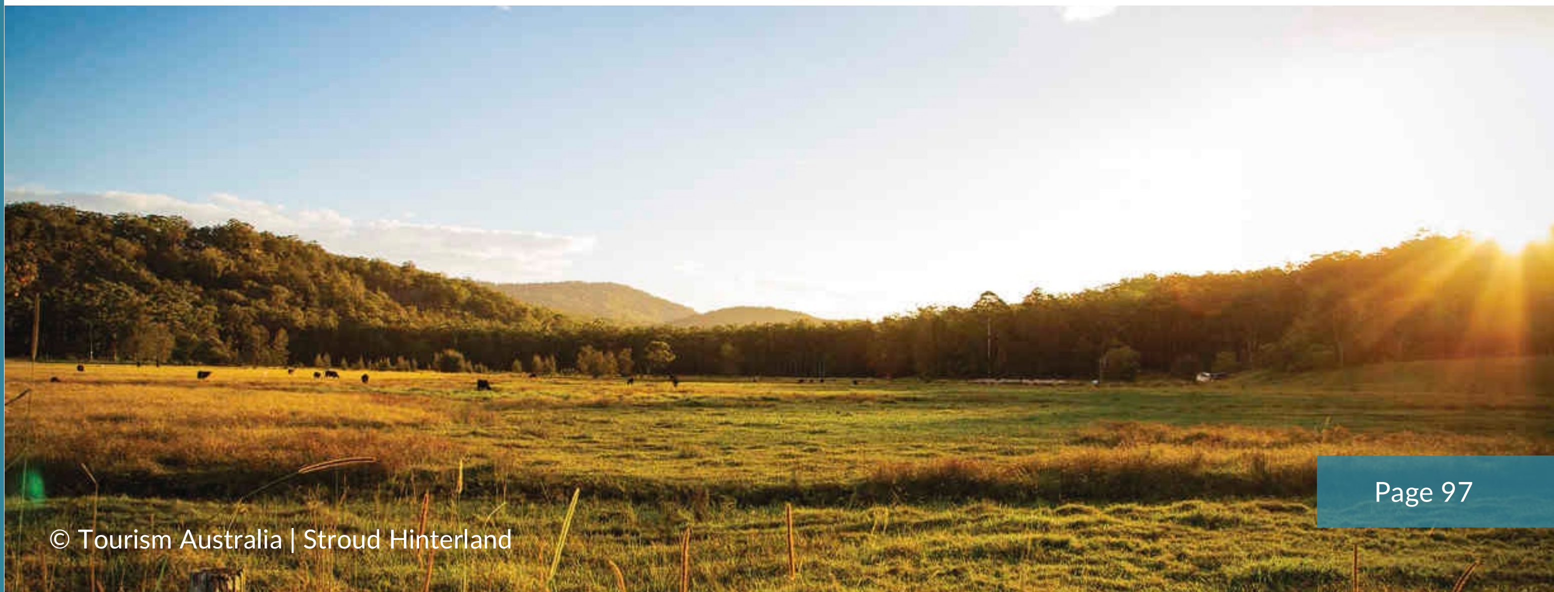
Underneath this overarching Community Vision sits the vision for Tourism in the Great Lakes, which is stated as follows:

'The Great Lakes will have a sustainable Tourism Industry. The Region, as well as being known for world class waterways and family holidays, will have an unrivalled reputation for its wealth of authentic Nature–based experiences, diverse landscapes, distinctive destinations and vibrant local culture, with a year–round program of events. Our accommodation, our food, our activities, our culture and our customer service will all add up to a visitor experience that creates lasting memories'. [230]

Overall Goal

The goal is then captured simply as:

'Tourism to grow in a sustainable way and to make an increasing contribution to the economic, social, cultural & environmental well–being of the Great Lakes'. [231]



© Tourism Australia | Stroud Hinterland

8.4 Overall Approach to Growing Tourism in the Great Lakes | www.greatlakes.org.au

Summary of the GLT's approach

Understandably given the current make–up of the Great Lakes Tourism Industry, the focus appears to be squarely on the domestic market, particularly families and children.

The intense seasonality clearly impacts the overall approach given approximately 65% of annual revenue is generated in one month after Christmas. This means there is little time for targeting specific niches or growth markets.

There has been a recognition that increasing regional dispersal will be essential, but this has clearly been challenging given the high demand from current Visitors to stay near to the coast and the major centres. The high rate of returning visitors should help with this, but at the moment these appear to be mainly families returning for the same beach–based holiday experience and hence they do not venture beyond the more mainstream Tourism locations.

As with most Tourism Offices in Local Government Areas, there are limited people resources to actively grow the Tourism Industry – it can be assumed they are particularly stretched during the peak summer months.

Section 10.2 covers the Great Lakes Tourism Brand Proposition in detail, but it is worth noting at this point that the proposition is not a particularly unique and ownable one as it is currently presented to potential visitors.

Great Lakes Tourism 2015–2016 Partnership Program

GLT runs a structured and comprehensive Partnership Program that offers businesses the opportunity to actively participate in campaigns and marketing activities at a local, regional, national and international level. Partners are also offered the opportunity to input directly into future Tourism strategies and initiatives through 'Tourism Reference Groups'. It currently involves approximately 180 business partners.

[See the Partnership Prospectus here: https://issuu.com/greatlakesnsw/docs/gl_partnership_prospectus_master_fo]

Great Lakes Tourism Budget 2014–15 and Tourism Visitor Infrastructure

Until the recent amalgamation, Great Lakes Tourism was primarily funded by the Great Lakes Council, with a Budget in 2014–2015 of AUS $966,000 against AUS $679,00 in reported actual expenses.[232]

Around AUS $50,000 is stated as being received annually via the Great Lakes Tourism Partnership Program.

There are 3 Visitor Information Centres:

1) **Great Lakes** Visitor Information Centre (Forster),
2) **Bulahdelah** Visitor Information Centre; and
3) **Tea Gardens** Visitor Information Centre.

© Petra Paul | Wallis Lake

8.5 Key Promoted Great Lakes Tourism Offerings | www.greatlakes.org.au

The Great Lakes website introduces visitors to the Region by referring to the type of stays that can be had ('holidays', 'short breaks & weekends') followed by some descriptive text of the area (see image at right).

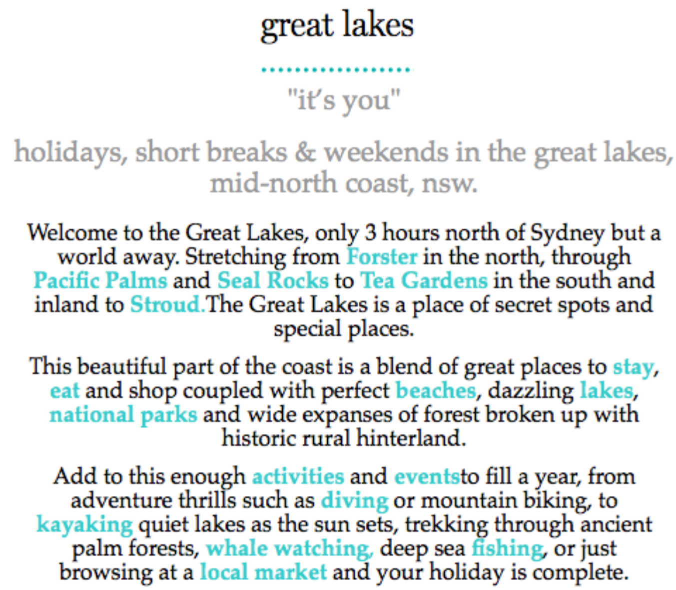
4 specific areas are then promoted, although this structure is not always rigidly adhered to. The sub–regions are: 'Forster Tuncurry', 'Pacific Palms', 'Myall Coast' and the 'Hinterland'.

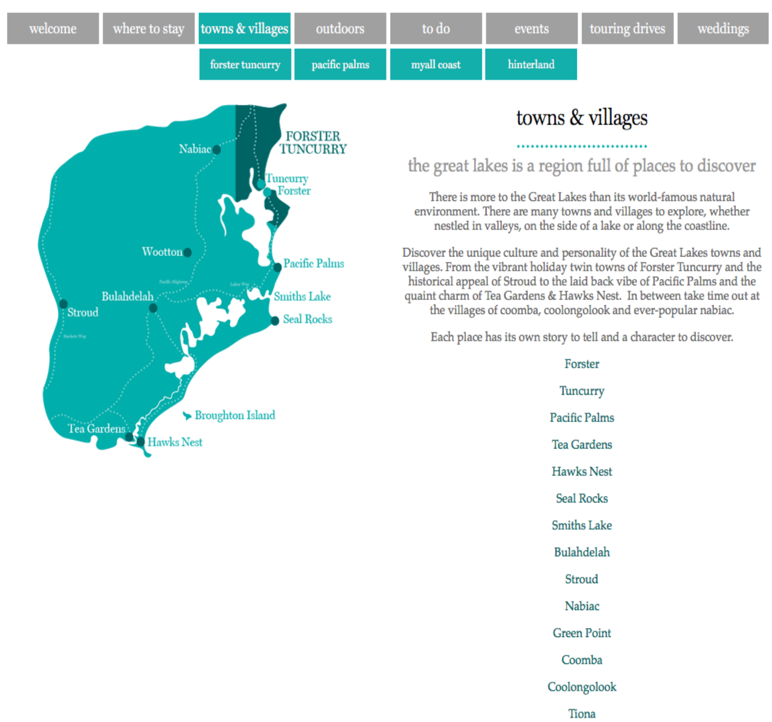
This structure is in itself slightly confusing as Forster Tuncurry is a main urban centre, Myall Coast & the Hinterland are geographic regions, and Pacific Palms is effectively a combination of the two.

15 towns & villages are also called out (including Forster, Tuncurry and Pacific Palms) with 9 then on the area map (including Wootton which is mentioned inconsistently in places on the website).

The top–level navigation is similar to that of North Coast NSW in that it is slightly less–structured
than Destination NSW or Tourism Australia; it starts with an overall description under 'Welcome', then provides some logistial accommodation options under 'Where to Stay', before covering some of the higher–level categories under 'Towns & Villages', 'Outdoors', 'To Do', 'Events', 'Touring Drives' and 'Weddings' (see image at foot of page).

One thing to note with this top–level navigation is that it is a mixture of an overview of some experience options, with more logistical details alongside some specific events (i.e. weddings). This could probably be improved upon once a clearer overall Tourism proposition has been identified.

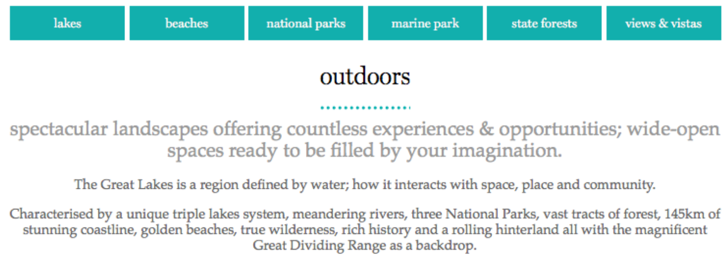




8.5 Key Promoted Great Lakes Tourism Offerings | www.greatlakes.org.au | continued

After the **'Where to Stay'** section, the 'Outdoors' is the next focus with 'Lakes, 'Beaches', 'National Parks', 'Marine Park', 'State Forests' and 'Views & Vistas' as the sub–sections.

There is a wealth of information included but, potentially because the structure of the website is slightly restrictive, it feels text heavy and is one of the clearest examples of where imagery could perhaps be better used to showcase the overall natural Tourism offering of the Great Lakes. At the moment it feels like the text is being relied on too heavily when images could sell the natural strengths of the area much harder.



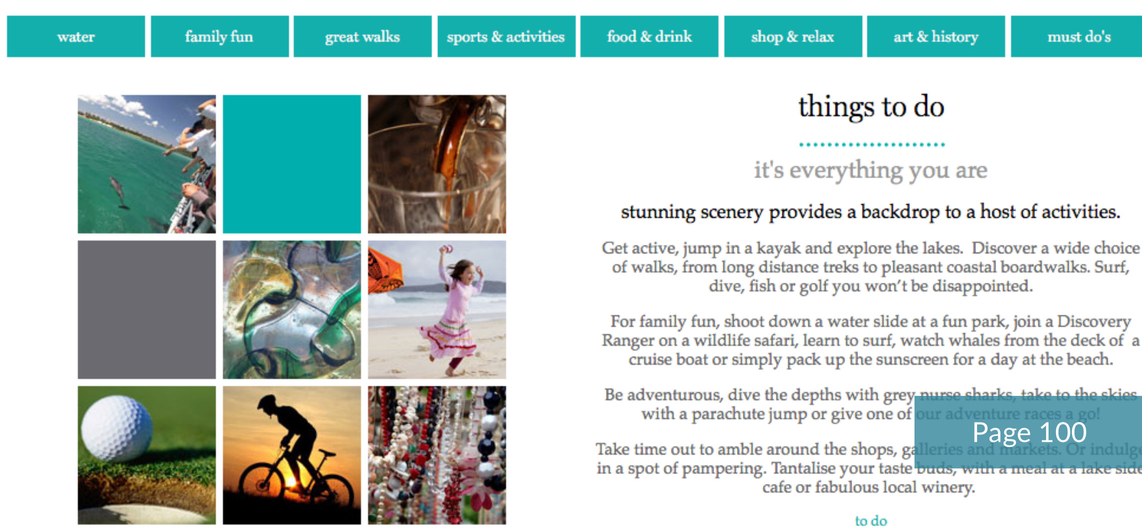
The last overview section worth mentioning is the **'Things to Do'** section which includes 'Water', 'Family Fun', 'Great Walks', 'Sports & Activities', 'Food & Drink', 'Shop & Relax', 'Art & History', and 'Must Do's'. Again there is a significant amount of text–led information that could do with a slightly clearer structure connected to an overall unique Great Lakes Tourism proposition.


© Great Lakes Tourism, Myall Lake

The other main initial entry point for Tourism information outside of the website is **'The Official Great Lakes Visitor Guide'**. This guide, despite being slightly hidden on the website, provides a comprehensive overview of the area and is perhaps only missing a clearer introduction to the area as a whole before the Forster Tuncurry spread.

This guide also has a much better balance between text and imagery that the current website could perhaps replicate much closer, under a new brand proposition once it has been developed.

View the Great Lakes Visitor Guide here:
[https://issuu.com/greatlakesnsw/docs/great_lakes_visitor_guide/1]



8.5 Key Promoted Great Lakes Tourism Offerings | www.greatlakes.org.au | Continued

One element of the current Tourism promotion structure that has the potential to limit future growth is the 4 area structure in use: **'Forster Tuncurry'**, **'Pacific Palms'**, **'Myall Coast'** and the **'Hinterland'**.

Section 14 includes an outline of the importance of restructuring the Great Lakes sub–regions and explores the potential this would open up, but it is worth including the indicative areas that could be combined in to 4 or 5 future Tourism Nodes in this section for reference.

Table 41: Potential future Great Lakes Tourism Nodes [FOR COMPLETION DURING DMP PROCESS]
Initial proposal based on this baseline analysis.

#	POTENTIAL NODE	KEY SETTLEMENTS	INDICATIVE TOURISM OPPORTUNITIES
1	'Great Lakes' Centred on Seal Rocks/ Bluey's beach	Blueys Beach, Seal Rocks, Pacific Palms, Tarbuck Bay.	NABT; Nature–based Marine Tourism (access to Port Stephens–Great Lakes Marine Park); Great Walks potential, 'Flashpacker' market; Wallis and Smiths Lake based experiences; National Park access.
2	'Forster Tuncurry & the Northern Beaches'	Tuncurry, Forster, Green Point, Coombe Park, Hallidays Point, Minimbah, Coolongolook.	Families and Children; Coastal/ Mainstream Tourism; Higher–volume, seasonal Tourism; festivals and more mainstream events.
3	'Bulahdelah & the Southern Beaches'	Bulahdelah, Hawks Nest, Tea Gardens, Mungo Brush, Bombah Point, Broughton Island.	NABT; Nature–based Marine Tourism (access to Port Stephens–Great Lakes Marine Park); Great Walks potential, 'Flashpacker' market; Myall Lake based experiences; National Park access.
4	'Wootton/ Bunyah & the Eastern Hinterland'	Wootton, Bunyah, Nabiac, Upper Myall.	Local Food and Wine offering; access to NABT in the Barrington Tops; Women's Adventure + Wellbeing; niche events; Cultural offering?
5	'Stroud & the Western Hinterland'	Stroud, Clareval, Washpool.	Local Food and Wine offering; access to NABT in the Barrington Tops; Women's Adventure + Wellbeing; niche events.

* Note that names used for Potential Nodes are indicative only.

The above structure is a very rough draft of how the Region could be re–structured; as with Gloucester, it will clearly be dependent on how the overall MidCoast's Tourism offering is structured. *See Section 14 for more detail*.

© Lazy Paddles | Myall River

8.6 Nature–based Tourism in the Great Lakes | All data from Table 42 unless specified

Given the potential for Nature–based and Adventure–based Tourism in the Great Lakes, it is worth quantifying the current value more accurately and exploring its likely future growth.

Current estimates place the value of Nature–based and Adventure–based Tourism (NABT) in Australia at between AUS $16.5 billion and AUS $20.6 billion; in New South Wales at between AUS $6.1 billion and AUS $7.7 billion; and in North Coast New South Wales at between AUS $0.68 billion and AUS $0.86 billion.

An estimated 4.1 million International Visitors to Australia, along with approximately 15.5 million Domestic Day and 15 million Domestic Overnight visitors undertook Nature–based activity in 2015.[233]

Modelling to 2030 predicts a value of NABT of up to AUS $101 billion for Australia, AUS $37.35 billion for New South Wales and AUS $4.2 billion for North Coast New South Wales. The overall question here is what proportion of this potential market the Great Lakes will be able (or wants) to capture.

Table 42: Current and Forecast Value of Great Lakes Nature–based and Adventure Tourism (2015 vs. 2030)
Sources: UN Statistics Division, Tourism Research Australia and Destination NSW.

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
The Great Lakes	**$359 million**	**$71.8 million**	**$89.8 million**	**$974 million**	**$340.9 million**	**$438.3 million**

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

The current value of NABT in the Great Lakes is estimated at between AUS $71.8 million and AUS $89.8 million. It is forecast to grow to between AUS $340.9 million and AUS $438.3 million by 2030.

This potential value for Nature–based Tourism in the Great Lakes makes it the single largest opportunity for the Region out to the end of the next decade.

The other element worth mentioning that is often referred to is the higher–value nature of NABT Tourists. A study by Tourism Research Australia in 2009 provides the clearest example of this, with the average visitor expenditure for International Nature Visitors estimated at AUS $5,898 vs. AUS $3,614 for 'Other Visitors' (a +163% premium) and Domestic Overnight Visitors at AUS $1,008 vs. AUS $556 (+181%). *Table 43.*

Table 43: Average Visitor Expenditure by item (Australia)
Source: TRA, Nature Tourism in Australia Snapshot, 2009.

	International		Domestic overnight	
	Nature visitors	Other visitors	Nature visitors	Other visitors
Accommodation, food and beverages	1,807	1,043	598	343
Shopping	544	448	228	224
Domestic airfares	389	326	558	450
Other transport	1,793	1,389	196	123
Organised tours	531	274	355	354
Education	9,059	9,839	345	509
Entertainment	200	197	144	125
Other	1,468	736	451	215
Total average expenditure per visitor	**5,898**	**3,614**	**1,008**	**556**
Total average expenditure per night	**141**	**175**	**178**	**160**

8.6 Nature–based Tourism in the Great Lakes | Continued

The 'Natural Tourism Assets' (or 'Natural Capital for Tourism') available to the Great Lakes, and to the MidCoast more broadly, are mentioned throughout this report. It is no exaggeration to say they are the most important component of the Great Lakes and overall MidCoast Regions' future Tourism growth.

Without a structured, long–term approach to managing these assets there is little chance of the AUS $440 million forecast value from NABT and almost AUS $1 billion in forecast value from Tourism being realised (see Section 11.1 for further detailed modelling of the Tourism opportunity.

The overall map of the National Parks and State Forests in the Region provides good 'visual evidence' of the strength of these Natural Tourism Assets. Estimates vary in the various documents reviewed for this report, but somewhere between 45–55% of the Great Lakes LGA is either a National Park, Marine Park, Nature Reserve or State Forest. The most heavily promoted of these are around the main current concentrations of Tourism: Myall Lakes, Booti Booti and Wallingat National Parks and the Port Stephens–Great Lakes Marine Park.

It is difficult to accurately calculate the precise level to which these assets are currently being effectively used for Tourism, but somewhere between 10–20% could be an indicative range. Whilst recognising the obvious limits that exist in terms of the carrying capacity of these areas, there is clearly significant potential to use these assets more for Tourism.

One absolutely critical factor in enabling this will be a strong and open relationship with The New South Wales Parks and Wildlife Service. This relationship has not been analysed in detail in this report, but anecdotal evidence suggests that some work will be needed to develop this relationship in the future.

Map 11: Lakes and National Parks in the Great Lakes Region

© 2015 Great Lakes Tourism.

8.6 Nature–based Tourism in the Great Lakes | Continued

As part of the Nature–based Tourism opportunity, developing suitable treks, walks and, potentially Great Walks will be necessary. The Great Lakes Council and Great Lakes Tourism have already started exploring the development of a number of walks and undertaken some collation of details of current walks in the Region (approximately 52 have been documented so far to varying levels of detail).

The following table provides a sample of these walks as an initial introduction into the current level of development of walks in the Region. Comparing these with the examples included in Table 67 in Section 13.1, the most obvious difference is in the overall length of the majority of the walks. There are a number of walks of 30, 45, 60, 65 and 100kms in length, vs. one 21km walk detailed below for the Great Lakes.

Table 44: A Selection of Current Walks in Great Lakes' National Parks

Sources: NSW National Parks and Wildlife Service; Myall Lakes, Booti Booti and Wallingat National Parks Information Sheet.

#	WALK	LOCATION	CATEGORY	DESCRIPTION
1	'Mungo Brush Rainforest Walk'	Myall Lakes National Park	Easy ½ Day Walk	2km loop track. An easy 30–minute walk through coastal rainforest, starting from the northern end of Mungo Brush Camping Area.
2	'Sugar Creek Walking Tracks'	Wallingat National Park	Easy ½ Day Walks	Two short loop walks (0.8km and 1.7km) wind through delightful wet eucalypt forest.
3	'Tamboi Trail'	Myall Lakes National Park	½ Day Walk	4km one way. An easy walk starting from the bar gate at the southern end of Mungo Brush. Wander through stunning Cabbage Tree Palm forest to the old fishing village of Tamboi, or follow the boardwalk to Brambles Green.
4	'Booti Hill–Lakeside Walking Tracks'	Booti–Booti National Park	Easy Day Walk	Popular 7km loop walk from the Ruins campground or Elizabeth Beach and takes around 2.5 hours to complete. Shorter sections possible.
5	'Yacaaba Headland Walking Track'	Myall Lakes National Park	Day Walk	1.5km one way. A more challenging walk, starting from the carpark at the end of Beach Rd, Hawks Nest. Although there is no formal lookout at the top, there are views through forest along the way.
6	'The Mungo Track'	Myall Lakes National Park	Various Walk Options	Total of 21km one way along the lake edge, river and beaches to Hawks Nest or can be done in shorter sections via access points on Mungo Brush Rd.
7	'The Old Gibber Trail'	Myall Lakes National Park	1–2 Day Walk	11km one way to Shelly Beach (or 4km one way to Johnson's Beach). Enjoy coastal forest and the Moors, a unique wet heathland with extensive bird life and seasonal wildflowers.
8	'The Mining Road Trail'	Myall Lakes National Park	2 Day Walk or 1 Day Ride	Popular ride or overnight hike along the former Mining Road for 10km and then 10km along the Old Gibber Fire Trail to reach the Mungo Brush Road.

Despite a lack in overall length, there is a broad range of existing walks in the Great Lakes that provides a good starting point for developing this future growth sector. The forecast value to the Great Lakes Region of developing Walks and Great Walks as part of a focus on NABT is covered in Section 14.

See Section 7.6 for examples of walks in the Gloucester Region, Section 9.6 for Manning Region walks and Section 13.1 for further insights into the growing 'Great Walks' market and examples of a number of single day, multi-day and guided walks in New South Wales.

9 | CURRENT STATE OF TOURISM IN THE MANNING REGION

9.1 An Overview of Tourism in the Manning Region

Key Statistics

Source: Australian Census data/ Australian Bureau of Statistics unless indicated.

Size:	3,729 sq. km
Population:	49,095 (est. 2016)
Population in 2036 (Est.):	70,708 (+42.7%) [234]
Population density:	13.1 per sq. km
Gross Regional Product (GRP):	AUS $30,920 per capita[235]
International Tourists:	7,000 (2014)
Domestic Visitors:	669,000 (2014)
Estimated value of Tourism:	AUS $160 Million per annum
North Coast NSW Ranking:	8 [15]

© Manning Valley Tourism | Salty Bay National Park

Map 12: Detailed Tourism Map for the Manning Valley
© 2015 The Legendary Pacific Coast.

9.2 The Importance of Tourism to the Manning Region

The Manning Region is a destination within New South Wales known (and promoted) as **'an area of natural beauty and diverse landscapes offering a combination of beach, river and mountain environments'** for Tourism.[236]

The Region includes one of the highest single drop waterfalls, Ellenborough Falls, and 'the only double delta river system' in the southern hemisphere.

Located on the Mid North Coast of New South Wales, it is situated within the Manning Valley, approximately 320 kms north of Sydney and 620kms south of Brisbane.

With 677,000 visitors in 2015 staying for 904,000 nights and spending $160 million annually, the Manning Region (Greater Taree) ranks 8th out of the 15 Local Government Areas that make up North Coast New South Wales. *Table 45.*

Manning actually receives almost 60,000 more visitors than the 7th ranked region, Ballina, but receives AUS $21 million less in expenditure.

With an estimated 265 Tourism businesses (8.2% of the total of 3,228) and approximately 627 individuals directly employed in Tourism (3.7% of the total workforce of 16,937) and a further 424 indirectly employed to take the total to 1,050 (6.2% of total employment),* It is the 8th most important employer in the Region (based on direct employment).[237]

Table 45: Performance of North Coast NSW LGAs: Manning

Source: TRA, International & National Visitor Surveys 2014.

LOCAL GOVERNMENT AREAS (LGAs)	TOTAL VISITORS (2014)	TOURISM EXPENDITURE (2014)	RANK
Coffs Harbour	1,598,000	$433 million	1
Port Macquarie–Hastings	1,453,000	$423 million	2
Byron	1,376,000	$426 million	3
Tweed	1,444,000	$357 million	4
Great Lakes	998,000	$359 million	5
Clarence Valley	927,000	$299 million	6
Ballina	620,000	$181 million	7
Greater Taree (Manning)	677,000	$160 million	8
Kempsey	496,000	$171 million	9
Lismore	623,000	$116 million	10
Richmond	299,000	$76 million	11
Nambucca Valley	259,000	$75 million	12
Bellingen	223,000	$57 million	13
Gloucester	180,000	$51 million	14
Kyogle	129,000	$24 million	15

Tourism sits below 'Healthcare and Social Assistance' (2,704 employed), 'Retail Trade' (2,098), 'Manufacturing' (1,379), 'Education & Training' (1,274), 'Accommodation & Food Services' (1,100), 'Construction' (710) and 'Agriculture, Forestry & Fishing (676); and ahead of, 'Public Administration & Safety' (577), 'Other Services' (541) and 'Transport, Postal & Warehousing' (504).[238]

From the point of view of economic contribution, at AUS $73.88 million per annum Tourism provides approximately 3.8% of the AUS $1,961.68 million in value added by all industry and 10.5% of Gross Regional Product (GRP), putting it below both the Gloucester (4.4% & 19.7%) and Great Lakes (10.7% & 30.3%) Regions.[239]

In spite of being marginally less important to the overall economy than in Gloucester or the Great Lakes, Tourism is still a significant industry in the Manning Region. It not only provides employment and significant revenues, but, as in the Great Lakes in particular, also helps drive development in the Region that directly benefits the local residents in terms of the access it facilitates to coastal areas, the natural environment and other leisure activities that would not be as economically viable without a strong Tourism industry.

As in the Great Lakes, the influx of over 650,000 tourists per year, with more than 70–80% of those in the peak season, clearly has a broader impact on a community of just under 50,000 (seasonality is slightly more pronounced than in Gloucester, but well below that of the Great Lakes). The type of Tourism experiences available has a direct effect on the types of people attracted to the Region; this overall influence on the community should always be front of mind when considering future Tourism development, with the aim of matching that development with the kind of community the Manning Region wants to remain (or become).

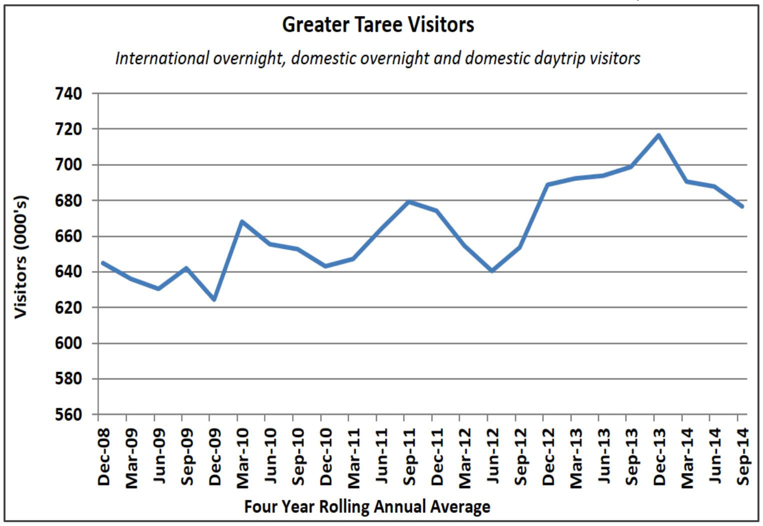
* It should be noted that Tourism data is not reported separately in the ABS statistics, so the Manning Region figures have been estimated based on North Coast NSW data. This means these figures should be viewed as estimates only.

9.3 Current Tourism Performance in the Manning Region

A) Overall Performance

In terms of overall Visitor numbers since 2008, the Manning Region saw strong growth from a low at the end of 2009 of under 625,000 to a peak of almost 720,000 in the summer of 2013/14 (+15.5%). Taking into account the seasonality evident in the Visitor numbers, the overall trend has been upwards, with increasing peak levels of visitors each summer since at least 2009/10. *Graph 18.*

Graph 18: Greater Taree City Visitor Trend (2008–14)
Source: TRA, International & National Visitor Surveys 2008–15



Continuing the pattern of the MidCoast as a whole, visitors to the Manning Region are more or less exclusively from domestic markets; almost 98.8% (669,000) of the total in the latest visitor figures (*Table 46, p.108). *Sydney and Regional New South Wales make up an estimated 88% of domestic overnight stays (255,000).

Note that data numbers are too low to accurately estimate inter–state percentage splits for overnight stays, with total numbers estimated at 34,000.[240]

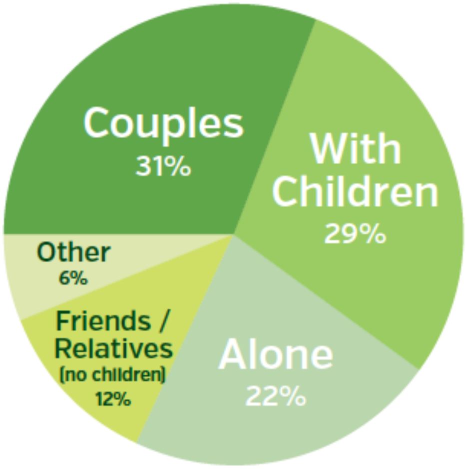
Other key characteristics include a high proportion of people Visiting Family and Friends (46%), a lower percentage visiting for a holiday (37%) and 17% visiting for other reasons (including Business at 12%).[241]

Graphic 16 shows primary motivators for visiting tend to be more mainstream than in Gloucester (and to a certain degree the Great Lakes) and, in spite of the Nature–based positioning (see Section 11), lead activities are ‘VFR’ at 53% (+4pts vs. NSW state average of 49%); ‘Eat out at Restaurants’ at 49% (–9pts vs. NSW at 58%); ‘Go to the Beach’ at 27% (+4pts vs. NSW at 23%), ‘Go Shopping’ at 24% (–2pts vs. NSW at 26%) and ‘General Sightseeing’ at 23% (–3pts vs. NSW at 26%).[242]

Graphic 16: Main Reasons to Visit the Manning Valley
Source: TRA, International & National Visitor Survey 2014

The main types of travel party to the Manning Valley are ‘Couples’ at 31%, closely followed by those ‘With Children’ at 29%. Those traveling ‘Alone’ make up almost a quarter of visitors (22%), with those traveling with ‘Friends/ relatives (no children)’ and ‘Other’ making up the final 18%. *Graphic 17.*

Graphic 17: Types of Travel Party to the Manning Valley
Source: TRA, International & National Visitor Survey 2014.



According to the current Manning Valley Destination Management Plan (DMP), the Region currently *‘provides the opportunity for a diverse range of water based activities and nature experiences. With Ellenborough Falls being one of the southern hemisphere’s longest single drop waterfalls and the Manning River the only double delta river system in the southern hemisphere we are well equipped for unique experiences. To compliment the outdoor and adventure activities; there is also a range of accommodation, food, shopping, sports, art and culture options.’*[243]

Note

*Additional detail from the full Local Government Area Tourism Profile for Greater Taree City can be found in **Appendix 18.13**.*

9.3 Current Tourism Performance in the Manning Region | Continued

B) International Visitors

Whilst representing only 1.1% of the current Tourism mix (7,000), International Visitors were estimated to have generated AUS $3 million per annum in 2014 (1.9%). They spent 50,000 nights in the Region with an average stay of 6.7 nights and average spend per stay of AUS $390; ahead of Gloucester (AUS $364), but significantly below the spend in the Great Lakes (AUS $617). *Table 46 and Destination Australia LGA Profiles 2014.*

68% of international visitors to the Region are estimated as coming for the purpose of a holiday, with the highest proportion of the 3 MidCoast Regions international visitors coming for the purpose of VFR (27%).[244]

The only market that is statistically strong enough to be specified is the United Kingdom at 1,000 or 14% of International visitors. Other significant markets are assumed to be New Zealand, Germany, USA and the Netherlands, with some visitors assumed to come from China and South Korea as per regional trends. [245]

There appears to be some opportunity to increase yield from International Tourists, with some simple opportunities identified in Manning Valley's 2014 DMP including increasing day trips from neighbouring areas like Port Macquarie and the Great Lakes. With the creation of the MidCoast Council, this potentially becomes much easier to manage than has previously been the case.

C) Domestic Day Trip Visitors

56.1% of visitors to the Manning Region were Domestic Day Trip visitors (380,000), generating an estimated AUS $42 million per annum in 2014 (26.4%). They spent an average of AUS $109 per trip (slightly ahead of the NSW State average, AUS $106). 'Eat out at Restaurants', 'VFR', 'Go Shopping', 'General Sightseeing' and 'Pubs, Clubs, Discos' were the main reasons for visiting (in fairly stark contrast to Gloucester motivations).[246]

D) Domestic Overnight Visitors

42.7% of visitors to the Gloucester Region are Domestic Overnight Visitors (289,000), generating an estimated AUS $115 million per annum in 2014 (26.4%). They spent 262,000 nights in the Region with an average stay of 3.0 nights and average spend per stay of AUS $397 (well below the NSW State average of $574). *Table 46.*

33.5% of Domestic Overnight Visitors (97,000) currently originate from Sydney and 54.7% from regional NSW (158,000), with the remaining 12% assumed to be mainly from other major State Capitals (Brisbane, Canberra and Melbourne mainly), and the southern Queensland coast (accurate data unavailable).[247]

This particular segment is called out as the primary target audience in the current Manning Valley DMP.[248]

Table 46: Selected Manning Region Tourism Metrics (2014/15)*

Sources: Tourism Research Australia, Regional Development Australia and Australian Bureau of Statistics (ABS) Tourism Satellite Account.

Regional Rank	Total Expenditure (Domestic + International)	% of Total LGA GRP	Total Visitors	Change +/– (Since 2008)	Market Share (of North Coast NSW)		Total Employment (Direct & Indirect)	
					Domestic	International	Total	% Jobs
8 (15)	$160 million (2014)	3.8% (2014)	677,000 (2014)	+4.96% (Visitor #)	6.0% visitors 4.9% nights (2014)	2.4% visitors 1.6% nights (2014)	1,050 (est.) (2015)	6.2% (est.) (2015)

International Visitors			Domestic Overnight			Domestic Day Trips	
Visitor #	Nights	Spend	Visitor #	Nights	Spend	Visitor #	Spend
7,000 (2014)	50,000 (2014)	$3 million (2014)	289,000 (2014)	854,000 (2014)	$115 million (2014)	380,000 (2014)	$42 million (2014)

** Majority of Manning Region data is based on a 4 year rolling average to end September 2014. Note change in visitor numbers from 2013 to 2014 is an estimate only as 2013 LGA data is not comparable with 2014 data (based on different data sets).*

9.3 Current Tourism Performance in the Manning Region | Continued

E) General Visitor Analysis [Following data taken from various sources]

A selection of additional tables and statistics are included here from a variety of sources that provide further insight into the current state of certain (disparate) elements of the Manning Region's Tourism industry.

Table 47, for example, looks at recent accommodation statistics in the town of Taree, which show a decline in the number of larger establishments (–6.67%), bed space (–2.28%) and hence in takings (–8.69%), with room occupancy consequently rising marginally (–5.0%) due (mainly) to the reduction in room numbers.

Tables 47–51: Additional Manning Visitor Data (2015/2016)

Source: Manning Valley Economics Report March 2016, NSW Transport, Manning Valley DMP 2014 & Manning Valley Local Strategy.

47| TAREE TOURISM ACCOMMODATION	June Quarter 2014	June Quarter 2015	Annual % Change
Establishments (15+ Rooms)	15	14	–6.67%
Bed Space	879	859	–2.28%
Room Occupancy	49%	54%	+5.0%
Takings from Accommodation	$2,413,480	$1,345,282	–8.69%

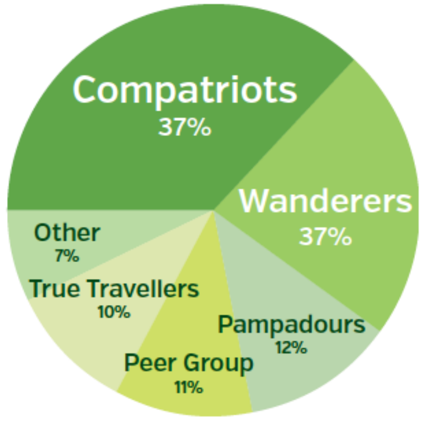
Table 48 (below) then details the latest Visitor Profile for the Manning Valley, which remains in line with other data sourced for this section (trend data was not available).

48| MANNING VALLEY VISITOR PROFILE	Domestic Day	Domestic Overnight	International
Average Stay (Nights)	–	3.0	8.0
Average Spend per Trip ($)	$109	$333	$315
Average Spend per Night ($)	–	$115	$42

Table 49 provides some detail on the current targeted travellers (from the current Manning Valley DMP), with 'Compatriots' and 'Wanderers' making up 74% of the total (37% each group). These traveller types are based on Destination NSW Categories.

The passenger movements detailed in Table 50 report flights between Sydney and Taree airports, with the high fluctuation rate clearly apparent and indicating the overall high degree of variability in visitor numbers to a relatively small destination like Taree.

49| TARGETED TRAVELLERS



50| PASSENGER MOVEMENTS (Sydney to Taree Airports)	Number	% Change
A) April–June 2015	3,555	+22%
B) January–March 2015	2,773	–31%
C) April–June 2014	3,982	–

Lastly, Table 51 outlines some planned and potential infrastructure needs currently being investigated to improve overall customer access to some additional Tourism experiences. A number of these tie in well with the growth strategies identified for the MidCoast in Section 14 of this report.

51| TOURISM NEEDS	Potential Infrastructure Development	Increase Manning River Usage
Medium Priority Gaps As detailed in the MidCoast Council's **'Draft Manning Valley Local Strategy'**, May 2016.	Pedestrian/cycle path (Harrington–Crowdy Head). Building Whale–watching facilities at Crowdy Hd. Developing Coopernook as a Tourist Destination. Install Heritage Markers on Heritage Buildings. Improve Bays Hill Look Out. Foreshore improvements (Taree, Harrington, Old Bar) to encourage marine businesses. Improve Camping facilities for Grey Nomads. Improve sporting & conference facilities. Work with NPWS to improve infrastructure in Natural Attractions.	Identify locations for boat facilities. Encourage businesses along the river. Encourage foreshore pop–up shops/ cafes. Enable water–taxis & river cruises. Encourage boat storage facilities. Encourage additional Marinas at Harrington, Manning Point and Old Bar.

9.3 Current Tourism Performance in the Manning Region | Continued

F) Key Tourism Assets of the Manning Region

Seven categories of assets have been identified as important for Tourism in the Manning Valley,[249] ranging from 'Sport Tourism Based' to 'Nature, Outdoor and Adventure'.

These categories are detailed in Table 52 below, along with a listing of the key individual assets (or groups of assets). 'Arts, culture and Heritage–based' (particularly through events); and 'Food–based' appear to be strongly represented. Manning is the only Region that calls out Aboriginal/ Indigenous–based Tourism so strongly.

Table 52: Key Assets for Tourism in the Manning Region

Source: Manning Valley Tourism. *'Manning Valley Destination Management Plan. 2014'.*

CATEGORY	KEY ASSET
1| Nature, Outdoor & Adventure.	National Parks, State Forests & Nature Reserves: SEE TABLE 53. Ellenborough Falls – Located on Tourist Drive 8 – at 200m drop second longest drop waterfall in southern hemisphere; Wingham Brush – 10 ha of subtropical floodplain rainforest including a colony of Grey Headed Flying Fox and huge Moreton Bay Fig trees; Cattai Wetlands; Manning River: Australia's only double delta river system having two entrances, one at Harrington and one at Old Bar – offers 150kms of navigable waterways; Harrington Beach State Park; Camping; Lookouts: Brushy Cutting, Apex, Breakneck, Vincents, Newbys, Blue Knob, Pilot Hill and Flat Rock; Farquhar Park; Beach 4WD; Mountain bikes, road bikes; Walking trails; Push / Dirt Bike trails / Fire trails; Kite surfing – Mud Bishops Reserve; Saltwater Fishing: Harrington, Manning Point, Old Bar, Charleys Island, Croki, Wingham and 'just about anywhere on the Manning'; Freshwater Fishing: Rocks Crossing; Bird watching: Cattai Wetlands, Stewarts River, Hannam Vale, Waitui, Crowdy Bay NP, Oxley Island, Mud Bishops reserve, Old Soldiers Road, Talawahl, Khappinghat, Boorganna, Brimbin NR, Kiwarrak, Lansdowne and Yarratt State Forest
2| Coast, Beaches, Waterways, Surfing Based.	Beaches: Saltwater / Wallabi Point, Black Head, Red Head / Diamond Beach, Old Bar, Manning Point, Harrington, Crowdy Bay. Manning River. Waterfalls: Ellenborough, Waitui and Falls. Access to river and waterways, pontoons.
3| Aboriginal–Based.	Aboriginal Culture; Saltwater National Park; Bluewater; Art Galleries.
4| Food–Based.	Developing food and wine experiences and itineraries; Farmers Markets / general Markets; Wineries; Fresh produce; Manning Valley Beef; Manning Valley Free Range Eggs; Dairy Industry; Oysters; Potential to further develop Region as an online business hub; Potential to develop food tours: farm gate, producers, bush tucker; Farm tours and experiences; Emerging café culture; Cooking / cheese making schools; Specialist retail outlets
5| Sport Tourism Based.	Huge variety of sports groups and facilities. Facilities: Hockey, mountain bike and BMX riding, football, cricket, soccer, swimming, surfing, equestrian, horse racing, clay and target shooting, archery, go cart racing, basketball. Adventure sports; NSW Surfing activities.
6| Arts, Culture and Heritage Based.	Manning Entertainment Centre; Manning Regional Art Gallery; Museums: Wingham, Cundletown and Tinonee; Gardens and Nurseries – open gardens and specialised nurseries; Events, including: Akoostik Festival and Fireworks; ANZAC Day Ceremonies; Australia Day – Hallidays Point, Harrington, Old Bar, Taree, Wingham; Bonnie Wingham Scottish Festival; Charity–Based Events: Walk for Life, Starlight; Christmas Carol events; Envirofair; Hallidays Point fun day; Harrington Festival; Killabakh – Day in the Country; Manning Winter Festival; Old Bar Beach Festival; Relay for Life Manning Valley; Stan Austin Memorial Under 16s Cricket; Taree Agricultural Show; Taree Craftathon; Taree Cup weekend including cup day; Taree Easter Powerboat Spectacular; Taree Open Art Exhibition; Taree Riverbank; Taree Summer Regatta; Troy Bayliss Classic; Volunteer Rescue Association Weekend on Wheels; Wingham Beef Week; Wingham Community Christmas Street Carnival; Wingham Show; Wingham Summertime Rodeo.
7| Cross–Regional Assets.	Gloucester / Barrington Tops; Great Lakes Region. Port Macquarie: Timbertown, Koala Hospital, Billabong Koala Wildlife Park

9.3 Current Tourism Performance in the Manning Region | Continued

G) General Observations and Main Settlements/ Parks

Although there is no specific quantitative analysis available, based on current Tourism performance and the natural assets identified, it would appear that the Manning Valley/ Region is underperforming in terms of Nature–based and Adventure–based Tourism. This is in spite of the clear positioning and is potentially because it still needs time to resonate strongly in potential visitors' minds, but also because the NABT offerings in the Great Lakes and Gloucester Regions appear comparatively stronger at present. This presents a clear opportunity for growth.

There are obviously Tourism experience and infrastructure gaps that need addressing, with the potential for developing longer/ multi–day walks, for example, highlighted in Section 9.6 as one clear one. However, there is at least some basic infrastructure in place for a number of the Tourism opportunities that appear to have potential for strong growth. The highlighting of Aboriginal/ Indigenous–based Tourism in the 2014 DMP is also particularly noteworthy (Manning appears to be the only Region to do so), given this is likely to be a strongly growing area of demand (see Section 13.4 for further detail).

As a final element of background detail on the make–up of the Manning Region, a summary of the main towns, villages and key localities is included below, along with the National Parks, State Conservation Areas and Nature Reserves that are within the Region's boundaries.

Table 53: Main Settlements and Parks in the Manning Region
Source: Government of New South Wales.

MAIN TOWNS, VILLAGES, PARKS AND LOCALITIES OF THE MANNING REGION (2015)
KEY SETTLEMENTS AND SITES OF INTEREST Belbora (part), Black Head, Bobin, Bohnock, Bootawa, Brimbin, Bucca Wauka, Bundook (part), Bunyah (part), Burrell Creek, Cabbage Tree Island, Caffreys Flat, Caparra, Cedar Party, Cells River, Comboyne (part), Coopernook, Cooplacurripa, Coralville, Croki, Crowdy Head, Cundle Flat, Cundletown, Diamond Beach, Dingo Forest, Dolly's Flat, Dumaresq Island, Dyers Crossing, Elands (part), Firefly, Ghinni Ghinni, Glenthorne, Hallidays Point, Hannam Vale, Harrington, Hillville, Johns River, Jones Island, Karaak Flat, Khatambuhl, Killabakh, Killawarra, Kimbriki, Kippaxs, Kiwarrak, Knorrit Flat, Koorainghat, Krambach, Kundibakh, Kundle Kundle, Langley Vale, Lansdowne, Manning Point, Marlee, Melinga, Mitchells Island, Mondrook, Mooral Creek, Moorland, Moto, Mount George, Nabiac (part), Number One, Old Bar, Oxley Island, Pampoolah, Possum Brush, Purfleet, Rainbow Flat, Red Head, Saltwater, Stewarts River, Strathcedar, Tallwoods Village, Taree, Taree South, The Bight, Tinonee, Tipperary, Upper Lansdowne, Waitui, Wallabi Point, Wang Wauk, Wherrol Flat, Wingham and Yarratt Forest.
SELECTED NATIONAL PARKS, STATE CONSERVATION AREAS AND NATURE RESERVES Biriwal Bulga SF, Brimbin NR, Bulga SF, Cattai Wetlands, Comboyne SF, Coopernook SF, Coorabakh NP, Crowdy Bay NP, Dingo SF, Goonook NR, John's River SF, Khappinghat NR, Killabakh NR, Kiwarrak SF, Knorrit SF, Lansdowne SF, Talawahl NR & SCA, Tapin Tops NP, Wingham Brush NR, Yarratt SF.

© Visit Manning Valley | Ellenborough Falls

9.3 Current Tourism Performance in the Manning Region | Continued

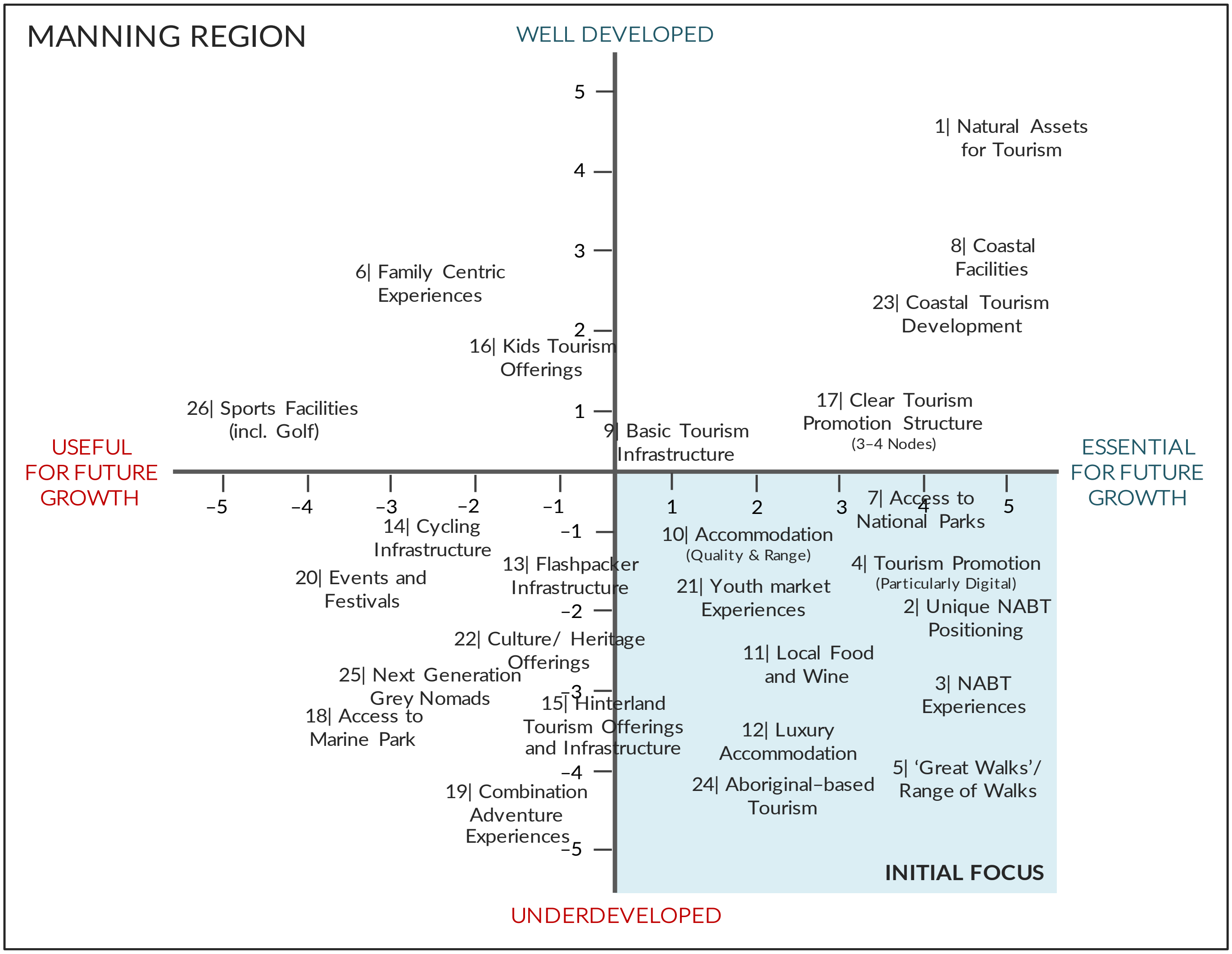
H) Indicative Gap Analysis for the current Manning Region Tourism offering

To summarise some of the current gaps in the Manning Region's Tourism industry, an initial summary gap analysis has been undertaken, whilst acknowledging that there are some clear deficiencies in the available data.

The following graphic looks at 26 key components and identifies the main areas of weakness that will likely need addressing to open up the growth opportunities in Manning identified in the latter part of this report.

Graphic 18: Gap analysis of key components of Manning Valley Tourism

Analysis by 2iis Consulting based on Baseline Analysis and DMS Field Visits April–August 2016.



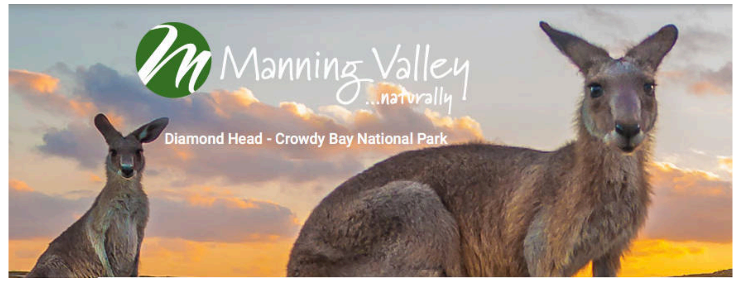
Looking at the gap analysis matrix above, the bottom right quadrant is where the main suggested areas for development can be found. The components there include 'Great Walks/ Range of Walks', 'NABT experiences', 'Unique NABT Positioning' (although more developed than the Great Lakes and Gloucester), 'Accommodation' (quality/ range generally and Luxury specifically), 'Aboriginal/ Indigenous–based Tourism', 'Local Food & Wine', 'Youth Market Experiences', 'Combination Adventure' and 'Hinterland Tourism Offerings & Infrastructure'.

Those in the top right are those that are essential for future Tourism growth, but are already relatively well developed. They will still need focus and investment, but are less of a priority for Manning (with the possible exception of Tourism Promotion and Structure, given these are critical for the MidCoast Region overall.

The top left quadrant includes those offerings that are still important for growth, but are more a case of maintaining an existing strength. 'Family Centric Experiences' is the one area for maintenance.

NOTE: DETAIL ON THE FUTURE GROWTH POTENTIAL FOR TOURISM IN THE MANNING REGION CAN BE FOUND IN SECTION 14.

9.4 Overall Approach to Growing Tourism in the Manning Region | www.visitmanningvalley.com.au



Manning Valley Tourism (MVT) consists of a team of 5 employees and 7 volunteers who are responsible for the marketing, management and development of Tourism in the Manning Region. [250]

MVT states its' overall vision as being ***'To make the Manning Valley the visitor location of choice for our target markets and key growth markets.'*** [251]

It then outlines its mission as being ***'To promote the Manning Valley as a desirable destination for visitors so as to create economic, environmental, social and cultural benefits to the whole community through the development, implementation and performance monitoring of the DMP. This DMP is in place to work towards the NSW State goal of doubling Visitor Spend by 2020.*** [252]

To achieve this, it has identified five top–level goals that were intended to align with the overall NSW 2020 Goal:

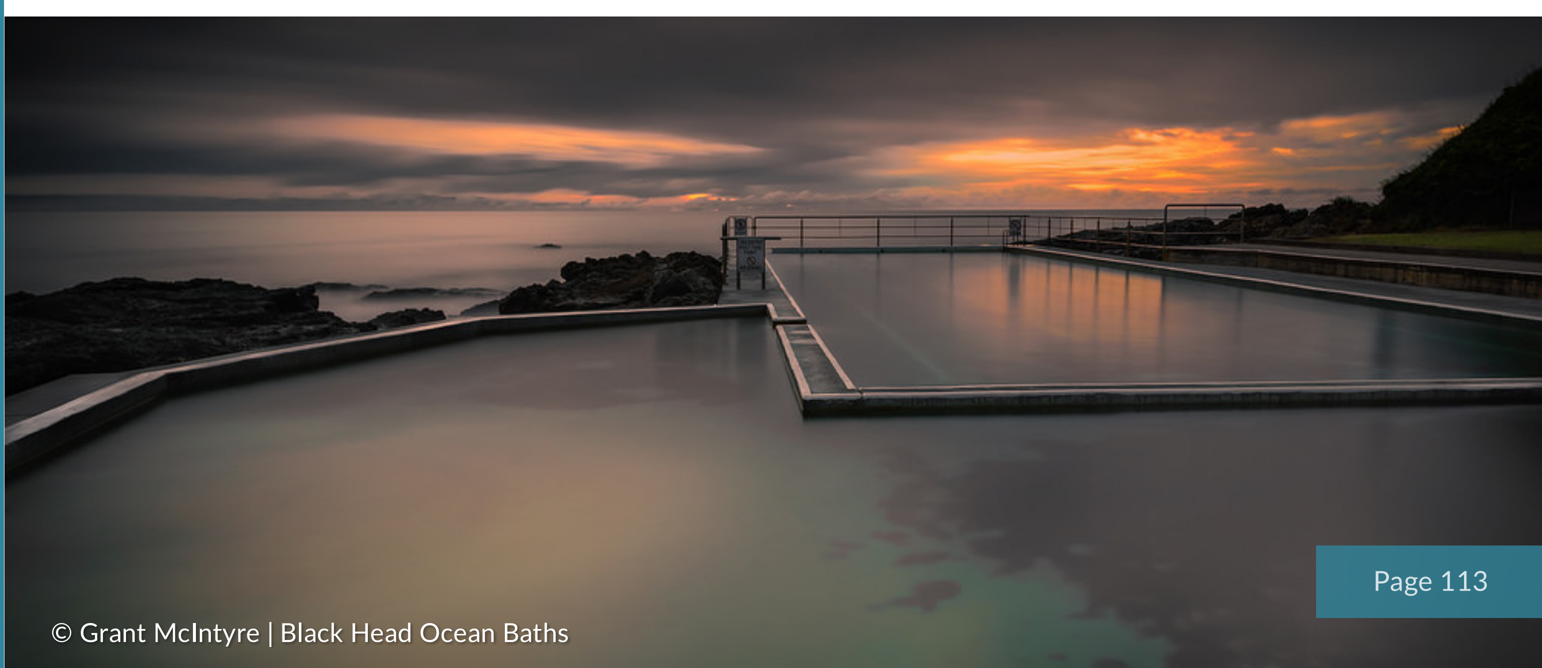
1) Increase Visitation;
2) Grow Physical Capacity;
3) Renew and Revitalise Destinations;
4) Improve the Visitor Experience;
5) Increase Visitor Spend.

Whilst these goals are fairly broad, they are focused by the commitment that future tourism marketing and promotion 'will be proportionate to the segments outlined in the visitation research: 'Visiting Family and Friends' (46%), 'Holidays' (37%), 'Business Tourism' (12%) and 'Others' (5%).' [253]

However, under these goals are 41 Objectives/ Actions ranging from 'Converting Day–trippers into Overnight Stays' to 'Developing and implement a compelling, consistent and long–term brand strategy for **Manning Valley...naturally**™.'

Considering the resources available (both in people and budget terms), this many Objectives/ Actions seems a little unrealistic (whilst recognising that some of them are likely driven by NSW State requirements). Transferring all of these to a broader MidCoast DMP will not be feasible, however a number of them (like exploring the Great Walks potential, investing heavily in digital marketing capability and addressing some of the Tourism experience supply issues) are clearly relevant for all three Regions.

[See the full Destination Management Plan here: http://visitmanningvalley.com.au/wp-content/uploads/MV-DestinationPlan.pdf]



© Grant McIntyre | Black Head Ocean Baths

9.4 Overall Approach to Growing Tourism in the Manning Region | Continued

A SWOT analysis was undertaken as part of the last planning process and is worth including here as more or less all of the findings still appear to hold true.

Table 54: SWOT Analysis of Manning Valley Tourism Offering and Promotion

Source: Manning Valley Destination Management Plan 2014.

STRENGTHS	WEAKNESSES
1) Highway signage; 2) Welcome and town entry signage; 3) Unique selling points; 4) Diversity in what the Region has to offer; 5) Proximity to Sydney and Newcastle; 6) Cost effective holiday options; 7) Base yourself in the Manning Valley for day trips; 8) Transport to major centres; 9) Brand recognition; 10) Local produce and producers; 11) Local people in local businesses; 12) Proximity to LGAs with high tourist visitation.	1) Quality of service; 2) Inadequate use of websites and social media; 3) Not seen as comparable to other destinations; 4) Size; 5) Understanding of our defined area; 6) Lack of public transport; 7) Marketing $ available; 8) Amount of cultural diversity in Region; 9) Major commercial attractions; 10) No strong point of difference; 11) Roads and bridges.
OPPORTUNITIES	**THREATS**
1) Special interest events/ activities: a) Weddings as central location; b) Small business conferences (less than 200); c) Sporting NSW events: hockey facility, pool sports; d) River sports: rowing, sports boats, cricket; e) Motor enthusiasts. 2) River activities and cruises; 3) Partnering with other regions; 4) Social media engagement and marketing; 5) Competitions and offers; 6) Events and activities; 7) Identify attractions and reasons to come; 8) Strengthen brand outside Region; 9) Develop strong partnerships; 10) International market; 11) 'Street–scaping'; 12) Walkways, bike tracks; 13) Indigenous tourism.	1) Reduced funding opportunities; 2) Competition from other regions striving for the same $; 3) Socio–economic profile of our Region for potential Tourism investors; 4) Current status of 'stagnation' of the Manning Valley's Tourism destination lifecycle; 5) Perceptions associated with natural disasters; 6) Perceptions of social profile.

© Australian Geographic | Crowdy Bay National Park.

9.4 Overall Approach to Growing Tourism in the Manning Region | Continued

Manning Valley's Brand, Unique Selling Propositions and Themes

Tourism in the Manning Valley is promoted under the tagline '**Manning Valley... Naturally™**' which clearly aims to position the destination as one focused on Nature–based and outdoor Tourism, attempting to make the most of the Natural Tourism assets that are readily accessible.

There are also 12 Brands/ themes highlighted as sitting underneath this umbrella Branding, although it is not entirely clear how they are intended to be used (or have been used to date):

1) Manning Valley Coast; 2) Country on the Coast; 3) Gateway to the North Coast; 4) Central and cost effective holiday options; 5) Unspoilt; 6) Manning Valley Hinterland; 7) Country Hospitality; 8) Manning Valley Country; 9) Natural, clean and green; 10) Place to spend quality time with partner, family friends; 11) Something for everyone/ choice; 12) Relax and rejuvenate.[254]

17 'Unique Selling Points (USPs) to focus on' are also described – although the very fact there are so many of them makes it hard to either drive focus or make any of them true USPs for the Region's Tourism.

1) Proximity to Sydney; 2) Gateway to Mid North Coast; 3) Cost effective base with a diverse range of holiday and accommodation options: families, grey nomads etc.; 4) Climate; 5) Quality lifestyle; 6) Friendly, welcoming; 7) Diverse range of natural attractions; 8) Agricultural industry: oysters, fishing, dairy, beef, manufacturing; 9) National Parks: Ellenborough Falls; 10) State Forests; 11) Wingham Brush; 12) Cattai Wetlands; 13) Range of Tourism options; 14) Uncrowded, unpretentious, uncomplicated, unspoilt Region; 15) Education options; 16) Pristine beaches, coastline, waterways; 17) Boutique accommodation options.[255]

The overall positioning is certainly potentially strong and seems to have been successful in the Manning Valley itself and nearby regions. The weaknesses lie in the somewhat broad and unfocused *'brands, themes and USPs'* outlined above, coupled with the fact that marketing budgets are relatively small and positionings like this need to be consistently communicated over the medium–term for the benefits to be fully realised.

Team Manning Valley 2016/17 Partner Program

Manning Valley Tourism runs a structured Partner Program with 3 tiers of membership: Bronze ($150 p.a.), Silver ($300 p.a.) and Gold ($600 p.a.). In 2015/16, partners directly contributed $21,500 towards the promotion of the Region as well as helping secure an additional $65,500 in funding from Destination NSW for a joint campaign to promote the Manning Valley in the Newcastle and New England markets.

[See the Team Manning Valley Membership Prospectus here:
http://visitmanningvalley.com.au/wp-content/uploads/2016/06/Team-Manning-Valley-2016-17-web.pdf]

Manning Valley Tourism Budget 2014–15 and Tourism Visitor Infrastructure

Until the recent amalgamation, Manning Valley Tourism was primarily funded by the Greater Taree City Council, with a forecast Budget in 2016–2017 of AUS $1,052,394 which includes all salaries, promotion budgets and building maintenance/ operational costs for the Visitor Information Centre.[256]

There is a single Visitor Information Centre in Taree North and overall Tourism staffing consists of: Team Leader Tourism and Public Relations; Public Relations Officer; Digital Media Officer; Tourism Officer; Communications Support Officer; and 7 Casual Visitor Services Officers. [257]

Key Identified Risk to Future Tourism Development in the Manning Region

9 key risks were identified in the 2014 DMP, all of which could conceivably be applied to the entire MidCoast.[258]

1) Decline in quality or loss of tourism product; 2) Reduction in marketing or major event budget; 3) Decline in visitation numbers; 4) Lack of industry cohesion/ fractured industry; 5) Reduction of political support for Tourism; 6) Reduction of funding; 7) No new product development in Region; 8) Poor image / perception of destination through major events (i.e. flooding); 9) Environmental impacts: forestry, flooding, drought, water usage.

9.5 Key Promoted Manning Tourism Offerings | www.visitmanningvalley.com.au

The Visit Manning Valley website starts by welcoming visitors to **'The Manning'** and describing how:

'Just three and a half hours north of Sydney, you will experience a world where spectacular coastline and pristine beaches meet rustic countryside and adventurous mountain trails – a destination where you really can have the best of both worlds.'

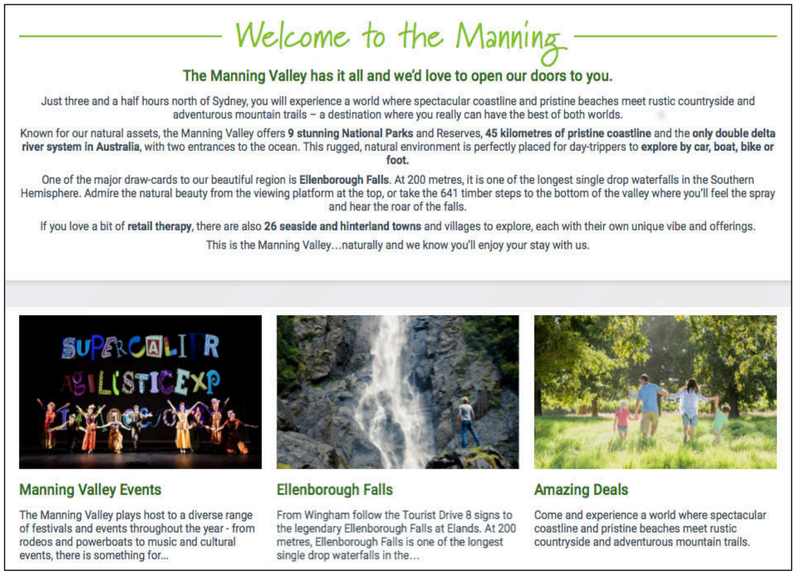
The focus is squarely on the natural assets of the Region, describing '**9 stunning National Parks and Reserves, 45 kilometres of pristine coastline and the only double delta river system in Australia, with two entrances to the ocean.'**

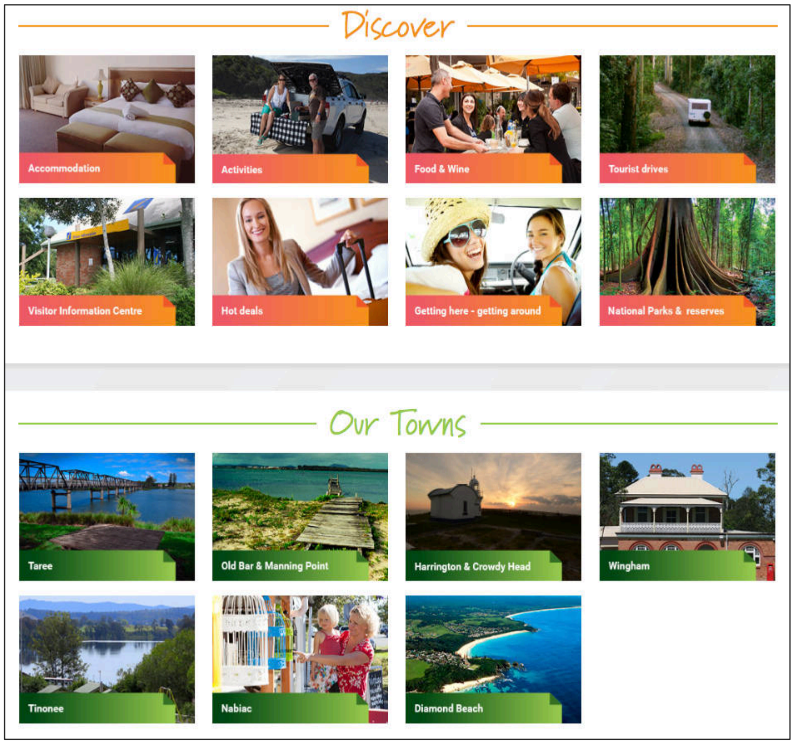
The Ellenborough falls is then highlighted as the only main drawcard attraction called out strongly – again, a nature–based attraction.

The next featured section on the homepage actually feels slightly out of place as it focuses on specific **'Manning Valley Events'**, the **'Ellenborough Falls'** (again – with an advert for Manning Valley Livestock and Property on rotation) and **'Amazing Deals'**.

The **'Discover'** section beneath this feels like it should actually be higher up the page as it provides more of a general overview of the Region with sections on 'Accommodation', **'Activities', 'Food & Wine', Tourist Drives', 'Visitor Information Centre', Hot Deals', 'Getting Here– Getting Around' and 'National Parks & Reserves'**.

Below this again are some sections on **'Our Towns'** which provide an overview on 9 of the Regions main Tourist areas: Taree, Old Bar/ Manning Point, Harrington/ Crowdy Head, Wingham, Tinonee, Nabiac and Diamond Beach.





9.5 Key Promoted Manning Tourism Offerings | www.visitmanningvalley.com.au | Continued

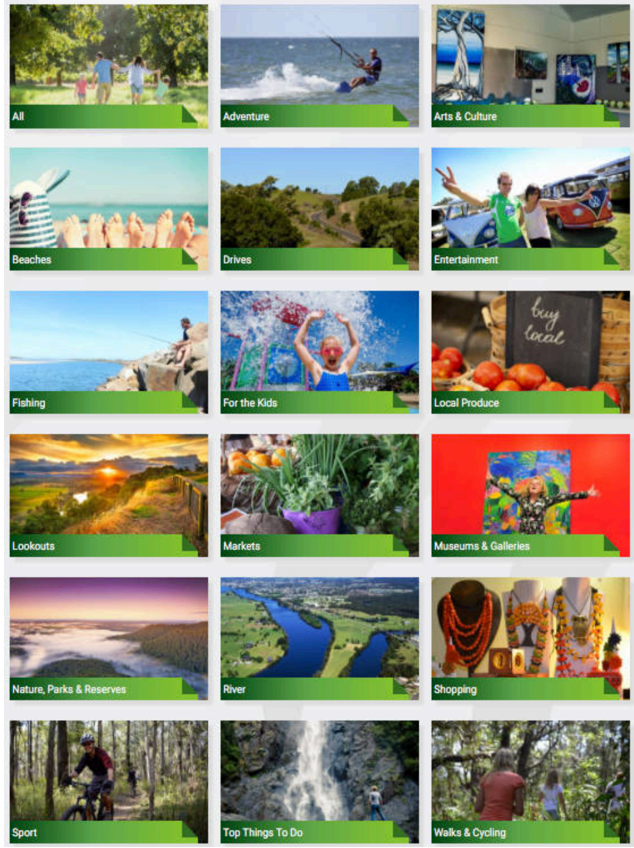
Whilst visitmanningvalley.com.au is fairly well structured overall, it still focuses a little too heavily on the functional side of the Tourism offering, rather than fully bringing what is a strong and single–minded consumer proposition to life. There is an opportunity to provide more emotive detail on the Nature–based assets of the Manning Valley before getting into the more directory style– information (that is always needed at some point for visitors).

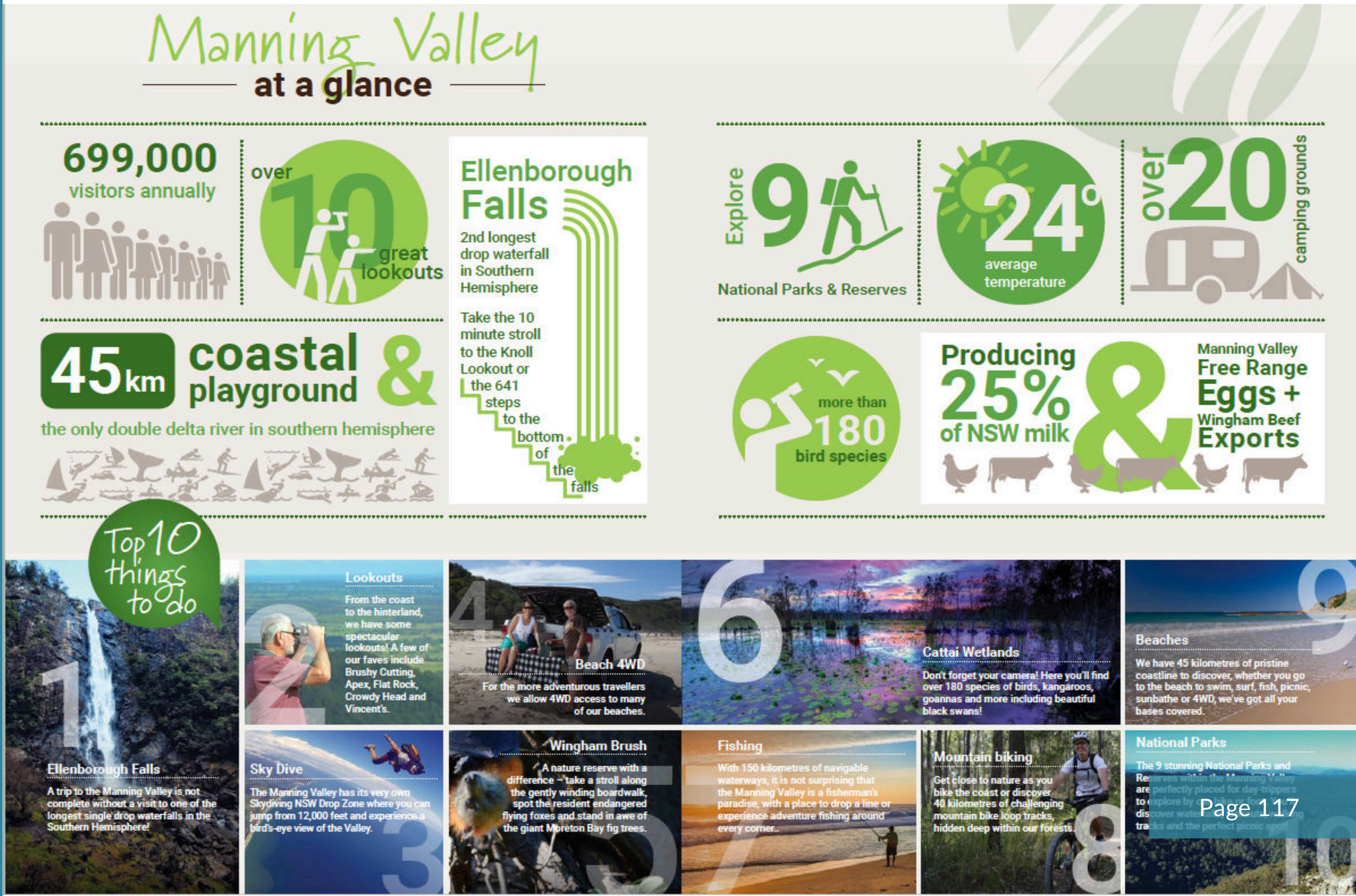
The **'See & Do'** Section also provides a wealth of Tourism information but probably needs a more focused structure as well given there are currently 18 categories.

The core printed Tourism materials (also fairly accessible as digital downloads) are easily the strongest items of collateral produced for the Manning Valley.

They are well–structured, visually strong and give a very clear sense of the Region's offerings. Some of the summary pages (an example can be found at the foot of this page) are particularly effective and demonstrate a focus that is missing from some parts of the website.

See the current Manning Valley Visitor Guide here:
[http://visitmanningvalley.com.au/visitor-guide/]





9.5 Key Promoted Manning Tourism Offerings | www.visitmanningvalley.com.au | Continued

Another ‘directed’ way that potential visitors are guided through the Tourism offerings is via the brochures made available (again in both printed and digital formats).

The current brochures available online are:

A. Activities

1) ‘Manning Valley Beaches’; 2) ‘Manning Valley Markets’; 3) ‘Manning Valley Rainy Day Fun’; 4) ‘Manning Valley Wineries’; 5) ‘Manning Valley Galleries and Museums’; and 6) Manning Valley Op Shop Hop’.

B. Accommodation

1) ‘Manning Valley Caravan and Camping’; 2) ‘Manning Valley Motels’; 3) ‘Manning Valley Resorts & Self–Contained’; and 4) ‘Manning Valley Country Retreats’.

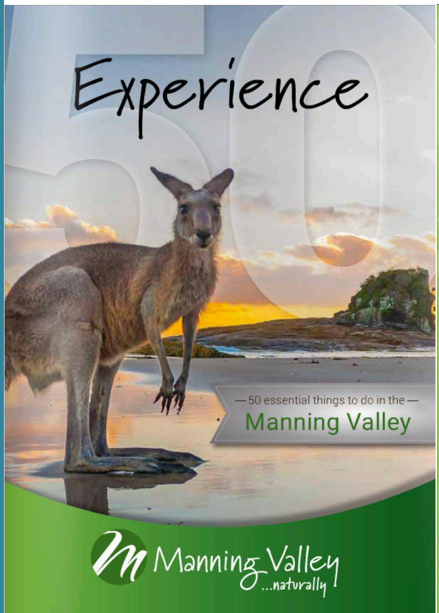
Whilst the materials overall are good with regards to the functional information they communicate, the categories these are currently divided into are probably not the strongest when it comes to supporting the overall **‘Manning Valley … Naturally™’** proposition and feel like they are slightly outdated materials that need revamping under the new branding.

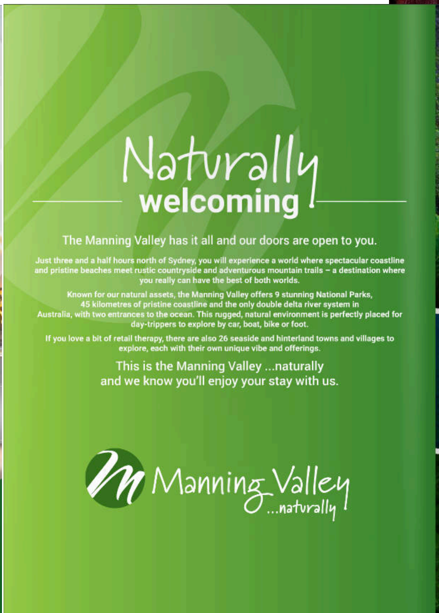
As an example of this, no brochure currently exists on National Parks/ Nature Reserves and/ or Walks which comes across as a clear gap considering the intended focus on Nature–based offerings.

This could actually be easily rectified in the short–term by making the ’50 Essential things to do’ guide much more prominent and accessible online.

View the brochures and ‘50 Essential things to do in the Manning Valley Guide’ here:
[http://visitmanningvalley.com.au/brochures/]


© Manning Valley Tourism | visitmanning valley.com





9.5 Key Promoted Manning Tourism Offerings | www.visitmanningvalley.com.au | Continued

The Manning Valley currently focuses its' promotion mainly around the beaches, Taree/Wingham & Nabiac, the Manning River and Ellenborough falls near Eland.

The following table outlines some initial thoughts on 4–5 potential nodes that could provide some structure for future devlopment. One element that is particulalry interesting to note is the clustering of National Parks/ SCAs/ Parks in 3 areas: the North East, South East and West. This could potentially form a '3 node structure' to help promote a stronger focus on Nature–based and Adventure–based Tourism.

Table 55: Potential future Manning Valley Tourism Nodes [FOR COMPLETION DURING DMP PROCESS]
Initial proposal based on this baseline analysis.

#	POTENTIAL NODE *	KEY SETTLEMENTS	INDICATIVE TOURISM OPPORTUNITIES
1	'Greater Taree' Centred on Taree/ Chatham.	Taree, Chatham, Cundletown, Kundle Kundle, Mondrook, Purfleet, Timonee.	Families and Children; Coastal/ Mainstream Tourism; Higher–volume, seasonal Tourism; festivals and more mainstream events; access to National Parks/ Nature Reserves; MTB (Taree Tips) and the Manning River.
2	'Harrington & the Northern Beaches/ National Parks'	Harrington, Coopernook, Crowdy Head, John's River, Langley Vale, Manning Point.	Coastal Tourism; NABT (access to Crowdy Bay NP); Great Walks potential, 'Flashpacker' market; Surfing; Combination Adventure Tourism.
3	'Saltwater & the Southern Beaches/ Nature Reserves'	Saltwater, Black Head, Corrigan, Diamond Beach, Halliday's Point, Koorainghat, Nabiac, Old Bar, Rainbow Flat, Wallabi Point.	Coastal Tourism; NABT (access to Khappinghat NR & Kirrawak SF); Great Walks potential, 'Flashpacker' market; Surfing; MTB?
4	'Wingham and the Western Manning Valley'	Wingham, Appletree Flat, Bebora, Burrell Creek, Elands (Ellenborough Falls), Hillville, Killawarra, Krambach, Kundibakh, Mount George, Wherrol Flat.	Access to NABT in the Tapin Tops & Biriwal Bulga NPs; Rural Tourism (towards Gloucester); Food & Wine/ Heritage; ; Ellenborough Falls; MTB?
5	'Lansdowne and the Northern Manning Valley' Potentially merged with N Beaches.	Lansdowne, Hannam Vale, Killabakh, Melinga, Upper Lansdowne.	Local Food and Wine offering; access to NABT in a range of NPs & SFs; Women's Adventure + Wellbeing.

* Note that names used for Potential Nodes are indicative only.

The above are suggested as indicative only and are intended to promote discussion and will be developed further during the remainder of the Destination Management Process.

How the Manning Region is structured for future Tourism development also will very much depend on the outcomes of the work that needs to be undertaken to segment the overall MidCoast Region and how this affects Gloucester. More detail on a potential structure for the MidCoast as a whole is included in Section 11.

© Visit Manning Valley | Cattai Wetlands

9.6 Nature–based Tourism in the Manning Region | All data from Table 56 unless specified

As with the previous 2 sections, it is worth looking at the current & future value of Nature–based Tourism to the Manning Region specifically.

The current value of NABT is estimated at between AUS $32.0 million and AUS $40.0 million and is forecast to grow to between AUS $151.2 million and AUS $194.4 million by 2030. This compares with between AUS $48.7–62.6 million in Gloucester and AUS $340.9–438.3 million in the Great Lakes.

The growth in NABT in Manning is forecast to be slightly lower due mainly to the fact that the Region doesn't have a singularly unique asset like Gloucester (The Barrington Tops) and the Great Lakes (the lake system). Whilst a broad range of National Parks, State Forests and Nature Reserves exist, the river system is extensive (and the Ellenborough Falls is obviously a specific drawcard), they need more structured and focused promotion to achieve the same growth rates as could be achieved with a singular asset.

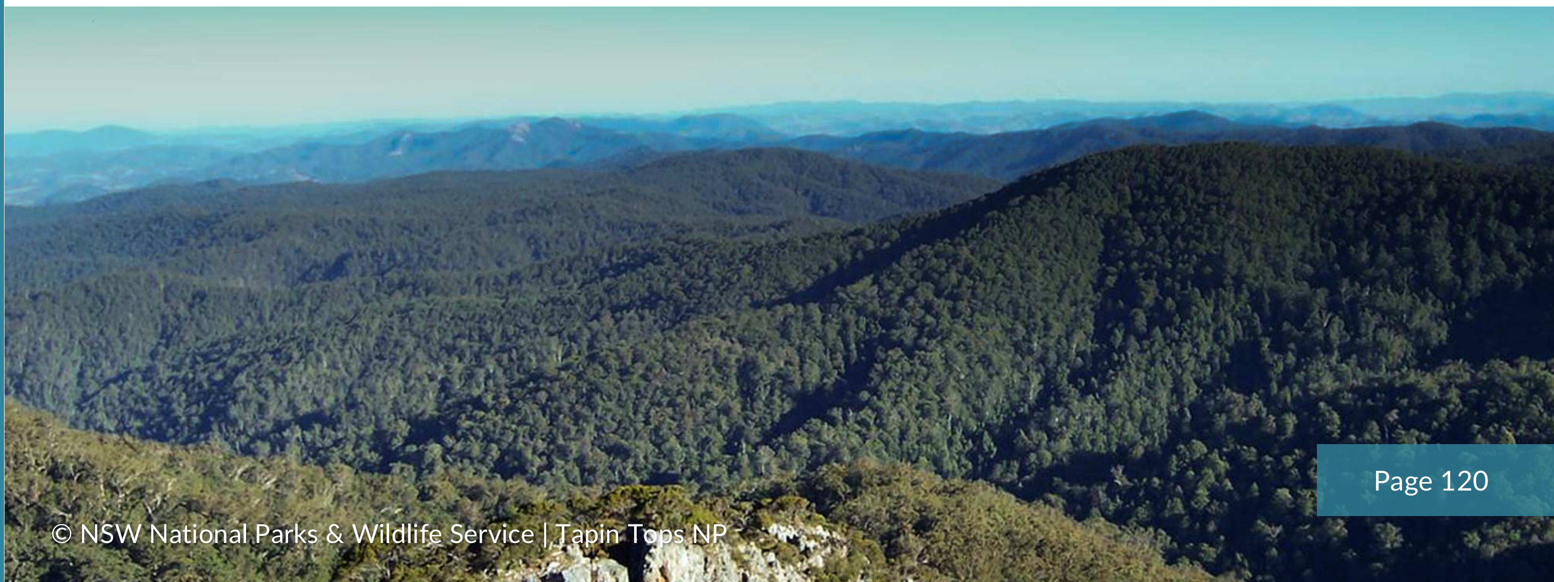
In spite of this lower growth, the potential value for Nature–based Tourism in the Manning Region is still the single largest opportunity for the Region out to the end of the next decade.

A structured, long–term approach is clearly needed to manage these natural assets – with perhaps greater attention to how they can be structured than the other 2 Regions – to ensure the $194.4 million forecast value from NABT and AUS $432 million in forecast value from Tourism overall is realised.

Table 56: Current and Forecast Value of Manning Nature–based and Adventure Tourism (2015 vs. 2030)
Sources: UN Statistics Division, Tourism Research Australia and Destination NSW.

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
Manning Region	**$160 million**	**$32 million**	**$40 million**	**$432 million**	**$151.2 million**	**$194.4 million**

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



© NSW National Parks & Wildlife Service | Tapin Tops NP

9.6 Nature–based Tourism in the Manning Region | Continued

To conclude this section on Tourism in Manning, it is worth considering the walks currently available.

The following table provides a sample of walks in the Manning Region as an initial introduction into the current level of development of walks in the Region. One immediate observation is that the walks are all short, with no clearly promoted walks over half a day in duration.

Details on the walks available in the Region are generally readily accessible, although the National Parks website (www.nationalparks.nsw.gov.au) is arguably still the best source for detailed information vs the Visit Manning Valley website itself.

Table 57: A Selection of Current Walks in Manning Valley National Parks

Sources: NSW National Parks and Wildlife Service.

#	WALK	LOCATION	CATEGORY	DESCRIPTION
1	'Ellenborough Falls'	Elands	30 mins–1 Hour incl. climb to top of waterfall	Take a leisurely 15 minute stroll to The Knoll for great photo opportunities or walk to the bottom for a swim after a 30 minute hike down to the Valley below.
2	'Newbys Creek Walk and Caves'	Coorabakh National Park	20 mins	A short walk along Newbys Creek in Coorabakh National Park takes visitors to a scenic cave, where a large overhanging rock creates a natural shelter above the stream. Under 1km.
3	'Five Islands Walking Track'	Saltwater National Park	1 Hour Walk	This gorgeous coastal walking track follows a part of the Saltwater National Park coastline that is rich in Aboriginal history with great spots for swimming, fishing, surfing, and sailing, near Taree. 2.5km return.
4	'Ms Kelly's Walking Track'	Brimbin Nature Reserve	1 Hour Walk	Ms Kelly's Walking Track in Brimbin Nature Reserve is a short walking track near Taree, that follows a historic bullock route and takes in landmarks with names significant to the area's historic heritage. 1.5km loop.
5	'Diamond Head Loop Walk'	Crowdy Bay National Park	2 Hour Walk	Diamond Head Loop Walk offers scenic coastal views across Crowdy Bay National Park. Expect beaches, lookouts, and glinting rock faces, giving Diamond Head its name. 4.3kms.
6	'Laurieton Track'	Dooragan National Park	2 ½ Hour Walk	Part of the Three Brothers, this challenging walk to the scenic summit overlooking Laurieton is not to be missed. The views are some of the best across northern New South Wales. 3kms one way.
7	'Perpendicular Point Walking Track'	Kattang Nature Reserve	2 ½ Hour Walk	This easy walk rewards you with spectacular scenic coastal views to Port Macquarie and Diamond Head. The lookout is perfect for whale watching, birdwatching and photography. 3.7kms return.
8	'Rawson Falls Walk'	Boorganna Nature Reserve	2 ½ Hour Walk	Follow Rawson Falls walk all the way to the scenic waterfalls, passing a lookout, picnic area and swimming hole, while enjoying birdwatching and wildlife along the way. 5kms return.

There appears to be a number of opportunities for longer walks in areas like the Tapin Tops National Park or a Coastal Walk connecting Crowdy Head NP to Khappinghat NR (or beyond into the Great Lakes), however walks are currently aimed more at mainstream visitors vs. more NABT–focused Tourists.

See Section 7.6 for examples of walks in the Gloucester Region, Section 8.6 for examples of walks in the Great Lakes and Section 13.1 for further insights into the growing 'Great Walks' market and examples of a number of single day, multi-day and guided walks in New South Wales.

SECTION 10

Gloucester, Great Lakes and Manning Tourism Brands

10.1.1 The Gloucester Region Brand Proposition and Positioning: Summary Analysis

The Tourism offering of Gloucester is currently promoted under both the **'Gloucester. Basecamp for Barrington Tops'** and **'Gloucester. Basecamp for Barrington Tops world heritage wilderness'** propositions, with a limited range of print/ brochure, digital and online materials for potential visitors to the Region.

'Visit Gloucester and World Heritage Barrington Tops' also features in selected marketing materials, including the Visit Gloucester website homepage–the banner of which is included at the foot of the page as an example of the simple executions used.

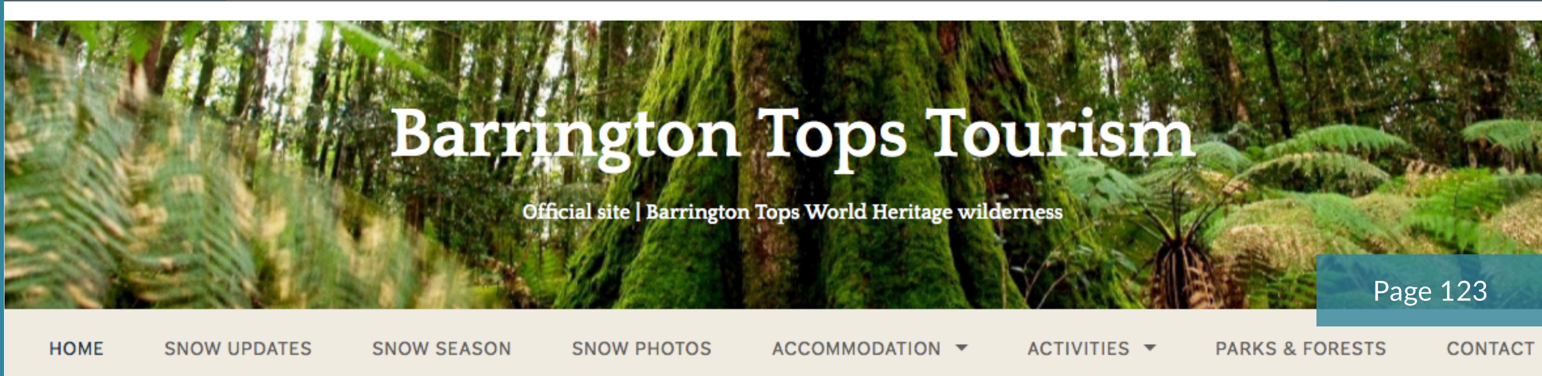
Visit Gloucester and World Heritage Barrington Tops

There are a number of rotating images on the homepage including snowy views, a family kayaking, some mountain bikers, concert musicians, cattle on a rural road, café imagery and some local business owners. The image included below is probably the strongest image that ties in best with the Barrington Tops led positioning; it also a strong, high quality image where some of the other images are less striking/ lower quality.

Potential visitors to the Gloucester Region are also likely to be driven via the Barrington Tops Tourism website, the banner of which is also included below. The Barrington Tops are World Heritage listed and are not marketed under any other positioning: imagery of the natural assets of the park are a central feature of the website. This site is visually stronger from a Tourism perspective, while still fairly simple.

Graphic 19: Visit Gloucester and Barrington Tops Tourism Home Page Banners

Sources: www.visitgloucester.com.au and www.barringtontopstourism.com.au.



10.1.1 The Gloucester Region Brand Proposition and Positioning: Summary Analysis

Gloucester has minimal Tourism promotional activity on social media, with You Tube the only channel visible presently. The current featured video on You Tube (can be viewed via the link to the right) is a general promotional video under the tagline **'Welcome to Glorious Gloucester'**.

This video is fairly broad in its' appeal meaning it is likely to appeal to an older demographic and some families. It promotes the Region as a quiet rural town with unparalleled access to the Barrington Tops. Nature–based activities feature strongly (walking, kayaking and horse trekking in particular), as does the Copeland Gold Mine and the food, accommodation and family offerings available in Gloucester itself. It is of a fairly standard professional standard, although has only received just over 1,900 views since its release in March 2016 (most likely due to the lack of social media surrounding it).

Branded materials for Tourism in Gloucester are in general very limited, however a photographic competition has delivered some strong local imagery that appears to have been used in a variety of ways – including an execution as **'Greetings from Glorious Gloucester'** postcards (see right).

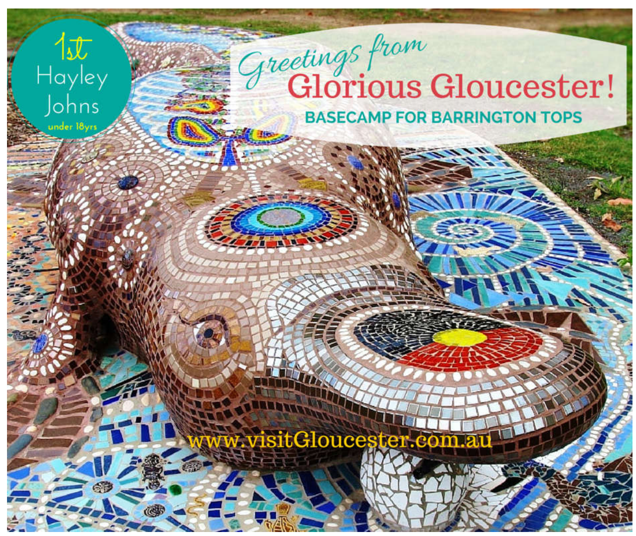
The www.visitgloucester.com.au website can best be described as 'basic'. It has the usual Tourism content that is expected of a regional Tourism website, but the functionality is fairly limited, imagery too often fails to do justice to the location and overall the website could do with an overhaul to enable it to better promote the Region. Whilst usage data was not available, it can be assumed that the Barrington Tops Tourism site is used by a high volume of potential visitors.

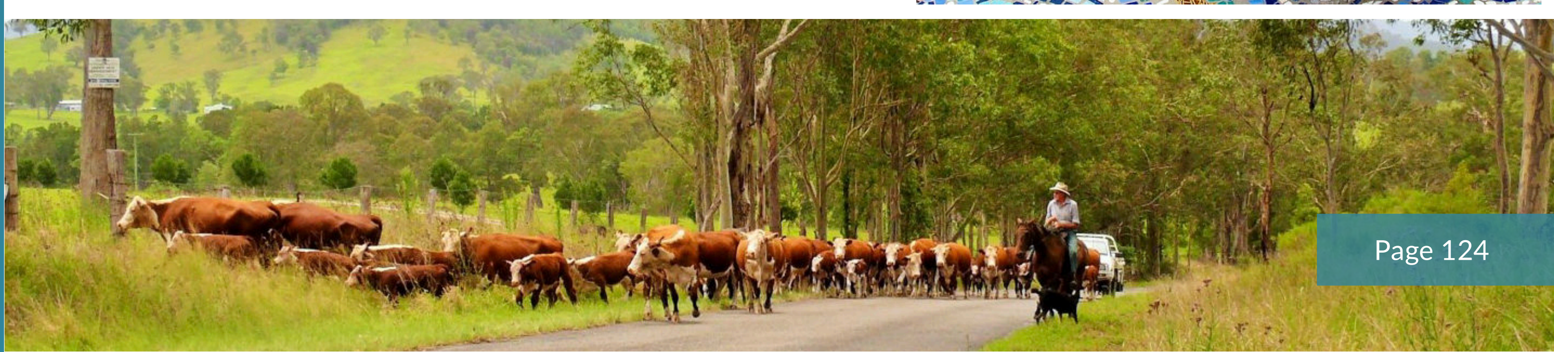
The lack of social media activity (particularly through standard channels like Facebook & Instagram) could also be rectified fairly quickly. The activity does not need to be sophisticated, but a presence on mainstream social channels is more a less mandatory in an age of digital travel research.

One other area that stood out was the lack of consistency creatively, particularly on some of the core materials. 'The Gloucester Visitor Guide' is the clearest example of this, consisting of text–based listings only rather than using a more visual approach under the current 'Glorious Gloucester/ Basecamp for the Barrington Tops' positioning.

[See: http://visitgloucester.com.au/wp-content/uploads/2016/08/The-Visitor-Guide-7.2016.pdf]

To go to Visit Gloucester's You Tube Channel, click here:
[https://goo.gl/ZBlDMf]





10.1.1 The Gloucester Region Brand Proposition and Positioning: Summary Analysis

From a positioning point of view, **'Gloucester. Basecamp for Barrington Tops'** certainly makes the most of what is clearly one of the Region's key assets. However, it does not provide a strong emotional call to action, as a tagline could equally apply to Dungog, and focusing just on the Barrington Tops NP means it does not fully capture all that the Gloucester Region has to offer visitors.

This does not mean the Unique Selling Proposition that *'Gloucester is the closest town to World Heritage listed Barrington Tops, which is an unbeatable position'* (as outlined in Gloucester's 2015–18 Destination Management Plan) should be discarded, but rather that other elements could perhaps be incorporated to make it less direct and functional.

Some of the key steps that need to be taken to define any future Gloucester Region brand proposition include:

1) **Fully defining the Gloucester regions to be promoted** (outside of the Barrington Tops) and their unique characteristics (once Regional Structure agreed);
2) **Deciding on a hierarchy for the Tourism offerings and experiences** on offer in the Region;
3) **Confirming the key target markets (and their relative importance)** and subsequently their primary motivations for visiting the Gloucester Region;
4) **Building (or revising) a brand architecture** that provides a structure for any future Gloucester Tourism brand whilst allowing for future flexibility;
5) **Reviewing key regional competitors** to assist in making the future proposition and positioning as unique and differentiated as possible.

Some of the above is explored in this baseline analysis, the remainder will be considered, at least in part, during the remainder of the DMP process.

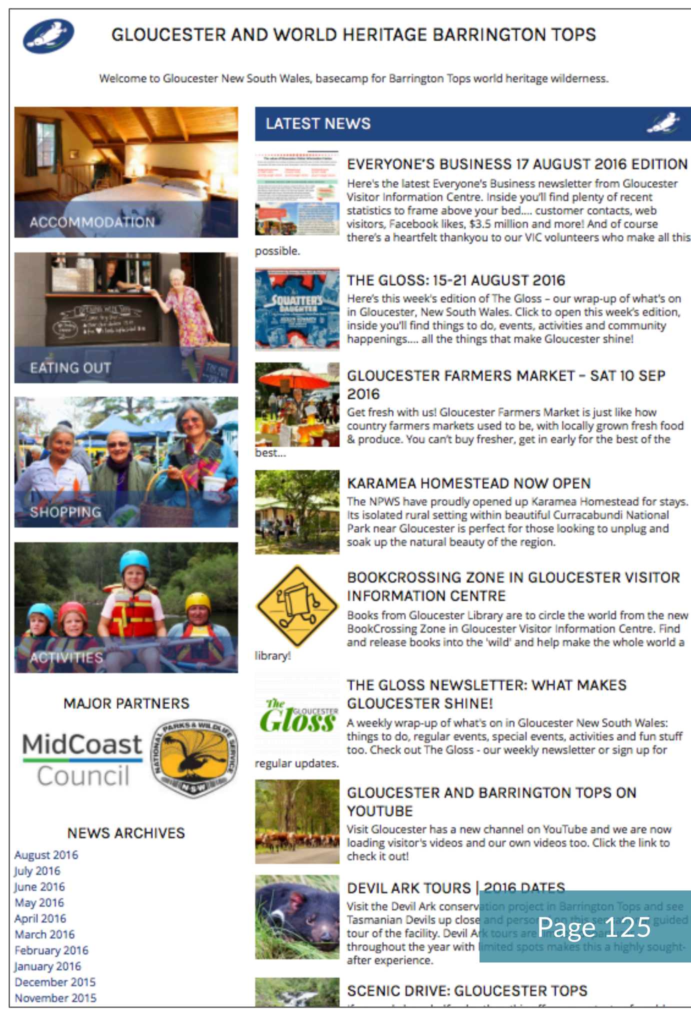
A key consideration for any future Gloucester Region Tourism brand positioning work actually rests in some key decisions that need to be made about the overall approach to Tourism promotion in the broader MidCoast Region.

Should, for example, it be decided that Gloucester be promoted as part of two separate western sub–regions, then a quite different approach to that taken currently would be necessary (*see proposed structure in Section 11.7*).

Functional decisions about the MidCoast Region's overall Tourism Promotion (i.e. how the online presence will be structured) will also have an impact.

Graphic 20: Current Barrington Tops 'Mood Board'
Source: Barrington Tops Tourism Website 2016.

Graphic 21: Visit Gloucester Homepage
Source: Visit Gloucester Tourism Website 2016.



10.1.2 The Gloucester Region Brand Awareness

Table 58: Online Rankings for selected Gloucester & East Coast Australia Tourism search terms

Search engine analysis undertaken by 2iis Consulting (August 2016). Click on the underlined text to go direct to referenced page.

#	TOP 10 RANKED WEB PAGES UNDER SELECTED SEARCH TERMS [Google 19–20/08/16]		
	'Gloucester, NSW'	'Best places to visit near the Barrington Tops, New South Wales'	'Things to do near Gloucester, NSW'
1	Visit Gloucester | Barrington Tops wilderness www.visitgloucester.com.au/ Here's the latest Everyone's Business newsletter from Gloucester Visitor ... Classic Australian movie at Wards River Community Hall, Sat 20 Aug 2016 ...	| See Graphic 22 | Page 127 | 1. Barrington Tops National Park, 2. Barrington Tops State Forest, 3. Barrington Tops Accommodation. NO OTHER LISTINGS.	Gloucester Attractions – NSW www.visitnsw.com › Destinations › Hunter › B... Hidden Treasure picnic area. All paths in Copeland Tops lead from Hidden Treasure picnic area. The Steps Mountain Bike Park. Gloucester Museum ...
2	Gloucester – Accommodation, Maps, Attractions & Events – NSW www.visitnsw.com/destinations/hunter/bar... Famous for gold deposits and the bushranger Captain Thunderbolt, Gloucester is located in the north Hunt ...	Barrington Tops Attractions – NSW www.visitnsw.com/destinations/hunter/bar... The rainforests of Barrington Tops National Park are of international ... to an intriguing natural wonder in Barrington Tops National Park, near C ...	Visit Gloucester | Barrington Tops wilder... www.visitgloucester.com.au/ Here's the latest Everyone's Business newsletter from Gloucester Visitor ... Classic Australian movie at Wards River Community Hall, Sat 20 Aug 2016 ...
3	Gloucester Visitor Information Centre www.visitnsw.com/visitor-information-centres/... Your short detour off the Pacific Highway to Gloucester via the Bucketts Way is one of the state's oldest tourist drives, and for good reason. Short scenic drives ...	Barrington Tops – Accommodation, Maps, Attractions & Events www.visitnsw.com › Destinations › Hunter Barrington Tops National Park is an unspoilt wilderness covering more than 83,000 ... accom ...	The Top 5 Things to Do in Gloucester – TripAdvisor www.tripadvisor.com.au › South Pacific › Au ... Things to Do in Gloucester, Australia: See TripAdvisor's 49 traveler reviews and photos of Gl ...
4	Gloucester, New South Wales – Wikipedia https://en.wikipedia.org/wiki/Gloucester,_New_ Gloucester a town in dairy and beef cattle country, is located in Mid–Coast Council, within the Manning district on the Mid North Coast of the state of New ...	Visit Gloucester | Barrington Tops wil ... www.visitgloucester.com.au/ You can't buy fresher, get in early for the best of the best. ... Its isolated rural setting within beautiful Curracabundi National Park near Gloucester is ... New South Wales: things to do, regular events ...	Escape to Gloucester, NSW | Things to do, places to see in Gloucester https://visitgloucester.wordpress.com/ Every weekend the spectacular countryside of the Gloucester Region is a magnet for hundreds of visitors....on motorcycles, in cars and four–wheel dr ...
5	Gloucester Holiday Park, Cabins and Camping Holidays, Barrington ... www.gloucesterholidaypark.com/ Gloucester Holiday Park , your gateway to the Barrington Tops National Park, NSW, comfortable ca ...	Barrington Tops National Park (New ... www.tripadvisor.com.au › ... › New South ... ...online for Barrington Tops National Park, New South Wales: See 29 reviews, articles, ... National Park, ranked No.743 on TripAdvisor among 23 ...	Gloucester Things To Do – Attractions & Must See – VirtualTourist https://www.virtualtourist.com/...New_South_ Riverwood Downs. Lawlers Creek Road, Monkerai Valley, Gloucester, New South Wales, Australia. 1 re...
6	Real Estate & Property For Sale in Gloucester www.realestate.com.au/buy/in-gloucester, ... Find Real Estate & Property For Sale in Gloucester, NSW 2422. Search for real estate and view the latest listings of Gloucester, NSW 2422 properties for sale.	Riverwood Downs Of Barrington Tops www.riverwooddowns.com.au/#!LOCAT... ... of Sydney on the banks of a mountain river in the foothills of Barrington Tops " World ... Explore the property's shady walking trails, tall mountains and ...	Gloucester Falls walking track | NSW National Parks www.nationalparks.nsw.gov.au/things-to-do/ Short and easy Gloucester Falls walking track, with waterfall views, scenic lookouts, and ...
7	Map of Gloucester, NSW 2422 | Whereis® www.whereis.com/nsw/gloucester-2422 Maps of directions of Gloucester NSW, 2422 for locals and travellers. Easy to use driving directions.	Barrington Tops Tourism – Official site | www.barringtontopstourism.com.au/ ... ancient forests: visit Barrington Tops, the highest sub-alpine region outside the Australian alps. ...	Gloucester Highlights & Essential Things To Do – AroundYou www.aroundyou.com.au › Home › Hunter V ... Explore Local Highlights & Essential Things To Do ...
8	Images for the Gloucester NSW   	Activities – Barrington Tops Tourism www.barringtontopstourism.com.au/activ... 4 days ago - A couple of lookouts are close to town within 7km, whereas Devils Hole, Thunderbolts and Carson's are ... Gloucester offers a range of ...	Events Gloucester https://eventsgloucester.com.au/ Gloucester Mountain Man Tri Challenge, Sun 11 Sep 2016 ... the amazing diversity of events, things to do and happenings around Gloucester, New South W ...
9	Gloucester Country Club – Gloucester ... www.gloucestergolf.com.au/ 4651 BUCKETTS WAY, GLOUCESTER, NSW 2422. 02 6558 1602. HOME · GOLF ... VISIT US TODAY. Situ ...	Barrington Tops National Park | NSW... www.nationalparks.nsw.gov.au/visit-a-... Immerse yourself in the World Heritage-listed rainforest of Barrington Tops National Park. Easy ...	Gloucester & Barrington Tops | Top ... pacificcoast.com.au/itineraries-and-trails/top- North Coast New South Wales Top things to do. The best Attractions, hotels, breaks, accommodation ...
10	Gloucester – NSW– Travel – smh.com.au www.smh.com.au/news/New-South-Wales/Gl ... Jul 14, 2008 – Gloucester Quiet rural township on the edge of the Bucketts. Gloucester, known as the gateway to the Barrington Tops, is a charming co ...	Barrington Tops National Park, Camping, 4WD and Attractions Guide blog.mud-maps.com/.../barrington-tops-... Holiday Ideas: South West Rocks is one of those 'best kept secret' coastal places that make you...	Gloucester NSW - Sydney Australia To... www.sydney-australia.biz › ... › New South ... Two main attractions in Stroud, located south of Gloucester, are the Stroud Courthouse Museum, open 11am to 1 pm on Sundays as well as the Qua ...

10.1.2 The Gloucester Region Brand Awareness | Continued

No recent studies have been undertaken of either general or location specific brand awareness, so it is difficult to provide an accurate estimate of the Gloucester Region's current brand awareness.

However, a topline review of Gloucester's current digital/ online performance is included here *(Table 58, above)* as a way of getting at least some indicative measure of current awareness levels.

A number of conclusions can be drawn from this analysis, starting with the fact that there is a general lack of digital content about the Gloucester Region and it appears that the Gloucester website could be better Search Engine Optimised (Visit Gloucester only appears once in the Top 10 under the 'Gloucester, NSW' search term).

The lack of social media content mentioned previously in this section is also apparent, with only the WordPress blogging content appearing at positon 4 in 'Things to Do Near Gloucester'.

Given the lack of overall content, www.visitgloucester.com.au actually features relatively strongly in the top 10 under the 3 search terms, appearing 4 times in total (i.e. 13% of the total–including the lead entry overall), and if you include the Events Gloucester & official Barrington Tops website this increases to 7 (23%).

One of the other striking features of this topline analysis, is the strong performance of Destination NSW which features 5 times (17%), with all of these in the top 3 entries of each category.

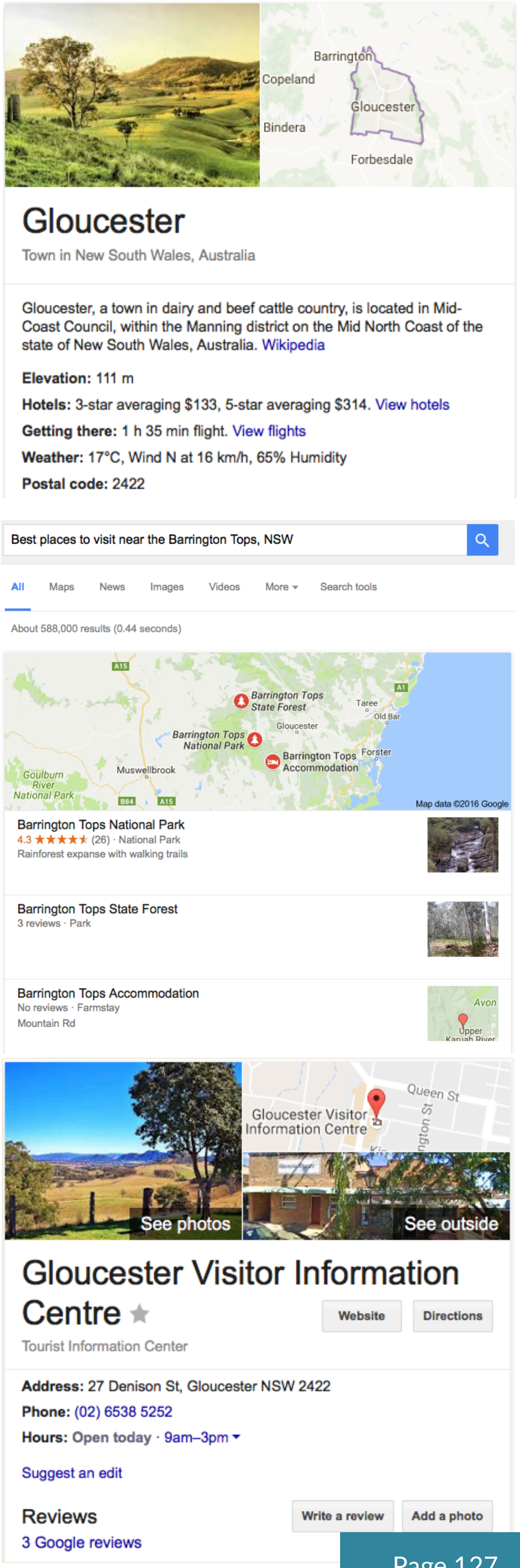
The official Barrington Tops site (7%), Trip Advisor (7%), the Sydney Morning Herald (3.5%) and Whereis (3.5%) also feature in terms of source websites for information about the Gloucester Region, as does the Legendary Pacific Coast although it only features once at position 9 under 'Things to do near Gloucester'.

The Gloucester Wikipedia entry also features in the top 10 (number 4), meaning it is used fairly substantially in comparison with other potential sources (destinations with stronger content do not tend to feature Wikipedia this high up the rankings).

Graphic 22 (right) is an example of the first overview potential visitors receive when searching for Gloucester. The limited number of 'Places to visit' is a further indicator of the low level of content and also indicates local businesses may need to review the efficiency of their SEO as they are not featuring at present.

Overall, as with the Great Lakes and Manning, there is clearly an opportunity to develop a greater volume of digital content and mainstream Tourism materials for the Gloucester Region. Gloucester (partly due to size and historic budgets) is the least developed from both a digital, social media and general materials pint of view. The relatively weak Visit Gloucester website and lack of social media are particularly obvious gaps.

Graphic 22: Online Search Analysis Gloucester
Source: Google 19–20/08/16.



10.2.1 The Great Lakes Brand Proposition and Positioning: Summary Analysis

The Tourism offering of the Great Lakes is currently promoted under the **'great lakes. it's you'** proposition, with a range of print/ brochure, digital and online executions targeting a number of the key tourist audiences for the Region.

'The Great Lakes, a place of secret spots & special places.' also features in selected marketing materials, including the execution included at the foot of this page as an example of how the core proposition is brought to life at its simplest.

The various executions that are prominent when researching the Great Lakes as a tourist destination cover a number of the offerings and experiences for tourists–albeit mainly via imagery rather than text. These include: pristine beaches, family/kids, marine wildlife (dolphin watching), Forster/Tuncurry, unspoiled coastlines and couples.

There are no prominent executions for a number of activities that appear to be current (or potential) drawcards to the area for certain demographics. These include surfing, nature–based activities (particularly inland), walks, local food and wine, the hinterland, whale watching and the Region's relaxed and friendly lifestyle.

Graphic 23: Great Lakes Overall Brand Positioning Advert
Source: Great Lakes Tourism, Great Lakes Visitor Guide 2015.

10.2.1 The Great Lakes Brand Proposition and Positioning | Continued

Great Lakes Tourism also runs its promotional activity on a number of social media platforms including Facebook, Twitter, Pinterest, Flickr and You Tube.

The Facebook activity is one of the stronger components of Great Lakes' Social Media activity, currently the second largest tourism Facebook page on the North Coast with an engaged and active following. Similarly, the Instagram page has strong base content and an engaged audience that appears set–up for growth. This provides a strong platform for future engagement however the region ends up being structured from an overall Tourism point of view.

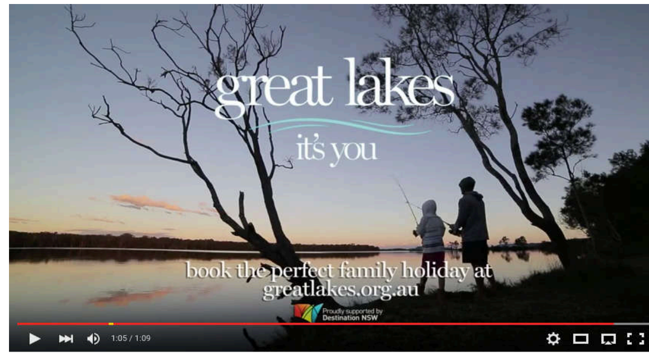
The current featured video on You Tube (can be viewed via the link to the right) targets the family market and includes the additional descriptors of 'it's energetic', 'it's fresh', 'it's family', and 'it's you'. Other videos on the channel focus on surfing, Forster Tuncurry NYE Fireworks and diving

Overall, whilst the positioning certainly allows for future flexibility in targeting different audiences, it is fairly undifferentiated and does not fully do justice to what the Great Lakes Region has to offer visitors from a NABT point of view.

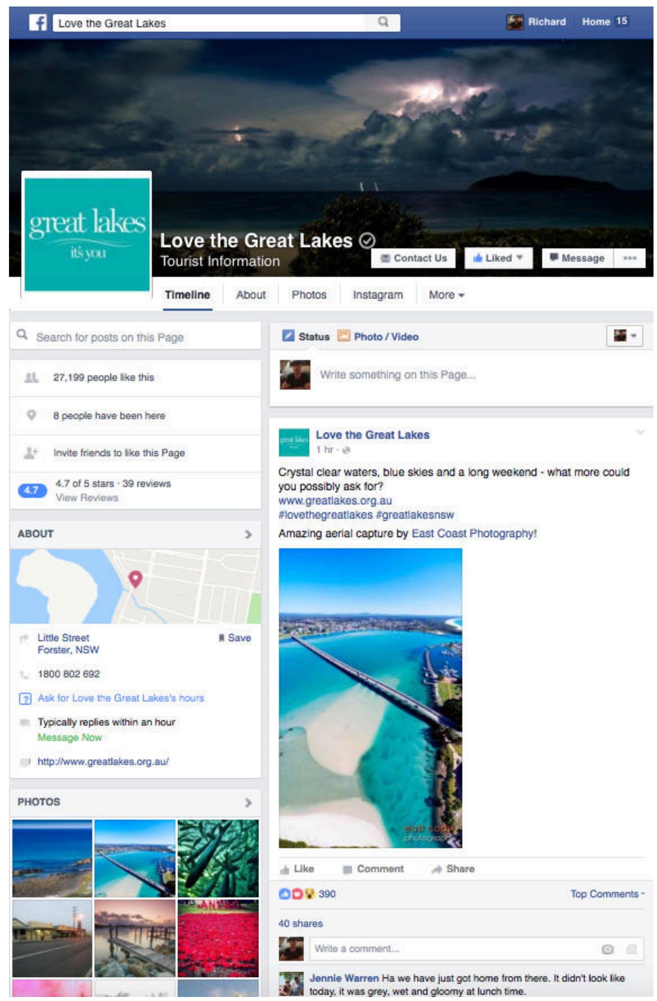
Part of this appears to be that it is trying to target a very wide range of audiences, whilst also not really communicating anything unique and compelling about the Great Lakes' Tourism offering.

One way to test how strong a particular proposition is for a destination is through seeing if other destinations would work with the line being used. Realistically, just about any destination in the Region would work with 'it's you'.

The imagery used in some of the executions is also slightly flat when considering the natural environment that exists in the Great Lakes. Given the executions are image vs. text led, this becomes particularly important to execute well as the image is doing the bulk of the communication job at present. Having seen some of the strong imagery of the Region through the research undertaken for this report, this is an area that is relatively easily fixed.



To go to the Great Lakes' You Tube Channel, click here:
[https://www.youtube.com/user/greatlakestourism]



10.2.1 The Great Lakes Brand Proposition and Positioning | Continued

One of the keys to finding the Great Lakes' future proposition and positioning lies in:

1) **Fully defining the Great Lakes regions to be promoted** and their unique characteristics;
2) **Deciding on a hierarchy for the Tourism offerings and experiences** on offer in the GL Region;
3) **Confirming the key target markets (and their relative importance)** and subsequently their primary motivations for visiting the Great Lakes;
4) **Building (or revising) a brand architecture** that provides a structure for the Great Lakes brand whilst allowing for future flexibility;
5) **Reviewing key regional competitors** to assist in making the future proposition and positioning as unique and differentiated as possible.

As with Section 10.1 on the Gloucester Region, some of the above is explored in this baseline analysis with the remainder to be considered, at least in part, during the remainder of the Destination Management process.

The overall approach outlined above will also need to be revised and finalised once the overall Tourism structure for the Region has been decided, as this will have a significant impact on all elements of Tourism Promotion throughout the MidCoast *(see Section 11.7)*.

Graphic 24: Current Great Lakes 'Mood Board'

Source: Great Lakes Tourism Partnership Prospectus 2015.

10.2.2 The Great Lakes Brand Awareness

Table 59: Online Rankings for selected Great Lakes & East Coast Australia Tourism search terms

Search engine analysis undertaken by 2iis Consulting (April–May 2016). Click on the underlined text to go direct to referenced page.

#	TOP 10 RANKED WEB PAGES UNDER SELECTED SEARCH TERMS [Google 02–04/05/16]		
	'The Great Lakes'	'Best places to visit in North Coast New South Wales'	'Top 10 places to visit for Nature Tourism in New South Wales'
1	Great Lakes www.greatlakes.org.au/ Forster Accommodation, Forster Visitor Centre, Tea Gardens, Hawks Nest, Myall Lakes, Pacific Palms, **Great Lakes New South Wales**, Great Events, Family ... Where to Stay – Markets – To Do – Events	| See Graphic 25 | Page 132 | 1. Port Stephens, 2. Dorrigo National Park, 3. Big Banana, 4. Tomaree National Park, 5. Stockton Beach, 6. Billabong Koala and Wildlife Park, 7. Broughton Island, 8. Booti Booti National Park, 9. One Mile Beach, 10. Little Beach Nelson Bay, 11. Smoke Cape L/house, 12. Hawks Nest Golf Club.	New South Wales–Top 21 Hot Spots – Discover Why... www.discoverwhy.info/catalogue/ Sydney simply has to be at the top of your list for travelling in NSW...10. Jervis Bay Worth visiting for its natural beauty alone...
2	Forster visitor information centre–Great Lakes www.greatlakes.org.au/travel-tools/.../forster-visitor-information-centre Forster visitor information centre	North Coast Attractions | Things to do North Coast–NSW http://www.visitnsw.com/attractions Find the best things to do in North Coast, including attractions, free things to do and more!...	Destinations in NSW–Weekend Getaways & Places to Visit www.visitnsw.com/destinations Find your next short break, weekend getaway or holiday destination in NSW...
3	Great Lakes Council www.greatlakes.nsw.gov.au/Home Ageing and Disability Services from Great Lakes Council. Find out about the services our ... Telephone : (02) 6591 7222. Email : council@**greatlakes.nsw**.gov. au ...	North Coast NSW–Towns, Events, Beaches & Things to Do www.visitnsw.com/destinations/north-coast Visit the scenic North Coast of NSW where you'll discover a hinterland of lush river valleys...	The Top 10 Things to Do in New South Wales–TripAdvisor www.tripadvisor.com.au/Attractions- We have reviews of the best places to see in New South Wales. ... Minute Hotels in New...
4	Great Lakes–Myall Lakes, Smith Lake & Pacific Palms–NSW www.visitnsw.com/destinations/north-coast/forster-and-taree-area/great-lakes The Great Lakes Region is home to a unique triple lakes system set by the rugged coastline...	Destinations in NSW–Weekend Getaways & Places to Visit www.visitnsw.com/destinations Find your next short break, weekend getaway or holiday destination in NSW ... on earth, from the NSW South Coast to the Central Coast to...	The 10 Best Family Resorts in New South Wales–TripAdvisor https://www.tripadvisor.com.au/HotelsList- Family Resorts in New South Wales: Find 10128 traveller reviews, candid... "It is a family resort so children are everywhere during school holidays...
5	Great Lakes Council–Wikipedia https://en.wikipedia.org/wiki/Great_Lakes_Council Great Lakes Council is a local government area in the Mid North Coast region of New South Wales, Australia. The area is situated adjacent to the shores of Port ...	Holiday Destinations Ideas on NSW North Coast???–New South ... https://www.tripadvisor.com.au/ShowTopic- Travel Forum Jan 22, 2009 - We will be visiting for a week in March/April this year (2009)...	Sapphire Coast: Beautifully Uncivilised www.sapphirecoast.com.au The Sapphire Coast of NSW offers coastal wilderness dotted with adventure trails , ..., experiencing the best food & nature experiences
6	Images for the Great Lakes NSW   	Sapphire Coast: Beautifully Uncivilised www.sapphirecoast.com.au The Sapphire Coast of NSW offers coastal wilderness dotted with adventure trails , ... Explore artisan galleries, taste the freshest of produce...	Travel places in New South Wales, Australia – Lonely Planet www.lonelyplanet.com/australia/new- Where to go in New South Wales, Australia... Where back-to-nature meets life's-a-beach, this..
7	BIG4 Great Lakes Holiday Park Forster Tuncurry Accommodation ... www.greatlakes.com.au/ BIG4 Great Lakes Holiday Park is the best place to stay	North Coast NSW Getaway. Places to Visit Tourist Guide www.sydney-australia.biz/nsw/north- North Coast NSW - Things to do, places to visit.	Holiday in NSW–Tourism Australia www.australia.com/en/places/nsw.html New South Wales has endless unspoilt beaches, breathtaking natural ..... make it one of the most..
8	BIG4 Forster–Tuncurry Great Lakes Holiday Park, NSW Caravan ... www.big4.com.au/caravan.../nsw/.../great-lakes-	Byron Bay & N. NSW: Lonely Planet www.lonelyplanet.com/australia/new- Beach towns and national parks leapfrog each other all the way up this stupendous stretch of coast...	The Top Ten New South Wales Tourist Destinations www.rentnewcars.com.au/travel/nsw- The Top Ten New South Wales Tourist... the
9	Great Lakes Advocate: Great Lakes News, sport and weather www.greatlakesadvocate.com.au/ Great Lakes Advocate delivers the latest news from...	Travel places in New South Wales, Australia–Lonely Planet www.lonelyplanet.com/australia/new-south- Where to go in New South Wales, Australia top...	NSW Holiday Ideas | NSW Holiday Destinations | NRMA Travel www.mynrma.com.au/travel/holiday- NRMA Travel ... temperatures reach 40°C, while..
10	Great Lakes Area, NSW | Gumtree Australia Free Local Classifieds www.gumtree.com.au/s-great-lakes/l3003163	North Coast | NSW | NRMA Travel www.mynrma.com.au › ... › Holiday Ideas › Holiday Ideas: South West Rocks is one of those 'best kept secret' coastal places that make you...	The Top 10 Things to Do in New South Wales – TripAdvisor – New ... www.tripadvisor.com.au/Attractions- ... this weekend, or in May. We have reviews of...

10.2.2 The Great Lakes Brand Awareness | Continued

As with Gloucester and Manning, no recent studies have been undertaken of either general or location specific awareness, so it is not possible to provide an accurate estimate of the current brand awareness of the Great Lakes. However, a topline review of the Great Lakes' current digital/ online performance is included here *(Table 59, above)* as a way of getting at least some indicative measure of current awareness levels.

One important factor to note is that the Great Lakes analysis was undertaken at a different time (May vs. August 2016) and with broader search terms (columns 2 & 3), so it should not be directly compared with the Gloucester and Manning analysis. It does however, provide some broader insights into areas that will need to be refined to optimise future MidCoast Tourism promotion.

In spite of this disparity in source data, a number of conclusions can be made, starting with the fact that, similar to Gloucester and the Manning Valley (if not to the same degree), there is a general lack of Digital content about the Great Lakes Destinations and/ or that the website has not been fully Search Engine Optimised (SEO). A key reason for this is clearly the age of the site (6 years+) and a planned re–launch that would have addressed a number of these issues has been put on hold pending the full DMP development. The Facebook and Instagram pages are clear exceptions to this, providing strong current content that scores highly across the region as a whole.

This general lack of awareness is indicated by the fact that www.greatlakes.org.au only features 2 times in the top 10 under **'The Great Lakes'** search term, and does not feature at all under **'Best places to visit in North Coast New South Wales'** or **'Top 10 places to visit for Nature Tourism in New South Wales'** (i.e. only 6.5% of the total). That said, the Great Lakes does perform the best overall of the 3 MidCoast regions.

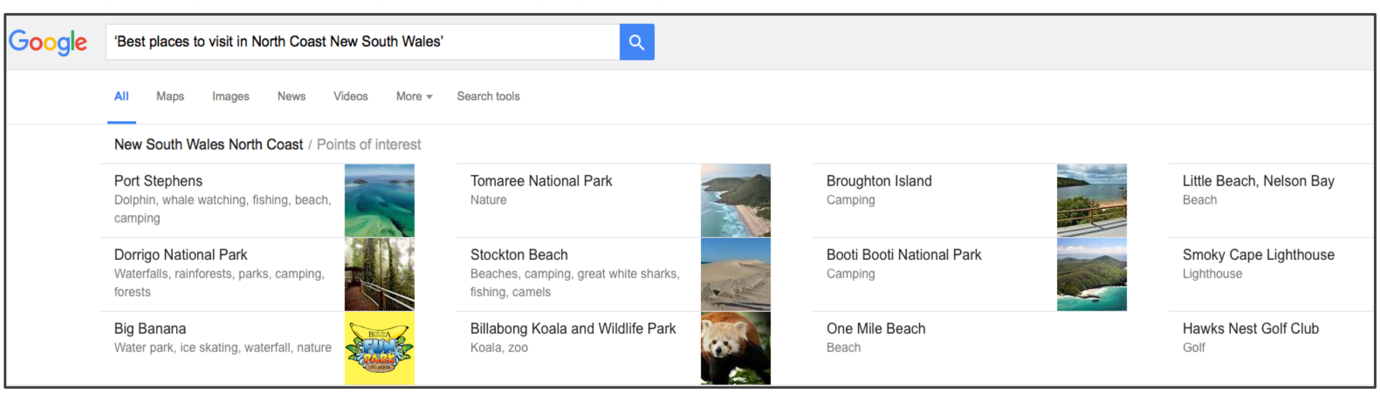
One of the other striking features of this topline analysis, is the appearance of the Sapphire Coast in 2 of the 3 search terms–including the search for **'Best places to visit in North Coast New South Wales'**. This both indicates that the Sapphire Coast has a strong, structured digital presence, and also that none of the North Coast NSW destinations (with the possible exception of Byron Bay and the Coffs Coast) are marketing themselves online particularly effectively. The Sapphire Coast is explored as an area that the Great Lakes could learn from in Section 12.1.

Destination NSW, Big4 Caravan Parks, Trip Advisor and the Lonely Planet also feature strongly in terms of source websites for information about the Great Lakes, Tourism in NSW and Nature–based Tourism. The Big 4 site also benefits from having the www.greatlakes.com.au URL which would often be the default for potential visitor researching the area (i.e. this site will likely be the first impression many people will get of the area).

Graphic 25 (below) is the first overview potential visitors receive when searching for the best places to visit in the North Coast of New South Wales. Of the twelve, four are in the Great Lakes area which is actually a strong result given the competition in the area from the likes of Coffs Coast and Byron Bay. The four featured are: **Broughton Island, Booti Booti National Park, One Mile Beach** and **Hawks Nest Golf Club**.

Overall there is clearly an opportunity to develop a greater volume of digital Tourism content for the Great Lakes, as well as making sure any future sites are fully Search Engine Optimised & built with a digital audience in mind.

Graphic 25: Top Search Result for 'Best places to go in North Coast New South Wales' *(from Table 59, p. 131)*
Search engine analysis undertaken by 2iis Consulting (April–May 2016).



10.3.1 The Manning Region Brand Proposition and Positioning: Summary Analysis

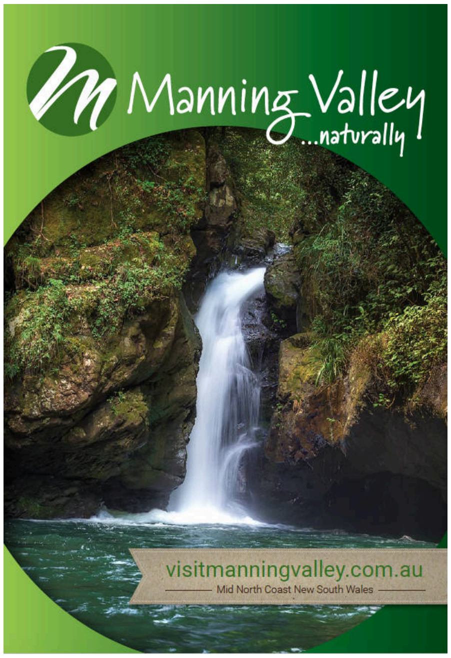
The Tourism offering of the Manning Region is currently promoted fairly consistently under the **'Manning Valley …naturally'** proposition, with a fairly wide range of print/ brochure, digital and online materials (including a range of targeted guides for specific segments) for potential visitors to the Region.

The 'Naturally' positioning is fairly well integrated across materials produced, with the Manning Valley Visitor Guide (available via the link at right) providing good examples of this. Indicative executions that show this integration include **'Naturally Magnificent'**, **'Naturally Welcoming'**, **'Naturally Refreshing'**, **'Naturally Inviting'**, **'Naturally Accommodating'** and **'Naturally Delicious'**.

The Manning Valley Visitor Guide as a whole provides fairly strong visual branding for the Region and is very similar to the Great Lakes Visitor Guide in this respect; as with the Great Lakes, image quality can be inconsistent.

Although still not particularly compelling as an overall tourism proposition, the Manning Valley's proposition and positioning are clearly the strongest from a Nature Tourism point of view; there is also some evidence of other businesses in the Region trying to integrate their activity with it (e.g. LJ Hooker in their print ad on page 48 of the Visitor Guide).

Like the Great Lakes website, www.visitmanningvalley.com.au has some relatively comprehensive Tourism content, whilst not necessarily being best practise from a structure point of view. Creatively the 'Naturally' positioning features fairly consistently on the homepage with images that include a rural road, surfers, the Martin Bridge into Taree and Crowdy Bay Beach. The hero image of two Kangaroos on the beach at Diamond Head also features strongly.



To view the Manning Valley Visitor Guide online, click here:
[http://visitmanningvalley.com.au/visitor-guide/]

Graphic 26: Manning Valley Example Tourism Creative

10.3.1 The Manning Region Brand Proposition and Positioning | Continued

Whilst the hero images and much of the supporting imagery is consistent and strong on the website, there are a number of images that could do with refreshing to both tie closer to the overall positioning and also make sure the Manning Valley's Tourism assets are promoted as strongly as possible.

As mentioned previously, there is a broad range of imagery available so this is relatively easy to rectify.

Manning Valley Tourism also runs its promotional activity on a small number of social media platforms including Facebook, and Instagram, although it is not on Pinterest or Flickr like the Great Lakes.

The current Manning Valley videos on You Tube are from 2009 and, despite featuring Di Morrissey, appear dated and nowhere near as strong as content from other NSW regions.

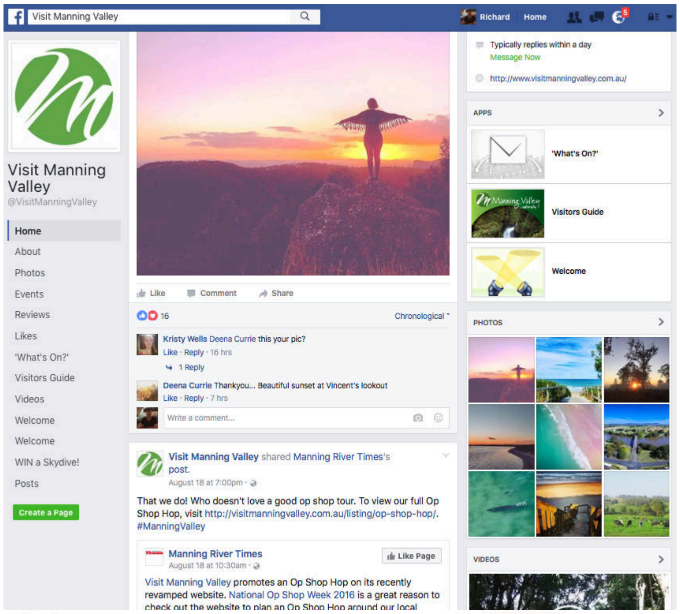
To go to the 2 current Manning Valley You Tube videos, click here:
[https://www.youtube.com/watch?v=YOpZ-j94Phc]

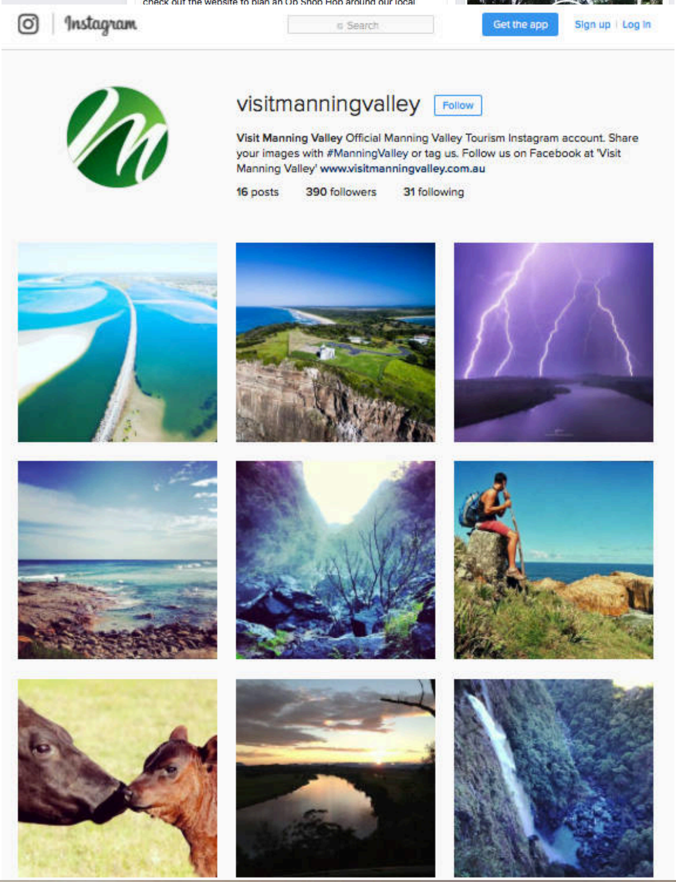
An opportunity may exist to produce both some strong promotional videos and an expanded photographic library for the Manning Valley; or potentially expand it to become part of a broader MidCoast initiative which would be financially more efficient. The Gloucester photographic competition referenced in section 10.1.1 could provide an ongoing mechanic to keep this resource up to date, using Instagram, Flickr and Facebook as key channels.

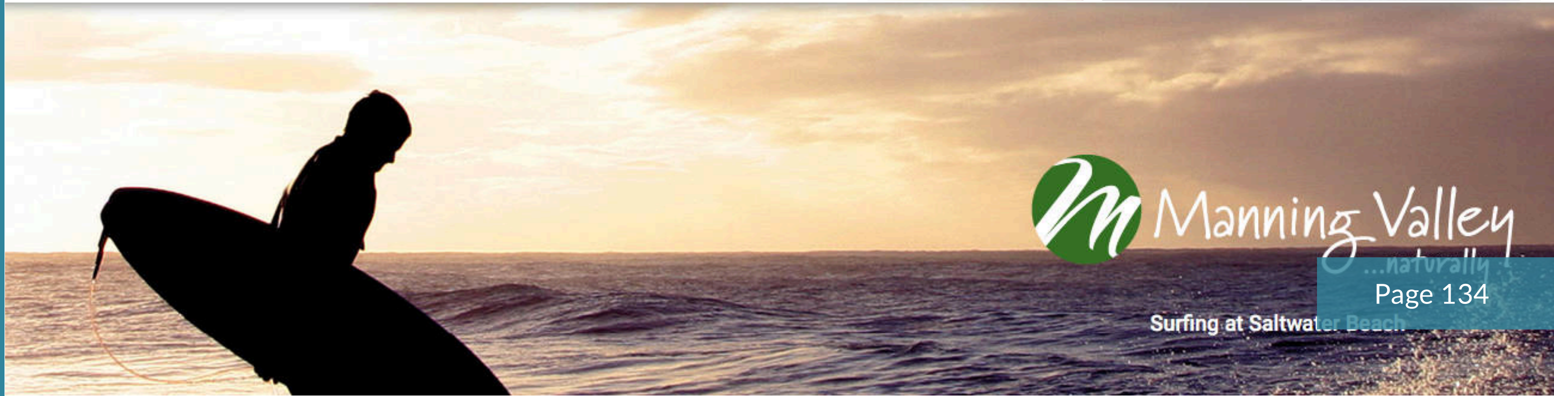
Whilst not necessarily the most unique and ownable proposition or positioning, **'Manning Valley ...naturally'** is certainly simple and captures the NABT offerings of the Region relatively well. Because of its simplicity, the positioning has broad appeal which is then used to target a number of specific audiences including families, couples, cultural and food experience seekers, 'young adventurers' – including surfers & mountain bikers and 'grey nomads'.

That said, it will still need reviewing as part of the full Destination Management process as it is not necessarily the most compelling Nature–based positioning that could be developed for the Manning region and its' assets.

The brand positioning work will also ultimately need to reflect the overall structure of the region's Tourism.







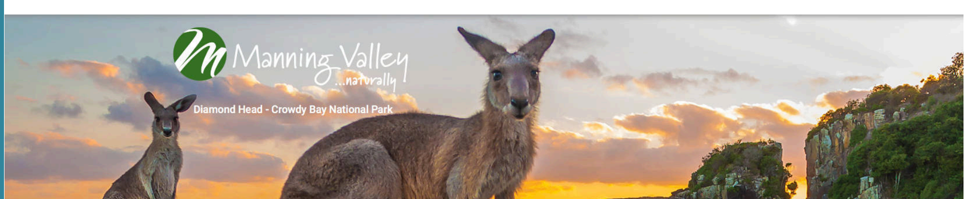
10.3.1 The Manning Region Brand Proposition and Positioning | Continued

Some areas to consider when looking at the current **'Manning Valley …naturally'** Brand Positioning and Proposition and whether it needs revision include:

1. **The structure of the MidCoast Region from a Tourism perspective** and how the Manning valley fits into this;
2. **The potential need to more clearly differentiate the Nature–based offering** and how this will work across the various nodes and regions defined by the DMP process;
3. **Whether the key target markets remain the same and, if not,** what the primary motivations for visiting the Manning Valley are for the revised audiences;
4. **Reviewing best practise in the Region and nationally** (on an ongoing basis) to assist in making sure any future proposition/ positioning as unique and differentiated as possible;

As with Gloucester and The Great Lakes, any review of the current positioning should follow a broader look at the Region and how it should be segmented geographically as this will define what area the Manning Valley covers and can therefore offer to visitors which then clarifies the positioning brief to be answered.

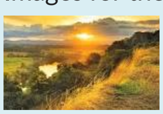
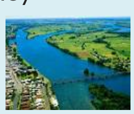
On a purely creative level, it will be worth reviewing and then potentially adding stronger secondary level imagery (and continuing to expand the availability of strong Tourism focused imagery in Manning Valley and the MidCoast generally).



10.3.2 The Manning Region Brand Awareness | Continued

Table 60: Online Rankings for selected Manning & East Coast Australia Tourism search terms

Search engine analysis undertaken by 2iis Consulting (August 2016). Click on underlined text to go direct to referenced page.

#	TOP 10 RANKED WEB PAGES UNDER SELECTED SEARCH TERMS [Google 19–20/08/16]		
	'Manning Valley'	'Best Places to Visit in the Manning Valley'	'Things to do near Taree, NSW'
1	Welcome to the Manning Valley – Manning Valley Tourism www.visitmanningvalley.com.au/ Visit the Manning Valley, just 3.5 hours north of Sydney, you'll experience spectacular coastlines, rustic countrys ...	Manning Valley | See & Do | Top Thin... www.pacificcoast.com.au/see-do/manning- Manning Valley attractions. What to see and do, tourist drives, beaches, surfing, whale watching, National Parks, shopping, & kids activities.	The Top 10 Things to Do in Taree – Tr... www.tripadvisor.com.au › South Pacific › Aus... Things to Do in Taree, Australia: See TripAdvisor's 245 traveller reviews and photos of Taree tourist attractions. Find what to ... Skydiving NSW Drop ...
2	Manning Valley | See & Do | Top Things... www.pacificcoast.com.au/see-do/manning-valley/ Manning Valley attractions. What to see and do, tourist drives, beaches, surfing, whale watching, National Parks, shopping, & kids activities ...	Welcome to the Manning Valley – M... www.visitmanningvalley.com.au/ Visit the Manning Valley, just 3.5 hours north of Sydney, you'll experience spectacular ... trails – a ...	Taree Attractions – NSW www.visitnsw.com › Destinations › North Co... Club Taree. Club Taree is located on the Wingham Road just north of the Taree business district and is the largest club in the Manning Valley. .... Things ...
3	Manning Valley Visitor Information Centre http://www.visitnsw.com/visitor-information-centres/manning-valley-visitor-information-centre The Manning Valley Visitor Information Centre can provide a wealth of information on the facilities and services available in the area, including accommodation ...	The Manning River | Taree Attraction www.visitnsw.com/destinations/north-coa ... The Manning River is a double delta river system with two openings. ... parks, commercial tourist destinations and towns and villages scattered along the river.	Forster & Taree Area Attractions – NSW www.visitnsw.com › Destinations › North Co... Forster & Taree Area Attractions .... Located 33 kilometres north–east of Taree on the mid north coast, is the historic Crowdy Head Lighthouse. ... Things To Do.
4	Manning River – Wikipedia, the free ency ... https://en.wikipedia.org/wiki/Manning_River Manning River (Aboriginal: Boolumbahtee), an open and trained mature wave dominated ... descending 1,500 metres (4,900 ft) over its 261 kilometres (162 mi) course from the high upper reaches, through the Manning Va ...	Manning Valley Visitor Information... www.visitnsw.com/visitor-information.../m.. The Manning Valley Visitor Information Centre also offers a large range of locally made produce including local honey, chutneys, and pickles. ... Destinations.	Taree – Accommodation, Maps, Attract... www.visitnsw.com › Destinations › North... Crowdy Head Lighthouse, a 40–minute drive from Taree, has sensational ocean panoramas and is a great spot for whale–watching (in season). Nearby towns worth visiting include Cundletown, Tinonee, Han ...
5	Manning Valley Free Range Eggs www.manningvalleyeggs.com.au/ From humble beginnings, for over 25 years, Manning Valley Free Range Eggs – Nature's Intention ® has been passionately producing only free range eggs from ...	Top 10 Things to Do Near Manning V... www.tripadvisor.com.au › ... › Wingham › Things to do near Manning Valley Historical Museum on TripAdvisor: See 125 ... JOIN; LOG IN; USD; International Sites .... "Helpful Staff, good ..."	Taree, New South Wales: Travel guide... www.traveller.com.au › Australia › New South... Jan 23, 2015 – Taree (including Manning Point, Old Bar and Saltwater) is a substantial service centre on the Manning River.
6	Manning Valley Property and Livestock www.mvpal.com.au/ Manning Valley Property & Livestock are your 100% locally owned real estate team! Specialising in rural and small acreage properties throughout the Manning ...	The Top 10 Things to Do in Taree – Tr... www.tripadvisor.com.au › South Pacific › A... Things to Do in Taree, Australia: See TripAdvisor's 245 traveller reviews and photos of Taree tourist attractions. Find what to do today, this weekend ...	Welcome to the Manning Valley – Man... www.visitmanningvalley.com.au/ Accommodation · Activities · Food & Wine · Tourist Drives · Visitor Information Centre ... Taree · Old Bar & Manning Point · Harrington & Crowdy Head ...
7	Images for the Manning Valley   	Taree Tourist Attractions – Manning V... www.localguidesigns.com.au/taree–guide/... Taree Tourist Guide : Local Guide Signs: Australia's leading local guide map ... It's a great place to spot whales in season and has views back to the qua ...	Activities – Manning Valley Tourism www.visitmanningvalley.com.au › Taree There are so many activities and things to see and do in the Manning Valley from ... Address: Corner of Albert Street and Manning Street Taree NSW 2430 ...
8	Ray White Real Estate Manning Valley www.raywhitemanningvalley.com.au/ Ray White Manning Valley is part Australia's largest Real Estate group for residential commercial or rural property to buy rent or lease, call (02) 6557 7222.	Waterfalls & Ways – Manning Valley www.waterfallsandways.info/manningvalley/ Major towns include Taree, Wingham, Old Bar Beach, Manning Point, ... Best swimming beach is Crowdy Bay Beach on the northern side where ...	Manning Valley | See & Do | Top Things.. www.pacificcoast.com.au/see-do/manning-va... What to see and do, tourist drives, beaches, surfing, whale watching, ... Café, Craft Workshop and B&B, 702 Tinonee Road, Mondrook (Taree), NSW, 2430, ...
9	Real Estate & Property For Sale by Mann... www.realestate.com.au/buy/by-escniw/list-1 Manning Valley Property and Livestock are your 100% local property team and are the acreage specialists wit...	Taree NSW Manning Valley – Sydney... www.sydney-australia.biz › ... › NSW Coast... Beautiful North Coast of New South Wales, Taree and the Manning Valley has ... of accommodate ...	4 Things To Do in Taree, Australia – Vir... https://www.virtualtourist.com/...New_South... Taree Things To Do eviews and photos of things to see in Taree, Australia from ... of the most significant...
10	Manning Valley Neighbourhood Services www.mvns.org.au/ To be a benevolent community development organisation that resources and empowers individuals, groups and the community in the Manning Valley and ...	Local Attractions - Wingham, Taree &... www.golfclubmotorinn.com.au/#!local-a... The Manning is full of hidden treasures and is the best kept secret on the eastern coast. Further details are available from the Manning Valley Visi ...	Things to do in Taree to Port Macquarie... www.lonelyplanet.com › ... › Byron Bay & Nor... 10 things to do in Taree to Port Macquarie, Australia – Take in the sights from Crowdy Bay National Park to Dooragan National Park. ... NSW TrainLink. Tar ...

10.3.2 The Manning Region Brand Awareness | Continued

As with the other 2 Regions, no recent studies have been undertaken of either general or location specific brand awareness, so it is difficult to provide an accurate estimate of the Manning Region's current brand awareness.

However, a topline review of the Manning Valley's current digital/ online performance is included here *(Table 60, above)* as a way of getting at least some indicative measure of current awareness levels.

A number of conclusions can be drawn from this analysis, starting with the fact that there is, as with both Gloucester and the Great Lakes, a general lack of digital content about the Manning Valley/ manning Region. This is clearly a theme for all 3 Regions so will need addressing for the MidCoast more broadly at some point in the relatively near future.

Visit Manning Valley Tourism features strongly in the analysis, with the lead entry overall as well as position 2 when looking at 'Best places to Visit'; in total it has 4 entries or 13.3% of the total.

As with Gloucester, Destination NSW also performs well, featuring 5 times (17%), with all but one in the top 3 entries of each category.

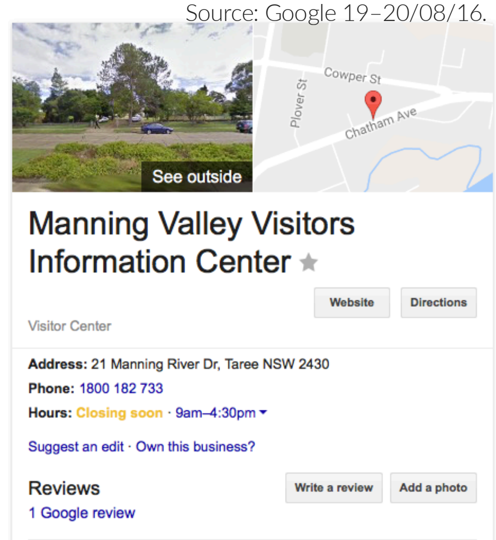
Manning is the only Region where The Legendary Pacific Coast has a noticeable impact, having the top result in one of the categories, 2nd in another, and 3 entries in total (10%). It is not clear what the reason for this is, but it is possibly due to a higher volume of content on Taree and the Manning Valley on www.pacificcoast.com.au.

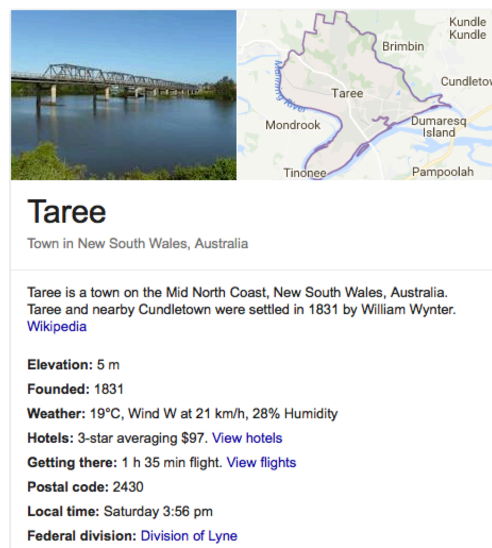
Trip Advisor (7%), Lonely Planet (3.5%) and Virtual Tourist (3.5%) also feature in terms of source websites and there are also some websites like 'Manning Valley Free Range Eggs', 'Manning Valley Property and Livestock' and 'Manning Valley Neighbourhood Services' that would ideally not appear on the key pages for potential Tourists researching the area, but this really just reflects the need for more content and greater SEO.

Graphic 27 (right) is an example of the first overview potential visitors receive when searching for the Manning Valley and Taree. Of the three Regions, the Manning Valley probably has the lowest immediate areas of interest appearing – partly because the Barrington Tops NP helps provide additional depth for Gloucester and the Myall Lakes NP and Great Lakes themselves do the same for the Great Lakes.

Overall, as with the Great Lakes and Gloucester, there is clearly an opportunity to develop a greater volume of digital content and mainstream Tourism materials for the Manning Valley, with Social Media (particularly YouTube and Facebook) clear channel opportunities. Search engine optimisation should be explored and Tourism businesses in the Region encouraged to keep developing their online presence (particularly mobile).

Graphic 27: Online Search Analysis Manning
Source: Google 19–20/08/16.





10.4 Selected Examples of Competitive Brand Positionings

Given how competitive Tourism is on the New South Wales Coast, there are a large number of competitive brand positionings that exist. To assist in the future development of MidCoast Tourism propositions and positioning, a selection of competitive positionings are included here: five from the North Coast NSW Tourism Region and one from just outside the region (Port Stephens in the Hunter).

10.4.1 Coffs Coast | Ranked 1

[www.coffscoast.com.au]

‘Coffs Coast. Where Memories Are Made’

Perhaps not surprisingly given its lead ranking in the region, the Coffs Coast has a clear positioning even if it is a fairly undifferentiated one. The website provides a strong visual entry into the region with a top level communication focus on *‘World Class Experiences’*, *‘World Heritage Landscapes’*, *‘Spectacular 75km Coastline’* and *‘101 Things to Do’*.

The focus markets come across as families, nature–based tourists and backpackers/ surfers. There is also a sense of scale to the region, with ‘200 places to stay’ being promoted.

10.4.2 Port Macquarie, New South Wales| Ranked 2

[www.portmacquarieinfo.com.au]

‘Come out of Your Shell’

The overall positioning is not really followed through on the main Tourism entry points, with *’Come Play’* and *‘Come Connect’* the elements that do integrate it, but the rest of the promotional material does not really expand on this. The positioning has the potential to lead to a differentiated space for the region, but ends up being slightly confusing.

The next focus of the website is the regions of Wauchope and Camden Haven without really bringing to life the key experiences on offer.

Couples are the clearest focus market (including weddings), with families also represented (if a little hidden) and conferences prominent to appeal to the business sector.

10.4.3 Byron Bay, New South Wales | Ranked 3

[www.byron–bay.com]

‘Don’t Spoil Us, We’ll Spoil You’

Byron Bays’ positioning is surprisingly poorly communicated currently, although it seems possible that there is a new positioning that may be rolled out more fully.

The positioning that is most prominent is ‘Cheer Up, Slow Down, Chill Out… Come Visit Byron Bay’ with ‘Byron. Don’t Spoil Us, We’ll Spoil You’ appearing to be the new focus.

Overall, Byron does have a clear historical positioning as a laid–back, alternative and beach–focused destination and appears to be still trading on this without much recent brand refresh work.

10.4 Selected Examples of Competitive Brand Positionings | Continued

10.4.4 Tweed | Ranked 4

[www.destinationtweed.com.au]

'Your Daydream is Just a Trip Away'

The Tweed's positioning is actually fairly unique at its core, even if the execution is not integrated across all the materials produced. It is also the only region of the 6 here that focuses clearly on a strong regional art offering.

It still has the natural environment as a key attribute, but differentiates itself pretty effectively through talking about **'a vibrant culture of music, art, creativity, spirituality… & a sense of adventure'**, complemented with some degree of historical focus.

The focus markets appear to be older and potentially of higher value (i.e. higher disposable income with potentially longer stays).

10.4.5 Clarence Valley | Ranked 6

[www.clarencetourism.com]

'Discover It' and 'Own Every Moment'

Probably the least well executed of the 6 examples, with both an old **'Discover it'** positioning still visible (also used by a number of other regions of NSW as a general descriptor), alongside a newer **'Own Every Moment'** positioning that appears to be trying to target families more directly.

'Own Every Moment' is a potentially strong and relevant emotive approach; however, like a number of Regional Tourism positionings, the execution of what could be an ownable and unique strategy is poor, and consequently doesn't bring to life what it means for potential visitors to the Clarence Valley.

10.4.6 Port Stephens | Part of Hunter Region (not ranked)

[www.portstephens.org.au]

'PS. I Love You xx'

This positioning is an interesting one, even if there is a general lack of consumer insight behind it. It is a fairly well established positioning (at least to locals and repeat visitors) and is also fairly consistently communicated, although the website is weak.

It doesn't connect particularly well with what appears to be a strong nature–based focus of the Tourism experiences being promoted, although it is a flexible positioning which means this need not necessarily be an issue if executed better.

The target markets are, like the Coffs Coast, fairly broad: ***'for the young, the young at heart, singles, groups, couples and families with something to please every taste and budget'.***

SECTION 11

A SUMMARY OF TOURISM IN THE AMALAGAMATED MIDCOAST REGION

11 | A SUMMARY OF TOURISM IN THE AMALAGAMATED MIDCOAST REGION

11.1 An Overview of Tourism in the MidCoast Region

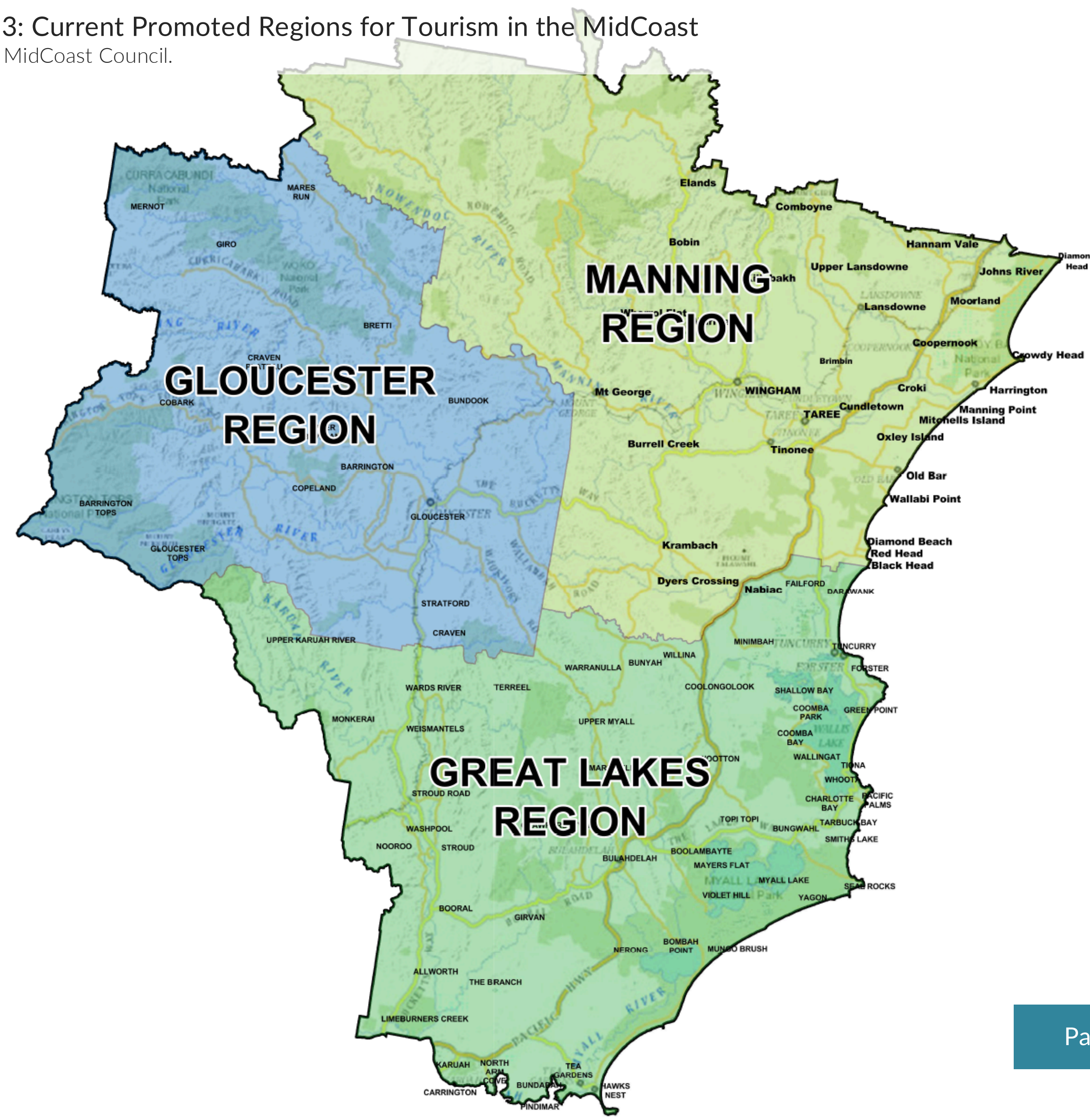
Key Statistics

Source: Australian Census data/ Australian Bureau of Statistics unless indicated.

Size:	10,052 sq. km
Population:	90,876 (est. 2016)
Population in 2036 (Est.):	121,408 (+33.6%) [259]
Population density:	9.0 per sq. km
Gross Regional Product (GRP):	AUS $32,627 per capita[260]
International Tourists:	20,000 (2014)
Domestic Visitors:	1,834,000 (2014)
Estimated value of Tourism:	AUS $570 Million per annum
North Coast NSW Rankings:	4 |15 | 8 |15 | 14 |15


© Matthew Cramer | Crowdy Bay National Park

Map 13: Current Promoted Regions for Tourism in the MidCoast
© 2015 MidCoast Council.



11.2 Current Tourism Performance in the MidCoast Region

The following table summarises some of the key Tourism statistics and estimates included in Section 7–9 to give an overall indication of current Tourism performance in the new amalgamated MidCoast Council Area. It is based on a variety of sources and, due to the disparate nature of some of these data sources, should be viewed as broadly indicative only. It does, however, provide some fairly clear and robust insights to help inform the next stage of the Destination Management Process.

Table 61: Summary Tourism Statistics for the amalgamated MidCoast Council Area

Sources: Combined data from Sections 3, 7, 8 & 9. Sources detailed in each section as relevant.

KEY STATISTIC	MIDCOAST COUNCIL	GLOUCESTER FORMER GLOUCESTER SHIRE COUNCIL	GREAT LAKES FORMER GREAT LAKES SHIRE COUNCIL	MANNING FORMER GREATER TAREE CITY SHIRE COUNCIL
Size/ Land Area | Sq. kms	10,052 km^2	2,950 km^2	3,373 km^2	3,729 km^2
Current Population | 2015	90,975	5,160	36,720	49,095
Estimated 2036 Population	121,408 | +33.6%	4,850 | –3.3%	45,850 | +24.3%	70,708 | +42.7%
Number of Businesses | 2015	6,540	708	2,530	3,302
Tourism Businesses | 2015 Estimate	736 | 11.3%	81 | 11.4%	391 | 15.5%	265 | 8.0%
Local Jobs | 2015	29,426	1,963	11,066	16,397
Tourism Jobs | Direct & Indirect 2015	2,810 | 9.5%	210 | 10.7%	1,550 | 14.0%	1,050 | 6.4%
Tourism Value | % of All Industry 2015	6.5%	4.4%	10.7%	3.7%
Tourism Value | % of GRP 2014	19.2%	19.7%	30.3%	10.5%
International Visitor Numbers	20,000	1,000	12,000	7,000
International Visitor Nights	90,000	6,000	54,000	50,000
International Visitor Spend	$6.36 million	$364,000	$3.0 million	$3.0 million
Domestic Overnight Numbers	970,000	96,000	585,000	289,000
Domestic Visitor Nights	3.44 million	262,000	2.32 million	854,000
Domestic Overnight Spend	$470 million	$43 million	$312 million	$115 million
Domestic Daytrip Numbers	863,000	82,000	401,000	380,000
Domestic Daytrip Spend	$94 million	$8 million	$44 million	$42 million
Types of Tourism (Estimated % splits in 2014)	Domestic O/N 52.3% Domestic Day 46.6% International 1.1% Holidays 58%; VFR 31%; Other (inc. Business 11%)	Domestic O/N 53.5% Domestic Day 45.9% International 0.6% Holidays 64%; VFR 28%; Other (inc. Business 8%)	Domestic O/N 58.6% Domestic Day 40.2% International 1.2% Holidays 61%; VFR 28%; Other (inc. Business 11%)	Domestic O/N 42.7% Domestic Day 56.2% International 1.1% Holidays 43%; VFR 37%; Other (inc. Business 20%)
Total Visitor Numbers | 2014	1.86 million	180,000	998,000	677,000
Estimated Visitor Numbers | 2008	1.68 million	177,000	875,000	625,000
Estimated Growth Rate | 2008–14	+10.9%	+1.7%	+14.0%	+8.3%
Total Tourism Expenditure | 2014	$570.4 million	$51.4 million	$359 million	$160 million
Estimated Tourism Budgets*	$2.22 million	$201,093	$966,000	$1,052,394
Rank in North Coast NSW | 2014	–	14 | 15	4 | 15	8 | 15

* Tourism budgets are best estimates based on 2015/16 reported budgets in existing operational plans for 3 MidCoast Council Regions.

11.2 Current Tourism Performance in the MidCoast Region | Continued

The first observation that can be made about the data in Table 61 is that the broader MidCoast Council Area is forecast to experience overall population growth to 2036 of between 30–35%, with that growth primarily driven by the 2 coastal regions (Manning + 43% and the Great Lakes + 24%), with Gloucester forecast to decline slightly by –3.3%. This would see the population grow from its current level of 90,975 to over 121,000.[261] This growth reflects the overall growth projections for regional areas in NSW, and for the MidCoast it is assumed that the overall demographic make–up of the Region would stay broadly similar (i.e. remains an older skewing retiree region). With a combined land area of 10,052 km^2, this would see the MidCoast Region's population density move from just over 9 people/km^2 to 12.1 people/km^2, whilst retaining the higher density adjacent to the coast as exists currently.[262]

From an overall value point of view, Tourism currently represents approximately 19% of GRP in the MidCoast (6.5% of total industry value), with the Great Lakes clearly the Region where it plays the strongest role at 30.3% (10.7%) vs. 19.7% (4.4%) in Gloucester and 10.5%) 3.7% in the Manning Region. There are several reasons for this, including the Great Lakes' closer proximity to Sydney and generally better developed Tourism Industry, the higher prevalence of manufacturing in the Manning Valley (which decreases Tourism's relative importance) and the relative inaccessibility of Gloucester. The overall attraction of the Great Lakes to higher volumes of Tourists is also a base factor.[263]

From an employment point of view, 9.5% of MidCoast jobs are either directly or indirectly in Tourism, with a similar trend to overall value: Great Lakes 14%, Gloucester 10.7% and Manning 6.4%.[264]

Looking at total visitor numbers to the MidCoast, this has grown from 1.68 million in 2008 to 1.86 million in 2014, an overall growth rate of almost 11%. The Great Lakes has led this growth, moving from 875,000 to 998,000 (+14.0%), followed by the Manning Region (625,000 to 677,000, +8.3%) and then Gloucester which has only shown a marginal increase over the same period (177,000 to 180,000, +1.7%). This growth in numbers has seen similar growth in Total Tourism Expenditure which now exceeds AUS $0.57 billion per annum. The Great Lakes makes up 63% of this value at AUS $359 million, followed by Manning at 28% (AUS $160 million) and then Gloucester at 9% (AUS $51.4 million). The strong relative Tourism performance of the Great Lakes is again apparent in these numbers given the Region's population is 20% smaller than Manning's (36,720 vs. 49,095), yet it receives 40% more in terms of Visitors and 125% more in term of Expenditure.[265]

Splitting the Visitor numbers, only 1.1% of visitors to the MidCoast are International Tourists, ranging from 0.6% in Gloucester (1,000 visitors, 6,000 nights, AUS $364,000); to 1.1% in Manning (7,000 visitors, 50,000 nights, AUS $3 million); and 1.2% in the Great Lakes (12,000 visitors, 54,000 nights, AUS $3 million). Interestingly, International Visitors tend to spend significantly longer (7.1 days vs. 4.5 days) and more (AUS $428 vs. $250 per trip) in Manning than the Great Lakes, most likely due to the higher proportion Visiting Friends and Relatives (37% in Manning vs. 28% in the Great Lakes). Gloucester International Visitors stay for an average of 6.0 nights and spend AUS $364, so are closer to Manning Region averages.[266]

Of the 1.83 million Domestic Visitors to the MidCoast (98.9% of total visitors), 970,00 are overnight visitors (53% of total) and 863,000 are day–trippers (47%). Overnight visitors are made up of 585,000 from the Great Lakes (60%), 289,000 from Manning (30%) and 96,000 from Gloucester (10%); day–trippers consist of 401,000 from the Great Lakes (46%), 380,000 from Manning (44%) and 82,000 from Gloucester (9.5%). From this it can be seen that Gloucester's share is consistent, but Manning currently receives proportionately more day–trippers than the Great Lakes.[267]

With regards to the types of Tourism, Gloucester has a strong skew towards Holidays at 64%, followed by Visiting Friends and Relatives (VFR) at 28% and a particularly low % attending for other reasons (including business) at 8%. The Great Lakes also has a high proportion of holidaymakers at 61%, followed by VFR at 28% and 'Other' at 11%. Manning has a noticeably different split with significantly more visitors for the purpose of VFR (37%), a higher proportion of business visitors (20%) and only 43% visiting for holidays.[268]

11.2 Current Tourism Performance in the MidCoast Region | Continued

And lastly, from a ratio of council spending to Tourism Revenue point of view, the Great Lakes appears to have been the most effective with a ratio of 1:371 (i.e. AUS $371 in Tourism Revenue generated for every $1 in Council Tourism budget) vs. 1:254 for Gloucester and 1:151 for the Manning Region. This should be viewed with caution however as there are multiple factors influencing this ratio in addition to Council budgets – not least the geographical location of each Region.[269]

Overall, this data is reflected in its simplest form by the Great Lakes being ranked 4th amongst the former North Coast LGAs, followed by Manning in 8th and Gloucester in 14th. *Further detail on each Region in Sections 7–9.*

11.3 Some Key Characteristics of MidCoast Tourism

If we then look at some of the characteristics of Tourism in each Region as outlined in Sections 7–9, a number are clearly fairly unique to certain areas, but there are also a number that are consistent either across all three Regions or in two of them. In general, Tourism in the Great Lakes and Manning Regions are closer to each other than Gloucester for the obvious reason that they are both heavily influenced by their coastal location. That said, as can be seen in Table 62 below, there are also some types of Tourism that are consistent across the Great Lakes/ Gloucester Regions and Manning/ Gloucester Regions.

Table 62: Key Tourism Characteristics of the 3 MidCoast Regions (Current and/or Future)*

Source: Various data sources in this Baseline Report and 2iis Consulting analysis.

COMPARISON OF STRENGTHS/ CHARACTERISITCS	GLOUCESTER REGION	GREAT LAKES REGION	MANNING REGION
1| TOURISM CHARACTERISTICS UNIQUE TO EACH REGION	Rural–based Tourism; Barrington Tops NP; Heritage Tourism (Mining); Gloucester; Motorbike Touring; White water rafting; Art/ Galleries; Farm Gates/ Organic.	Lake–based Tourism (Myall Lakes NP); Forster Tuncurry/ Pacific Palms/ Seal Rocks; Combination Tourism (particularly Kayaking); specific sports sectors (e.g. diving/ golf).	Ellenborough Falls; Taree/ Crowdy Head/ Harrington; Indigenous–based Tourism (current & future); Higher % VFR; Business Tourism (current & future).
2| TOURISM CHARACTERISTICS CONSISTENT ACROSS THE GREAT LAKES AND MANNING		Coastal Tourism/ Beaches/ Surfing; Mainstream (Seasonal) Tourism; Families/ Kids; Couples/ Weddings; Hinterland (current & future); Coastal Great Walk; Youth Market; 'Flashpackers'.	
3| TOURISM CHARACTERISTICS CONSISTENT ACROSS GLOUCESTER AND MANNING	Mountain Biking Trails: The Steps; Food & Wine (strongest); Nature–based positioning (location specific: BT).		Mountain Biking Trails: Taree Tip (strongest); Food & Wine (stronger than Great Lakes); Nature–based positioning;
4| TOURISM CHARACTERISTICS CONSISTENT ACROSS THE MIDCOAST REGION (Or Potentially Consistent)	Nature–based & Adventure–based Tourism (current & future); Range of NPs/SFs/NRs/SCAs; Water–based (Rivers/ Lakes) Tourism including Kayaking; Activities for kids (Manning/ Great Lakes stronger); Walks/ Treks (Gloucester 1, GL 2, MV 3); Cycling/ Cycle Touring; Unspoilt/ uncrowded (with some exceptions in Great Lakes & Manning, e.g. Forster/ Taree); Health & Wellbeing (including Women's H&W); Grey Nomads (current & future); Indigenous–based Tourism; International (higher proportion in future, still low %); Nature–based and Adventure–based Tourism (NABT); Mountain Biking/ Combination Tourism; Regional Positioning; Great Walks; Food & Wine/ Farm Gates (Just Gloucester/ Manning?); Heritage Tourism (West of Region focused?).		

** Future Tourism Growth opportunities are highlighted in red.*

11.3 Some Key Characteristics of MidCoast Tourism | Continued

In the summary table above an attempt has also been made to highlight those characteristics of Tourism that are current strengths and those which have significant potential; this is also looked at in the Gap Analysis summary in Section 11.6. Some areas are also highlighted in Table 62 as being for discussion (i.e. whether food/ wine is more of an opportunity for Gloucester/ Manning than the whole MidCoast Region).

Overall it is interesting to note the specific Tourism types that are consistent across the MidCoast, with the majority being connected in some shape or form to the Natural assets available in the Region. There are also some specific types of Tourism, ranging from Indigenous/ Aboriginal–based Tourism to Mountain Biking that could be particular focuses for a part (or parts) of the MidCoast.

The specific types of Tourism referred to in this table will be outlined in more detail in Section 14, which looks at Future Opportunities for Tourism Growth in the MidCoast Region.

11.4 Nature–based and Adventure–based Tourism in the MidCoast Region

The natural assets of the Region are clearly evident throughout the characteristics summary table; both when looking at the types of Tourism that are currently strong, and also when reviewing where the greatest potential for growth appears to lie.

The Sections on the current state of Tourism in Gloucester, the Great Lakes and Manning each highlighted that Nature–based and Adventure–based Tourism (NABT) was the single most important opportunity for future growth. It is no surprise then that NABT is also the single largest opportunity for the MidCoast Region in its entirety; the table below summarises the various NABT forecasts included in Sections 7–9 to provide an overview of the potential for this underlying core growth area out to 2030.

Table 63: Current and Forecast Value of MidCoast Nature– and Adventure–based Tourism (2015 vs. 2030)
Sources: UN Statistics Division, Tourism Research Australia and Destination NSW.

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.

11.4 Nature–based and Adventure–based Tourism in the MidCoast Region | Continued

The current total value of NABT in the MidCoast Region is estimated at between AUS $114.0 million and AUS $142.6 million and is (conservatively) forecast to grow to between AUS $540.8 million and AUS $695.3 million by 2030.

This total is built on a forecast of NABT growth in Gloucester from AUS $10.2–$12.8 million to AUS $48.7–$62.6 million; in the Manning Region from AUS $32.0–$40.0 million to AUS $151.2–$194.4 million; and in the Great Lakes from AUS $71.8–$89.8 million to AUS $340.9–$438.3 million

It also sees the overall share of NABT increase from a current estimated level of 20–25% of total Tourism to 35–45% in 2030. Although these forecast ranges are based on a combination of UNWTO, TRA and Destination NSW trend estimates, based on the scale and variety of Natural Assets that are clearly available for Tourism in the MidCoast Region, they are likely to be at the bottom end of the scale in terms of potential (i.e. very conservative). Even a modest increase in the overall share of NABT in the MidCoast to 55–65%, would see the range increase to AUS $852.5 million to AUS $1.01 billion. This level of share for NABT is eminently achievable by 2030 based on the fact that sizeable opportunities have been identified in each of the 3 MidCoast Regions. Achieving a share for NABT in excess of 50% would also be a clear indicator that the MidCoast had become a lead Region for NABT in New South Wales.

This overall growth forecast is also conservative; it assumes a minimal level of growth in Tourism investment from the public and private sectors and minimal focus on the higher growth potential Tourism sectors outlined in this report. Just focusing on the Great Walks and core Nature–based positioning highlighted on the following page in Section 11.6 could add a further 7.5–12.5% growth to these forecasts.

One element that is essential in achieving even the base AUS $540.8 million forecast, however, is a clear restructuring of Tourism resourcing right across the new MidCoast Council. Tourism promotion will need to be focused around growing the whole Region's Tourism vs. being restricted by the historic boundaries inherited from the previous LGA structure.

The exact structure of MidCoast Tourism Promotion resources will be dependent on the final 'Tourism Nodes' agreed in the DMP, but the forecasts assume any revised structure is fully operational within 18 months – and that the amalgamation remains in place until 2030.

11.5 Total Tourism Potential of the MidCoast Region

Table 63 *(page 145)* also includes a summary of the current value of Tourism in the MidCoast and a 2030 forecast that is based on a deliberately conservative growth path for the Region.

Using a variety of data sources, the total value of MidCoast Tourism is forecast to grow from AUS $570.4 million today (2014 totals) to AUS $1.55 billion by 2030. This would represent 17% of the total value of the NSW North Coast Destination Networks' Tourism Industry and 1.9% of the total Tourism Industry in NSW.[270]

On current projections and assuming evenly spread investment across the MidCoast, the Great Lakes would still be the lead Region having grown to almost AUS $1 billion in value (AUS $974 million from AUS $359 million), followed by the Manning Region (AUS $432 million from AUS $160 million) and then Gloucester (AUS $139 million from AUS $51 million). [271]

A Tourism Industry worth AUS $1.55 billion in 14 years' time is a clear step up from the current industry size of AUS $569 million. It will require a structured approach and some focused investment from both the private and public sectors. However, the forecast has been based on conservative estimates, so has a degree of risk accounted for in some of the base growth assumptions. This means AUS $1.55 billion could very feasibly be exceeded and valid arguments could be made for making it a stretch goal for 2025 (this would also assist the MidCoast in trying to achieve the NSW State Governments stated objective of doubling Tourism by 2020).

[See Section 14 for more detail on future Tourism potential in the MidCoast.]

11.6 Summary Gap analysis of Tourism in the MidCoast Region

Building on the gap analysis undertaken for the individual Regions, a MidCoast gap analysis is included on the following page as Graphic 28. It looks to provide an overview of the key areas that should be considered as potential priorities during the development of the full Destination Management plan.

All the 26 components included below are important for the future of Tourism in the MidCoast to some degree, and all could provide growth in some shape or form if focused on and invested in.

However, the 13 components included in the bottom right quadrant are those which this baseline analysis are indicating as offering the greatest potential for the Region and/or the ones that need the most initial development work to open up their potential in the longer–term; they are the areas that it is suggested should be considered first in the DMP process.

In an approximate order (from the component with most potential to least) they are:

1) Unique NBT Positioning; 2) 'Great Walks'/ Range of Walks; 3) Tourism Promotion (Particularly Digital); 4) NABT Experiences; 5) Access to National Parks; 6) Accommodation (Quality and Range; 7) Local Food & Wine; 8) Luxury Accommodation; 9) Hinterland Tourism Offerings and Infrastructure; 10) Youth Market Experiences; 11) Culture/ Heritage Offerings; 12) Cycling Infrastructure; and 13) Aboriginal–based Tourism.

There are then 4 components that are on the fringes of the Initial Focus quadrant:

1) Combination Adventure Experiences, 2) Flashpacker Infrastructure; 3) Basic Tourism Infrastructure; and 4) Clear Tourism Promotion Structure. These are areas that still provide significant growth opportunities so should still be considered as important, but may be relevant to 1 or 2 Regions only or for mid vs. short–term focus.

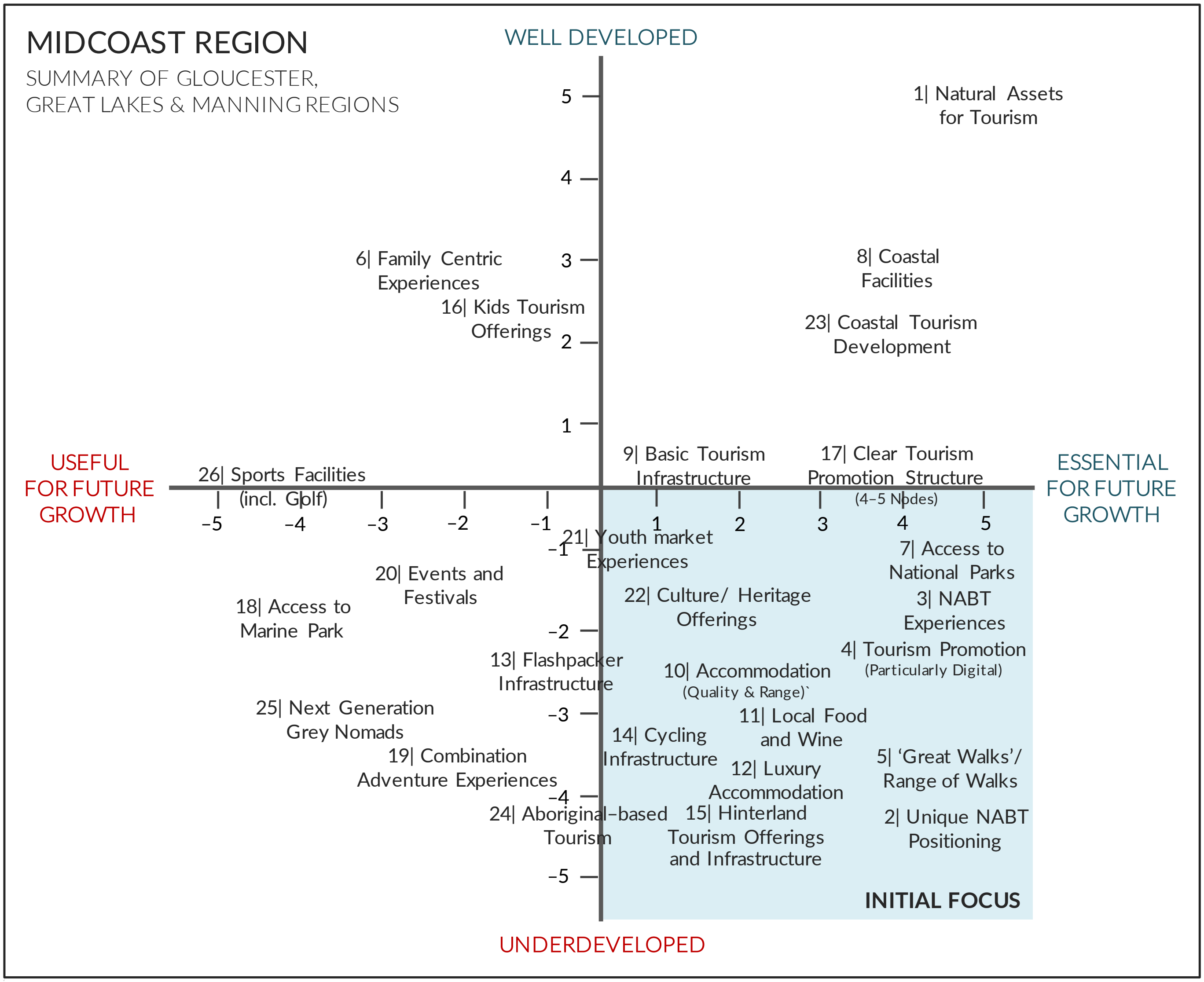
The final 9 components are either of lower potential and hence priority: 1) Access to Marine Park; 2) Events and Festivals; 3) Sports Facilities (incl. golf) and 4) Next Generation Grey Nomads; or already relatively well–developed and so should be considered as more a case of being maintained than prioritised for significant focus and investment: 1) Family Centric Experiences, 2) Kids Tourism Offerings; 3) Coastal Tourism Development (mainstream vs. NABT); 4) Coastal Facilities; and 5) Natural Assets for Tourism.

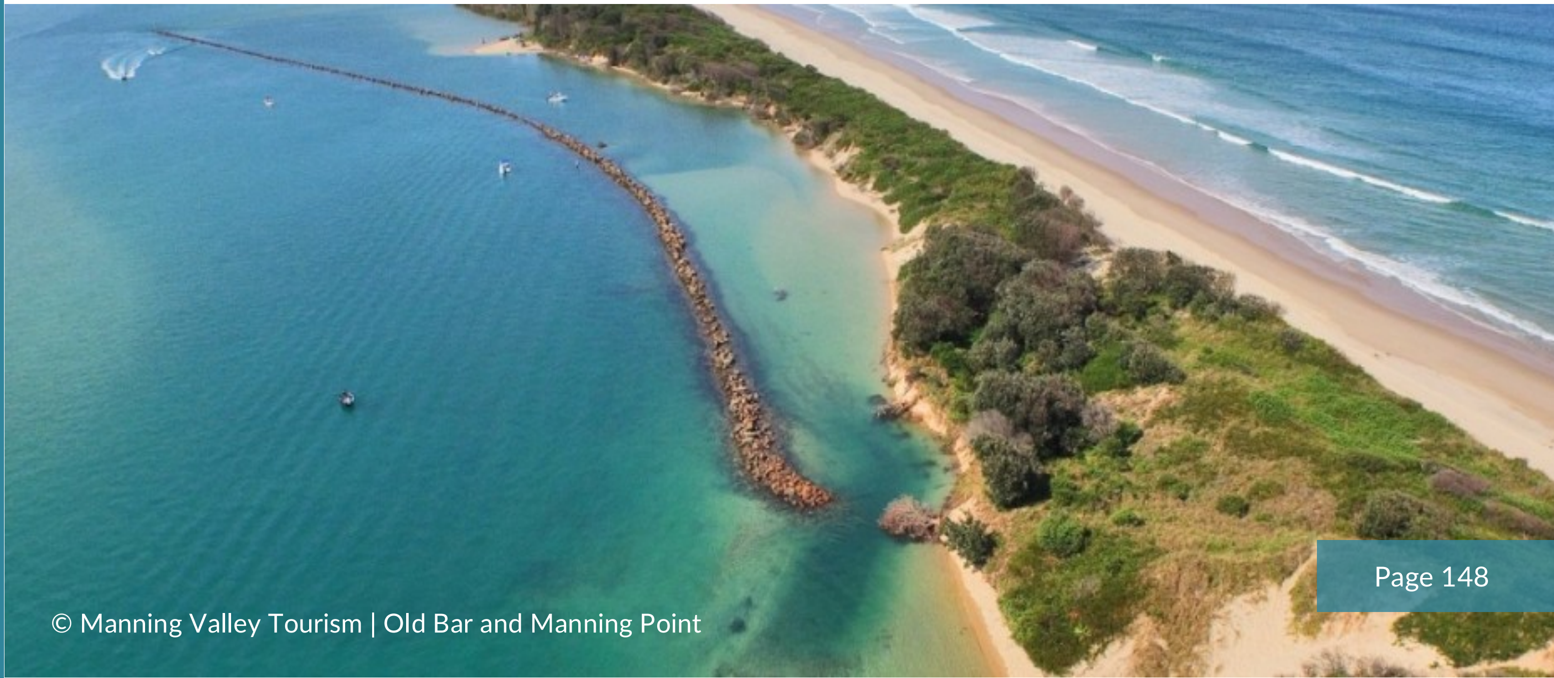
It should be noted that although Events and Festivals do not score highly in the gap analysis, focusing on them can still provide a strong pull to visit a Region, so certainly have a role in future growth.

11.6 Summary Gap analysis of Tourism in the MidCoast Region | Continued

Graphic 28: Gap analysis of key components of MidCoast Tourism

Analysis by 2iis Consulting based on Baseline Analysis and DMS Field Visit in April 2016.





11.7 Potential Structure for Tourism in the MidCoast Region

One of the harder aspects of looking at the future potential for MidCoast Tourism lies in identifying a potential structure for how the Region could be promoted.

This is mainly because the data outlining current Tourism performance and forecasting future trends cannot reliably be used to develop an optimal structure for something with so many variables.

As a starting point, potential 'Tourism Nodes' were identified for each of the individual Regions and included in the relevant section that outlined current Gloucester, Great Lakes and Manning tourism performance. A similar exercise has been undertaken for the MidCoast Region as a whole and is included in Table 64 below.

Of all the elements covered in this Baseline Analysis, this is by far the most subjective given it is based only partly on the data uncovered during the project, and relies heavily on opinions developed during the review of a wide range of materials and the exploration of a broad range of potential growth areas.

It also requires detailed on–the–ground knowledge and a clear understanding of the MidCoast Region's geography and connectivity (i.e. road condition, general accessibility); incorporating this 'local knowledge' is included in the stakeholder engagement/ consultations and planning stages of the broader project.

Whilst acknowledging these limitations, it is possible, however, to make some indicative suggestions as to the areas that have suggested themselves as potential 'Tourism Nodes' for the MidCoast Region and to outline some options for an overall tourism structure.

With the above in mind, the following table provides an initial structure to be considered in the DMP.

Table 64: Potential future MidCoast Tourism Nodes [FOR COMPLETION DURING DMP PROCESS]
Initial proposal based on this baseline analysis: intended to inform the broader DMP process.

#	POTENTIAL NODE *	SELECTED SETTLEMENTS	INDICATIVE TOURISM OPPORTUNITIES
1	'Taree and The North Coast'	Taree, Brimbin, Coopernook, Croki, Crowdy Head, Cundletown, Diamond Beach, Dyers Crossing, Harrington, Lansdowne, Manning Point, Mitchells Island, Nabiac, Old Bar, Oxley Island, Timonee, Wallabi Point.	Coastal Tourism; NABT; Family holidays/ Kids; Couples; Local Food & Wine; Grey Nomads; National Parks access (particularly Crowdy Bay NP); Great Walks Potential?; Surfing; Aboriginal/ Indigenous–based Tourism (Saltwater NP); Cycle–touring; Business Tourism; VFR; 'Flashpacking'/ Youth; Combination Adventure (walking/ cycling); Events & Festivals.
2	'Wingham and the Northwest'	Wingham, Appletree Flat, Bobin, Bretti, Bundook, Burrell Creek, Elands, Giro, Karaak Flat, Killabakh, Killawarra, Krambach; Mares Run, Mernot, Mt George, Somerset.	NABT; Mountain Biking; Kayaking; Great Walks Potential?; National Parks access + Ellenborough Falls; Health Retreats; Family holidays; Local Food & Wine; Farmers Markets; Grey Nomads; Rural Life; Heritage; Festivals and Cultural Events.
3	'The Hinterland and Barrington Tops'	Gloucester, Allworth, Barrington, Berrico, Bunyah, Copeland, Craven, Faulkland, Glen Ward, Monkerai, Moppy, Mt Peerless, Rawdon Vale, Rookhurst, Stratford, Stroud, Terreel, Upper Bowman, Upper Myall, Wards River, Waukivory.	'Rural Life'; NABT; National Parks access (particularly Barrington Tops); Heritage (e.g. gold mining); Local Food & Wine; Farm breaks; Luxury Accommodation; Cycle–Touring & MTB; River–based activities, e.g. rafting; Aboriginal/ Indigenous–based Tourism; Great Walks potential (linking to coast?).
4	'The Great Lakes'	Forster Tuncurry, Bombah Point, Bulahdelah, Coolongolook, Coomba Park, Green Point, Hawks Nest, Mayers Flat, Minimbah, Mungo Brush, Nerong, Pacific Palms, Seal Rocks, Smiths Lake, Tea Gardens, Tiona, Wallingat, Wootton.	Coastal Tourism; NABT; Family holidays/ Kids; Surfing; Couples; Local Food & Wine; Grey Nomads; National Parks access (Myall Lakes + PS–GL Marine Park); Great Walks Potential?; Luxury Accommodation; Cycle Touring and MTB; Aboriginal/ Indigenous–based Tourism (Dark Point); 'Flashpacking'/ Youth; Combination Adventure (walking/ MTB/ kayaking/ diving); Events & Festivals.

* Note that names used for Potential Nodes are indicative only.

11.7 Potential Structure for Tourism in the MidCoast Region | Continued

From the table above, it appears that subdividing the MidCoast into 4 separate areas is the simplest and potentially most effective way of setting up the Region for future Tourism growth.

Working from the top of the Region down, the 4 areas identified are:

1) **Taree and the North Coast:** covering the region to the East of Taree (predominantly the area between the Pacific Highway and the Coast) and running from Diamond Head to Black Head;
2) **Wingham and the Northwest:** covering the region stretching from Wingham/ Krambach up to the Northwest towards the Curracabundi NP (i.e. made up of west of the Manning Region and north east half of Gloucester Region– potentially using 'Manning Valley' as it's descriptor);
3) **The Hinterland and Barrington Tops:** covering the southwestern half of the Gloucester Region, the area to the west of the Pacific Highway in the Great Lakes Region and potentially a small southwestern corner of the Manning Region (depending on extent of Wingham and the Northwest area);
4) **The Great Lakes:** covering the Eastern half of the former Great Lakes Council Area (east of the Pacific Highway and from Hawks Nest to Black Head).

From a total land area perspective, the 2 coastal areas are significantly smaller than the 2 inland ones, which matches up with the current and forecast population densities for the Region. Splitting the hinterland into 2 distinct areas also allows for the Barrington Tops to play a key role whilst also freeing up some of the other areas in the west of the MidCoast for Tourism development and promotion (Ellenborough Falls becomes a hero attraction in the 'Wingham and the Northwest' area/ node).

There are clearly a number of ways to sub–divide the MidCoast Region, ranging from an inland half and coastal half, to 7 or 8 sub–regions around the more heavily populated towns. However, the 4 areas/ nodes proposed above, supported as they are by the findings of this baseline analysis, appear to provide a good starting point for further development through the detailed Destination Management Plan development phase.

© Craig Fardell and Christina Armstrong | Barrington Tops NP

11.8 Tourism Branding Evaluation Summary & Potential Implications for the MidCoast

11.8.1 Evaluation Summary

Looking at the brand materials analysed for each of the 3 Regions in Section 10, there is relatively little difference between the 3 regions from an overall ranking point of view, with all having some clear areas of weakness that should be considered as part of the overall Brand review component of the DMP. From a Nature–based Tourism point of view, Manning has the marginally stronger Nature–based proposition and positioning currently (although it is still not necessarily the most compelling Nature–based proposition that could be developed). This was both the overall impression gained when researching the Region 'as a tourist', but also on more detailed analysis via the 10 criteria outlined in Table 65 below.

This table looks at a range of important attributes ranging from how relevant the positioning is to the Region's Tourism Offering/ Unique Selling Point (USP), to creative consistency. It looks to pull the different positionings apart from one another and is deliberately 'unforgiving' given it compares the Regions with best practice from around Australia. Given the highest score was 53 and lowest 44 all have areas that can be improved on fairly significantly.

Table 65: Topline Evaluation of Gloucester, Great Lakes and Manning Tourism Brands
Source: Various materials as reviewed during the compiling of this Baseline Report.

#	MIDCOAST REGION	BRAND CRITERIA EVALUATION [Scored from 1 – 10, with 10 being 'Australian Best Practise']										SUMMARY	
	NOTE. This evaluation is based on subjective criteria and is scored against leading Tourism Destinations Australia–wide. It should be viewed as indicative only.	Relevant to the Offering/ USP	Differentiated/ unique	Clear Brand Hierarchy	Strength of Nature–based Positioning	Strong Imagery	Creative Consistency	Wide Range of Impactful Materials	Appeal to Key Target Audiences	Effectiveness of Key Audience Targeting	Overall Brand Positioning	TOTAL SCORE [Out of 100]	RANK
1	GLOUCESTER REGION	5	4	4	5	4.5	4	3.5	5	5	4	44	3
2	GREAT LAKES REGION	6	5	5	3	6	6	6	6	5	5	53	1
3	MANNING REGION	6	4	4	6	5	5	6	6	5	5	52	2

11.8.2 Potential Implications for MidCoast Tourism Branding

Looking at some of the potential implications for future MidCoast positioning work, one of the most significant ones is how the overall Region is segmented for Tourism. This needs to be decided on first before any detailed work can be undertaken on how the different 'sub–regions' should be positioned. Some initial thoughts on a potential MidCoast segmentation are included in Section 14 to assist the DMP process.

Outside of the above, there were a number of weaker areas that were consistent across the Gloucester, Great Lakes and Manning Regions that will need addressing as part of any future positioning/ branding initiatives:

1) All 3 Regions could strengthen their positioning's connection to their Tourism offerings/ USP;
2) All 3 positionings were relatively undifferentiated;
3) All could further develop the 'emotive appeal' of their corner of the MidCoast Region;
4) There is a general lack of compelling digital content bringing the 3 Regions to life for potential visitors;
5) Imagery tends to be inconsistent and there is the potential for a Region–wide image/ digital content library.

SECTIONS 12–13

12 | Learning from Other Areas in Australia and New Zealand

13 | Key Sector Insights

12 | LEARNING FROM OTHER AREAS IN AUSTRALIA & NEW ZEALAND

In exploring the potential for Tourism in the MidCoast Region and ways to sustainably accelerate its development, it is worth looking to other areas for some examples of different approaches and best practice.

The following areas have been selected for a variety of reasons, ranging from overall Destination Positioning to Tourism product development; from significant infrastructure development to drive growth, to the importance of taking a multi–year and ambitious approach.

The five areas outlined below are included to act as further input for future Tourism planning in the MidCoast Region. There are clearly many similar areas that could be included, but the examples selected have been included because of their clear relevance to this project. The areas included on the following pages are:

12.1 The Sapphire Coast, Southern New South Wales | Clear and well–structured Nature–based Positioning;

12.2 Coffs Coast, North Coast New South Wales | Lead Tourism Region in North Coast NSW;

12.3 Kangaroo Island, South Australia | Long–term Tourism Planning;

12.4 Forrest, Victoria | Mountain Biking; and

12.5 New Plymouth, Taranaki, New Zealand | Coastal Infrastructure.

In looking at these examples, the objective is to identify some key elements that can be used to help inform the development of the MidCoast Destination Management Plan.

A number of other examples of potential interest including ‘Australia’s Coral Coast’ in Western Australia, ‘Coffin Bay’ in South Australia and ‘The Bay of Plenty’ on the North Island of New Zealand are also included in a summary table at the end of this section.

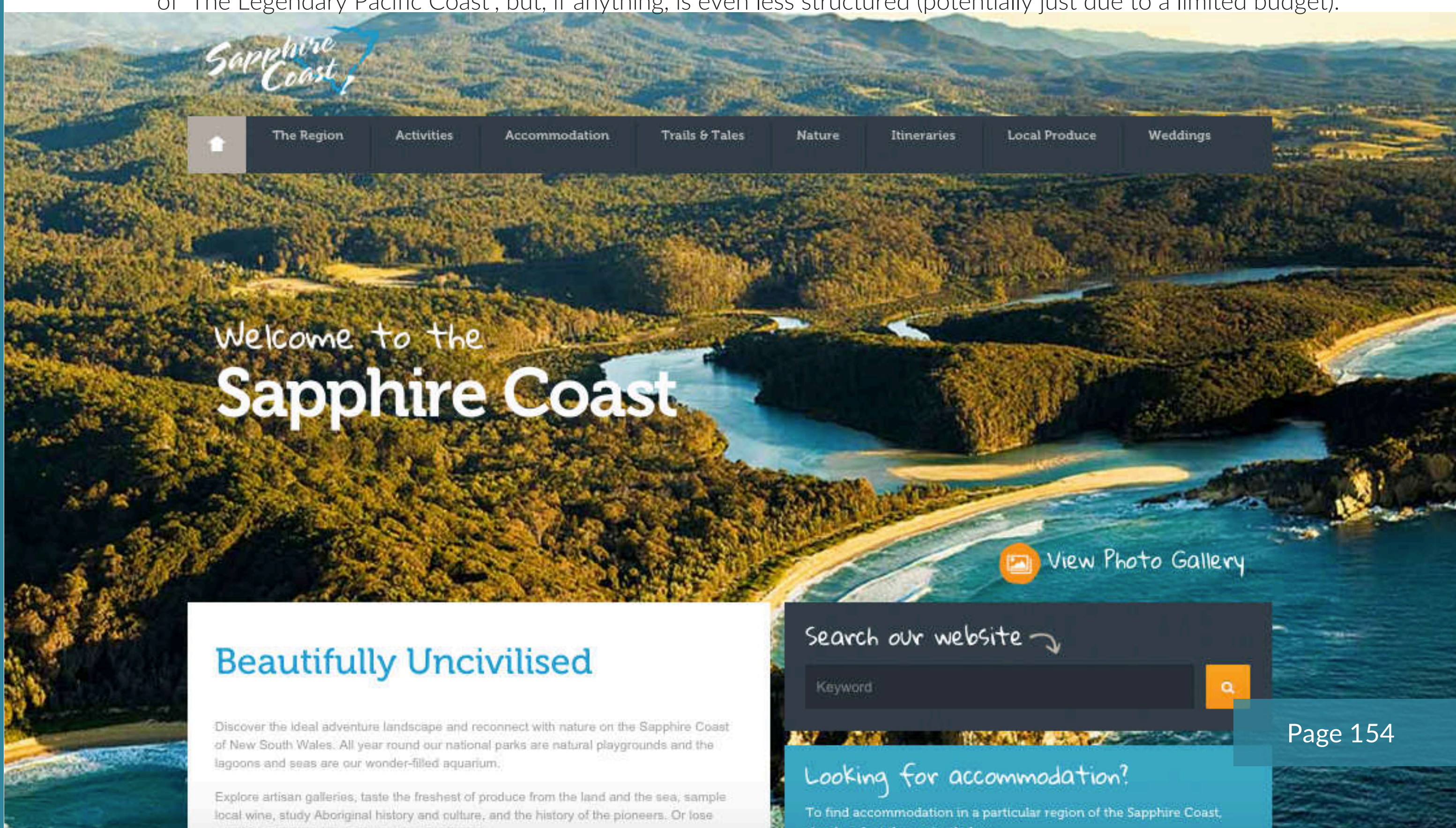
© Sunday Sunset | Ningaloo Reef, Australia’s Coral Coast

12.1 The Sapphire Coast, Southern NSW | www.sapphirecoast.com.au

The Sapphire Coast is an interesting case study as it has many similar assets to the MidCoast Region (the Great Lakes and parts of the Manning Region in particular), but seems to have a much more structured understanding of what the region has to offer and to whom.

Some of the elements of Tourism promotion that are particularly strong include:

1) An evocative and location specific positioning: 'Beautifully Uncivilised'
   - The positioning is one that particularly stood out amidst the many similar/ undifferentiated ones that exist for the different regions of East Coast NSW.
   - It captures both the wilderness and 'frontier–like' history of the region in a compelling, yet simple way.
2) Effective nature–focused imagery
   - The imagery is strong and evokes the region and its natural assets well.
3) Strong and clear Nature–based Tourism offerings
   - Nature–based Tourism is front and centre of the region's offering – and appears to be a long–term focus.
4) Wilderness Walks a clear strength of their offering
   - A number of walks are offered, including the ***'Light to Light'*** 3–4 day walk mentioned in Section 13.1 (page 162).
5) Well–constructed 'Tourist Routes' offered (Nature and Cultural/ Historical based)
   - Categorised as 'Trails and Tales', the nature–based offering is simple to access and the historical/ cultural side is, if anything, even stronger and helps provide a point of difference through the history of whaling in the region.
   - It also ties in closely with the propensity for Nature–based Tourists to also look for cultural experiences when travelling.
6) Promote the National Parks in their region in an integrated way (especially Ben Boyd National Park)
   - National Parks are a centre–piece of the offering with a number of entry points to them, e.g. via 'Activities', 'Nature', 'Trails and Tails' and 'Itineraries'.
7) Adventure–based activities are well communicated – including Guided Walks
   - Whilst nature is at the top of the experience hierarchy, adventure is a close second with a wide range of adventure offerings tapping into this segment.
8) Strong integration with Regional Tourism promotion
   - Has a close connection with the 'Australia's Coastal Wilderness' Tourism promotion website. This is the equivalent of 'The Legendary Pacific Coast', but, if anything, is even less structured (potentially just due to a limited budget).



12.2 The Coffs Coast, North Coast New South Wales | www.coffscoast.com.au

As the leading Tourism region in North Coast New South Wales (and regional New South Wales more broadly), the Coffs Coast is clearly getting more right than wrong with its Tourism promotion.

2014 saw 1.6 million visitors spend AUS $433 million in the area, with three of its' advantages clearly being the presence of Coffs Harbour in the region, its' location midway between Brisbane and Sydney and ongoing inclusion as a location promoted to International markets by Destination NSW and Tourism Australia. However, these assets alone don't explain the consistent success Coffs has as a Tourism destination.

The following is not meant to be a comprehensive analysis of the Coffs Coast's Tourism promotion, but some of the elements that Coffs seems to do consistently well include:

1) Strong visual branding and effective use of imagery
   - Whilst not perfect, imagery is strong throughout primary materials and has a consistent feel that reinforces the offering.
2) Consistency and apparent longer–term focus
   - The approach seems to be a long–term one with materials building on previous executions and a commitment to build a positioning rather than continually change and/ or amend it.
3) Clear segmentation and fairly clear hierarchy of Tourist interest areas/ destinations offerings
   - The top level focuses on World Class Experiences (& lots of them), World Heritage Landscapes/ nature & the Coastline.
4) Using one of their main assets (the Harbour) as one of the 'hero offerings' for the area
   - The harbour is a clear pull for more mainstream audiences allowing for other areas to focus on more niche offerings.
5) An understanding of the more mainstream nature of their offering
   - Coffs is a more mainstream destination than most other parts of the region and they tailor their materials accordingly.
6) A strong and comprehensive website
   - As the primary source of Tourism information, they have invested consistently in their core Tourism promotion asset.
7) Nimble and effective digital marketing
   - They seem to be a 'fast follower' in terms of digital marketing platforms, most recently developing the *'Coffs Coast App'*.
8) Consistent and significant investment in Tourism promotion
   - With a budget of AUS $1.9 million in 2014–15, Coffs Coast spent $1,189 per 1,000 visitors vs. $1,193 in MidCoast.
9) Effective integration of Tourism with Council and other key sectors.
   - The overall impression is that Council, planning, local business and the Tourism Office are working effectively together.

All of the above elements are clearly relevant to the MidCoast Region, and improving performance in any one of them would deliver long–term economic and social benefits to the broader community. Of these 9, a focus on segmentation and building a strong website would seem to be obvious priorities for the coming 12 months, with consistency and a longer–term focus something that should become an underlying theme for the MidCoast.

© Coffs Coast Tourism | Urunga Boardwalk, Southern Beaches Drive

12.3 Kangaroo Island, South Australia | www.tourkangarooisland.com.au & www.kangarooisland–australia.com

Kangaroo Island is a particularly interesting case study because of the long–term approach that has been taken to destination management and Tourism development (going back to 1997 and beyond), that now sees the Island as one of Australia's National Landscapes and an internationally renowned destination.

1) Understanding the need for long–term investment and commitment to build the Destination
   - Kangaroo Island's current success is based on a 20–year commitment to investing and managing the destination in a sustainable way. There is a clear desire to ensure the majority of Tourism development decisions are considered within the overall planning framework for the Island.
2) Comprehensive, integrated and ongoing planning processes
   - There is a clear framework in place to guide decision–making and investment that has been refined and added to over time. Whilst it could be argued it has become overly structured in certain respects over time, the benefits in terms of a longer–term approach are clear.
3) Close involvement and engagement of the local community
   - The way in which government, business and the local community work together in a more–or–less integrated manner is another strong factor behind their sustained Tourism growth.
4) Clear commitment to small–scale, sustainable Nature–based Tourism as the model for the island
   - Included the development in 1997 of the *'Kangaroo Island Tourism Optimisation Model'* (KITOMM) which is worthy of additional study alongside the 2011 and 2014 planning documents detailed at the foot of the page.
5) Strong food and wine offering integral to the Tourism Destination
   - The focus on quality local food and wine is another critical component. This is currently an area of weakness for the key areas of the MidCoast Region, but there is clear potential to develop it as a core offering.
6) Promoted as an all–season destination
   - A relatively recent development, but the offering is also tailored for the different seasons as a way of evening out the usual seasonal fluctuations.
7) Includes Health & Wellbeing as an offering alongside Nature and Adventure–based Tourism
   - Again, a recent addition. Partly a consequence of the length of time the Destination Planning Process has been operating, which has allowed for more segmented offerings like this to develop.
8) Has created and built a number of key events as part of an integrated annual calendar
   - These include regular Farmers and Community Markets alongside annual events like the Kangaroo Island Marathon, Field Day and Arts Festival.
9) Significant long–term infrastructure investment
   - This initially focused on improving primary transport links like the ferry connections to Penneshaw and airport at Kingscote and subsequent development of more specific Tourism infrastructure in key areas of the Island.

The comprehensive Kangaroo Island planning document from 2011 and addendum from 2014 are available here:
[https://www.sa.gov.au/topics/property-and-land/planning-and-land-management/plans-for-regional-south-australia]

© Kangaroo Island Australia | Remarkable Rocks

12.4 Forrest, Victoria | Mountain Biking

Forrest is included here specifically for the development that has gone into the Forrest Mountain Bike (MTB) Trails and the associated Tourism support services that now exist in the town.

Situated 160 kms south west of Melbourne and inland from the Great Ocean Road, development on the Forrest MTB Trails began in 1997 and now consist of over 60kms of sign–posted single track in and around the town. It is renowned as one of Australia's leading locations for Mountain Biking.
[See www.rideforrest.com.au]

Whilst there are other activities for tourists, the Mountain Biking is the clear lead for attracting visitors:

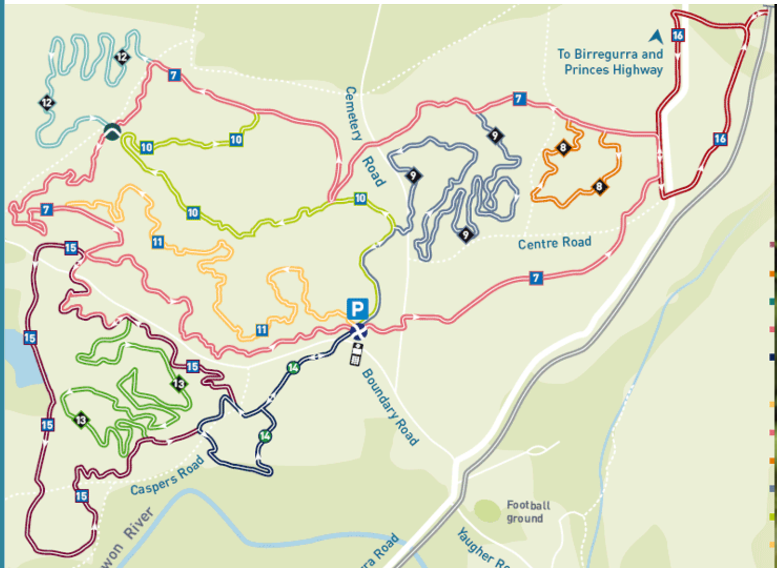
'Forrest and its picturesque surrounds are bursting at the seams with things to do. The world class Forrest mountain bike trails have become the region's signature activity, but the surrounding Otways rainforest is a pristine playground for nature–based, environmentally friendly and adventurous things to do. Mountain bike trails literally surround the town, so visitors can stay in town and experience genuine ride–in, ride–out, accommodation in Forrest. Mountain bike hire, lessons and tours are also available at businesses in Forrest, while road cycling is also a popular visitor activity, with a range of challenging and enjoyable routes in the region.'[272]

Some of the core elements behind the successful development of Mountain Biking in and around Forrest include:

1) Developing an area already popular with MTB enthusiasts and with some existing well–used trails
   - Taree Tips and The Steps in MidCoast would seem to fit these criteria;
2) Having a vision of an Australia–leading (potentially world–leading) MTB facility;
3) Investing initially in the basic trail infrastructure – ideally interweaving the trails in and around a town;
4) Incentivising support services (i.e. Bike Hire, lessons, tours and targeted accommodation);
5) Focusing on Mountain Biking initially, but looking to develop all forms of cycling around the 'MTB Hub';
6) Exploring the potential to create, support or sponsor high profile MTB events to bring profile;
7) Involving the local community as much as possible upfront to minimise negative impacts.

For a further example of leading Mountain Bike Trail Development, see the Derby MTB Trails in North East Tasmania that were upgraded with a $2 million investment in 2014/15: www.ridetassie.com/derby.html.

A number of studies into the potential benefits of MTB development are also available including one from 2015 for the Atherton Tablelands that includes some examples of economic benefit in different parts of Australia (for example the Otway Odyssey around Forrest results in a weekend spend by visitors of $718,620.00):[273]
[http://www.tablelandsfutures.com/wp-content/uploads/2015/04/MTB-benefits-Atherton-Tablelands-v3-2015.pdf]



12.5 New Plymouth, Taranaki, New Zealand | Infrastructure

There are a number of opportunities for long–term infrastructure investments in the MidCoast Region that have the potential to transform certain areas economically, socially and from a community perspective (as well as enhancing overall tourism performance).

The award–winning Coastal Walkway and associated Town–Centre re–development in in New Plymouth, Taranaki is one example of where a key piece of infrastructure development has had a far–reaching impact on the broader community and economy. It is a case study that can provide a number of insights for the MidCoast.

The Walkway itself is a ten kilometre path that forms an expansive sea–edge promenade stretching almost the entire length of the city, **'ideal for walking, running, cycling or skating, or simply enjoying the view of the dramatic west coast, the walkway runs from the Hickford Park, Bell Block to the east to Port Taranaki to the west, with numerous pedestrian access points along its route.'** [274]

Some of the core elements that have underpinned its' success are:[275]

1) Breaking the project down into stages
   - The Walkway commenced with a focus on a 1km central section to rejuvenate the old railway yards in the central part of New Plymouth. This initial development gained community support for the rest of the project;
   - Stages have been undertaken as funding has become available and/or certain business opportunities have arisen;
   - The Walkway is now 12.7km in length with a further 5km+ stage being planned.
2) Understanding the broader benefits of a project of this nature
   - Initially the intent was just to rejuvenate a disused and derelict area, however the broader benefits quickly became clear – including the economic involvement of the local Maori community;
   - These ranged from health & wellness, community connectivity and social cohesion; to tourism development, broader economic development and the attracting of additional public and private funding.
   - The walkway has also been identified as one of the key enablers for broader Town Centre planning & re–development.
3) Including iconic structures as part of the development
   - This has added to the appeal of ongoing development (e.g. the Te Rewa Rewa Bridge).
4) Connecting with Heritage & Cultural developments
   - The Walkway is clearly linked with other Tourism sites in New Plymouth (e.g. Govett Brewster/ Len Lye Galleries).
5) Securing National and International Awards to assist in raising New Plymouth's Tourism profile
   - Including the gold award for 'Community Projects' at the 11th International Awards for Liveable Communities.

The Walkway has also assisted in successfully rejuvenated a number of local businesses, including the camping/ caravanning park located on the edge of New Plymouth. Prior to being connected to the CBD by

© Chris Gregory | New Plymouth Coastal Walkway, Taranaki, NZ

12.5 New Plymouth, Taranaki, New Zealand | Continued

the walkway, it was proving difficult to secure investors for upgrade work that was needed. Not only did the construction of the walkway encourage significant additional investment, it has also clearly provided an increase in ongoing income to the New Plymouth Council from increased usage.

Other new businesses have included a small number of temporary businesses, in particular 2 cafés that are set–up for the tourist season (one of them in a converted shipping container that has become an iconic attraction in its own right). These have again added to the attraction of the central part of New Plymouth and are particularly successful with visitors.

Events are also becoming commonplace on the Walkway; from a bi–annual Sculpture Symposium (with completed works often being bought by local residents and then gifted back to the city) to an 'International Festival of the Arts Lantern Parade'. Again, this kind of activity has clear benefits for both Tourism and the local Community.

More broadly, the Walkway has both accelerated and, in some cases, facilitated a more integrated and long–term approach to Town–Centre Planning, with New Plymouth's CBD now recognised as being much better structured for development and able to maximise the economic benefits from both Tourism and the economy in general.

Specifically from a Tourism perspective, the Walkway is now recognised as one of the lead attractions to New Plymouth, alongside Mount Taranaki, the Botanic Gardens, the Len Lye Centre and Gallery and the Len Lye designed 'Wind Wand' sculpture (that is located on the walkway).

Whilst the exact economic benefit of the walkway and associated Town–Centre re–development is difficult to quantify, it was recently identified as being one of the key drivers behind a significant increase in Domestic Visitors, many of them traveling to New Plymouth for the first time (+4% to NZ $252 million in value for January–July 2016).[276]

The impact on providing New Plymouth with a clear and strong identity for Tourists has also been significant and, coupled with the clear economic, social, environmental and community benefits that have been provided to New Plymouth from a more structured town–planning approach, explain why further stages to the walkway are being planned over 20 years after the initial walkway got underway.

In the MidCoast an opportunity would seem to exist for a more comprehensive planning review of the Forster Town Centre (and possibly Taree) to explore the socio–economic benefits of a more integrated approach (any development could obviously be staged in as occurred in New Plymouth). To start with, there are existing sections of a potential 'coastal walk' that could be leveraged fairly easily; for example, providing better linkages between Forster Main Beach, the town centre and Wallis Lake and connectivity to One Mile Beach via the Bicentennial Walk.

Further detail on the project, including a timeline, can be found here:
[http://www.newplymouthnz.com/OurDistrict/Attractions/CoastalWalkway.htm]






12.6 Other areas of interest

A number of other areas in both Australia and New Zealand could provide additional insights to the MidCoast region and are potentially worthy of further study.

They are included in the table below, with the examples selected focused on a number of different 'Insight Areas' that highlight the area of Tourism that is of particular relevance. These 'Insight Areas' have been chosen because they are either gaps, areas of weakness or sectors of high potential for the MidCoast Region (or a combination of these factors).

Table 66: Other Australian Tourism Regions/ Areas to learn from
Source: 2iis Consulting Online Desktop Research, April and August 2016.

#	TOURISM AREA	LOCATION	INSIGHT AREA	WEBSITE
1	'Australia's Coastal Wilderness'	VIC–NSW	Coastal Tourism	www.australiascoastalwilderness.com.au
2	'Australia's Coral Coast'	Western Australia	Nature–based Marine Tourism	www.australiascoralcoast.com
3	'Coffin Bay'	South Australia	Oysters and Food Offering	www.coffinbay.net
4	'Eurobodalla'	South Coast, NSW	Oysters and Coastal Tourism	www.eurobodalla.com.au
5	'Jervis Bay'	New South Wales	Positioning and Clear Targeting	www.jervisbaytourism.asn.au
6	'The Blue Mountains'	New South Wales	Inland National Park	www.visitbluemountains.com.au
6	'Narooma'	Southern NSW	Oysters and Mainstream Tourism	www.narooma.org.au
7	'East Coast Tasmania'	Tasmania	Strong Overall Offering	www.eastcoasttasmania.com
8	'Milford Sound'	South Island, NZ	Great Walks and High–end Lodges	www.milford-sound.co.nz
9	'Fjordland'	South Island, NZ	Nature–based Marine Tourism	www.fiordland.org.nz
10	'Bay of Plenty'	North Island, NZ	Coastal Waterways and Food	www.bayofplentynz.com

13 | KEY SECTOR INSIGHTS

There are a number of sectors that are of particular interest to the MidCoast Region either because they are currently underdeveloped or they are a potential area of opportunity for sustainable, long–term Tourism growth in the region. As with Section 12, the following is not meant as a comprehensive analysis, but rather to provide some insights to help inform future MidCoast Region Tourism development.

For the purpose of this baseline, fourteen areas have been highlighted as of potential relevance, with some identified as worthy of further more detailed study in Section 15:

12.1 The Great Walks Market;

12.2 Nature and Eco Lodges;

12.3 The Luxury Market and its' connection to the nature market;

12.4 Indigenous Tourism;

12.5 The Food and Wine Market;

12.6 The redefinition of Backpacking and the growing 'Flashpacker' Market;

12.7 Sport and Tourism;

12.8 Cycle Tourism (Mountain Biking and Cycle–touring);

12.9 The Women's Health & Wellbeing Market;

12.10 The changing Youth market;

12.11 Next Generation Grey Nomads;

12.12 Other sectors: 'Combination Holidays', Heritage/ Cultural Tourism and Visiting Friends and Relatives (VFR).

13.1 The Great Walks market

Great Walks are a key opportunity for development in the MidCoast Region given this Tourism segment's recent and forecast strong growth, the strong natural resource base in the region, the high proportion of National Parks and State Forests available and some initial development that has already occurred.

Nationally, *'bushwalking/ rainforest walks'* and *'visiting national parks/ state parks'* are the most popular nature activities for international visitors (52%), domestic overnight (48% and 47% respectively) and domestic day visitors (43% and 36% respectively).[277]

Looking at New South Wales, over a third of all travellers in Australia who undertake a bushwalk choose New South Wales for this activity, with more than one in six of all holiday trips in NSW (16%) involving bushwalking. Well over a half (58%) of all holiday trips to NSW will involve a nature based activity of some description.[278]

Overlaying this with the long–term trend for increasing niche–based Tourism activities (including more adventurous multi–day walking holidays),[279] then this appears to be a Tourism sector that has strong potential growth ahead of it, whilst also delivering a higher yield per tourist given it follows the overall tendency for Nature–based tourists to spend more per trip as already highlighted in Sections 7.6, 8.6, 9.6 and 11.4.

Precise, credible statistics regarding the current and potential size of the market for single—day/ multi–day/ Great Walks and trekking are not readily available, in part due to the inconsistent definition of this segment around the world. However, where reliable data is available, double digit growth rates of between 10%–15% are often reported in many 'trekking destinations'.[280]

One specific Australian case study that does include some economic analysis, is the Great Ocean Walk in Victoria. Opened in January 2006, the walk is often called *'the State's premier multi–day bushwalking experience'*, covering 104–kilometre of spectacular coast from Apollo Bay to the Twelve Apostles in Port Campbell National Park. The trail offers walkers the option of short walks of a few hours to day hikes and seven–night/eight–day camping experiences. The proximity to local towns also allows for visitors to stay in 'off–walk' accommodation and enjoy a variety of independent or packaged services, such as tours, guides, transport providers, food and wine; by year 3 of its operation it involved more than 40 marketing partners.[281]

In 2009, whilst still in the early stages of development, the economic benefits of the trail were estimated to provide an estimated annual impact of AUS $15 million (including marketing, visitor expenditure and flow–on expenditure) and more than 100 full–time jobs.[282]

© Tourism Australia | Southwest National Park, Tasmania

13.1 The Great Walks market | Continued

There has been a strong recent focus on growing the adventure–walking sector in Australia, most notably through the establishment of **'Great Walks of Australia'** (www.greatwalksofaustralia.com.au), that brings together 9 walks from 5 of the States and Territories (VIC, NT, QLD, SA and TAS) and has the intention of providing further walks from the remaining States to become a national experience provider.

Within the walks offered are great examples of the different sub–categories available:
1) **Multi–day Point–to–Point Walks** (with or without optional add–on segments);
2) **Hub–and–Spoke Walks** using the same (usually) top–end lodge for accommodation each night;
3) **Combination Walks** with a mixture of Point–to–Point and Hub–and–Spoke Walks (Point–to–Point component often the 'walk–in' and 'walk–out' legs);
4) **Guided Walks** (all those offered by Great Walks are guided, but un–guided walks are readily available);
5) **Single or Half–day Walks** (not included in the Great Walks offering, but a popular sub–category).

The other common feature of the walks on offer is that they all provide high quality, local food and wine as a key selling point (indicating the higher value Tourists being targeted), and also often have a 'hero experience' at the conclusion of the walk (e.g. a helicopter ride over the route just travelled).

The full **'Great Walks of Australia'** brochure providing details of 8 of the 9 current walks can be accessed here:
[http://greatwalksofaustralia.com.au/wp/wp-content/uploads/2014/10/GreatWalksOfAustralia-Brochure.pdf]

All the walks featured have some degree of relevance, but the **'Freycinet Experience Walk'**, **'Twelve Apostles Walk'** and **'Maria Island Walk'** provide some clear insights around the potential for the development of a hero experience of this kind in the MidCoast Region.

Using these walks as examples would indicate an experience in the MidCoast could involve a walk in to a luxury lodge/ camping ground base where high quality local food and wine would be provided. This would form the base for a 'Hub–and–Spoke' walking experience that could be combined with some potential Nature–based marine Tourism in the Port Stephens–Great Lakes Marine Park. There may also be the potential to include cycling and kayaking as part of the whole experience – even a seaplane ride out from one of the Great Lakes or helicopter ride out of the Barrington Tops.

The location for this kind of experience would most logically sit in and around on of the key iconic National parks of the MidCoast: Barrington Tops NP, Woko NP, Crowdy Bay NP or Myall Lakes NP for example. There is also potential for developing a combined experience of this kind moving through a number of the Region's Parks.


FREYCINET EXPERIENCE WALK

THE FREYCINET EXPERIENCE WALK IS A FOUR-DAY EXPLORATION OF THE FREYCINET NATIONAL PARK ON TASMANIA'S EAST COAST. RETURNING EACH NIGHT TO THE FRIENDLY BEACHES LODGE RENOWNED FOR ITS AWARD-WINNING ENVIRONMENTAL ARCHITECTURE.

Set against the dramatic backdrop of pink granite mountains, you will be led by engaging guides to rarely explored corners of the Freycinet National Park including the breathtaking Schouten Island. Here you will discover diverse marine and wildlife, secluded turquoise bays and rich coastal forests. Travelling in the footsteps of the Oyster Bay Tribe, the walk traverses the same ancient bush tracks trodden some 30,000 years ago.

On day two there is a choice between a challenging walk over Mt Graham or a leisurely coastal route before re-grouping at the end of the day at the spectacular Wineglass Bay. Travelling light you will only need to carry a small backpack for your lunch and a camera.

The ambience at Friendly Beaches Lodge is informal but sophisticated. The relaxing atmosphere is accompanied by delicious meals using the best of Tasmanian produce – freshly caught flathead, local oysters and wines of the region. The lodge is exclusive to your group (maximum ten) where you will have private rooms with comfortable beds and enjoy friendly personal service.

We recommend a final swim at Friendly Beaches, it is exhilarating!

Accessed from: Freycinet Peninsula, Tasmania
Duration: 4 days/3 nights
Total distance: up to 37km (22 miles)
Graded as: easy to moderate

FREYCINET EXPERIENCE WALK

13.1 The Great Walks market | Continued

An example of a more ambitious option could be to look at a 'Great Lakes Traverse' type experience that combines walking, kayaking, cycling and even running to take visitors right round the 3 lake system of the Great Lakes. This kind of experience is behind the current grant application for a feasibility study (see box at foot of page).

In looking at developing an experience of this nature, there are also a number of principles that need to be taken into account. All the successful walking experiences seem to deliver on some or all of the following:

1) Provides a unique experience
   - There is often an element of 'only available here' in the established walks. Whether that be experiencing a unique natural environment, gaining access to inaccessible regions, being exposed to localised cultural experiences or sacred sites, or walking to iconic locations like the Twelve Apostles.
2) Has a World Class National Park/ UNESCO World Heritage Site/ Iconic location as a core offering
   - The natural environment and wildlife are often the key complimentary factors to the walk itself with the area often being renowned prior to the establishment of the walk (e.g. 'Cradle Mountain Huts Walk').
3) Is exclusive/ has limited availability
   - Numbers are often limited either just through a decision of the company offering the experience, or by the need to restrict numbers to avoid damaging the environment the walk is in (e.g. via the provision of permits).
4) Involves unique overnight accommodation
   - This is most often a bespoke lodge in a stunning location, but can also be through luxury camping or exclusive beach campsites or National Heritage buildings only accessible through the walk.
5) Includes high–quality, local food and wine
   - In some cases, this is almost the main focus of the experience, but, even if not that central, a chef is often provided just for the group.
6) Provides options for additional side–trips
   - This allows for an even more bespoke experience and allows for the members of the group to decide the overall balance of their trip between walking and time spent relaxing or just enjoying the environment.
7) Concludes with a 'hero moment'
   - This could be as simple as a swim from a pristine beach, up to a helicopter ride back to the start point.

One of the key variables that will need to be considered is whether the experience is guided or un–guided or, in the longer–term, both options are provided to cater for distinctive markets. If both are offered, they would likely need to be in separate locations to manage the exclusivity requirement mentioned above. The overall 'luxury level' of the experience will also need to be carefully considered, although there does seem to be an opportunity to aim more towards the top–end in the MidCoast Region to make the most of the marketing opportunity that a hero experience would provide (and currently seems to be lacking in the region – other than Seal Rocks & the Barrington Tops which probably provide the strongest general Tourism pull currently).

Tourism Demand Driver Infrastructure (TDDI) Application 'Great Lakes Great Walk & Aquatic Trails Initiative'

The initial baseline analysis undertaken for the Great Lakes estimated that over $400 million per annum could be directly generated by Nature and Adventure-based Tourism for the region by 2030.

In order to achieve this economic outcome, a key recommendation of the draft Destination Management Plan (DMP) was to investigate the option of 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. The appeal of the Great Walk would be enhanced by aquatic trails extending from Port Stephens into Myall Lakes and including Smiths Lake and Wallis Lake.

To initiate the planning process, an application was recently made for TDDI funding for a *'Great Lakes Great Walk and Aquatic Trails Feasibility Assessment and Master–plan'*.

The decision on funding is pending at the time of writing this report, but, if successful, will provide a great way to fast–track the development of MidCoast 'Great Walks'.

13.1 The Great Walks market | Continued

To conclude this brief look at the Great Walks market, the following table details some of the one–day, multi–day and guided walks that are currently promoted in New South Wales: to be used as part of the detailed due diligence work that will need to be undertaken in developing plans for any MidCoast 'hero' walk experience(s).

Table 67: A Selection of Promoted 'Structured Walks' in New South Wales

Sources: Tourism NSW, Destination NSW and online search engines (Google and Bing).

#	PROMOTED WALK	LOCATION (NSW)	CATEGORY	DESCRIPTION
1	'White Sands Walk'	Jervis Bay	Short/ 1–day Walk	Easy hour–long walk along *'the whitest sands of the world'*.
2	'Red Top lookout and Boardwalk'	Mungo National Park	Short/ 1–day Walk	Walk giving views of the park's deep ravines, the Mungo lunette and lakebed.
3	'National Pass'	Blue Mountains	Short/ 1–day Walk	Hard walk built into the side of the cliff and follows a trail originally built in 1906.
4	'Breadknife and Grand High Tops Walk'	Warrumbungles National Park	Short/ 1–day Walk	Regarded as one of the State's best day walks because of it its volcanic landscape.
5	'Mt Kosciuszko Summit Walk'	Mt Kosciuszko NP	Short/ 1–day Walk	Walk to the peak of Australia's highest mountain (can include a chair lift ride and a number of additional side trails).
6	'Light to Light Walk'	Far South Coast	Multi–Day Walk	Covers 30 km of coastline and links historic Boyds Tower and Green Cape Light Station.
7	'Solitary Islands Coastal Walk'	North Coast	Multi–Day Walk	An easy four–day walk over 60 km.
8	'Kanangra Walls to Katoomba'	Blue Mountains	Multi–Day Walk	Challenging 45 km hike through stunning scenery.
9	'Green Gully Track'	New England	Multi–Day Walk	Award–winning track covering 65km over four days through the Oxley Wild Rivers National Park.
10	'Sydney's Great Coastal Walk'	Sydney	Multi–Day Walk	A seven–day walk e covering 100km of coastal trails from Barrenjoey on Sydney's northern beaches to the Royal National Park in the South Can be done as a multi–day walk or broken up into day sections.
11	'Gibraltar–Washpool World Heritage Walk'	Gibraltar Range National Park	Multi–Day Walk	3–4 day, 45km Gibraltar–Washpool World Heritage walk through eucalypt forests, rainforests, wetlands and granite tors in the Northern Tablelands.
12	'Mount Gower Walk'	Lord Howe Island	Guided Walk	Challenging eight–hour return trek, complete with rope–assisted climbs.
13	'The Coast Track' *[Sydney Coast Walks]*	Royal National Park	Guided Walk	Two–day hike for private groups through Australia's oldest national park.
14	'Yuraygir Coastal Walk' *[AusWalks]*	North Coast	Guided Walk	6–day walk from Yamba to Red Rock through rainforest, paperbark swamps and heathland.
15	'The Six Foot Track' *[Life's an Adventure]*	Blue Mountains	Guided Walk	45 km route follows the 1884 heritage horse track through the Blue Mountains

13.2 Nature and Eco Lodges

Some top–level statistics on Nature–based Tourism were touched on in Section 5.7, but it is worth expanding on the predicted growth opportunity for this sector in a bit more detail.

In general terms, the United Nations World Tourism Organisation (UNWTO) predicted in 2012 that Ecotourism, nature, heritage, cultural and 'soft adventure' Tourism would grow rapidly over the next two decades and global spending on Ecotourism could be expected to increase at a higher rate than the Tourism industry as a whole.[283] Given the strong growth rate of global Tourism predicted in general *(see Section 5)*, this indicates significant opportunity in this higher–yielding and lower impact segment.

Building on the UNWTO's forecasts, in 2014 a global study found that 43% of respondents would be considering the ethical or environmental footprint of their main holiday that year, with an additional 10% saying they would be doing so partially.[284]

In terms of economic value, the world's terrestrial Protected Areas are estimated to receive about 8 billion visits per year. These visits have been calculated as generating over US $600 billion per year in direct in-country expenditure whilst reducing the social, cultural and environmental costs of Tourism to the host area.[285]

Looking at the economic value from a different angle, the International Ecotourism Society (TIES) forecast in 2010 that Ecotourism could grow to 25% of the global travel market by 2015 and account for US$ 470 billion per year in direct expenditure.[286] This forecast appears to have been conservative, although Ecotourism having a 20–25% share of the Global Tourism market remains the most commonly quoted figure.

And lastly, when considering the threats posed to destinations by climate change, sustainable Tourism has the benefit of directly addressing those threats by protecting destinations at the same time as *'enhancing brand value, increasing profits, saving costs, and improving competitive positioning, both for attracting and retaining customers and recruiting the best talent'*.[287]

With all these trends pointing to the sustained growth of Nature–based Tourism, it is no surprise that the provision of bespoke services has been growing to meet this demand. This is particularly true in Australia, where Nature–based Tourism has, more or less, always been a significant driver of Tourism growth.

Nature and Eco Lodges are one part of this service provision, but are of particular interest here because of the current gap in the MidCoast with regards to quality accommodation in general, and desirable Eco/ Nature accommodation more specifically.

© Sal Salis, Ningaloo Reef, WA

13.2 Nature and Eco Lodges | Continued

Driven both by the growth in Nature–based Tourism/ Ecotourism, but also by the increasing expectations of more mainstream Tourists' that resorts, hotels and accommodation providers will manage their environmental footprint as a base level of service, there has been a rapid growth in the accommodation options available when it comes to Nature and Eco–focused offerings in Australia.

This is reflected in the development of certification schemes like Ecotourism Australia's 'Eco Certified Tourism' program and the wide range of specialised websites offering Eco accommodation options around the country.

In the last five years, this has led to an expansion in the type of offerings available, with the upper end showing particularly strong growth through the rise of options like 'Glamping' and the general move away from Eco accommodation being associated with more basic facilities and a lack of luxury. This reflects the broader trend towards the mainstreaming of sustainability in society as a whole.

In terms of the experience being looked for, there are some key criteria that seem particularly critical:

1) Genuinely operates with a low ecological and/ or socio–cultural footprint;
2) Is located in or near a National Park, Word Heritage Centre or remote/ pristine Coastal environment;
3) Exclusivity/ small scale is maintained – even if connected to a larger resort;
4) Provides access to unique environmental and/ or socio–cultural experiences (e.g. Indigenous immersion);
5) Owners often also visibly run the Lodge, with Local Community ownership becoming more common;
6) Often showcase a unique/ cutting edge architectural feature that enhances overall Eco credentials;
7) Becoming more expected that will participate in formal accreditation schemes (to combat Green–Wash);
8) Often connected to Walking/ Other Adventure Tourism providers, & look to incorporate eco cuisine.

As with the Great Walks section, some examples of various types of Nature and Eco Lodges are included below.

Table 68: Some Examples of Nature and Eco Lodges in Australia
Sources: Tourism NSW, Destination NSW, Green Getaways Australia, EcoTourism Australia and online search engines (Google and Bing).

#	NATURE/ ECO LODGE	LOCATION	DESCRIPTION
1	'Billabong Camp, Western Plains Zoo'	Dubbo, Country NSW	Immersive bush camping experience within Taronga Western Plains Zoo's Australian wildlife area, with accommodation in canvas tents.
2	'Davidson's Arnhemland Safaris'	Top End, Northern Territory	Located on a registered aboriginal sacred site in a remote 700km^2, exclusively leased area in the Arnhemland escarpment.
3	'Freycinet Eco Retreat'	Freycinet Peninsular, East Coast Tasmania	1,200 acre eco retreat offering accommodation in eco–cabins, and event venues for both formal and informal functions.
4	'Jabiru Safari Lodge'	Atherton Tablelands, Queensland	'Glamping' in luxury eco tents within the Mareeba Tropical Savanna and Wetland Reserve.
5	'Karijini Eco Retreat'	The Pilbara, Western Australia	Environmentally friendly, ecologically sound and affordable accommodation located in the Karijini National Park.
6	'Paperbark Camp'	Jervis Bay, New South Wales	Peaceful bush retreat near Jervis Bay providing luxury tented accommodation. One of NSW's earliest Eco accommodation providers.
7	'Pebble Point'	Great Ocean Road, Victoria	5 tented cabins (promoted as 'Glamping') located near 3 National Parks in close proximity to the Twelve Apostles.
8	'Rawnsley Park Eco–Villas'	Flinders Ranges, South Australia	Owned and managed by fourth generation locals Tony and Julieanne Smith, the focus is on authentic Outback hospitality.
9	'Tandara Luxury Eco Tent'	Lane Cove National Park, Sydney	Tented cabin located within the Lane Cove National Park, just 10km from the Sydney CBD.
10	'Thala Beach Lodge'	Tropical North Queensland	Located on a peninsula with that provides easy access to explore the Great Barrier Reef and Daintree Rainforest.

13.3 The Luxury Market and its' connection to the Nature market

As alluded to with regards to the growth in top–end Nature and Eco accommodation options in Section 10.2, there has been an acceleration in the expansion of the luxury Tourism market with a greater number of higher–value Tourists willing to spend more in a number of regions round the world.[288]

In Australia's case, this is particularly linked to the US market, where luxury travel to Australia grew +137% from 2014–15, driven, in part, by a strategic partnership between Tourism Australia and Virtuosa.[289] The US market is particularly important for Australia given they are the market with the highest total number of High Net Worth Individuals (HNWI) and are already a strong market for International arrivals.

Further evidence of the growing influence of Luxury Travellers from the US is demonstrated by the fact that US visitors spent close to A$2.95 billion in 2015, an increase of +14% over the year. Much of this growth is attributed to HNWIs who are estimated at between 10–20% of the total, and growing.[290]

Australian domestic luxury travellers are also growing in number, with the quick 2 to 4–day luxury getaway driving much of the growth. Over the past five years, 2 in 3 people have taken these kind of shorter domestic luxury holidays more often, with 1 in 4 exploring *'their own backyard in luxury'* on average 4–5 times per year.[291]

Domestic luxury travellers are also clearly becoming more engaged with environmental issues, with almost 60% saying these issues have increased in importance in the past five years, particularly issues such as protecting the Great Barrier Reef, wildlife conservation, climate change and pollution.[292]

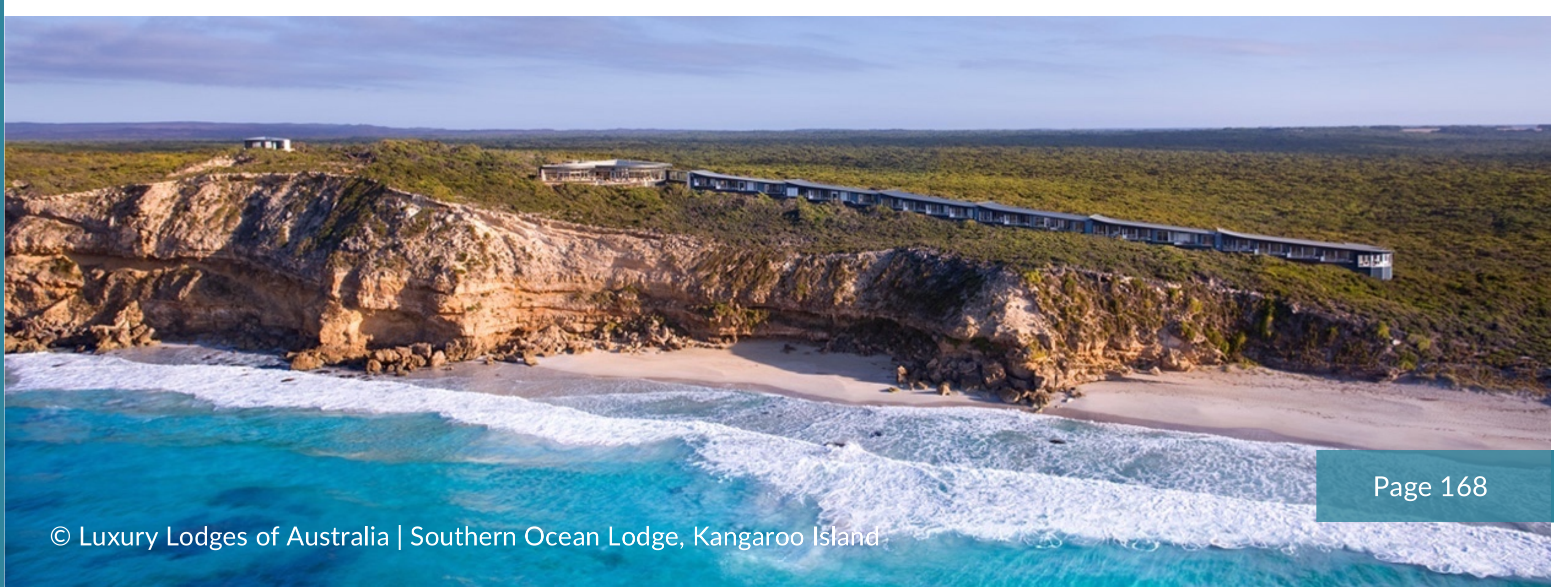
In terms of overall annual spend on Luxury Travel, 46% of travellers allocate an average annual luxury travel budget of AUS $10,000–AUS $30,000; 10% allocate AUS $30,000–AUS $50,000 per year; and 8% allocate more than AUS $50,000.[293]

Alongside this surging demand has been a corresponding increase in supply, supported by Tourism Australia's **'Best of Australia'** Program and with organisations like **'Luxury Lodges of Australia'** at the centre of a controlled expansion of top–end accommodation options, the majority of which have a strong connection to Nature–based Tourism Experiences, Food/ Wine and Cultural Immersion.

The **'Southern Ocean Lodge'** on Kangaroo Island *(image below)* is a particularly interesting case study that could help inform the development of suitable Luxury offerings in the MidCoast, but there are others of the 19 Luxury Lodges that are also relevant. **'Capello Lodge'** (Beachside Retreat), **'Lizard Island'** (Island–based Retreat), **'Lake House'** (Inland Lake location/ food focus), **'Pretty Beach House'** (smaller scale beachside development) and **'Saffire'** (larger–scale resort) are all worthy of further study for the different insights they could provide for different potential approaches in the region.

LUXURY LODGES OF AUSTRALIA

Download the full '**Luxury Lodges of Australia**' brochure:
[http://www.luxurylodgesofaustralia.com.au/wp-content/uploads/2015/02/lloa_brochure.pdf]

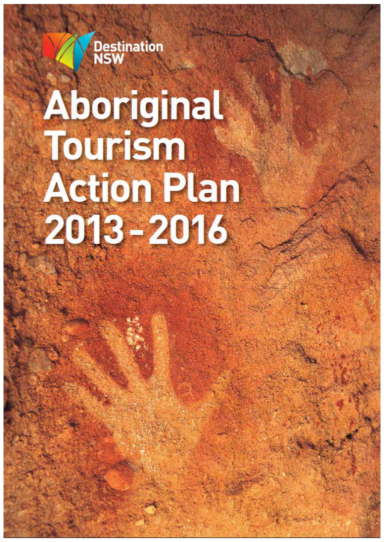


© Luxury Lodges of Australia | Southern Ocean Lodge, Kangaroo Island

13.4 Aboriginal/ Indigenous Tourism

The MidCoast has a number of significant Indigenous sites across the region, a relatively high Indigenous resident population (4–5%) and an underdeveloped product offering; all of which indicate there is an opportunity to develop differentiated Aboriginal/ Indigenous Tourism propositions and accelerate the development of these kind of Tourism experiences as part of an integrated DMP.

This is particularly true given the growing trend for visitors, both domestic and international, to seek out high–value, low–impact Indigenous experiences in Australia. For example, in 2012 over 600,000 international visitors to NSW (21% of total) participated in an Aboriginal experience, with an additional 42% indicating they would have liked to have had the opportunity to participate.[294]



For further detail:
www.destinationnsw.com.au/about-us/strategies-and-plans/aboriginal-tourism-action-plan

Selected Sites of Aboriginal Significance in the MidCoast Region

Gloucester:	Ancient campsites, scarred trees and sacred ceremonial places, Barrington Tops NP (Biripi, Wonnarua & Worimi Peoples).
Great Lakes:	Dark Point Aboriginal Place, Myall Lakes NP (Worimi People).
Manning Region:	Saltwater NP, includes declared Aboriginal Place (Biripi People).

The NSW Aboriginal Tourism Action Plan 2013–16

Current vision: to support the development of NSW Aboriginal Tourism experiences, products and businesses leading to a greater understanding of the richness of Aboriginal culture; and economic and social benefits for Aboriginal people, both as operators and employees. This plan is due for renewal for 2017 onwards and should be closely reviewed for potential opportunities (whether funding or partnerships).


© Visit Manning Valley | Saltwater NP

The Indigenous Tourism Champions Program | www.tourism.australia.com/aboriginal

A national initiative which provides access to business development specialists, targeted funding and marketing. Aligns Indigenous Business Australia investment in business development and mentoring with Tourism Australia's Tourism marketing initiatives, for selected quality Indigenous Tourism experiences. Potential funding and mentoring opportunities for the MidCoast Region.

'Camping with Custodians', Imintji Campground, The Kimberley

The 'Camping with Custodians' initiative has been developed by Tourism WA following a recommendation in the 'WA Caravan & Camping Action Plan, 2013–18'.[295] The Imintji Campground in the East Kimberley is the first site to be developed and became operational for the 2016 season. It would provide a good starting point for further study when looking more closely at the opportunities for Indigenous Tourism present in the MidCoast.


© Imintji (Ngarinyin) People | Imintji Campsite, The Kimberley, WA (during development for 2016 Season)

13.5 The Food and Wine Market

Developing Australia's Food and Wine Market has been a recent strategic focus of Tourism Australia, with a specific Food and Wine Campaign (**'Restaurant Australia'**) forming the centre of the **'There's Nothing Like Australia'** marking activity in 2014–15 and continuing in 2015–16.

The core reason behind this is the opportunity identified by a Tourism Research Australia study that found that 'great food, wine, and local cuisine' is a major factor influencing holiday decision making (at 38%), ranking third ahead of world class beauty and natural environments (37%).[296]

The research also showed that for people who have never visited Australia, only 26% associate the destination with a good food and wine offering. However, for those who have visited, Australia is ranked second across the 15 major markets for its food and wine experiences at 60%, behind France and ahead of Italy.[297]

Food and wine also accounts for 1 in 5 Tourism dollars spent and since the Tourism Australia campaign focusing on developing the category, overall spend is estimated to have increased by +21% (an additional AUS $886 million nationally).[298]

Offering great local food and wine is currently an area of relative weakness in the MidCoast and one that will need development for future higher–yield Tourism growth. If this becomes a desired future direction, then further more detailed analysis will be required, however there are some initial statistics currently available that are worth including here.

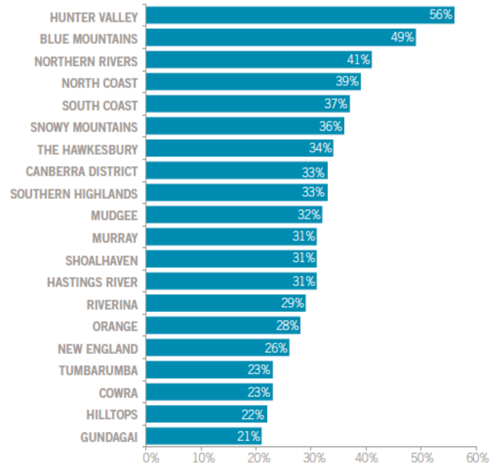
Research by Destination New South Wales into the Food and Wine Industry in New South Wales identified the Northern Rivers Region as a growing one with regards to its Food and Wine offering, with only 9% having visited a Northern Rivers Winery in the past 2 years, but 41% considering it for future visits (3rd behind the Hunter Valley and Blue Mountains). The North Coast is also high up the list for future visits at 39%. The Mid–North Coast does not currently feature in regions identified for Food and Wine experiences. *Graphs 19 and 20.*

The same research also identified some of the key attributes that Domestic Day and Overnight visitors are looking for when seeking a 'good food and wine Tourism experience'. The top 3 elements were identified as **'Eating Locally'**, **'Buying Local Produce'** and **'Visiting Local Arts/ Crafts/ Shops/ Markets'**. **'Eating at Wineries'**, **Eating Fresh Organic Food'** and **'Talking to Local Growers'** were also in the top 10. *Graph 21.*

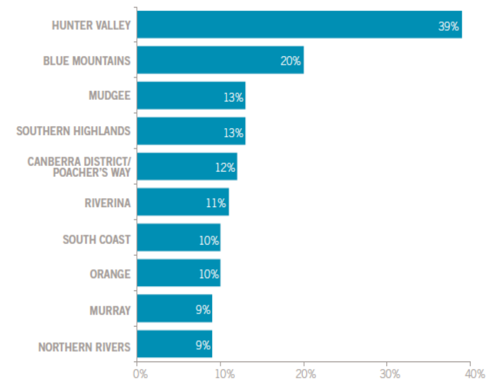
These underlying elements are some of those that will need to be considered when looking at how to build the local Food and Wine offering in the MidCoast. Oysters could obviously play a key role in this given the region is a key producer for Sydney, but the approach will need to be broader than that, and the wine (and potentially boutique beer) offering will need to be a core component of future development.

This area is also an area with minimal data and, given the opportunity for growth, is worthy of further investigation and analysis.

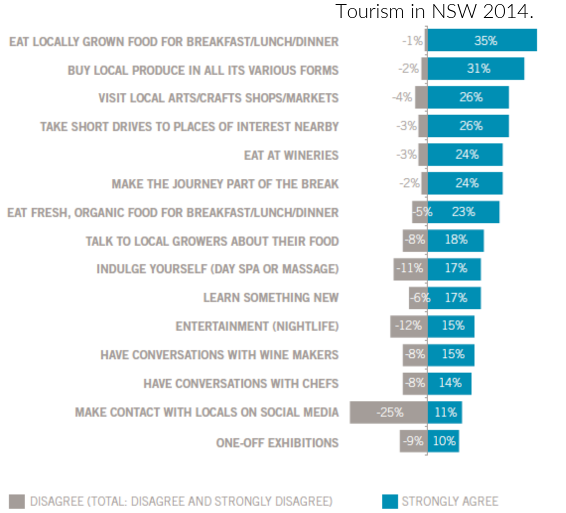
Graph 19: NSW Food and Wine Destinations People Consider Visiting
Source: Destination NSW. Food and Wine Tourism in NSW 2014.



Graph 20: Top 10 NSW Food & Wine Destinations Visited in the Last 2 Years
Source: Destination NSW. Food and Wine Tourism in NSW 2014.



Graph 21: Important Elements of a Good Food and Wine Experience
Source: Destination NSW. Food and Wine Tourism in NSW 2014.



13.6 The Redefinition of Backpacking and the Growing 'Flashpacker' Market

Backpackers are already relatively important contributors to the MidCoast Tourism market, particular via the International visitor segment. The surfing on offer on this part of the coastline is a particular draw, but the region also benefits from the general Backpacker movement up and down the coast between Brisbane and Sydney.

As noted in Section 5.4, one of the current global trends is the redefinition of backpacking and the rise of the 'Flashpacker' (or 'Glampacker'). A growing number of 'Flashpackers' now have substantial incomes and can move from cheap/ basic camping accommodation one night to a five–star hotel/ luxury lodge the next.[299]

These are the so–called 'Flashpackers' and are usually in their 30s and 40s with the same adventurous outlook as when they were backpackers. The only difference is that they are now established in a career (or have their own small business) and have access to much more disposable income. 'Authenticity' and 'New Experiences' are very high on the list of behavioural drivers.

According to the UNWTO, they are willing to spend significantly more than their standard backpacker counterparts; in 2014 they were estimated to spend 20–30% more than traditional tourists, equating to AUS $577–AUS$625 (vs. AUS $481) per trip in the MidCoast.[300]

This is of particular interest when thinking about ensuring the region attracts higher–value Tourism segments in the future. To do so will require ensuring unique and authentic experiences are provided as part of the overall Tourism mix – including more adventure–based experiences and/or Nature–based marine Tourism experiences. The type of walking–based experiences outlined in Section 13.1 above would also drive interest in the region from this segment.

Research by Tourism Victoria has identified that they tend to *'stay longer and spend more than the average international visitor'*. They also have a '*higher propensity to disperse into regional areas benefiting regional economies'* – something that is of particular importance to the MidCoast.[301]

Anecdotal evidence also suggests that 'Flashpackers' are more environmentally sensitive visitors, with *'travel patterns that are more sustainable and less intrusive than other visitor segments'*. Importantly, 'Flashpackers' are also less vulnerable to fluctuating economic conditions and are more likely to be resilient travellers in the wake of challenges such as the global financial crisis.[302]

As well as the 'Flashpacker', within the backpacker category there is also increasing evidence of growing fragmentation generally, with greater numbers seeking working holidays, participating in study tours or looking to get involved in another fast growing trend, 'voluntourism'.[303]

© www.seumochilao.com.br | The Flashpacker Culture

13.7 Sport and Tourism

When related to Tourism, sport can be broadly categorised into **'Sports Events (watch or participate)'** and **'Sports Activities (adventurous and leisure–focused)'**.[304]

From a **'Sports Events'** point of view, whilst 24% of Australians said they had attended a regional event in the last 2 years, only 6% attended a sporting event and 3% participated *(Graphic 29)*; it is a relatively niche (whilst high value) segment.

That said, over 75% of those respondents said they would not have visited the area were it not for the event so events are often a good way to introduce people to a region they wouldn't have otherwise visited. Not surprisingly, this segment skews quite strongly male (59%).[305]

The MidCoast Region already has a number of Sports Events, with the Great Lakes Region in particular seeming to have built a good range of sporting events to date *(Table 69)*.

In the short–term the opportunity appears to be:

a) Gloucester: build the existing Mountain Man Tri Challenge into a region leading event and explore the potential for Mountain Bike–based event(s).

b) Great Lakes: promote the existing events more broadly and use them to both increase visitation, extend length of stay and encourage dispersal throughout the MidCoast.

c) Manning: review potential for more nature–based sports events and promote existing events more broadly.

The Mountain Bike opportunity appears to be one that could be explored across the MidCoast Region–some additional data on Cycling Tourism is included in Section 13.8.

Graphic 29: Regional Event Attendance (Last 2 Yrs)
Source: TRA. Events: Drivers of Regional Tourism. 2014.

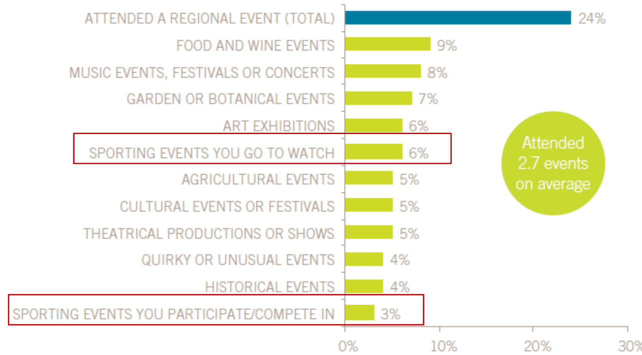


Table 69: Selected Sports Events in the MidCoast Region
Source: Gloucester, Great Lakes & Manning Tourism websites.

REGION	SELECTED EVENTS
Gloucester	Mountain Man Tri Challenge
Great Lakes	Forster Running Festival Hawks Nest Triathlon Paddle NSW Myall Classic Ultramarathon Scody Triathlon NSW Club Championships The Professionals Weekend of Surf Wildcat Regatta WSL Pro Surf Series XXXX Gold Cup (Horse Racing) 2016 Bowls NSW Championships
Manning	Dirty Dog Tail Run Easter Powerboat Spectacular SRAM Singletrack Mind series (MTB, Taree) Taree Cup Weekend Troy Bayliss Classic Wingham Summertime Rodeo

© Dave Bateman | Brent Miller on the 'Taree Tip Trails'

13.7 Sport and Tourism | Continued

Looking next at 'Sports Activities', the first thing to note is that they are a relatively low driver of visitation to regional areas; only 3% of Australians name 'Sporting Activities' as the main reason for going to a regional destination *(Graphic 30)*. There is some crossover with Outdoor Activities (17%) however, so the true figure is probably somewhere between 8–10%.[306]

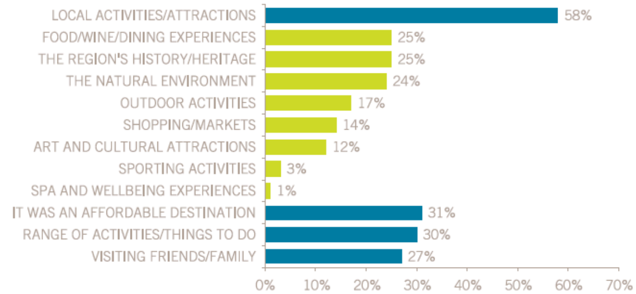
'Sporting Activities' include a broad range of different pursuits. On the more adventurous side are trail running, diving, mountain biking, cycle–touring, surfing, offshore swimming, parasailing and trail–biking. More leisure–focused pursuits include trail walking, golf, sailing, fishing (onshore & offshore) and lawn bowls.

All of these activities are represented to some degree across the MidCoast, the key will be on focusing more on those that deliver higher–value visitors, have high local resident participation and/or already have some infrastructure in place (or where infrastructure can be built that caters for a number of sporting pursuits).

In the case of the MidCoast, expanding trail infrastructure to take advantage of the extensive National Parks and State Forests would appear to be a priority opportunity given this will increase capacity for trail runners/ walkers, mountain–biking and (possibly) trail–biking. Doing this could also be used as a way of enhancing the events offering of the region.

One final area of sport that is worth considering is golf, a Tourism segment estimated as worth $820 million to $1.09 billion in Australia.[307] A selection of MidCoast Golf Clubs is included below, with the observation that, given the 2 key drivers of golf Tourism are course quality and variety, [308] significant investment would likely be needed if the region is looking for golf to play more of a role in attracting higher numbers of high value visitors.

Graphic 30: Reasons for Going to the Destination
Source: TRA. Events: Drivers of Regional Tourism. 2014.




© Forster Tuncurry Golf Club | Tuncurry Golf Course


© Great Lakes Tourism | Fishing on Wallis Lake

Table 70: Selected Golf Clubs in the MidCoast Council Area
Sources: Online search and Gloucester, Great Lakes and Manning Tourism websites.

REGION	GOLF CLUB	CATEGORY*	WEBSITE
Gloucester Region	Gloucester Country Club	2/3	www.gloucestergolf.com.au
The Great Lakes	Forster Tuncurry Golf Club [2 Courses]	1/2	www.forstertuncurrygolf.com.au
	Hawk's Nest Golf Club	1	www.hawksnestgolfclub.com.au
	Krambach Golf Club	3	www.greatlakes.org.au/to-do/sports-activities/golf/krambach/krambach-golf-club
	Forster Tuncurry Driving Range	3	www.forstertuncurrygolfdrivingrange.com.au
Manning Region	Club Taree	2	www.tareerslandgolf.com.au
	Harrington Waters Golf Club	1/2	www.harringtonwatersgolfclub.com.au
	Tallwoods Golf Course & Resort	1	www.tallwoodsgolf.com.au
	Wingham Golf Club	2	www.winghamgolfclub.com.au

* Category is for the MidCoast Region only; it is not intended to rank the quality of the courses against either NSW or Australia.

13.8 Cycling Tourism (Mountain Biking and Cycle–touring)

Cycling Tourism is a relatively small sector forecast for growth in the coming decade, with both standalone cycling and Combination Holidays (see Section 13.13) showing strong potential out to 2025.

For the purposes of this report, 'Cycling Tourism' includes both Mountain Biking and Cycle–touring and includes both day and overnight trips. The most recent credible research on the segment with relevance for the MidCoast was undertaken by Tourism Research Australia in December 2015: **'Growing Cycling in Victoria.'**

Overall, 15% of the population were found to have engaged in some form of Cycling Tourism in the last 2 years, with 41% of those undertaking day trips and 59% going on overnight trips.[309]

Dispersal to regional areas was also found to be common with 49% of cycle tourists venturing to such areas, particularly in Victoria and New South Wales.[310]

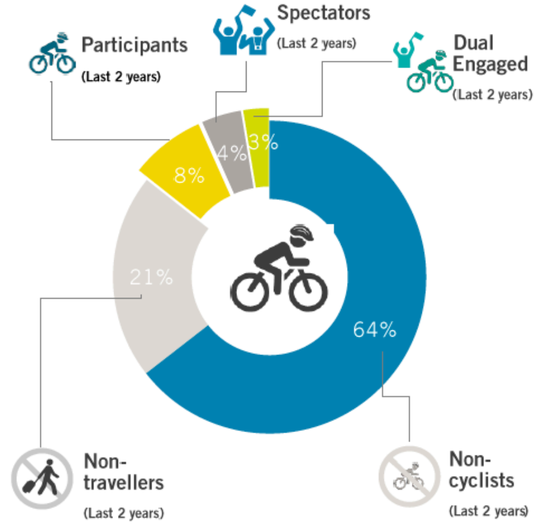
Sightseeing around the city/town (41%) and cycling on paths/ routes along a foreshore, river or lake (35%) were the most popular activities, with riding in a charity or bike event (19%), mountain biking (18%) and historical/ heritage rides & food and wine cycle tours (both 16%) also activities that could be developed as suitable offerings in the MidCoast.[311]

The main reasons for Cycling Tourism were cited as being health and fitness (50%), relaxation (42%), enjoying the outdoors/open air (42%), enjoying recreational cycling (42%) and sightseeing (40%).[312]

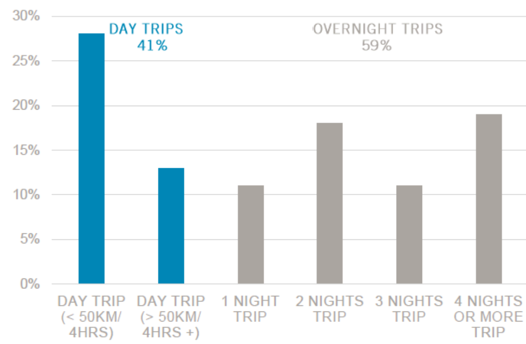
Overall, whilst this market is relatively small (estimated total expenditure of cycle tourists in Australia is $2.5 billion+),[313] participation is high with those involved taking multiple trips each year & showing a high degree of interest in the areas/regions visited.

The market is also growing and, coupled with both overall low awareness of the opportunities for high quality Cycling Tourism experiences in Australia (50%+ of Australians couldn't identify an Australian location good for Cycling Tourism), and the natural assets available for cycling in the MidCoast, a development opportunity certainly seems to exist. *

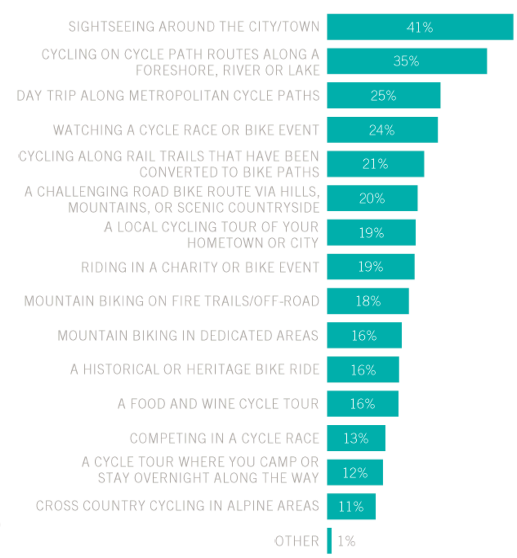
Graphic 31: The Cycle Tourism Market
Source: TRA. Growing Cycling in Victoria. 2015.



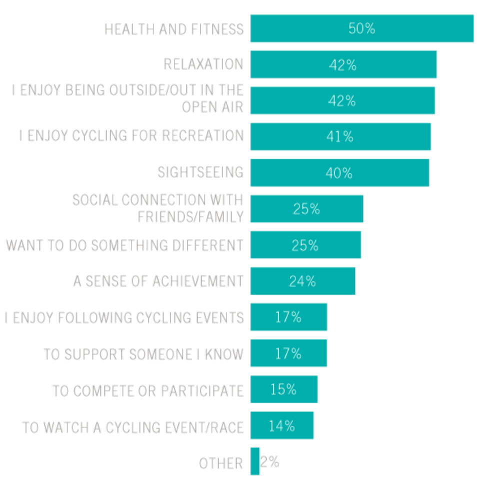
Graph 22: Types of Cycling Trip
Source: TRA. Growing Cycling in Victoria. 2015.



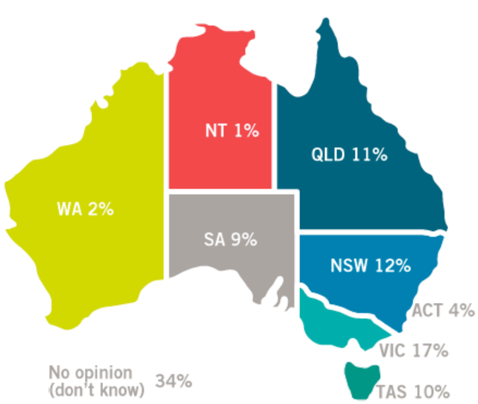
Graphic 32: Most Common Activities
Source: TRA. Growing Cycling in Victoria. 2015.



Graphic 33: Reasons for Participation
Source: TRA. Growing Cycling in Victoria. 2015.



Graphic 34: Best State for Cycling Tourism
Source: TRA. Growing Cycling in Victoria. 2015.



* NOTE: Some cycling infrastructure already exists in the MidCoast Region, with the Kiwarrak Forest Trails (Taree Tip Trails) being one example.

13.9 The Women's Health and Wellbeing/ Guided Walk/ Adventure Tourism Markets

There have been some interesting recent shifts globally with regards the overall Women's market, and particularly regarding the Health and Wellbeing/ Guided Walk/ Adventure Tourism areas; these niche areas have started to become more apparent in Australia in the last 18–24 months.

At the overall level, one significant shift has seen women make up the majority of affluent travellers in key Western markets like the US and UK for the first time. A study in 2013 first tracked this trend, placing the overall female share of the affluent market at 54%, up from 42% in 2010.[314]

Women have also been identified as more adventurous than men when it comes to both destinations and the kind of Tourism experiences they seek, whilst also expecting high quality accommodation and services based on their experiences as business travellers.[315]

Looking at the growth in *'Wellbeing Tourism'*, this Tourism trend was estimated to be worth US $438.6 billion globally in 2013 and forecast to grow to US $715.6 billion by 2017, a +9% annual growth rate. The same report estimated 'Wellness Tourists' in Australia spend 65% more than conventional tourists.[316]

According to a recent Roy Morgan Research *'Holiday Tracking Survey'*, Australian female travellers are increasingly choosing active, adventurous holidays and cultural experiences both domestically and overseas. They are also more likely to travel by themselves than ever before, with the number of women who travelled alone on their most recent holiday increasing by 3% to 13%. The research also found the proportion of Australian women taking part in food and wine experiences on their last trip had risen nearly four per cent to 27.5% in the past 10 years.[317]

Guided Walks is also a growing niche for women, connected to the more adventurous destinations they are visiting. Taken with the growth in Adventure & Wellness Tourism, this represents a significant opportunity for the MidCoast.

The growing number of Australian companies offering tailored Adventure and Wellbeing experiences for Women is further evidence of these growth trends, with Health and Wellbeing and Adventure Travel/ Trekking both well represented. *'Adventurous Women'*, for example, was the fastest growing Travel, Adventure and Lifestyle company in 2014–15.

Additional detail on some of the women focused adventure experiences available both in Australia and Overseas can be found at '*Adventurous Women'* (www.adventurouswomen.com.au) and *'Women's Own Adventure'* (www.womensownadventure.com.au). *'Gaia Retreat'* is a good example of a higher–end Health and Wellbeing offering in Bangalow near Byron Bay (www.gaiaretreat.com.au).

© Adventurous Women | Kangaroo Island Walking Holiday

13.10 The Changing Youth Market

The Youth Market is currently under–represented in the MidCoast, primarily due to the historical and ongoing strength of family holidays. However, similar to the 'Flashpacker' market, there are a number of trends evolving that could provide opportunities for future growth in the region.

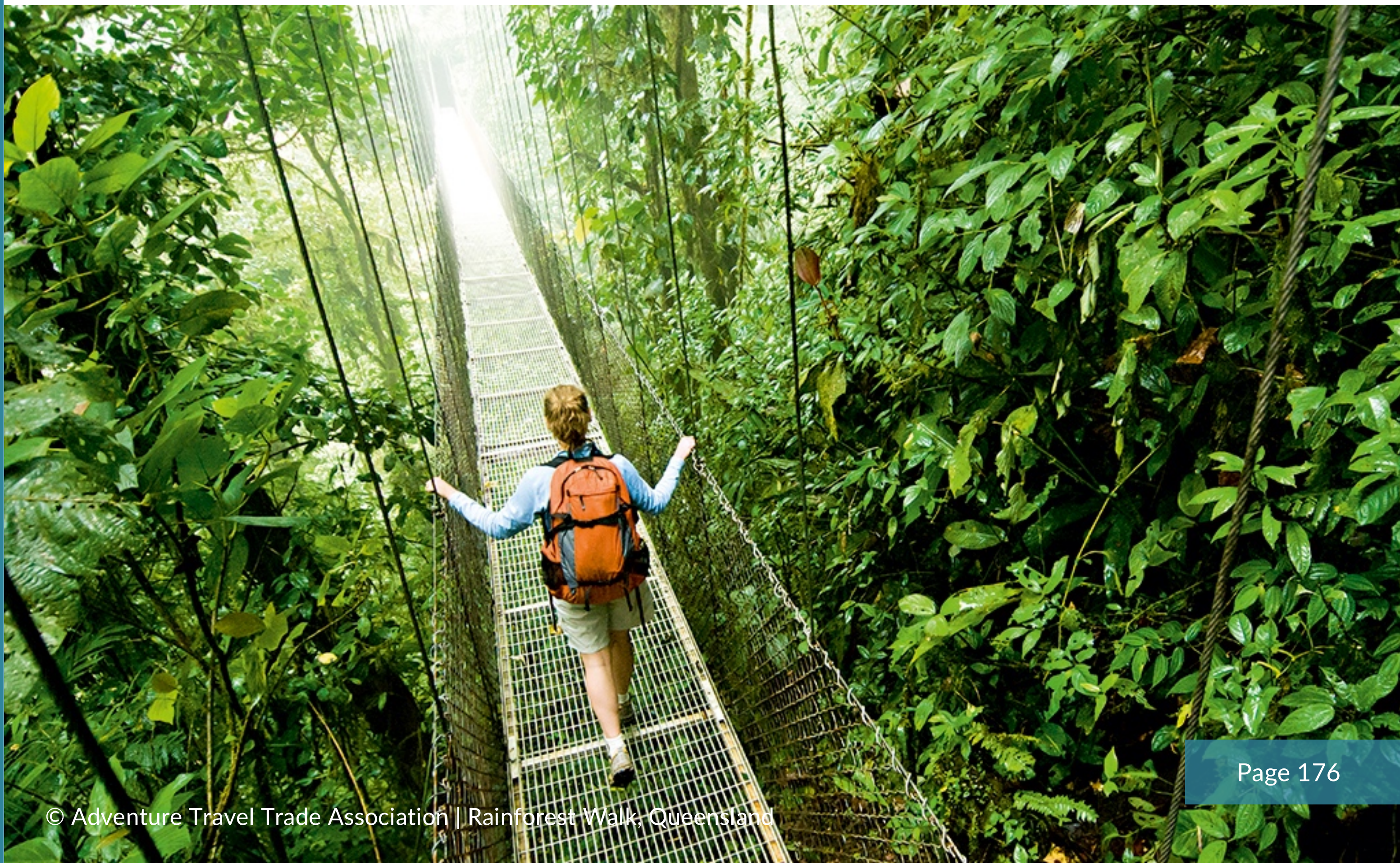
Looking at overall size first, 2015 saw strong growth amongst International Youth Visitors to New South Wales. The State received over 1.1 million International youth visitors (+6.8% vs. 2014), staying 48.8 million nights (+10.5%). They spent over AUS $4.8 billion, (+19.3% vs.2014), equating to an average spend of AUS $4,211 per visitor and AUS $99 per night.[318] Domestic Youth Travel is showing a similar upwards trajectory, particularly with regards to short, 2–4 night inter– or intra–State trips.

Also relevant is the recent 'Domesticate' research undertaken by TNS for Destination New South Wales; whilst this is predominantly qualitative research, it still provides some areas worthy of consideration.

Some of the key findings in this report include the fact that *'young Australians now travel more often domestically than any other age group', with* visiting friends and relatives (VFR) a key driver of their domestic travel. They are now the largest single group when it comes to interstate travel, with *'money to spend'*.[319] Due to growing financial and career pressures, they believe strongly that you *'need to make the best out of life and its experiences'*, with these experiences being *'more important than party time than ever before'*. In terms of the type of experience they are looking for, *'cultural adventures, refined experiences and connection with indigenous and local culture is increasingly important'*. [320]

Their accommodation needs are also changing. Aside from the 'Flashpacker' style offerings, Hostels are seen as 'more a thing of the past', with accommodation most likely to be either in hotels or with friends and family.[321]

Finally, their pre–trip travel planning is also changing. Online and digital remain the main source of their information about a particular destination and social media continues to strongly influence their behaviour: for example, 60% of young Australians now say that *'viewing the experiences of friends and family on social media strongly influence their decision about holidays'*.



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13.11 Next Generation Grey Nomads

Historically, the segment of tourists referred to as 'Grey Nomads'* have been categorised as of low–value from a Tourism perspective as, although they tend to spend multiple nights at a destination and travel for extended periods of time, their overall contribution to the local economy was minimal.

A 2007 survey by Tourism Research Australia (TRA) provides a succinct summary of the key characteristics of the 'Grey Nomad' market in Australia: 86% were adult couples, none were away for less than a month, 63% had more than 3 months away (mean number of nights was 212 or 7 months), 88% had stayed in more than 20 caravan parks in the 5 years prior to the survey, all were visiting more than one state, none were travelling with children, and most grey nomads (91%) were retired and therefore had lower incomes (21% had incomes less than $20,000 per annum, 50% reported earning between $20,000 and $50,000 and 29% $50,000 plus). As a segment they were clearly identified as being a lower–spending one overall, hence the continued accepted view that they have not been worth targeting (in spite of their tendency to travel outside of peak school holiday periods). [322]

However, for the last decade a shift has been occurring in the 'Grey Nomad' market, with the most recent TRA research indicating that (compared with 2000) trips by 'active seniors' are up 90%, with spending also up significantly (+77%). Another statistic from this survey that is worth highlighting given the Nature–based assets throughout the MidCoast Region, is that 55% of Grey Nomads indicated that they were 'very interested' in staying in a nature or eco–type caravan park. This is supported by the fact that they are travelling in 4WDs, camper vans, or with a 4WD camper–trailer which gives them easy access to national parks. [323]

As well as growing in number and overall spend, 'Grey Nomads' are also significantly more active than they were 10 years ago and are interested in a wider range of activities; from walking, cycling and water–based leisure pursuits (including 'soft adventure' and more immersive experiences) to cultural and heritage offerings. To support these activities, they are travelling with more equipment generally, e.g. light–weight kayaks & bikes.

They are also starting to become more likely to seek out local food and wine and are willing to invest time in finding better quality produce in the regions they visit.

The other particularly important characteristic of this market is their interconnectedness and the 'word–of–mouth' they can generate about a destination that caters to them well. Certain elements of social media (e.g. Facebook in particular) and online sites like www.trublutravelling.com.au are a core part of how they interact.

**'Grey nomads' are those identified as people in dwellings where all people in the dwelling were aged 55 years and over, were not in the labour force, and were staying in caravans, cabins or houseboats, who reported having no usual address on Census night.*[324]

© MyTravelResearch.com | Grey Nomads

13.12 Other Relevant Sectors: 'Combination Holidays' & the VFR Market

Three other sectors are worth outlining briefly as of potential relevance to future Tourism development.

Combination holidays is a sector currently experiencing growth, with cycling, kayaking, swimming, running, trekking, diving and other adventure–based activities being combined in a variety of ways. Wellbeing activities are also often included (Yoga in particular) as are food and wine experiences and/or immersive wildlife experiences like whale watching.

This type of Tourism has been growing with both international and domestic Tourists, but, given the Mid–coast's strength with domestic overnight visitors is of more interest for targeting visitors from New South Wales, Victoria and, potentially, Queensland.

The combination style holiday could have strong potential to be connected to the development of some multi–day walks and kayaking in the MidCoast. The 'Great Lakes Great Walk & Aquatic Trails Initiative' is a good example of the type of offering that has the potential to tap into this growing market.

'World Expeditions' 2015 Cycle Kayak Walk Northern Tasmania' is another example of this kind of experience. [www.worldexpeditions.com/au/index.php?id=115611]

Heritage/ Cultural Tourism is often connected to Nature–based and Adventure Tourism as those looking to immerse themselves in a Nature–based experience also have a high degree of interest in the heritage and culture of the area they are visiting.

This has been touched on already in this report in the Sections on the Sapphire Coast (12.1) and Indigenous Tourism (13.4), but it is worth repeating here as the MidCoast is relatively weak in terms of Heritage and Cultural Tourism offerings.

Focusing initially on a small number of Heritage experiences in the Gloucester region (e.g. mining around Copeland) and Aboriginal experiences (potentially starting with a 'Camping with Custodians' style project in Saltwater NP) would seem to be a way of starting to strengthen the offering to this market.

The Visiting Friends and Relatives (VFR) Market is the final sector that is of interest.

New South Wales receives nearly 10.5 million domestic overnight visitors who visit the State for the purpose of 'Visiting Friends and Relatives' (VFR). These visitors spent nearly 32.1 million nights in the State in 2015, representing 37.2% of visitors and 35.2% of nights.[325]

As identified in the detailed Sections on Tourism in Gloucester, the Great Lakes and Manning (7–9), the VFR market is a significant one for the MidCoast. However, it is already an established market and, whilst certainly important, is not an area that will require as much focus, investment or change.

Many of the key initiatives suggested in the conclusions of this report will help drive growth in the VFR market, with the one area that is worthy of further consideration being finding ways to improve the communication of Tourism opportunities to those visiting the MidCoast to visit friends and relatives. This is likely to be a clear and relatively straightforward way to improve overall yield from this segment.

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SECTIONS 14–15

14 | Future Opportunities for Tourism Growth in the MidCoast Region

15 | Information Gaps and Potential Areas for Further Study

14 | FUTURE OPPORTUNITIES FOR TOURISM GROWTH IN THE MIDCOAST REGION

14.1 A Forecast for Tourism in the MidCoast

Looking at the potential for overall Tourism growth in the MidCoast, modelling to 2030 indicates that the Region has the potential to attract 4.65 million visitors (+250%), spending over 8.65 million nights in the Region (+245%) and generating $1.55 billion in direct Tourism revenue (+272%). Average stay per person would increase slightly from 3.5 nights to 3.65, and average spend per person would increase from AUS $306 to AUS $333 per visitor, indicating higher–yielding visitors staying for slightly longer and spending more. *These figures, and those below, are based on the modelling in Table 71.*

From a growth rate point of view, total visitor numbers will increase by an estimated +250%, total visitor nights by +245% and spend by +272%.

International Visitors have the potential to increase from 20,000 in 2015 to 65,400 (+327%) by 2030, spending 355,500 nights in the Region vs. 90,000 now (+395%) and increasing their expenditure from AUS $6.4 million to AUS $23.0 million (+360%). Average stay per person is predicted to increase from 4.5 nights to 5.4 and average spend per stay to increase from AUS $320 to AUS $352 per visitor; indicating higher–yielding visitors staying for longer and spending more.

Domestic Overnight Visitors grow at a lower rate (but off a higher base) from 970,000 in 2015 to 2.32 million (+239%) by 2030, spending 8.29 million nights in the Region vs. 3.44 now (+241%) and increasing their expenditure from AUS $470 million to AUS $1.26 billion (+269%). Average stay per person increases marginally from 3.5 nights to 3.6 and average spend per stay increases from AUS $485 to AUS $543 per visitor; indicating higher–yielding visitors who are spending more over roughly the same length of stay.

Domestic Day Trip Visitors grow marginally faster than Domestic Overnight (but below International Visitors) from 863,000 in 2015 to 2.26 million (+262%) by 2030, and increasing their expenditure from AUS $98 million to AUS $269 million (+275%). Average spend per person increases from AUS $113 to AUS $119 per visitor.

Table 71: Tourism Forecasts for the MidCoast (2015–30)

Modelled based on data from the UNWTO, TRA, Destination NSW and Australian Bureau of Statistics (ABS) Tourism Satellite Account.

TOURISM SEGMENT	MIDCOAST 2015			MIDCOAST 2030*					
	Visitor Numbers	# Nights	Spend (AUS$)	Visitor Numbers	+/–	# Nights	+/–	Spend (AUS$)	+/–
International	20,000	90,000	$6.4 million	65,400	327%	355,500	395%	$23.0 million	360%
Domestic Overnight	970,000	3.44 million	$470 million	2.32 million	239%	8.29 million	241%	$1.26 billion	269%
Domestic Day Trip	863,000	–	$98 million	2.26 million	262%	–	–	$269 million	275%
Total	1.86 million	3.53 million	$570 million	4.65 million	250%	8.65 million	245%	$1.55 billion	272%
Nature–based Tourism	465,000	882,500	$143 million	2.09 million	451%	3.86 million	438%	$695.3 million	486%

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

14.1 A Forecast for Tourism in the MidCoast Region | Continued

The second main insight for the MidCoast lies in the overall potential for Nature and Adventure–based Tourism. These particular segments have the potential to grow at almost twice the rate of the other Tourism segments in the Region; going from a value of AUS $143 million in 2015, to AUS $695.3 million in 2030.

This would take Nature and Adventure–based Tourism from just under a 25% share of the total market to 45–50%, which would be a much fairer representation of the potential value of the natural Tourism assets that exist in the Region.

This rate of growth would increase the number of Nature–based Tourists from 465,000 to 2.09 million (+451%), spending over 3.86 million nights in the Region (+438%) and generating $695.3 million in direct Tourism revenue (+486%).

As outlined in Section 5.7, Australian Nature–based Tourists have been estimated to spend 63% more than the average Tourist, meaning International Nature–based Visitors to the MidCoast would spend on average AUS $574 vs. the AUS $352 spend from the more mainstream Visitor, and Domestic Overnight Visitors would spend AUS $885 vs. AUS $543.

This data, combined with the additional analysis of Nature–based Tourism in Sections 5.7, 7.6, 8.6 & 9.6, and the existence of a particularly strong Natural Tourism resource base, strongly suggests that a focus on Nature–based and Adventure Tourism would accelerate the growth of the Mid Coast's Tourism Industry.

The third and final main overall insight regarding future MidCoast Tourism lies in the potential additional growth that could be gained from the recent amalgamation of Gloucester, Great Lakes and Greater Taree City Councils. It is difficult to place an overall economic value on what this could deliver, but what is true is that the potential efficiencies, coupled with a more holistic approach to marketing the Tourism offerings of the Region could deliver some additional growth that would not be available if the 3 Regions remained autonomous.

Conservatively estimating this potential 'amalgamation growth premium' at between 2.5–5% in total over the next 14 years would see an additional AUS $38.75 million to AUS $77.5 million in Tourism Expenditure per annum. Overall this equates to well in excess of AUS $0.55 billion of additional value potentially available from Tourism; a fairly significant incentive for ensuring the MidCoast's Tourism promotion structure is optimised and structured investments are made in developing overall capacity.

Note: all figures in section 14.1 are based on the modelling in Table 71 unless otherwise stated.

14.2 Overview of Future MidCoast Tourism Growth Opportunities

From the Global, National and Regional Trends in Sections 5 and 6, analysis of the current state of Tourism in Gloucester, the Great Lakes, Manning and overall MidCoast in Sections 7 to 11, insights derived from other Tourist Areas and Sectors in Sections 12 and 13 and forecast growth in Section 14.1 above, a number of areas present themselves as potential opportunities in the MidCoast Region.

The following should not be viewed as the basis of a Tourism Destination or Marketing Plan, but rather as a range of opportunities that have the potential to deliver varying degrees of Tourism growth in the MidCoast. They will need prioritising as part of the DMP process, and decisions will also need to be made about the overall timeframe for each of them (i.e. whether they are immediate priorities or longer–term initiatives).

14.2.1 Combined MidCoast Tourism offering vs. standalone Gloucester, Great Lakes & Manning Valley

Being able to promote all that the MidCoast has to offer – from the Barrington Tops, Rural Tranquillity and Ellenborough Falls in the west, to unspoiled beaches, unparalleled NABT offerings and the Great Lakes along the Coast – in a holistic and connected way provides a clear opportunity to accelerate Tourism growth right across the Region.

A conservatively estimated additional AUS $0.55 billion appears to be the immediate economic benefit by 2030.

14.2 Overview of Future MidCoast Tourism Growth Opportunities | Continued

14.2.2 Re–structuring the overall Region's offering around Tourism assets vs. previous LGA Boundaries

The Tourism assets of the Region stretch across the current arbitrary boundaries that have led to the Great Lakes, Manning Valley and Gloucester/ Barrington Tops Tourism Promotion.

A potential structure has been proposed in Section 11.7 for consideration, but whatever the final structure of the MidCoast's Tourism offering, it needs to more accurately reflect the assets of the Region to ensure as much of the potential AUS $1.55 billion in value can be captured.

14.2.3 Nature–based, Adventure–based and Nature–based Marine Tourism (NABT)

At AUS $695.3 million in potential annual value by 2030 and a wealth of untapped natural resources, the opportunity for the various forms of Nature, Adventure and Nature–based Marine Tourism is clear.

With MidCoast Tourism structured as it is, just under 16.5% of this (conservatively estimated) value is currently being captured (AUS $114 million).[326]

Capturing a greater percentage of this potential value is the single largest opportunity in the Region.

14.2.4 Trekking, Walks and 'Great Walks'

This is an accelerating Global and Australian growth trend and is one of the fastest growing high–value Tourism segments. Whilst there are a number of current barriers to opening up this opportunity, at an estimated 35–45% of the future value of the NABT segment, it has the potential to deliver AUS $189–$313 million in annual value by 2030.[327]

There are already a wide range of existing walks in the Region which can provide the starting point for creating 'Great Walk(s)' over the coming 3–5 Years. Obvious locations include Myall Lakes NP and up the coast to Crowdy Point NP, Barrington Tops NP, Woko NP and the area around Ellenborough Falls. Over the longer–term there is also the potential to create an inter–connected network of graded walks, including point–to–point, hub and spoke and multi–day walks alongside an expanded offering of shorter half and full–day walks.

A Tourism Demand Driver Infrastructure (TDDI) application has recently been made to undertake a feasibility study into a 'Great Lakes Great Walk & Aquatic Trails Initiative'.

Some exploratory work has also been undertaken looking at improving the infrastructure on a number of existing walks (e.g. Smiths' Lake Feasibility Study in 2009).[328]

14.2.5 The MidCoast's Natural Tourism Assets

On researching the MidCoast Region for this report, the natural assets are clearly the cornerstone of the future Tourism opportunity. However, the current Tourism products and experiences available, and overall marketing approach do not leverage these assets particularly effectively.

27 National Parks (including Myall Lakes NP, Crowdy Bay NP, Woko NP and a section of the Barrington Tops NP), 42 Nature Reserves, the Port Stephens–Great Lakes Marine Park and a significant number of State Forests and State Conservation Areas all lie within the MidCoast Region and underpin an estimated 85% of the AUS $1.55 billion 2030 Tourism opportunity (AUS $1.32 billion).[329]

14.2.6 Addressing The 'Positioning Gaps' in all 3 current Regions

It is difficult to estimate a monetary value for the gap that exists because of the current positionings in Gloucester and the Great Lakes in particular, and the Manning Valley to a lesser degree, but there is clearly an opportunity to drive the Tourism marketing and promotion of the area more effectively based around single–minded and clearly differentiated brand propositions and the associated positioning.

Even conservatively estimating the current propositions at 80–85% effective means AUS $85.5–$114 million p.a. in additional Tourism expenditure could be generated with optimised marketing in the short to medium–term.[330]

14.2 Overview of Future MidCoast Tourism Growth Opportunities | Continued

14.2.7 The Domestic Overnight and Day Trip NABT Opportunity

The Domestic Market represents 98% of the forecast value of Tourism in 2030 (vs. 99% in 2015). Within this, AUS $681 million is forecast to be the Domestic NABT opportunity so finding ways to develop Nature–based experiences for this market will need to be at the core of future planning.[331]

14.2.8 Existing strengths of the MidCoast Tourism Industry: Families and Mainstream Holidays

Focusing on developing the Nature and Adventure–based Tourism opportunity does not mean walking away from the current strengths of the MidCoast Tourism industry. Even based on a 'maintenance approach', the existing forms of Tourism are forecast to grow to AUS $653 million in value by 2030 (+149%), as these forms of Tourism will benefit from the overall 'halo effect' of the improved Tourism offerings and the stronger positioning of the Region's Tourism.[332]

14.2.9 The untapped potential of the Hinterland ('Wingham & the Northwest' and 'The Hinterland & Barrington Tops')[333]

With approximately 14–16% of overall MidCoast visitation currently (estimated at 5–7.5% of the total in the Great Lakes & Manning alongside all Gloucester visitors, 264,000–305,000),[334] Barrington Tops NP, Woko NP, Ghin–Doo–Ee National Park, Ellenborough Falls, a range of State Forests and an untapped local Food and Wine/ Rural opportunity, the long–term potential certainly exists for the west of the MidCoast Region to grow.

Given the data is fairly minimal for the Region, accurate forecasts are difficult to calculate, but growth to approximately 20% of the overall value of NABT Tourism would deliver AUS $310 million p.a. in 2030.[335]

The other opportunity in the Hinterland rests in the Council amalgamation; this will provide opportunities for accelerated development of this area as the Gloucester Region can be combined with parts of the Great Lakes and Manning Regions to form a much more holistic 'Hinterland' for Tourism than currently exists.

14.2.10 Aboriginal/ Indigenous–based Tourism

This offering is at a very low–level in the Region currently, with the only existing offerings appearing to be in the Saltwater NP and around Dark Point in the Myall Lakes NP. Given there is a relatively high Aboriginal population in the MidCoast and there are both initial offerings in Manning and the Great Lakes, and clear opportunities in and around Gloucester, an opportunity exists to build a much stronger Aboriginal/ Indigenous–base Tourism offering. The clear focus of both Destination NSW and Tourism Australia provides a further basis for investment.

There is no current value attributable to Aboriginal/ Indigenous–based Tourism in the Region due to the lack of any credible data, however even a 0.75%–1% share of 2030 forecast Tourism value would equate to AUS $11.6–$15.5 million p.a. so further feasibility work is certainly recommended. [336]

14.2.11 Coastal Walkway and City Centre Urban Redevelopment Project

An opportunity has been identified for a significant redevelopment of the Town Centre and main ocean frontage and its connection to Wallis Lake in Forster. Whilst other areas like Taree also have potential, this area appears to have the clearest rationale for redevelopment.

The core part of the project would be an ocean facing walkway that would shift the focus of the main Forster street towards the ocean; this could have a range of economic, social, environmental and community benefits as well as linking to the potential coastal 'Great Walk' identified in 14.2.4 above.

A redevelopment/ coastal walkways case study on New Plymouth, Taranaki can be found in Section 12.5.

14.2.12 Increased Tourism Promotion effectiveness

Focusing on the NABT market more overtly and targeting a greater proportion of marketing spend to digital promotion, is forecast as having the potential to deliver an additional 1.5–3% in Tourism revenue across the MidCoast by 2017/18 (AUS $23.25 million–AUS $46.5 million).[337]

14.2 Overview of Future MidCoast Tourism Growth Opportunities | Continued

14.2.13 Next Generation Grey Nomads

The Grey Nomad market is evolving, with a shifting trend towards higher–value visitors becoming apparent. The Region already attracts a proportion of this market, but some of the developments proposed in this analysis have the potential to attract an increasing number.

Even focusing purely on Nature–based offerings for Grey Nomads could deliver an estimated AUS $34.8 million p.a. to the MidCoast.[338] *See Section 13.11 for background on this market.*

14.2.14 'Rural Life' Positioning Opportunity

Whilst the coastal areas are a clear strength of the Region, with the inclusion of the Gloucester, the Hinterland now stretches across a considerable part of the MidCoast and encompasses some distinctive rural areas. There is an underdeveloped opportunity for growth in the growing attraction of 'Rural life', both for standalone overnight visitors and also for increased day trips from the coastal areas. An estimated AUS $135 million–$162.5 million p.a. could be available to the Region in 2030 from this segment.[339]

14.2.15 Heritage/ Cultural Offering

Increasing the availability of heritage and cultural offerings will be an integral part of a more focused NABT positioning for the Region, with some strong elements already available, but clear potential for expansion.

Specific opportunities include expanding the mining tourism experience around Copeland and exploring more rural–based heritage offerings in the West of the MidCoast in particular. *See Section 13.12.*

14.2.16 Key higher–value International Visitor segments

At a forecast value of AUS $23.0 million, the overall value is relatively modest compared with Domestic Tourism, but within this segment are some significant high–value/ low–impact niche markets. US Luxury Tourists, 'Flashpackers' from the UK, Europe and North America and potentially the emerging middle class from Asia (China, India and South Korea in particular).[340]

The main forecast International growth markets for New South Wales include China, India, Korea and Asia generally; with the UK, Europe and US forecast to remain important without significant growth rates.[341]

14.2.17 The Women's Health and Wellbeing/ Guided Walks/ Adventure Tourism niche markets

Another market that is forecast to grow significantly to 2030, like the 'Flashpacker' market it is high–value/ low impact and has the potential to represent an estimated 3–5% of the NABT segment at a value of AUS $20.9–$34.8 million.[342] *See Section 13.9 for additional details.*

14.2.18 The higher–value, lower–impact 'Flashpacker' Market

This is a key International Tourism opportunity, but the Domestic market is also growing with quick, 2–4 day trips from higher–value Tourists (including 'Flashpackers') currently experiencing exponential growth.[343]

Forecasts place this opportunity at a slightly higher level than the Women's Health and Wellbeing Market at 7–9% of the NABT segment at a value of AUS $48.7–$62.6 million.[344] *See Section 13.6.*

14.2.19 The Luxury end of the market

This sector, particularly when connected to NABT, has been a key growth area in Australia in the past 5–10 years with 'Luxury Lodges of Australia' providing the most obvious evidence of the maturing nature of this market. Opportunities exist for Top–end Luxury Nature–based experiences and, in particular some iconic accommodation development(s) in Southern Coastal areas of the Great Lakes and at the North & Eastern end of the Barrington Tops NP. The forecast value of the annual opportunity ranges between 2.5–3.5% of the total market by 2030 (AUS $38.8–$54.3 million),[345] but it's overall impact on growing the Tourism market would be much greater (see *'halo effect'* in 14.2.20). *Detail on the Luxury Market can be found in Section 13.3.*

14.2 Overview of Future MidCoast Tourism Growth Opportunities | Continued

14.2.20 'Hero Experiences' and the 'Halo Effect'

Developing 'Hero' or 'Iconic' Experiences has a direct economic benefit for a Region's Tourism, but also provides a significant 'Halo Effect' where it highlights the strengths of a Region's offering, helps drive word–of–mouth and 'free' Tourism Promotion and attracts additional Visitors to the area even if they do not use the 'Hero Experience' itself. There are clearly opportunities for this kind of Tourism in the MidCoast.

No specific value for this opportunity is included here as it is a particularly difficult area to forecast given the broad range of variables that create and influence the 'Halo Effect' of any particular experience. Additional complexity is provided by the fact it tends to increase the overall effectiveness of a Regions' Tourism Marketing by reducing the need for some elements of awareness raising.

14.2.21 Increased access to Nature/ Coastal resources

Increasing overall visitor numbers and focusing on NABT as the primary Tourism offering will require improved access to some areas and potential additional access to new areas to ensure existing Natural resources are not over–used. Looking at it from another angle, opening up access to additional Coastal and Nature resources will be a key enabler of capturing the AUS $695.3 million forecast NABT value – as long as appropriate development controls are in place.

14.2.22 Cycling, Cycle–Touring, Mountain Biking and 'Combination Adventure Holidays'

Whilst a small niche standalone opportunity, the provision of additional Cycling/ Cycle–trekking infrastructure has broad benefits across many of the proposed target Tourism segments, in part because of the growing trend in 'Combination Adventure Holidays', but also because of the general (and increasing) popularity of recreational cycling. Estimates based on the forecast data in Section 14.1 indicate a direct value of Cycling and Cycle–trekking at AUS $27.8–$41.7 million in 2030 (4–6% of total NABT value).
See Section 13.8 for additional detail.

14.2.23 The growing high–value Local Food and Drink opportunity

Given the apparent local resources available (or at least perceived available resources), it is surprising the Local Food and Wine Offering has not developed to a greater extent in the MidCoast. A recent Tourism Research Australia report estimated 1 in 5 Tourism dollars were spent on Local Food and wine, indicating the Local Food and Drink opportunity could be worth an estimated AUS $310 million per annum to the MidCoast in 2030.[346] There is clearly also a premium opportunity if higher–end/ boutique/ local/ sustainable/ organic Food and Wine is the focus of the future offering. *See Section 13.5 for additional detail.*

14.2.24 Events, Festivals and Concerts

Whilst a smaller overall opportunity, as outlined in Section 5 the *'demand for public programming'* (i.e. public run events) is growing rapidly and becoming an increasingly important component of a Destination's offering. There is an opportunity to explore potential Nature–based/ Adventure focused events (including 'softer' Nature–based events), outdoor concerts (e.g. expand offerings like *'The Lakeside Festival'*) and larger annual Festivals.

Focusing the majority of them around the Natural environment is likely to generate the greatest value based on the earlier opportunities outlined in this report.

14.2.25 Optimising the accommodation mix

The overall accommodation offering is lacking, with minimal niche offerings and a general lack of higher–end facilities. Optimising the mix will be necessary to enable the overall Tourism growth forecasts to 2030 outlined in Section 14.1. Particular significant opportunities lie in expanding the range and type of NABT accommodation generally, and exploring the provision of accommodation for 'Flashpackers', the Women's Health & Wellbeing market and the Luxury NABT market. Farm stays could also be a specific opportunity in the Western half of the MidCoast Region.

14.2 Overview of Future MidCoast Tourism Growth Opportunities | Continued

14.2.26 Business Tourism in and around Taree

'Other types of Tourism (incl. business)' currently make up 20% of the Manning Valley's Tourism mix and 7% of the total MidCoast. Growing this share of Tourism by just 1.5% by 2030 would see it worth AUS $110 million p.a., indicating a focus on providing improved business conference facilities could be an opportunity.[347]

14.2.27 Addressing the '65% Seasonality Challenge'

An estimated 60–80% of the Great Lakes' annual visitation occurs in December and January (Manning & Gloucester Regions' seasonality is evident but much less marked).[348] An opportunity exists to shift this current visitation pattern substantially over the coming 5–10 years given a large number of the markets identified above as opportunities have much greater year–round potential and many of them (like the 'Flashpacker', NABT and Luxury markets) actively avoid peak seasons and School Holidays. Promoting year–round nature–based opportunities also provides an opportunity to spread visitation more evenly across the year.

14.2.28 The long–term horizon growth curve

Investing in the longer–term 2030 NABT opportunity delivers a forecast increase in the 2016–30 total revenue of between 22% and 54% vs. current baseline. Whilst upfront investment decreases the overall ROI (Return on Investment) between 2016–20, the return between 2020–30 rapidly outpaces 'business as usual'.[349]

14.3 Unlocking Future Tourism Growth in the MidCoast Region

In looking at the strategies and initiatives that are most likely to drive the sustained (and sustainable) Tourism growth necessary to unlock the potential outlined in Sections 14.1 and 11.4, the following have been identified through this baseline analysis as having the greatest potential for the MidCoast Region.

<u>28 Potential Strategies and Initiatives to unlock future Tourism growth in the MidCoast:</u>

14.3.1 Maximise the opportunity the amalgamation offers to restructure the MidCoast's Regional Tourism offering and fully open up the AUS $1.55 billion 2030 growth opportunity

There is a unique opportunity to ensure the Region's tourism offerings are developed and grown under a structure that is not restricted by previous LGA boundaries. This will require serious consideration as doing this has broad and far–reaching implications for the overall long–term Destination Management Planning process. It is both a significant opportunity and significant risk.

14.3.2 Set a long–term goal to become one of New South Wales' (and ultimately Australia's) leading destinations for Nature–based and Adventure–based Tourism (NABT)

At almost AUS $0.7 billion in value, the forecast potential for NABT in the MidCoast in 2030 provides the largest single opportunity. This strongly suggests there is an opportunity to increase overall ambition and set a goal to become one of the leading NABT destinations in Australia by 2030.

14.3.3 In setting this NABT goal, recognise that the objective with existing mainstream Tourism in the MidCoast (particularly in the Manning & Great Lakes Regions) will be one of 'maintenance'

The MidCoast Tourism offering is currently relatively strong when it comes to family/ kids beach holidays and surfing–focused holidays, but conversely relatively weak when it comes to unique nature–based offerings and the growing niche–based offerings (with some exceptions in locations like the Barrington Tops NP and Myall Lakes NP). This existing strength should not be ignored, but the objective should be one of maintenance rather than growth.

14.3.4 Be clear on the unique Tourism proposition(s) the MidCoast wants to own & build all activity around them

Whilst it clearly has some strong natural, social and institutional assets, it does not currently have a unique enough proposition, nor enough distinctive and engaging Tourism experiences to fully capture its fair share of the market. There is a need to develop a unique, differentiated proposition(s) that captures the Natural assets of the MidCoast and then build all Tourism development and promotion around it. How many propositions that need developing will depend on the Tourism structure adopted (as outlined in 14.3.1).

14.3 Unlocking Future Tourism Growth in the MidCoast | Continued

14.3.5 Build the MidCoast Tourism brand(s) as synonymous with immersive Nature–based experiences over the long–term

The 3 current brands ('Gloucester. Basecamp for Barrington Tops'; 'Great Lakes, It's You' and 'Manning Valley… Naturally™') use Nature–based experiences to underpin them to varying degrees, but none are clearly using them to drive a competitive advantage.

Work is needed to develop a focused NABT positioning (or positionings) as the first step to *'making the Region famous for its Nature and Adventure–based Tourism'*. Again, the type and number of positionings needed will depend on the structural decisions made about how to break up the MidCoast's Tourism.

14.3.6 Fully leverage the natural assets of the Region–and consider hero experiences in each sub–Region

The current Tourism experiences on offer and overall promotion don't leverage the natural assets of the Region strongly enough. The extensive National Parks, State Forests, Nature Reserves, SCAs and Port Stephens–Great Lakes Marine Park provide significant opportunities for managed growth.

14.3.7 Review the 3 current promoted Regions, and build a future structure around (potentially) 4 MidCoast Tourism Regions that better reflect available Tourism offerings and fully support a core NABT Positioning

The current Regional breakdown of 'Gloucester', 'The Great Lakes' and 'The Manning Valley' does not fully do justice to the Region's Tourism assets and limits potential future growth for a number of key Tourism sectors. It also fails to recognise how potential Visitors tend to view Regions, limited as it is by previous LGA boundaries.

This structure should be reviewed and one created that more accurately captures the Region's natural Tourism assets and experiences that are (or could be) offered.

The suggested future structure below is outlined in more detail in Section 11.7 and is an initial draft only. It is intended to help initiate the more detailed planning process that will be undertaken in developing the MidCoast's' DMP and clearly requires broad consultation given its' implications:

1) **Taree and the North Coast:** covering the region to the East of Taree (predominantly the area between the Pacific Highway and the Coast) and running from Diamond Head to Black Head;
2) **Wingham and the Northwest:** covering the region stretching from Wingham/ Krambach North West to the Curracabundi NP (i.e. made up of west of the Manning Region and north east half of Gloucester Region– potentially using 'Manning Valley' as it's descriptor);
3) **The Hinterland and Barrington Tops:** covering the southwestern half of the Gloucester Region, the area to the west of the Pacific Highway in the Great Lakes Region and potentially a small southwestern corner of the Manning Region (depending on extent of Wingham and the Northwest area);
4) **The Great Lakes:** covering the Eastern half of the former Great Lakes Council Area (east of the Pacific Highway and from Hawks Nest to Black Head).

There are clearly a number of other structural options available, although it is recommended that maintaining the current 3 Region structure be discounted because of the restrictions it will place on future Tourism development. (*See Section 11.7 for more detail on the options for future Tourism structure.)*

14.3.8 Start to build the necessary Nature–based infrastructure (with a particular initial focus on Trekking/ Walks, Cycling/ Mountain Biking and Kayaking/ Rafting)

Becoming a leading Region for NABT will require a marked increase in the availability of suitable experiences, and both the improvement of existing infrastructure and development of additional facilities.

It is suggested that, given the growth trend in Trekking/ Walks outlined in Section 13.1, the initial focus is on developing walking experiences and infrastructure. This has in effect already commenced with the recent application for grant funding to undertake a feasibility study for the 'Great Lakes Great Walk & Aquatic Trails Initiative' *(See Section 13.1)*.

14.3 Unlocking Future Tourism Growth in the MidCoast | Continued

14.3.8 Start to build the necessary Nature–based infrastructure | Continued

Cycling/ Cycle Trekking is also a rapidly growing niche–Tourism sector, so the development of suitable infrastructure for this segment should be explored (e.g. tracks and paths – possibly initially connected/ in close proximity to the 'Great Walks' development outlined in Point 14.3.9 below). The existing Mountain Bike Trails near Taree (Taree Tip Trails) and Barrington Tops (The Steps) should also be considered for further development, with the potential for additional facilities also considered in other regions of the MidCoast.

The last NABT infrastructure priority rests in developing experiences for the niche but growing 'Combination Adventure Tourist', who is looking for a Nature–based holiday involving a range of pursuits (e.g. cycling, trekking, kayaking, rafting & diving – with gourmet food). All of these pursuits should be considered as opportunities for development, with the view that they are secondary priorities initially behind Great Walks and Cycling/ Mountain Biking.

14.3.9 Develop some NABT 'Hero Experiences' that act as draws to the Region

Connected to Point 14.3.8 above, it is clear that the MidCoast is currently lacking in some clear 'Hero Experiences' and that developing these will be necessary to both draw high–value Tourists to the Region and also to offer a 'halo effect' to the other experiences on offer.

Signature walk(s) in the coastal area around Seal Rocks (Myall Lakes NP), in and near to Crowdy Bay National Park, near Ellenborough Falls and potentially in the West of the Region in Barrington Tops NP are the initial areas that seem most suitable for investigation. Section 13.1 provides detail on the various types of walks that are currently successful and some general criteria for these kinds of Tourism Experiences.

The potential expansion of kayaking around the Great Lakes or White Water Rafting/ Kayaking around Gloucester are two other potential areas for development; the Mountain Biking mentioned in 14.3.8 is another.

Nature–based Marine Tourism could also provide some suitable experiences: dolphin swimming/ watching and whale watching offerings and targeted investment in building the diving offering of the Region for example.

Based on the Kangaroo Island Case Study (see Section 12.3), high–end or outstanding accommodation should also be considered as part of a 'Hero Experience'. This could, for example, be a signature Eco-lodge to link with the 'Great Lakes Great Walk & Aquatic Trails' initiative as included in the TDDI application (see Section 13.1) or the redevelopment of the Gloucester Diary Factory to highlight the local produce.

14.3.10 Maintain base level promotion of the core Mainstream Tourism offerings in the MidCoast

Whilst this Baseline Analysis naturally focuses on Tourism growth areas, the importance of maintaining the existing mainstream Tourism offerings along the coast, particularly in and around Forster Tuncurry and near Taree should not be under–estimated. At a forecast value of AUS $653 million, Tourism offerings targeted at mainstream summer visitors should be maintained and gradually improved even if they are less of a development focus than the other growth areas highlighted in this report.[350]

14.3.11 Explore the longer–term development of a broader 'Hinterland' Tourism offering

One of the reasons the structure for MidCoast's Tourism was proposed as it was in 14.3.7 above rests with the potential to fully develop the Hinterland as more than just a gateway to the Barrington Tops. How this is undertaken will depend on the overall structure assumed for the MidCoast, but, assuming there is a Region that can be classed as a 'Hinterland', this should certainly be more fully developed as a standalone Tourism offering.

14.3.12 Be clear on the role of International Visitors (particularly the growing 'Flashpacker' & Luxury markets)

Whilst the International Market is significantly smaller than the Domestic Market (forecast at AUS $23.0 million in 2030),[351] a number of high value–segments have the potential to deliver significant value and are worthy of investigation. These include targeting luxury travellers from the US; 'Flashpackers' from the UK, Europe and the US and deciding if a focus on Asia (particularly China, India and South Korea) is of sufficient benefit to warrant additional investment.

14.3 Unlocking Future Tourism Growth in the MidCoast | Continued

14.3.13 Review the Domestic Target markets based on the NABT positioning

The total Domestic market is forecast to be over 66 times larger than the value of International Tourism in 2030 at AUS $1.53 billion.[352] Current core source markets are predominantly NSW based, with regional areas, Sydney and Newcastle dominating and a relatively small number from Brisbane and Melbourne.

Given the strong appeal to urban dwellers of a strong NABT destination, there is an opportunity to review the target markets for Domestic Overnight Tourism in particular and explore opportunities for growing the market in Sydney, Brisbane, Melbourne, Canberra and possibly Adelaide. Urban centres outside of the major capital cities should also be considered.

14.3.14 Start to grow Aboriginal/ Indigenous Tourism offerings in key parts of the MidCoast Region

Over the long–term the objective should be to have a number of thriving Aboriginal/ Indigenous Tourism operators throughout the MidCoast, with the Region being known (inter)nationally as a destination for unique and award–winning Aboriginal/ Indigenous Tourism Experiences.

To kick–start this in the short–term, an opportunity exists to develop 1 or 2 pilot programs in Saltwater NP and/or Dark Point (Myall Lakes NP). Opportunities also exist in the Gloucester Region as highlighted in Section 13.4.

Indigenous–led camping around Saltwater NP is potentially the one to start with; Western Australia's recent 'Camping with Custodians' program is a source of further background and insight.

14.3.15 Explore the potential for the Women's Health and Wellbeing/ Guided Walks/ Adventure Tourism niche markets

This is connected to the NABT and Food and Drink opportunities, but is a specific niche that will need a tailored approach to fully develop. Access to National Parks and/ or the Coast, high quality Food and Wine (including organic), specialised Health and Wellbeing offerings (Yoga, Reflexology, Nutrition etc.), Guided Walks and boutique tailored accommodation all need to be considered.

14.3.16 Explore the potential for top–end/ unique accommodation and further incentivise the development of a range of NABT accommodation options

Sections 13.2 and 13.3 look at the expanding range of NABT focused accommodation options in Australia from top–end lodges like the Southern Ocean Lodge on Kangaroo Island to various 'Glamping' options throughout Australia.

Once some of the initial NBAT infrastructure has been put in place, an opportunity exists to develop top–end offerings in a variety of areas of the MidCoast: in and around Myall Lakes NP, on the Northern fringe of Barrington Tops NP and potentially near Crowdy Bay NP for example.

There also appear to be a number of smaller–scale options throughout the MidCoast Region which will need (re–)developing to provide a suitable range of accommodation in the future.

14.3.17 Develop a strong local Food and Wine offering as a core strength of the MidCoast

The MidCoast has a small selection of high quality local Food and Wine offerings, with certain pockets of the Region fairly well–developed (e.g. local Food Markets in Gloucester and local food offerings in the Manning Valley), but the perception as a potential visitor is that this is not a core strength when set against some of the other regional Tourism destinations (the Hunter Valley and Tweed for example).

Offering high quality local Food and Wine and providing access to experiences like 'Grower's Markets' will be a key part of developing more of a leadership position.

The analysis in Sections 7–9 identified this as one of the MidCoast's key weaknesses, so it will likely need a separate long–term plan and some targeted investment to address.

See Section 13.5 for some additional insight into this opportunity.

14.3 Unlocking Future Tourism Growth in the MidCoast | Continued

14.3.18 Undertake a comprehensive planning review of Forster Town Centre (incl. Coastal Walkway opportunity)

The long-term benefits of redeveloping central Forster and creating a Coastal Walkway similar to the development along the coast in New Plymouth (New Zealand) appear significant; they could include economic, social, health & wellbeing and community benefits, as well as improving Tourism expenditure.

An initial estimate based on the New Plymouth project indicates a ballpark economic return of more than AUS $24 million p.a. to the Great Lakes Region,[353] although it should be stressed this is an extremely rough estimate. Undertaking a planning review of Forster Town Centre is recommended (Taree could also be considered).

14.3.19 Develop/ expand specific offerings for the growing 'Next Generation Grey Nomads' segment.

This segment is growing and, given the demographics of the Region and the strong VFR segment (particularly in the Manning Valley), a number of opportunities exist to secure a larger share of higher value Grey Nomads (forecast potential of AUS $34.8 million by 2030).[354]

Given they are looking for more active pursuits in general, the suggested improvements in walking & cycling infrastructure, and developing the local food offerings will all assist in growing this segment.

14.3.20 Consider expanding the Business Tourism offering in the Taree area.

One of the statistics that stood out in the Manning Valley Current performance analysis was the strength of the Business Tourism segment (estimated at over twice as large as in the Great Lakes and almost three times larger than in the Gloucester Region).

This analysis could not provide an accurate forecast (a rough estimate put it at around AUS $110 million p.a. in Manning),[355] but further investigation of this opportunity is certainly recommended. An audit of existing business/ conference facilities for the MidCoast could be one way to start this.

14.3.21 Review the current events program and build a calendar around a future NABT positioning (including the development of 1 or 2 hero events)

There is an opportunity to establish an events calendar that more clearly fits with the NABT positioning and has the potential to continue to grow over time.

Types of events to explore include a potential cycling event/ expanding the existing Taree MTB event, growing the Forster Adventure Race or creating a signature running event in Barrington Tops NP.

Outside of NABT events, food-focused festivals and larger-scale concert events in natural settings could also be considered. The 'Four Winds Festival' in Bermagui is an example worth reviewing for gaining insights into event development, but a small event that could potentially be used as a local case study already exists at the 'Great Lakes Paddocks' winery in Wootton ('Back Paddock Music').

14.3.22 Explore the potential for increased Sports facilities available for Tourism (including golf)

A lower level opportunity, but the availability of high quality sports facilities can be a supplementary factor for attracting higher levels of visitors to a destination (and for some niche segments the main attraction).

Golf is one particular offering that could provide focus, although the investment required to develop a course (or courses) to a standard high enough to be a strong driver of Tourism will be significant. The natural resources do appear to exist however, and an iconic course would deliver a strong marketing benefit.

See Section 13.7 for more on the sports opportunity.

14.3.23 Leverage the new NSW Destination Network (and connect it with the NABT positioning)

The new NSW Destination Network will offer targeted opportunities to strengthen awareness and understanding of the MidCoast's NABT positioning and developing a strong partnership with the new North Coast Destination network in particular will be essential. It has the potential to be particular useful in attracting an increased share of the International 'Flashpacker' market as well as maintaining existing backpacker Tourism numbers, but will also be important for the core Domestic Overnight market.

See Section 6.3 f) for further detail on the new NSW Destination Network.

14.3 Unlocking Future Tourism Growth in the MidCoast | Continued

14.3.24 Develop key partner relationships (particularly with NPWS and new North Coast Destination Network)
The MidCoast clearly has a limited budget, and some of the Tourism opportunities will require relatively significant resources. Developing partnerships will be a vital part of unlocking the Tourism Growth opportunity with both the Public and Private Sector needing to be considered. Existing Tourism Business Partners in each Region are clearly one group of partners that could be expanded on.

Appendix 18.8 provides an example of some of the Stakeholder that will need to be considered for future partnerships.

14.3.25 Be ambitious in seeking investment partners – the economic potential in the Nature–based and Adventure–based Tourism positioning is significant (as is the potential from an amalgamated Tourism offering)
The levels of investment for some of the potential developments – particularly the high–end NABT experiences and Nature Lodges – will be high. However, there is a clear and growing understanding of the significant economic opportunity presented by some of these rapidly growing Tourism segments and sustainable investment in general has showed unprecedented growth in the last 2 years.

14.3.26 Invest in a stronger digital/online Tourism marketing capability across the restructured MidCoast
The current online entry points for Tourism in the Gloucester, the Great Lakes and Manning Valley do not fully support the various current Tourism offerings. Given online is the entry point for 75%+ of potential tourists, the overall approach will need restructuring and investment once the overall structure, propositions and positionings have been finalised. It will also be necessary to deliver more mobile accessible digital entry points to MidCoast Tourism (see the Coffs Coast App, accessible via a link in Section 12.2.1).

14.3.27 Don't ignore the need to address regulatory barriers & foster enabling conditions for Tourism growth
There will be a range of regulatory barriers that will need to be negotiated, particularly with regard to any Tourism development that involves access to National and/or Marine Parks.

As previously mentioned, the need to ensure a Tourism structure is implemented that supports the whole Regions' future Tourism development will also be essential.

14.3.28 Commit to a long–term investment view of 10–15 years vs. 3–5 years
The structural changes needed to achieve a leadership position in NABT for the MidCoast by 2030 are substantial and require a minimum 10–year horizon to allow the necessary investments and enabling conditions to be created. One way to catalyse this longer–term view could be through the creation of a *'Tourism Strategic Plan 2030'* that would sit alongside a future MidCoast Community plan and supplement the DMP.

© Patterns of Nature | Smiths Lake

14.4 An initial look at indicative development requirements

The likely development requirements to support the growth areas outlined above are of varying scales and levels of investment. The following list is not comprehensive, but is intended to provide an indication of the key areas that are likely to require resources to develop them over the next 5–10 years.

14.4.1 Nature–based and Nature–based Marine Tourism

a) 'Hero experiences' in both Nature–based and Nature–based Marine Tourism.
b) Re–development of existing NABT infrastructure.
c) Provision of new experiences for expanding the overall offering in the MidCoast Region.
d) Continued improved access to National Parks, State Forests and Nature Reserves.

14.4.2 Trekking/ Great Walks/ Walking Infrastructure

a) Significant development will be required to create signature walks in a number of areas in the MidCoast, ideally forming a graded network of varying degrees of difficulty. Indicative areas include the coastal area from the Myall Lakes NP up to Crowdy Bay NP (a grant submission for a feasibility study is already underway); around Seal Rocks and potentially around Upper Karuah River; in Barrington National Park (potential to link to Coastal Areas); in the vicinity of Ellenborough Falls; and in a number of the key National Parks throughout the Region.

14.4.3 Cycling Infrastructure (Cycle Paths and MTB infrastructure; incentivise support businesses)

a) Tracks and paths – initially connected/ in close proximity to suggested 'Great Walks' development.
b) Expand existing MTB infrastructure at Taree Tips and The Steps and consider other sites in the MidCoast for mid–term development.
c) Additional Tourism Operators to offer Cycle Trekking/ Adventure–based options.

14.4.4 Adventure Tourism/ Combination Adventure

a) 'Hero experiences' – potentially connected to expansion of a combined MidCoast annual events calendar that includes Adventure/ Nature–based focused events.
b) Kayaking and Rafting facilities and infrastructure.

14.4.5 Aboriginal/ Indigenous–based Tourism

a) Initial infrastructure and operators in 2 potential locations: Dark Point & Saltwater NP.
b) Capacity building and seed–funding for Indigenous business owners and staff.
c) 'Camping with Custodians' type development.

14.4.6 Hinterland Heritage

a) Gold Mining in and around Copeland; potential rural heritage across West and Northwest MidCoast.
b) Potential development of old Dairy in Gloucester Region (heritage/ cultural use).
c) General infrastructure and Visitor services improvement.

14.4.7 Accommodation: particularly Nature–focused and Luxury

a) Top–end/ Luxury Nature–focused accommodation provision.
b) General increase in Nature–based accommodation options for various markets and price points (incl. campsites).
c) General improvement in range (e.g. including 'Flashpacker' style) and quality of accommodation.

14.4.8 Food and Wine Offering

a) General increase in quality and range of food availability (including expanding local Oyster availability, 'Wagyu Beef' potential and other higher–end offerings).
b) Growers' Markets, Local Produce development, Farmer's Gates (e.g. expanded Gloucester offerings).
c) Local Wine experiences/ Tours to wineries and general industry development.

14.4.9 Surfing/ Backpacker needs

a) Improved access to unique surf locations (e.g. in Myall Lakes NP, Crowdy Bay NP), including campsite availability and provision of 'Flashpacker' style Hostels.

14.4 An initial look at indicative development requirements | Continued

14.4.10 Grey Nomads Facilities

a) Potential provision of specific facilities catering to the Grey Nomad market.
b) Key coastal locations and Gloucester/ Forster/Wingham–Taree/ Stroud focus initially.
c) Potential online network provision to facilitate word–of–mouth promotion.

14.4.11 Business Tourism

a) This appears to be a specific opportunity in the Manning Region, so there could be a mid–term need for improved business infrastructure/ specific conference focused hotels.
b) Provision of standalone conference facility (more likely integrated with existing accommodation).

14.4.12 Urban Regeneration Infrastructure (Significant/ Multi–Phase Project)

a) Potential long–term development of a Coastal Walkway in Forster Tuncurry linking to a ‘Great Walk’ from Myall Lakes NP to Crowdy Bay NP; part of a broader Town–Centre re–development opportunity.
b) Phased approach similar to the New Plymouth walkway in Taranaki, NZ.

14.4.13 Events and Festivals

a) Development of Nature and Adventure–based Festivals and Events including venue investment.
b) Sports festivals/ events in key location(s).
c) Potential outdoor music venue development.

14.4.14 Sports/ Leisure Facilities

a) Development of Nature and Adventure–based Festivals and Events including venue investment.
b) Potential for long–term development of an iconic regional golf course.

14.4.15 General Access Improvement

a) Ranging from path and boardwalk creation, to access roads, car parking and visitor facilities.

14.4.16 MidCoast Tourism Promotion

a) Brand proposition and brand positioning development (including new Regional Structure).
b) Digital marketing capability (particularly redevelopment of the website under the NABT positioning).
c) New digital and hard copy promotional materials.

14.4.17 Industry Capacity Building

a) Opportunity for MCC Tourism to lead capacity building initiatives with industry & staff as part of an economic development & industry engagement program (
b) Range of initiatives from enhanced marketing efforts through to enhancing the Regional Food & Wine offer.

This draft indication of development requirements will be finalised through the next stage of the Development Management Planning process.

14.5 Which Type of Tourism Growth?

One of the challenges for the MidCoast in seeking to grow its' Tourism Industry, will be in managing the overall Tourism mix to ensure the carrying capacity of the local community and environment is not exceeded, whilst still delivering continued economic value growth. This will mean balancing the growth of more traditional forms of 'Mass Tourism' with higher–value/ lower–impact forms.

The potential impacts of Mass and Mainstream Tourism Development are well–documented, but it is worth highlighting some of the key challenges here.

A) Some Challenges with Mass and Mainstream Tourism Development[356]

14.5.1 **Overwhelming pressure on the existing carrying capacity of local resources**
Rapid growth of international, regional and domestic demand for Tourism experiences can put extreme pressure on an area and rapidly exceed the carrying capacity of local resources, utilities and existing infrastructure.

14.5.2 **Rapid unplanned and exploitative development of coastal areas**
The pressure described above can lead to poorly planned and under–regulated development of Tourism infrastructure. This can broadly be categorised as a 'develop fast–clean up later' approach, which has obvious, far–reaching impacts on local economies and communities.

14.5.3 **Extreme pressure on already under–resourced Government/ Local Council structures**
Existing government and governance structures are often already under–resourced and the pressure of rapid Tourism development, alongside other essential economic and societal priorities, can quickly overwhelm them. This not only has immediate impacts in terms of unplanned or poorly planned developments, but also creates considerable limitations to long–term planning whilst disrupting the often considerable efforts underway to build more sustainable Tourism structures.

14.5.4 **Pressure on the existing resources of human capital within the Tourism industry**
One of the key elements of successful Tourism development rests with the people working within the sector. This human capital can quickly be overwhelmed, leading to both a rapid decline in the overall quality of the Tourism products/ experiences and significant reductions in the capacity for future planning.

14.5.5 **Community and cultural degradation**
Influxes of large volumes of people from outside an area inevitably affect local communities and their culture. Given the importance of a cohesive MidCoast Community, this is a significant potential impact with a long–term effect.

14.5.6 **Direct environmental degradation**
Rapid expansion of Tourism infrastructure carries obvious risks to local environments. Whilst good environmental controls might exist, because of some of the inter–related challenges described above, they are often not fully followed.

14.5.7 **Higher overall economic and social cost to service each tourist**
Finally, mainstream/ mass–tourists not only spend less per person in the countries they visit, they also provide a greater overall economic burden on the host country through factors like their higher overall infrastructure demands and additional policing costs given the more 'hedonistic' pursuits they tend to undertake. This increased economic cost is then further exacerbated by the increased social costs they also tend to impose as described above.

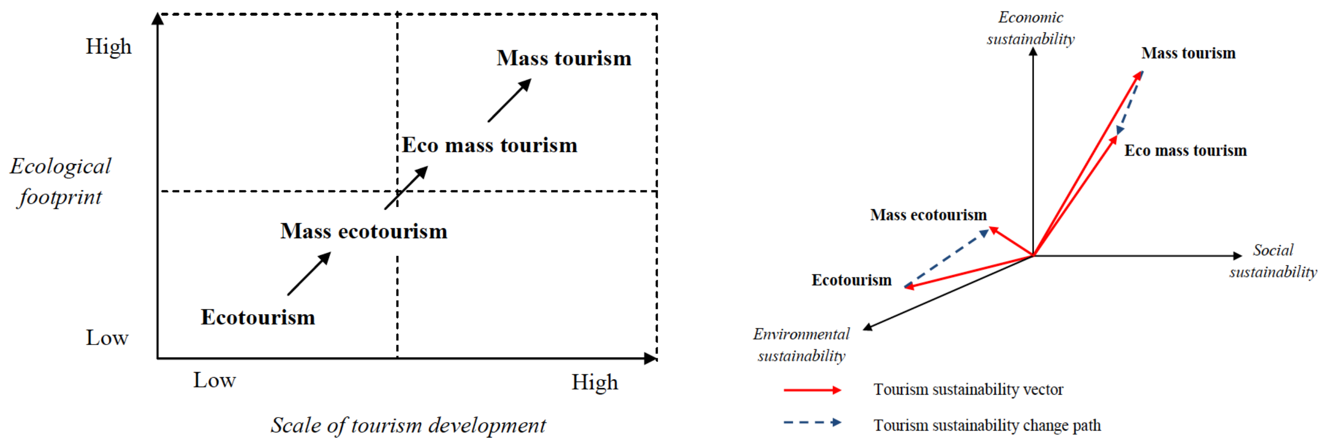
14.5 Which Type of Tourism Growth? | Continued

B) A Model for a Balanced Approach to Tourism Development

One recent approach that has tried to find a balance between mass and more sustainable forms of Tourism is described by Ivanov's SDEF Grid ('Scale of Tourism Development / Ecological Footprint') and provides a useful starting point for developing a roadmap to a more sustainable overall Tourism industry in a country or region (*Graphic 35 below*).[357]

The SDEF grid below outlines 2 potential additional Tourism definitions, 'Mass Ecotourism' and 'Eco Mass Tourism' that sit between the usual 'Ecotourism' and 'Mass Tourism' extremes. It then explores the overall economic, social and environmental impact of each type and looks at the potential sustainability change path for each type and what that might imply. For the MidCoast Region, Nature–based Tourism will mainly sit within the 'Ecotourism' definition, but over time could clearly stretch into 'Mass Ecotourism', whilst also providing insights to help 'Mass Tourism' move towards 'Eco Mass Tourism'.

Graphic 35: Scale of Tourism Development/ Ecological Footprint (SDEF) Grid & Tourism Sustainability Vectors
Source: Ivanov, S., & Ivanova, M. (2013). *Mass Ecotourism vs. Eco Mass Tourism.*



Exploring Tourism development in this context, clearly opens up a pathway to creating a more balanced overall industry in the MidCoast over the mid to long–term.

This 'balanced' approach to Tourism is a far from easy strategic and practical task. It requires the co–ordination and collaboration of a broad array of Tourism agencies, government departments, communities, businesses and other stakeholders. It also requires a longer–term and more measured view that is often challenging for Local Governments, given they often have more pressing priorities within short electoral cycles. Not least of these priorities from a Tourism perspective is a fairly constant drive for 'growth', often at the expense of other factors.

As will be seen in the rest of this report, a great opportunity exists to start this journey towards a more fully balanced Tourism industry in the MidCoast. Taking this approach, whilst not easy, will have a multitude of far–reaching benefits for the region way beyond that of just addressing some of the 7 challenges outlined above.

Note: This is a very brief look at this area of research, it is an area potentially worthy of further study.

14.6 Key Challenges and Risks

To conclude this section, it is worth briefly outlining some of the main challenges and risks that could negatively impact on the ability of the MidCoast to develop its Tourism sector to its full potential. The following list does not set out to capture all the various risks, but rather to identify 7 of the key ones that have the greatest potential impact on Tourism in the MidCoast Region.

1) The Ongoing Amalgamation of Gloucester, Great Lakes and Greater Taree Councils
   This is a significant change in the Region's governance & will clearly have an impact on Tourism development; the challenge is to make this impact a net positive one via some of the initiatives outlined in this report.

2) Degradation of the MidCoast's natural assets
   The growth of Tourism in the MidCoast Region relies almost entirely on its existing natural resource base. This will need ongoing protection, management and, in some areas, improvement to ensure this resource base is sustainable and can support the long–term economic growth of the Tourism industry.

3) Lack of long–term structural investment
   The development of Tourism will require some significant structural investment over the next 10–15 years. There is a clear risk of inadequate infrastructure and accommodation development, for example, if the necessary private and public investment cannot be secured.

4) Seasonal fluctuations and hyper–concentrated peak seasons
   Like many Tourism reliant regions, the MidCoast experiences significant seasonality, with, for example, 60–80% of annual visitation to the Great Lakes occurring in December and January. This has implications across a range of areas and is an aspect of the industry that would ideally be addressed over time.

5) Regulatory Barriers
   There are a number of local, state and potentially national regulatory challenges that could prevent key Tourism Developments taking place. The likely focus on integrating the Tourism offering more with National Parks means a close partnership with NSW National Parks and Wildlife Service will be necessary.

6) Climate Change Impacts
   Given the coastal location and water–centred geography of the MidCoast, climate change poses a number of risks to the Region. From sea–level rise to more frequent extreme weather, flooding to potential drought the potential risks are well documented, and there are a range of Council Level mitigation and adaptation/ resilience strategies that can be implemented.

   The likely effects on the marine environment and potential for changes in tropical disease patterns on East Coast Australia will also need consideration and managing over the mid–term.

   There are also likely to be climate change influenced fluctuations in International and Domestic travel patterns that will be more challenging to predict and manage. One advantage in focusing on Nature–based Tourism is that this is likely to be more resilient to some of these unpredictable fluctuations.

7) Global Economic Downturns and Exchange Rate Fluctuations
   Economic downturns have a significant impact on global and domestic Tourism activity, with the Asian Financial Crisis of 1997/98 and Global Financial Crisis (GFC) of 2007 being 2 recent examples.

   Exchange rate fluctuations also have a fairly strong impact on both International visitors to Australia and the overall volume of Australians travelling overseas. However, this is an accepted characteristic of the industry and a number of mechanisms exist to cope minimise the various impacts.

All of these challenges/ risks have the potential to impact efforts to grow Tourism in the MidCoast Region and will require consideration during later stages of the Destination Management Planning process.

Some of them, like Global Economic Downturns and Exchange Rate Fluctuations, are not able to be influenced directly at the local level and can only be allowed for in risk management. Others, though, can be actively addressed through specific initiatives and planning processes.

15 | INFORMATION GAPS AND POTENTIAL AREAS FOR FUTURE STUDY

During the compiling of this report, a number of information gaps were identified and certain areas presented themselves as being worthy of further study. These are mainly connected to the areas that seem to present development opportunities for the Region and might therefore need relatively significant long–term investment.

There are also some areas of analysis and fact finding that naturally fall outside the scope of this particular part of the project but might be of interest more broadly to developing Tourism in the MidCoast Region.

15.1 Visitor data in the MidCoast

The depth of detailed visitor data for the MidCoast (both international and domestic) is limited (particularly in the Gloucester Region), leading to a nunber of broad assumptions being made throughout this report.

This has already been recognised and an in–house program of visitor surveys has commenced to start to try to build up a more detailed local profile of visitors to the Great Lakes. This includes trying to identify some of the key differences across the various towns and to understand things like seasonal Tourism variation better.

Depending on the areas covered by this study, there may still be a need for further data collection – or potentially a joint study with Destination New South Wales expanded to cover Gloucester and Manning.

15.2 Nature–based Tourism (NBT) statistics and analysis

Data for Nature–based Tourism is fairly limited and inconsistent globally, so it is no surprise that the data available at the MidCoast level is not particularly detailed or readily available.

Given the likelihood of an ever–increasing focus on Nature–based Tourism, Nature–based Marine Tourism and Adventure–based Tourism for the MidCoast Region, it seems likely that further analysis will need to be undertaken. Obviously data collection will be a key part of this to start to fill the current statistics gap.

There may be potential to add this to the study mentioned in 15.1 above.

15.3 Overall Tourism balance for the Region

Finding the right balance of Tourism types for a region is challenging and rarely something that is achieved in the short–term. Further analysis is likely to be required, potentially in collaboration with the new North Coast Destination Network, Destination NSW or even Tourism Australia.

The ideal would be to more accurately model the optimal mix of Tourism types for the MidCoast (e.g. Nature–based vs. eco vs. mass eco vs. mainstream etc.) which could potentially be used as a case study for broader application. The model looking at mass Ecotourism and Eco Mass Tourism (Ivanov, S., & Ivanova, M. 2013. Mass Ecotourism vs. Eco Mass Tourism) briefly touched on in Section 14.5 could be worth analysing further to help with this.

15.4 Infrastructure Development for Broad Socio–economic Community Benefit

Various potential infrastructure developments have been highlighted throughout this report, ranging from Great Walks infrastructure to cultural centre development to Town Centre Integrated Planning.

All these will need more detailed economic benefit analysis with the potential town centre re–development in Forster Tuncurry one that could possibly be investigated first; initially via more detailed analysis of the New Plymouth Walkway and Town Centre re–development in Taranaki, New Zealand (see Section 12.5).

15.5 Great Walks development

There was limited scope in this report to properly analyse the optimal locations and type of walk offerings that would be of most benefit for the MidCoast.

The regulatory barriers were also not fully explored (although this was in part recognising that the MidCoast Council is already likely to understand these fairly well).

This will need further analysis and full due diligence to be undertaken in the planning stage. Further work on this is also planned in the next stage of Destination Management Planning and the existing application for grant funding for a feasibility study in the Great Lakes is also a part of this.

15.6 Potential Investors in Nature–based, Adventure & Luxury Tourism in the MidCoast

In trying to drive future investment in key sectors of the MidCoast Tourism Industry, it will be useful to learn more about who is currently invested in these sectors – and why – to help attract others. Areas for investigation could include exploring what their motivations are, why they first invested, how they found out about the opportunity and what would motivate them to invest in the areas for growth highlighted in this report.

15.7 Luxury Tourism accommodation provision

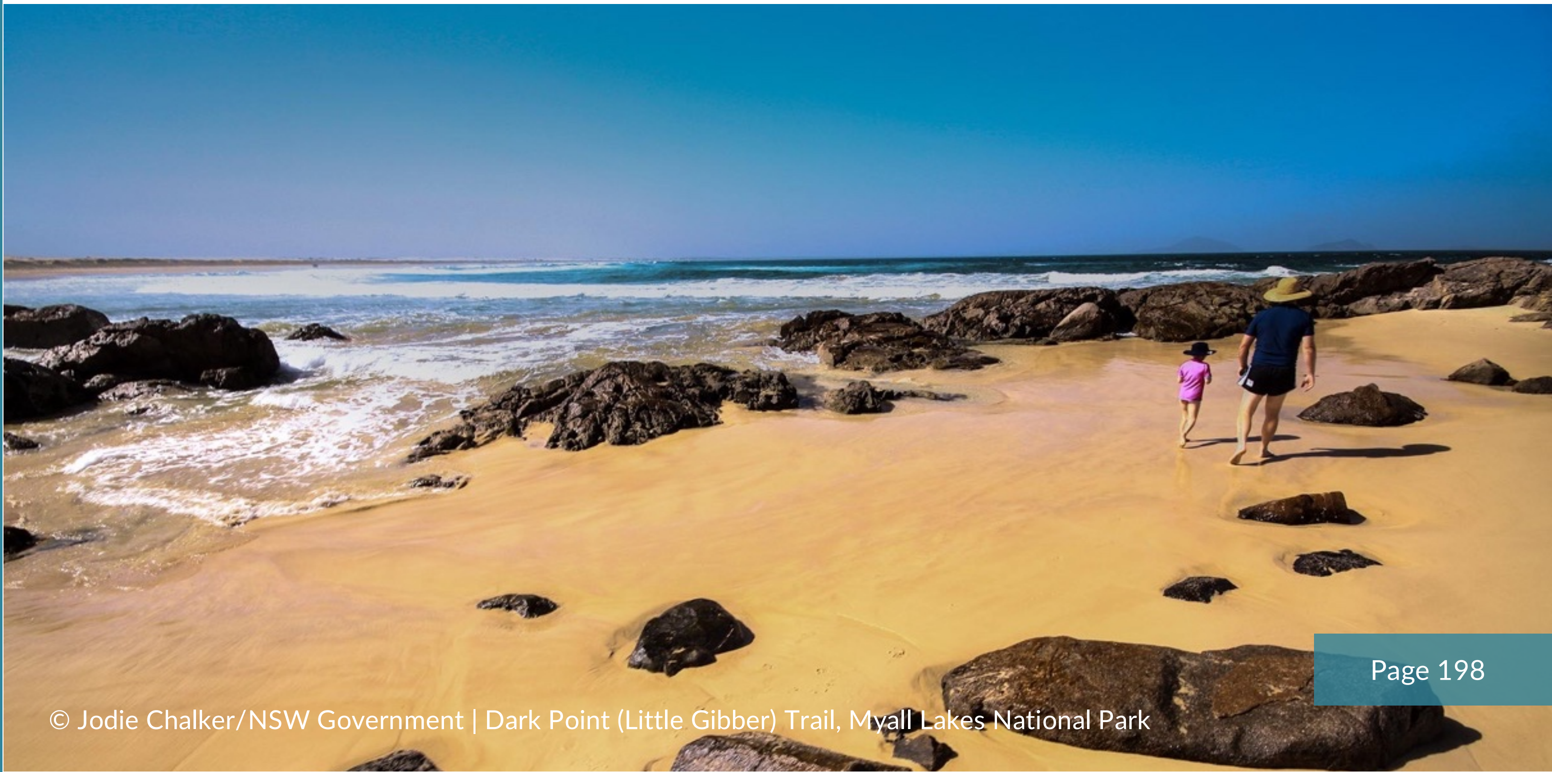
As an area that is likely to require significant investment, it may be necessary to further explore the optimum mix of accommodation in the various potential 'Tourism Nodes' of the MidCoast to establish future requirements – including the likely demand for higher–end options.

15.8 Women's Health & Wellbeing/ Guided Walks/ Adventure Tourism Opportunity

These are relatively new niche markets in Australia so robust data is currently limited. However, the forecast growth is strong (and high–value/ low–impact), so additional analysis would be beneficial to assist in more accurately quantifying this opportunity.

15.9 Combination Adventure Tourism

This a particularly interesting area for the MidCoast as it could connect a number of tourism opportunities, from Great Walks, Kayaking and Mountain Biking; to Indigenous and Heritage Tourism. As such it is worth collecting additional background information to help with more accurately quantifying the opportunity and identifying the best areas of the MidCoast for this type of Tourism to be explored.



© Jodie Chalker/NSW Government | Dark Point (Little Gibber) Trail, Myall Lakes National Park

15.10 Aboriginal/ Indigenous Tourism Development

Section 13.4 took a very initial look at Indigenous Tourism and the potential that could exist in the MidCoast Region. This is an area of Tourism growing strongly in Australia, identified as an area of focus by both Tourism Australia and Tourism NSW.

As such, a (limited) variety of studies, background documents and case studies are available that are worthy of further study, particularly given the immediate opportunities that seem to exist in Saltwater National Park and Dark Point in Myall Lakes NP. There may be funding available to support this area.

15.11 Local Food and Wine opportunity in the MidCoast

This is both a huge opportunity and also possibly one of the more complex ones to manage effectively given the multiple stakeholders involved and the longer time horizon for development.

However, it is a critical area so will need future effort, and this effort could certainly benefit with some more detailed analysis of the current state of the MidCoast Region's Food and Wine offering coupled with a deeper review of some of the recent successful Food and Wine Tourism development programs that have taken place in New South Wales and other parts of Australia (particularly Tasmania and parts of Western Australia).

15.12 Cycling Tourism (Mounting Biking & Cycle–Touring)

A potential development opportunity was identified for 'Cycling Tourism' in Sections 12.4 & 13.8. This is a relatively small but developing Tourism segment and the MidCoast seems to have potential for both cycle–touring and mountain biking, as well as day and overnight trips. Further exploration of the opportunity (possibly as part of a 'combination experience' offering with a multi–day walk) should be considered.

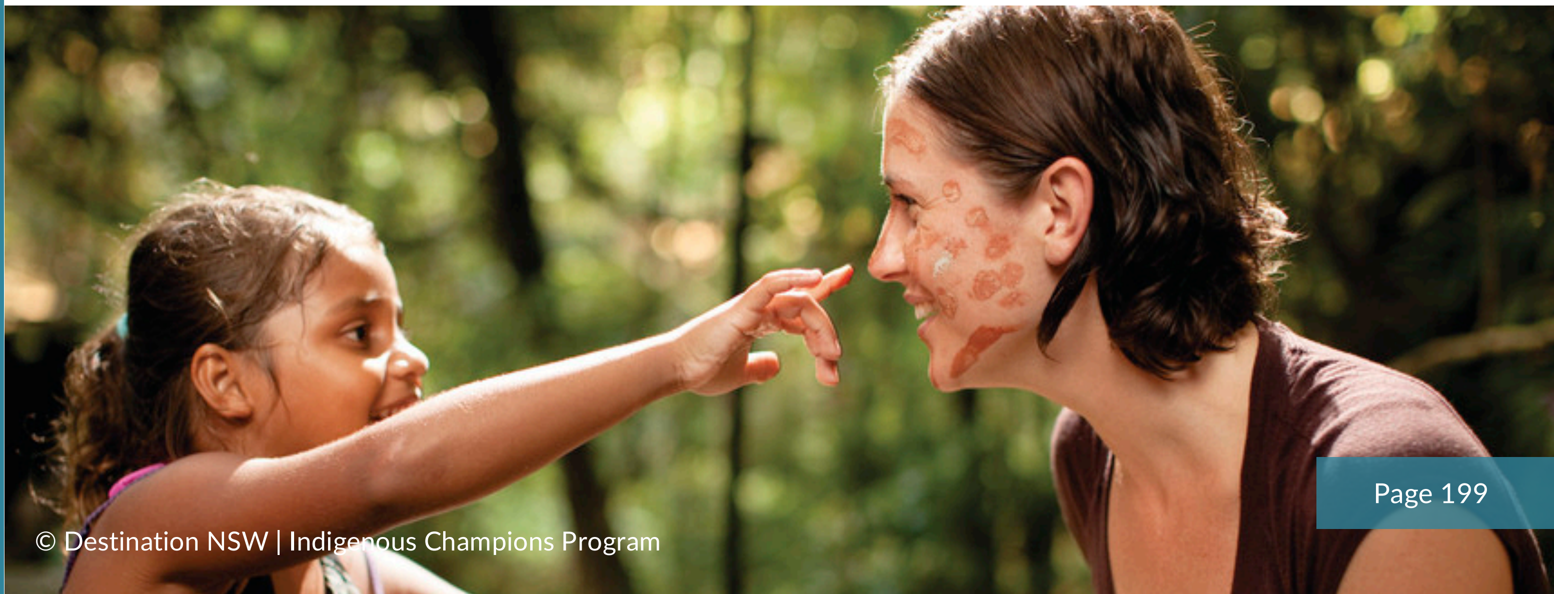
Mountain Biking, in particular, could be a high–value niche opportunity across the MidCoast Region and with existing infrastructure already in place (e.g. Kiwarrak Forest Bike Tracks and 'The Steps' near Gloucester), could be worth exploring further; potentially through a study of the potential economic benefits to the broader MidCoast Region (similar to the one undertaken for the Atherton Tablelands in Queensland).[358]

15.13 Stakeholder Mapping

An initial view of regional Stakeholders is included as Appendix 18.8, however this is a general overview only based on work undertaken by the old NCDN and will need to be developed further for the MidCoast.

15.14 Structures for Tourism Development in Amalgamated Regions

The structural changes taking place within the newly created MidCoast Council will clearly provide some challenges to developing Tourism in the Region, not least how the overall Tourism Promotion of the Region should be structured to fit best within the new North Coast Destination Network Structure. Further study of other regions that have restructured their Tourism Promotion would be beneficial.



SECTION 16

CONCLUSIONS

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The potential for building a stronger, community–centred, primarily Nature–based Tourism industry in the MidCoast Region that is central to the local economy and growing in a sustainable and environmentally appropriate manner is clear. This potential stems more or less exclusively from the strong existing natural resource base that currently underpins the vast majority of Tourism in the Region.

Maintaining and, in some cases, enhancing this resource base should underpin all the investment decisions that will be required to open up this long–term, high value Tourism opportunity; forecast to be worth over AUS $1.55 billion per annum to the MidCoast Region in 2030.

Whilst the opportunity is clear, capturing it in an increasingly competitive landscape is not straightforward. A number of core decisions will need to be made and development pathways chosen for long–term growth that will not necessarily deliver immediate returns. However, if the overall objective is to build a 'strong, resilient Tourism Industry with dynamic and adaptive product and experience offerings that adapt to the needs of visitors and community'[359] then foregoing some short–term returns is a necessary trade–off.

The following conclusions are not intended to lay out a definitive plan. They do, however, provide some insight into the potential areas that, from a Tourism perspective, are likely to provide the most long–term benefit for the MidCoast.

Note: *A wide range of information has been analysed and reviewed for inclusion in this Baseline Analysis. Only some of it is included in the following conclusions; the remainder is intended to provide an ongoing resource base for future MidCoast Tourism planning, as well as for use in the short–term for the Destination Management Planning process.*

16.1 Tourism is forecast to grow Globally, Nationally and Locally; but capturing the 'right kind of growth' requires investment, and the potential negative impacts will need careful management

Tourism globally is forecast to grow significantly in the next 2 decades. The United Nations World Tourism Organisation (UNWTO) predicts continuing growth to 2030, with International Tourism growing to US $1,998 billion in expenditure from US $1,245 billion in 2014, and Domestic Tourism growing to US $5,465 billion from US $3,642 billion. *See Section 5 for detail on Global Trends.*

Tourism Australia also forecasts impressive and consistent growth, with International Tourism growing to AUS $83.98 billion in expenditure in 2026 from AUS $33.4 billion in 2015, and Domestic Tourism growing to AUS $185.3 billion from AUS $73.7 billion. Growth projections for New South Wales have International Tourism growing to AUS $15.0 billion in expenditure in 2030 from AUS $8.4 billion in 2015, and Domestic Tourism growing to AUS $39.7 billion from AUS $22.2 billion. *See Section 6 for detail on Australian and New South Wales Trends.*

Whilst this growth trend provides opportunity, it also brings significant challenges in capturing the 'right kind of growth' from higher–value, lower–impact market segments. Doing so will require foresight to make long–term investments in certain key infrastructure and Tourism experiences, whilst balancing the overall Tourism mix to ensure the volume of Tourists attracted doesn't exceed the overall capacity of the Region.

16.2 There are some key Global trends that are particularly relevant to the MidCoast Region

Ten long–term trends are predicted to strongly influence future Tourism growth, with six of direct relevance: *'Increasing Importance of Niche/ Interest/ Activity–based Tourism'*, *'The Redefinition of Backpacking'*, *'Experiential Travel'*, *'The Green Movement'*, *'Voluntourism'* and *'The Demand for Public Programming'*.

Some of these trends directly influence some of the Tourism segments that are expected to experience strong, long–term sustainable growth out to 2030. Nature–based Tourism, Nature–based Marine Tourism, Adventure Tourism, the rise of 'Flashpackers' and Luxury Tourism (particular from the US) are the key growth segments that need to be considered in developing the MidCoast Destination Management Plan.

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16.3 The MidCoast has the potential to benefit significantly from a number of these niche growth trends

The MidCoast, with more than 1,808kms^2 of National Parks, Nature Reserves, State Forests and protected areas, over 190km of coastline and iconic landscapes like the Barrington Tops, the Manning Coastline and unique Great Lakes region, is clearly a Region with significant natural resources for Tourism.

It already has a well–developed and significant Tourism industry delivering social, economic and environmental value to the Region. With over 1.86 million tourists delivering AUS $570.4 million in annual revenue, and contributing over 19% of the MidCoast's Gross Regional Product in 2015, it is one of the most important industries in the Region. It is also in the middle of an amalgamation process (bringing the former Gloucester Shire, Greater Taree City and Great Lakes Councils together) that has the potential to be a strong enabler of Tourism growth.[360]

By being clear on the Region's overall positioning and focusing more tightly on some of the emerging niche–Tourism trends (particularly Nature–based and Adventure Tourism), modelling to 2030 indicates that the MidCoast has the potential to attract 4.65 million visitors, spending over 8.65 million nights in the Region and generating AUS $1.55 billion in direct Tourism revenue.[361]

This overall MidCoast forecast is made up of the Gloucester Region growing from 180,000 to 450,000 visitors generating AUS $139 million (vs. AUS $51.4 million in 2014); the Great Lakes growing from 998,000 to 2.49 million visitors generating AUS $974 million (vs. AUS $359 million in 2014); and the Manning Region growing from 677,000 to 1.71 million visitors generating AUS $432 million (vs. AUS $160 million in 2014).[362]

Targeting a clear leadership position in Nature–based and Adventure Tourism would also shift the overall mix of Tourism in the MidCoast to a more balanced model: more traditional mainstream Tourism (e.g. family beach holidays) would still have a role, but the growth would be in the higher–value/ higher–yielding niche segments of Tourism. As well as driving strong economic growth, this would ensure the long–term protection of the natural–resource base that Tourism (and the broader Community) depends on. It would also better support the socio–cultural make–up of the MidCoast that is clearly important to the Community.

16.4 To capture the potential growth, there are some clear gaps that need to be addressed

A number of weaknesses and gaps became apparent during the analysis, with the most significant being:

1) **The 3 current Regions (Gloucester, Great Lakes and Manning Valley) do not provide the best structure for effective and flexible promotion of the MidCoast Region's Tourism offerings into the future;**
2) **Current Tourism Propositions could work harder to fully leverage the Natural Assets for Tourism that exist** (whilst acknowledging that each Region does promote a number of its individual assets well)**;**
3) **There is a lack of 'hero' Nature/Adventure–based Tourism offerings across the MidCoast;**
4) **The approach to Trekking/ Walks is fragmented and requires greater co–ordination** (this is true of the individual Regions and even more so when looking at the MidCoast as a whole)**;**
5) **The Hinterland is a 'dormant opportunity' and needs long–term development to assist in regional dispersal;**
6) **Few top–end/ unique accommodation options – and some of the Nature–based options need development;**
7) **The Food and Wine offering is significantly weaker than other regions of New South Wales;**
8) **There is minimal in the way of clear Tourism offerings for certain growing niche markets** (e.g. 'Flashpackers')**;**
9) **All the current Tourism websites could be more effective at promoting the Region's Tourism** (NB many of the competitive regions in New South Wales have a similar gap in their digital Tourism promotion)**.**

As a general comment, it should also be noted that competition in the Tourism sector is set to increase in the coming decades and the coast of New South Wales is already a particularly contested space. Just about every region is promoting itself as an area of natural beauty in some way, and, at the moment, the three Regions of the MidCoast are somewhat hidden within this breadth of choice.

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16.5 This report identifies 28 areas that have the potential to drive strong future Tourism growth

In looking at the potential strategies and initiatives that are most likely to drive sustained (and sustainable) growth, the following appear to offer the greatest potential and highest overall Return on Investment (ROI):

1) Maximise the opportunity the amalgamation offers to restructure the MidCoast's Regional Tourism offering and fully open up the AUS $1.55 billion 2030 growth opportunity;
2) Set a long–term goal to become one of New South Wales' (and ultimately Australia's) leading destinations for Nature–based and Adventure–based Tourism (NABT);
3) In setting this NABT goal, recognise that the objective with existing mainstream Tourism in the MidCoast (particularly in the Manning and Great Lakes Regions) will be one of 'maintenance';
4) Be clear on the unique Tourism proposition(s) the MidCoast wants to own & build all activity around them;
5) Build the MidCoast Tourism brand(s) as synonymous with immersive Nature–based experiences over the long–term;
6) Fully leverage the natural assets of the Region – and consider hero experiences in each sub–region;
7) Review the 3 current promoted Regions, and build a future structure around (potentially) 4 MidCoast Tourism Regions that better reflect available Tourism offerings & fully support a core NABT Positioning;
8) Start to build the necessary Nature–based infrastructure (with a particular initial focus on Trekking/ Walks, Cycling/ Mountain Biking and Kayaking/ Rafting);
9) Develop some NABT 'Hero Experiences' that act as draws to the Region;
10) Maintain base level promotion of the core Mainstream Tourism offerings in the MidCoast;
11) Explore the longer–term development of a broader 'Hinterland' Tourism offering;
12) Be clear on the role of International Visitors (particularly the growing 'Flashpacker' & Luxury markets);
13) Review the Domestic Target markets based on the NABT positioning;
14) Start to grow Aboriginal/ Indigenous Tourism offerings in key parts of the MidCoast Region;
15) Explore the potential for the Women's Health & Wellbeing/ Guided Walks/ Adventure Tourism niche markets;
16) Explore the potential for top–end/ unique accommodation and further incentivise the development of a range of NABT accommodation options;
17) Develop a strong local Food and Wine offering as a core strength of the MidCoast;
18) Undertake a comprehensive planning review of Forster Town Centre (including a Coastal Walkway feasibility) and consider similar for Taree;
19) Develop/ expand specific offerings for the growing 'Next Generation Grey Nomads' segment;
20) Consider expanding the Business Tourism offering in the Taree area;
21) Review the current events program and build a calendar around a future NABT positioning (including the development of 1 or 2 hero events);
22) Explore the potential for increased Sports facilities available for Tourism (including golf);
23) Leverage the new NSW Destination Network (and connect it with the NABT positioning);
24) Develop key partner relationships (particularly with NSW–NPWS and new North Coast Destination Network);
25) Be ambitious in seeking investment partners – the economic potential in the Nature–based and Adventure–based Tourism positioning is significant;
26) Invest in a stronger digital/ online Tourism marketing capability across the re–structured MidCoast;
27) Don't ignore the need to address regulatory barriers & foster enabling conditions for Tourism growth;
28) Commit to a long–term investment view of 10–15 years vs. 3–5 years.

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16.5 Overview of the 28 areas with the potential to drive strong future Tourism growth | Continued

The above is not meant to be read as an action list or strategic plan, but rather as an indication of the areas and initiatives that offer the strongest growth potential. A rough prioritisation has been undertaken with the above, but given the interconnected nature of many of the initiatives, this is indicative only.

There are also a range of development timeframes with the above initiatives that would need to be factored in to future planning. Full detail on each of the 28 areas above can be found in Section 14.2 and 14.3; the detail included there will be used to inform the development of the full Destination Management Plan.

16.6 Addressing these 28 areas effectively (or the majority of them) will have significant economic, social, cultural, and environmental benefits for the MidCoast Community

The economic benefits of developing the MidCoast's Tourism Industry in the manner outlined above are clear, but the interconnected social, cultural and environmental benefits are of equal significance.

The necessary Nature–based and Adventure Tourism investments will provide additional leisure infrastructure for the resident population, whilst also ensuring the marine–based resources that other sectors of the economy depend on are protected. They will also leverage previous Tourism investments made within the Gloucester, Great Lakes and Manning Regions and help to ensure the broadest possible economic benefit from those investments reaches the MidCoast Community (or parts of that Community).

Making conscious decisions about the long–term mix of Tourism and focusing more on the Nature–based segment will also benefit the MidCoast community at large, as a greater proportion of lower–impact, more niche visitors will better reflect the overall make–up of the community and minimise any potential negative impacts.

The type of Tourism infrastructure that will be needed to help develop some of the Tourism options indicated as growth areas will also assist with the promotion of healthy lifestyles and general wellbeing.

16.7 The Council Amalgamation provides a unique opportunity to set the MidCoast up for growth

Re–structuring the Region's overall offering around its Tourism assets vs. the previous LGA Boundaries provides a unique opportunity to make full use of the Region's Tourism assets and accelerate 'the right kind of growth' in both numbers and value.

A potential structure is included in 16.11 below, with detail in Section 11.7 also available for consideration.

However, the MidCoast's Tourism offering ends up being structured, it needs to more accurately reflect the assets of the Region to ensure as much of the potential AUS $1.55 billion in value forecast to be generated by 2030 can be captured.

16.8 A Combined MidCoast Tourism offering vs. standalone Gloucester, Great Lakes & Manning Valley has clear economic potential

Being able to promote all that the MidCoast has to offer – from the Barrington Tops, Rural Tranquillity and Ellenborough Falls in the west, to unspoiled beaches, unparalleled NABT offerings and the Great Lakes along the Coast – in a holistic and connected way provides a clear opportunity to accelerate Tourism growth right across the Region.

Clearly a significant investment of time and resources will be required to structure the Region for accelerated Tourism growth, but a conservatively estimated additional AUS $0.55 billion in overall value from Tourism appears to be the immediate economic benefit available to the MidCoast from promoting the Region more collectively between 2017 and 2030.[363]

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16.9 Whilst there are differences, there is also much in common across the MidCoast

Having been promoted and developed independently for decades, along with a healthy dose of friendly regional rivalry, there are clearly some elements of each of the 3 Region's Tourism offering that are distinct.

There are also clearly geographical and location–specific differences that have driven some disparity in the Tourism available (or potentially available) in the Gloucester, the Great Lakes and Manning Regions.

However, as the table below shows, there are also a significant number of current and future Tourism characteristics that are consistent across either the entire MidCoast or in 2 of the 3 Regions. This has significant implications for future Destination Planning – and for the structure of the Region as outlined below in 16.11.

The below table is a topline summary of the detail contained in Sections 7–11; it is not a full evaluation of all the current and future Tourism opportunities, but does provide some clear direction as to where some of the more significant opportunities could lie and is intended as one of the key inputs to the full DMP process.

Table 72: Key Tourism Characteristics of the 3 MidCoast Regions (Current and/or Future)*

Source: Various data sources in this Baseline Report and 2iis Consulting analysis.

COMPARISON OF STRENGTHS/ CHARACTERISITCS	GLOUCESTER REGION	GREAT LAKES REGION	MANNING REGION
1| TOURISM CHARACTERISTICS UNIQUE TO EACH REGION	Rural–based Tourism; Barrington Tops NP; Heritage Tourism (Mining); Gloucester; Motorbike Touring; White water rafting; Art/ Galleries; Farm Gates/ Organic.	Lake–based Tourism (Myall Lakes NP); Forster Tuncurry/ Pacific Palms/ Seal Rocks; Combination Tourism (particularly Kayaking); specific sports sectors (e.g. diving/ golf).	Ellenborough Falls; Taree/ Crowdy Head/ Harrington; Indigenous–based Tourism (current & future); Higher % VFR; Business Tourism (current & future).
2| TOURISM CHARACTERISTICS CONSISTENT ACROSS THE GREAT LAKES AND MANNING		Coastal Tourism/ Beaches/ Surfing; Mainstream (Seasonal) Tourism; Families/ Kids; Couples/ Weddings; Hinterland (current & future); Coastal Great Walk; Youth Market; 'Flashpackers'.	
3| TOURISM CHARACTERISTICS CONSISTENT ACROSS GLOUCESTER AND MANNING	Mountain Biking Trails: The Steps; Food & Wine (strongest); Nature–based positioning (location specific: BT).		Mountain Biking Trails: Taree Tip (strongest); Food & Wine (stronger than Great Lakes); Nature–based positioning;
4| TOURISM CHARACTERISTICS CONSISTENT ACROSS THE MIDCOAST REGION (Or Potentially Consistent)	Nature–based & Adventure–based Tourism (current & future); Range of NPs/SFs/NRs/SCAs; Water–based (Rivers/ Lakes) Tourism including Kayaking; Activities for kids (Manning/ Great Lakes stronger); Walks/ Treks (Gloucester 1, GL 2, MV 3); Cycling/ Cycle Touring; Unspoilt/ uncrowded (with some exceptions in Great Lakes & Manning, e.g. Forster/ Taree); Health & Wellbeing (including Women's H&W); Grey Nomads (current & future); Indigenous–based Tourism; International (higher proportion in future, still low %); Nature–based and Adventure–based Tourism (NABT); Mountain Biking/ Combination Tourism; Regional Positioning; Great Walks; Food & Wine/ Farm Gates (Just Gloucester/ Manning?); Heritage Tourism (West of Region focused?).		

** Future Tourism Growth opportunities are highlighted in red.*

The table above is included from Section 11.3 of the full report, which contains more detail on the current performance of the MidCoast Region along with a potential Regional Tourism Structure, a Tourism Gap Analysis and a brand evaluation summary.

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16.10 Restructuring the MidCoast's Regional Tourism offering around 4 'Tourism Areas/ Regions' would provide both internal and external benefits

The current Regional breakdown of 'Gloucester', 'The Great Lakes' and 'The Manning Valley' does not fully do justice to the Region's Tourism assets and limits potential future growth for a number of key Tourism sectors. It also fails to recognise how potential Visitors tend to view Regions, limited as it is by LGA boundaries.

This structure should be reviewed and one created that more accurately captures the Region's natural Tourism assets and experiences that are (or could be) offered.

The suggested future structure below is an initial draft only. It is intended to help initiate the more detailed planning process that will be undertaken in developing the MidCoast's' DMP and clearly requires broad consultation given its' implications *(further detail can also be found in Section 11.7.*

1) **Taree and the North Coast:** covering the region to the East of Taree (predominantly the area between the Pacific Highway and the Coast) and running from Diamond Head to Black Head;
2) **Wingham and the Northwest:** covering the region stretching from Wingham/ Krambach up to the Northwest towards the Curracabundi NP (i.e. made up of west of the Manning Region and north east half of Gloucester Region– potentially using 'Manning Valley' as it's descriptor);
3) **The Hinterland and Barrington Tops:** covering the southwestern half of the Gloucester Region, the area to the west of the Pacific Highway in the Great Lakes Region and potentially a small southwestern corner of the Manning Region (depending on extent of proposed Wingham and the Northwest area);
4) **The Great Lakes:** covering the Eastern half of the former Great Lakes Council Area (east of the Pacific Highway and from Hawks Nest to Black Head).

Table 74: Potential future MidCoast Tourism Nodes [FOR COMPLETION DURING DMP PROCESS]
Initial proposal based on this baseline analysis: intended to inform the broader DMP process.

#	POTENTIAL AREA *	SELECTED SETTLEMENTS	INDICATIVE TOURISM OPPORTUNITIES
1	'Taree and The North Coast'	Taree, Brimbin, Coopernook, Croki, Crowdy Head, Cundletown, Diamond Beach, Dyers Crossing, Harrington, Lansdowne, Manning Point, Mitchells Island, Nabiac, Old Bar, Oxley Island, Timonee, Wallabi Point.	Coastal Tourism; NABT; Family holidays/ Kids; Couples; Local Food & Wine; Grey Nomads; National Parks access (particularly Crowdy Bay NP); Great Walks Potential?; Surfing; Aboriginal–based Tourism (Saltwater NP); Cycle–touring; Business Tourism; VFR; 'Flashpacking'/ Youth; Combination Adventure (walking/ cycling); Events/ Festivals.
2	'Wingham and the Northwest'	Wingham, Appletree Flat, Bobin, Bretti, Bundook, Burrell Creek, Elands, Giro, Karaak Flat, Killabakh, Killawarra, Krambach; Mares Run, Mernot, Mt George, Somerset.	NABT; Mountain Biking; Kayaking; Great Walks Potential?; National Parks access + Ellenborough Falls; Health Retreats; Family holidays; Local Food & Wine; Farmers Markets; Grey Nomads; Rural Life; Heritage; Festivals and Cultural Events.
3	'The Hinterland and Barrington Tops'	Gloucester, Allworth, Barrington, Berrico, Bunyah, Copeland, Craven, Faulkland, Glen Ward, Monkerai, Moppy, Mt Peerless, Rawdon Vale, Rookhurst, Stratford, Stroud, Terreel, Upper Bowman, Upper Myall, Wards River, Waukivory.	'Rural Life'; NABT; National Parks access (particularly Barrington Tops); Heritage (e.g. gold mining); Local Food & Wine; Farm breaks; Luxury Accommodation; Cycle–Touring & MTB; River–based activities, e.g. rafting, kayaking; Aboriginal/ Indigenous–based Tourism; Great Walks potential (linking to coast?).
4	'The Great Lakes'	Forster Tuncurry, Bombah Point, Bulahdelah, Coolongolook, Coomba Park, Green Point, Hawks Nest, Mayers Flat, Minimbah, Mungo Brush, Nerong, Pacific Palms, Seal Rocks, Smiths Lake, Tea Gardens, Tiona, Wallingat, Wootton.	Coastal Tourism; NABT; Family holidays/ Kids; Surfing; Couples; Local Food & Wine; Grey Nomads; National Parks access (Myall Lakes + PS–GL Marine Park); Great Walks Potential?; Luxury Accommodation; Cycle Touring and MTB; Aboriginal/ Indigenous–based Tourism (Dark Point); 'Flashpacking'/ Youth; Combination Adventure (walking/ MTB/ kayaking/diving); Events & Festivals.

* Note that names used for Potential Nodes are indicative only.

The table above is included from Section 11.7 of the full report, which contains more detail on the current performance of the MidCoast Region along with key characteristics, a Tourism Gap Analysis and a brand evaluation summary.

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16.10 Restructuring the MidCoast's Regional Tourism offering around 4 'Tourism Areas/ Regions' would provide both internal and external benefits | Continued

The table above outlines the main settlements within each potential area/ region and also summarises some of the indicative Tourism opportunities that this baseline analysis has identified.

There are clearly a number of other structural options available, although it is recommended that maintaining the current 3 Region structure be discounted because of the restrictions it will place on future Tourism development. (*See Section 11.7 for more detail on the options for future Tourism structure.)*

16.11 The MidCoast Tourism Brand(s) and promotion will require significant development

Once the Regional Tourism Structure is clear, there will clearly be a need for significant branding and Tourism promotion development to support the revised approach. This should include developing a unique, differentiated proposition (or propositions) that capture the Natural assets of each area (and the Region as a whole) and then building all Tourism development and promotion around it.

This will then lead to building the MidCoast Tourism brand(s) over the long–term so that they become synonymous with immersive Nature–based experiences.

This brand work will clearly build on the existing strengths of the individual Region's current brands – a full evaluation of which can be found in Section 10, with the summary from that section included below.

Table 75: Topline Evaluation of Gloucester, Great Lakes and Manning Tourism Brands

Source: Various materials as reviewed during the compiling of this Baseline Report.

#	MIDCOAST REGION	BRAND CRITERIA EVALUATION [Scored from 1 – 10, with 10 being 'Australian Best Practise']										SUMMARY	
	NOTE. This evaluation is based on subjective criteria and is scored against leading Tourism Destinations Australia–wide. It should be viewed as indicative only.	Relevant to the Offering/ USP	Differentiated/ unique	Clear Brand Hierarchy	Strength of Nature–based Positioning	Strong Imagery	Creative Consistency	Wide Range of Impactful Materials	Appeal to Key Target Audiences	Effectiveness of Key Audience Targeting	Overall Brand Positioning	TOTAL SCORE [Out of 100]	RANK
1	GLOUCESTER REGION	5	4	4	5	4.5	4	3.5	5	5	4	44	3
2	GREAT LAKES REGION	6	5	5	3	6	6	6	6	5	5	53	1
3	MANNING REGION	6	4	4	6	5	5	6	6	5	5	52	2

16.12 Nature–based, Adventure–based and Nature–based Marine Tourism are clear opportunities

As detailed in Sections 5.7, 7.6, 8.6, 9.6 and 11.4, the Nature–based, Adventure–based and Nature–based Marine Tourism 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 AUS $142.6 million in 2015 to AUS $695.3 million in 2030.[364]

This would take Nature and Adventure–based Tourism from just under a 25% share of the total market to 45–50%, which would be a much fairer representation of the potential value of the natural Tourism assets that exist in the Region.[365]

Although there are some clear areas of strong performance in parts of each of the 3 Regions, the MidCoast is currently underperforming as a whole in this segment compared with other similar regions in both New South Wales and nationally and there are some short–term wins available just through leveraging existing NABT assets more effectively.

The table above is included from Section 11.8 of the full report, which contains more detail on the current performance of the MidCoast Region along with key characteristics, a Tourism Gap Analysis and potential Regional Tourism Structure.

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16.13 Developing the Nature and Adventure–based opportunities will require relatively significant investment and a commitment to longer planning and investment horizons

There is a clear gap between the experiences currently available in the MidCoast and those needed for the MidCoast to become a leading Nature and Adventure–based Tourism destination.

Having said that, the starting point is actually fairly strong in some areas and there are examples of a variety of experiences already available; from 2–3 day walks in the Barrington Tops to surfing at Crowdy Bay to kayaking in the Great Lakes to cultural experiences in the Hinterland around Gloucester. There are just not enough of perceived sufficient quality and none are really clear 'hero experiences' that can attract significant numbers of tourists and have a halo effect on the broader Region.

Closing this gap is essential and will require longer–term planning and investment horizons to be adopted, as well as some clear expectation setting around the time it will take for significant ROI to be achieved. Probably the best case study for this is Kangaroo Island in South Australia *(see Section 12.3)*.

Examples of some of the likely Nature and Adventure–based Tourism experience development that will be required are included in Section 14.4.

16.14 The approach to the MidCoast's existing Tourism markets should be one of 'Maintenance'

Focusing on developing the Nature and Adventure–based Tourism opportunity does not mean walking away from the current strengths of the MidCoast Tourism industry. Even based on a 'maintenance approach', the modelling forecasts the existing forms of Tourism will grow to AUS $653 million in value by 2030 as these forms of Tourism will benefit from the overall 'halo effect' of the improved Tourism offerings and the stronger positioning of the MidCoast Region's Tourism.[366]

16.15 The Domestic Target markets should be reviewed based on the NABT positioning

At AUS $1.53 billion, the total Domestic market is forecast to be over 66 times larger than the value of International Tourism in 2030. Given the strong appeal to urban dwellers of a clear NABT destination, there will be an opportunity to review the target markets for Domestic Overnight Tourism and explore ways of growing the market in Sydney, Brisbane, Melbourne, Canberra and possibly Adelaide.

Urban centres outside of the major capital cities should also be considered as should the changing trends in the Youth market (both Domestic and International).

16.16 Whilst the Domestic Tourism Opportunity is higher volume, International Tourism has significant, high–value/ high–yield potential

Domestic Tourism is clearly the larger opportunity, but International Markets can play a significant role in delivering higher–value visitors (forecast to grow to AUS $23.0 million by 2030).

The main forecast International growth markets for New South Wales include China, India, Korea and Asia generally; with the UK, Europe and US forecast to remain important without significant growth rates.

Within these markets there appear to be specific opportunities for the MidCoast in targeting luxury travellers from the US; 'Flashpackers' from UK, Europe & the US and deciding if a focus on Asia is of sufficient benefit to warrant additional investment.

Developing a stronger partnership with the new North Coast Destination Network (and broader NSW Regional Destinations Structure) and finding ways to integrate with planned Tourism Promotion activity by Destination NSW and/ or Tourism Australia will be essential to ensure the International opportunity is captured without having to commit significant additional resources.

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16.17 The 'Hinterland' has the potential for accelerated growth over the longer–term

Part of the reason for suggesting the 4 Region structure outlined in 16.10 above rests with the potential to fully develop the Hinterland as more than just a gateway to the Barrington Tops. How this is undertaken will depend on the overall structure assumed for the MidCoast, but, assuming there is a region that can be classed as a 'Hinterland', this should certainly be more fully developed as a standalone Tourism offering.

16.18 A number of key 'Development Sectors' are critical for long–term growth

Outside of the core NABT opportunity and sectors outlined above, there are a wide range of Tourism sectors and niche markets included in the 28 areas identified as potential growth drivers in 16.5 above.

However, 9 of them are particularly significant given the growth potential they exhibit. These will need prioritisation in the DMP and then the selected areas will require specific focus given they will not deliver immediate high returns. Detail on each of the areas below is included in Sections 14.2 and 14.3.

1) Aboriginal/ Indigenous Tourism; 2) Cycling (Mountain Biking); 3) Women's Health & Wellbeing/ Adventure niche; 4) 'Rural & Heritage Tourism'; 5) 'Combination Adventure'; 6) Next Gen Grey Nomads; 7) 'Flashpackers'; 8) Coastal Walkway in Forster/ another location; and **9) Business Tourism in and around Taree.**

16.19 To assist in the DMP process, there are a number of best practice examples to learn from

Australia has a wealth of examples of successful Nature–based Tourism development that can inform the MidCoast's Destination Management process.

A number have been included in this analysis including Tourism areas like Kangaroo Island, the Sapphire Coast and New Plymouth in New Zealand; and Tourism Sectors like The Great Walks Market, Nature and Eco Lodges, Aboriginal/ Indigenous Tourism, Cycling Tourism, The Luxury Market (including links to the nature market), Next Generation Grey Nomads, the Food and Wine Market and The 'Flashpacker' Market.

These have been drawn on to inform these conclusions, but are also designed to guide the development of the detailed DMP. All 6 Tourism areas and 12 Sectors can be found in Sections 12 and 13.

16.20 The Destination Management Plan is important, but is just one part of the process needed to facilitate long–term, sustainable Tourism growth

The DMP is clearly a core part of planning for the MidCoast's future Tourism growth (in many ways the cornerstone of that growth), but it should be viewed as just one part of the process to set the Region's Tourism up for success. There are a broad range of stakeholders whose engagement and long–term involvement needs to be planned for and managed, with the DMP process being the first stage in that journey. As an initial step, an outline of North Coast NSW Tourism Stakeholders is included as Appendix 18.8.

16.21 A longer–term, structured approach is a prerequisite for success

The need for a longer–term approach and adoption of longer–time horizons is touched on throughout this report, but is worth emphasising here as it is one of the most critical requirements for developing an effective Destination Management Plan that will successfully grow the Mid Coast's Tourism Industry.

More or less every successful Tourism Destination has this kind of approach as one of the key factors in their success – they set themselves up for the long–term whilst ensuring they continually review and refine their approach.

16.22 As is strengthening the links with local, regional and State–based Tourism Networks

The other prerequisite for success will be in ensuring strong, enduring links with networks like the new North Coast Destination Network, Destination New South Wales and (to a lesser degree) Tourism Australia. Whilst the existing state of these links has not been analysed in detail in this report, it is clear that networks of this kind can always be strengthened. Leveraging these networks is only going to become more essential as the market becomes more competitive and media landscape more fragmented.

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16.23 Starting the journey to a potential AUS $1.55 Billion MidCoast Tourism Industry

This Baseline Analysis is designed to highlight the potential areas for Tourism growth, identify some examples of best practice to learn from and lay out some future pathways for further exploration.

What is clear from the analysis is that there is significant potential for growth in the Region – particularly from the Nature–based Tourism segment – but also from a number of the growth niche markets identified in this analysis and from the MidCoast's current key Tourism segments in each of the 3 Regions.

The Region is currently underperforming on a number of levels, which gives it a steeper potential growth curve – a fact that will very likely assist in attracting some of the necessary Private and Public investment to open up the growth opportunities that are ultimately settled on in the MidCoast's Destination Management Plan.

There are clearly challenges to overcome to achieve the levels of growth identified as possible in this report; but the opportunities available are clear both in terms of what the statistics are telling us, and also what the global trends are indicating.

There are also a number of short–term actions that can be taken that will immediately start to deliver tangible benefits to the Region and start the MidCoast on its journey to developing a potential AUS $1.55 Billion Tourism Industry.

To conclude, this report is very much a tangible starting point for what seems likely to be a project that will have significant and far–reaching positive impacts on Tourism in the MidCoast, and consequently the communities that are spread throughout the Region.

Made up as it now is of Gloucester, the Great Lakes and Manning Regions, The MidCoast is a unique area set within an inspiring and varied natural environment. The combined natural assets of the Region clearly have the potential to be stronger from a Tourism perspective than they were when structured within the 3 standalone Regions. As this report outlines, there are plenty of opportunities for these assets to be used more effectively in the future to help open up a much more balanced, growing and sustainable MidCoast Tourism industry.

Doing this will require investment, take time, and will need a number of challenges to be overcome. But the long–term benefits of doing so will be a more prosperous, resilient and vibrant community in the MidCoast Region, set within a productive and protected landscape and supported by a strong and growing Nature–based Tourism industry. An inspiring long–term vision that certainly seems like it will be worth the journey.

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16.24 Key Recommendations for Further Analysis

A range of areas were identified as either gaps or being worthy of further analysis. The most significant in terms of future development of Tourism in the MidCoast Region are as follows:

16.24.1 Visitor data in the MidCoast

This has already been recognised as a gap and an in–house program of visitor surveys has commenced for the Great Lakes that could be expanded to the Gloucester and Manning Regions. There may still be a need for further data collection–or potentially a joint study with Destination New South Wales if the topic tied in with one of their priority areas.

16.24.2 Nature–based Tourism (NBT) statistics and analysis

Data for Nature–based Tourism is fairly limited and inconsistent globally, nationally and locally. Given the likelihood of an ever–increasing focus on Nature–based Tourism, Nature–based Marine Tourism and Adventure–based Tourism for the MidCoast, it seems likely that further analysis will need to be undertaken.

16.24.3 Overall Tourism balance for the Region

Finding the right balance of Tourism types for a region is challenging and rarely something that is achieved in the short–term. Further analysis is would be beneficial, potentially in collaboration with the new MidCoast Destination Network, Destination NSW or even Tourism Australia.

16.24.4 Great Walks development

There was limited scope in this report to properly analyse the optimal locations and type of walk offerings that would be of most benefit for the MidCoast. This will need further analysis and full due diligence to be undertaken in the planning stage (part of this has already commenced through the application for funding to undertake a feasibility study in the Great Lakes).

16.24.5 Other areas

The other areas identified for further analysis included:

a) The Local Food and Wine opportunity in the MidCoast;
b) Luxury Tourism accommodation provision;
c) The Women's Health and Wellbeing/ Guided Walks/ Adventure Tourism niche market;
d) Aboriginal/ Indigenous–based Tourism;
e) Cycling, Cycle–touring and Mountain Biking;
f) Next Generation Grey Nomads;
g) Sports facilities (including potential high–end golf course);
h) Infrastructure development for socio–economic benefit (e.g. Forster–Tuncurry Walkway);
i) Potential Investors in Nature–based, Adventure & Luxury Tourism in the MidCoast; and
j) Investigating potential structures for optimal Tourism promotion in the MidCoast.

See Section 15 for more detail on current information/ data gaps and other potential areas for further study.

SECTIONS 17–19

17 | ACKNOWLEDGEMENTS

Source Material

This report draws on a wide variety of publically available data and numerous information sources.

Particularly useful have been a number of reports and materials published by:

The Australian Bureau of Statistics (ABS); Australian Government Department of the Environment; Caribbean Tourism Organisation; Centre on Ecotourism and Sustainable Development (CESD); The Coral Reef Alliance; Destination New South Wales; Destination Networks NSW; Euromonitor International; Global Sustainable Tourism Council (GSTC); Gloucester Tourism; Great Lakes Council; Great Lakes Tourism; Wendy Hughes and Thomas Davey (Gloucester DMP); iD; International Air Transport Association (IATA); International Monetary Fund (IMF); The International Ecotourism Society (TIES); International Institute for Environment and Development (IIED); The Legendary Pacific Coast; Manning Valley Tourism; MidCoast Council; New Plymouth District Council, New Zealand (Anna Crawford); NSW National Parks and Wildlife Service; New Zealand Tourism; North Coast Destination Network; Regional Development Australia; REMPLAN; South Australian Tourism Commission; Sports and Fitness Industry Association (SFIA); Tourism Australia; Tourism Victoria; Tourism Research Australia; Tourism Western Australia; TruBlu Travelling; United Nations Conference on Trade and Development (UNCTAD); United Nations Environment Program (UNEP); United Nations World Tourism Organisation (UNWTO); United Nations Statistics Division; Various State and Territory Governments of Australia; Visit Gloucester & Barrington Tops; Visit Manning Valley; The World Bank; World Economic Forum (WEF); World Travel and Tourism Council (WTTC).

Every care has been taken to correctly attribute any work used to its author(s), however 2iis Consulting takes no responsibility for any errors in attribution that may have occurred during the creation of this report.

We will, however, correct any we are made aware of and amend the digital version of this document accordingly.

Key Contributors

Substantive input to various sections of the report was also provided by Charlotte Prouse and Carl Solomon, Directors of Destination Marketing Store (DMS).

This report also benefited from information provided and comments made by representatives of MidCoast Council, in particular the input and background data provided by Sharon Bultitude, Tourism and Marketing Coordinator at Great Lakes Tourism who also contributed to the original Great Lakes Baseline Analysis.

Report Imagery

The imagery used in this report has been obtained from a variety of sources, with the majority provided by Gloucester Tourism, Great Lakes Tourism, Manning Valley Tourism, Destination New South Wales and Tourism Australia. Images are used for research purposes only, with some of those in this report included in a summary document and online project page at www.2iis.com.au.

Examples of marketing materials are also included from a range of Tourism Offices, operators and businesses. To the best of the author's knowledge, all are from publically available sources and able to be used for research purposes.

Images have been credited to individuals or individual businesses wherever possible, with apologies for any errors in attribution which are entirely the fault of the author.

Any errors brought to my attention will, of course, be corrected.

18 | APPENDICES

Appendix 18.1 Definitions of Key Tourism Related Terms

TERM	DEFINITION
Tourism	'The sum of government and private sector activities that shape and serve the needs and manage the consequences of holiday, business and other travel'. (Pierce et al, 1998, cited in Higginbottom, 2004, p.2)
Nature–based Tourism	'The segment in the Tourism market in which people travel with the primary purpose of visiting a natural destination.' (March 2003 Symposium "Tiger in the Forest: Sustainable Nature–based Tourism in Southeast Asia")
Nature Tourism	'Travel to unspoiled places to experience and enjoy nature'. (Honey, 2002, cited in Christ et al, 2003)
Adventure Tourism	"nature Tourism with a kick – nature Tourism with a degree of risk taking and physical endurance". (Honey, 2002, cited in Christ et al, 2003)
Ecotourism	"Traveling to relatively undisturbed or uncontaminated natural areas with the specific objective of studying, admiring, and enjoying the scenery and its wild plants and animals, as well as any existing cultural manifestations (both past and present) found in these areas'. (Ceballos–Lascurain, 1987, cited in Blamey, 2003) 'Responsible travel to natural areas that conserves the environment and sustains the well–being of local people'. (Honey, 2002, cited in Christ et al, 2003)
Wildlife Tourism	'Based on encounters with non–domesticated (non–human) animals in either the animals' natural environment or in captivity. It includes activities historically classified as 'non–consumptive' ... as well as those that involve killing or capturing animals ...' (Higginbottom 2004, p.2)
Sustainable Tourism	'Seeks to minimize the negative footprint of Tourism developments and at the same time contribute to conservation and community development in the areas being developed" (Christ et al, 2003) Tourists people who "travel to and stay in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited'. (UNWTO, 1995)

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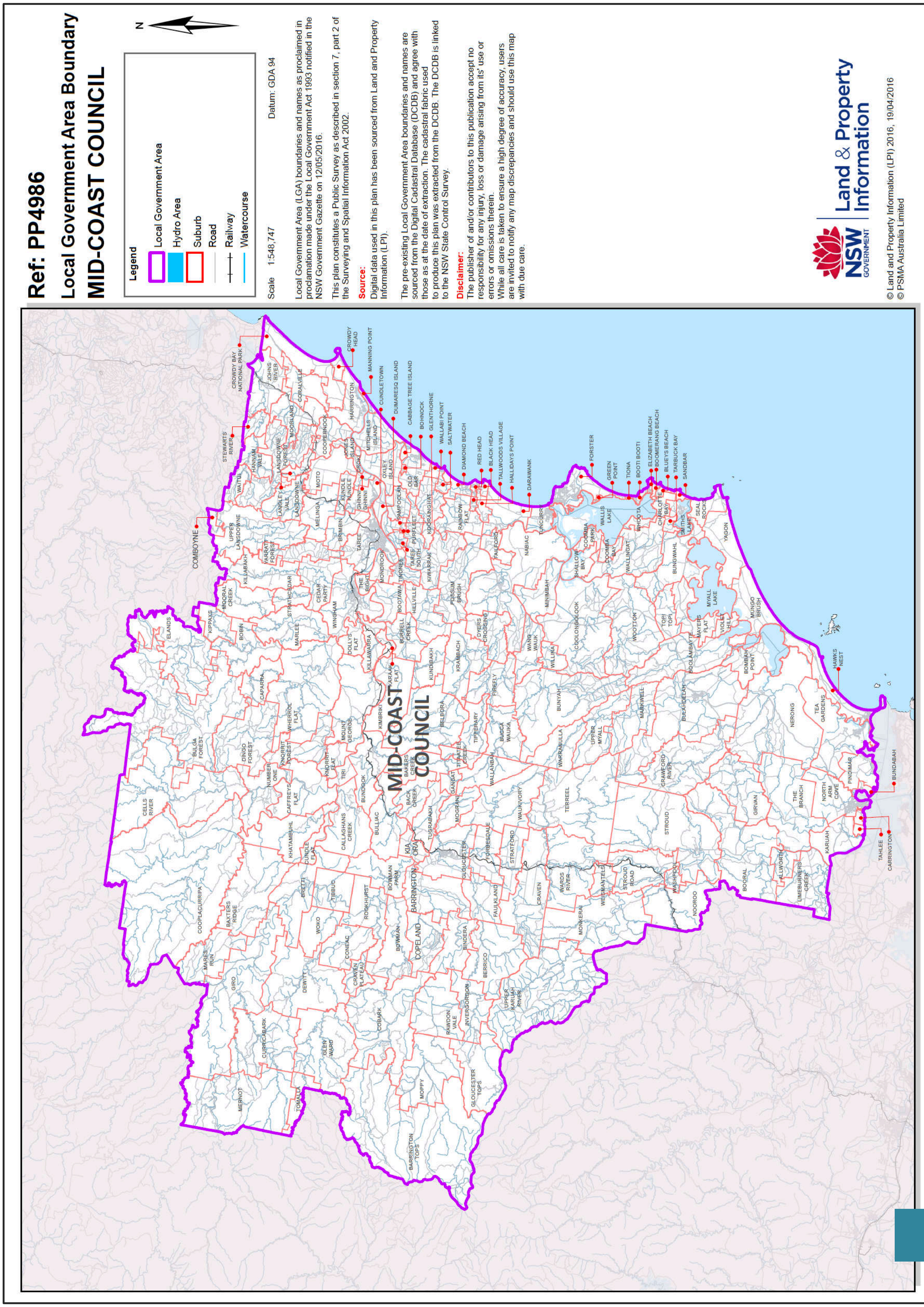
Appendix 18.2 Detailed MCC Area Map including Suburb–level detail



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Appendix 18.3 Total Visitor Nights in Australia by Purpose of Visit & State/ Territory

Australian Government
Austrade

TOURISM RESEARCH AUSTRALIA

Total visitor nights (15 years and over), state summary excluding external regions and other Australia

TOTAL VISITOR NIGHTS IN AUSTRALIA BY PURPOSE OF VISIT (STOPOVER REASON) AND BY STATE/TERRITORY

	Holiday	VFR [a]	Business	Other [c]	City	Regional	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	Total [b]
	'000														
2005-06	181 648	121 551	50 447	70 776	216 875	207 546	136 082	81 514	106 810	26 589	44 363	12 392	9 271	7 401	424 422
2006-07	199 399	123 950	53 897	70 130	229 272	218 103	142 333	84 177	113 767	26 150	48 744	12 960	11 117	8 129	447 377
2007-08	197 119	120 049	52 366	75 258	227 084	217 705	138 280	84 602	115 884	26 081	49 968	12 186	9 711	8 083	444 794
2008-09	191 504	117 790	45 787	81 014	232 708	203 390	139 386	84 404	110 067	25 639	47 391	11 092	10 117	8 001	436 097
2009-10	192 237	121 085	47 426	84 860	238 080	207 528	139 103	92 074	112 219	26 795	44 616	11 393	10 952	8 458	445 609
2010-11	189 971	124 792	50 815	90 417	247 666	208 331	149 151	93 133	110 649	27 160	47 347	10 648	9 736	8 170	455 994
2011-12	192 272	134 851	54 184	95 239	256 041	220 506	149 593	97 744	117 291	28 050	53 137	11 594	9 907	9 229	476 547
2012-13	206 008	140 072	56 885	97 281	273 112	227 134	154 679	103 173	122 036	29 407	58 022	12 227	9 694	11 007	500 244
2013-14	202 975	151 955	59 796	97 271	278 312	233 687	162 113	107 707	121 965	29 370	60 614	11 444	9 340	9 444	511 997
2014-15	203 843	159 529	76 379	108 545	299 066	249 227	169 433	116 848	129 157	30 006	66 630	13 097	12 261	10 863	548 295
2015-16	211 662	167 522	80 554	118 864	318 799	259 803	178 229	124 407	137 060	31 027	69 905	13 644	12 890	11 440	578 602
2016-17	220 728	175 255	85 686	125 956	336 450	271 175	187 564	130 413	143 953	32 481	73 491	14 203	13 531	11 989	607 625
2017-18	229 520	182 270	90 344	131 625	352 302	281 458	195 514	135 728	150 393	33 868	76 907	14 728	14 103	12 519	633 760
2018-19	237 276	188 339	94 298	136 619	366 141	290 391	202 465	140 450	155 624	35 153	79 990	15 214	14 626	13 010	656 532
2019-20	244 901	193 999	98 215	141 251	379 442	298 924	209 187	145 055	160 523	36 393	82 916	15 688	15 121	13 484	678 366
2020-21	252 467	199 613	102 104	145 971	392 864	307 291	215 992	149 765	165 297	37 634	85 735	16 163	15 608	13 961	700 156
2021-22	259 924	205 204	106 060	150 798	406 388	315 598	222 706	154 540	170 102	38 893	88 559	16 647	16 099	14 440	721 986
2022-23	267 710	210 955	110 168	155 810	420 418	324 224	229 684	159 522	175 053	40 208	91 484	17 150	16 610	14 931	744 642
2023-24	275 803	216 881	114 435	161 020	435 005	333 135	236 945	164 677	180 168	41 578	94 519	17 671	17 139	15 443	768 140
2024-25	284 175	222 974	118 870	166 442	450 136	342 325	244 455	170 025	185 441	43 005	97 662	18 210	17 688	15 975	792 461
	Year-on-year change (%)														
2011-12	1.2	8.1	6.6	5.3	3.4	5.8	0.3	5.0	6.0	3.3	12.2	8.9	1.8	13.0	4.5
2012-13	7.1	3.9	5.0	2.1	6.7	3.0	3.4	5.6	4.0	4.8	9.2	5.5	-2.2	19.3	5.0
2013-14	-1.5	8.5	5.1	0.0	1.9	2.9	4.8	4.4	-0.1	-0.1	4.5	-6.4	-3.7	-14.2	2.3
2014-15	0.4	5.0	27.7	11.6	7.5	6.6	4.5	8.5	5.9	2.2	9.9	14.4	31.3	15.0	7.1
2015-16	3.8	5.0	5.5	9.5	6.6	4.2	5.2	6.5	6.1	3.4	4.9	4.2	5.1	5.3	5.5
2016-17	4.3	4.6	6.4	6.0	5.5	4.4	5.2	4.8	5.0	4.7	5.1	4.1	5.0	4.8	5.0
2017-18	4.0	4.0	5.4	4.5	4.7	3.8	4.2	4.1	4.5	4.3	4.6	3.7	4.2	4.4	4.3
2018-19	3.4	3.3	4.4	3.8	3.9	3.2	3.6	3.5	3.5	3.8	4.0	3.3	3.7	3.9	3.6
2019-20	3.2	3.0	4.2	3.4	3.6	2.9	3.3	3.3	3.1	3.5	3.7	3.1	3.4	3.6	3.3
2020-21	3.1	2.9	4.0	3.3	3.5	2.8	3.3	3.2	3.0	3.4	3.4	3.0	3.2	3.5	3.2
2021-22	3.0	2.8	3.9	3.3	3.4	2.7	3.1	3.2	2.9	3.3	3.3	3.0	3.1	3.4	3.1
2022-23	3.0	2.8	3.9	3.3	3.5	2.7	3.1	3.2	2.9	3.4	3.3	3.0	3.2	3.4	3.1
2023-24	3.0	2.8	3.9	3.3	3.5	2.7	3.2	3.2	2.9	3.4	3.3	3.0	3.2	3.4	3.2
2024-25	3.0	2.8	3.9	3.4	3.5	2.8	3.2	3.2	2.9	3.4	3.3	3.1	3.2	3.4	3.2
	5-year average annual growth rate (%)														
2009/10-2014/15	1.2	5.7	10.0	5.0	4.7	3.7	4.0	4.9	2.9	2.3	8.4	2.8	2.3	5.1	4.2
2014/15-2019/20	3.7	4.0	5.2	5.4	4.9	3.7	4.3	4.4	4.4	3.9	4.5	3.7	4.3	4.4	4.3
2019/20-2024/25	3.0	2.8	3.9	3.3	3.5	2.7	3.2	3.2	2.9	3.4	3.3	3.0	3.2	3.4	3.2
	10-year average annual growth rate (%)														
2014/15-2024/25	3.4	3.4	4.5	4.4	4.2	3.2	3.7	3.8	3.7	3.7	3.9	3.4	3.7	3.9	3.8

Numbers shaded are forecasts.

As the survey methodology for the NVS changed in 2014, domestic tourism data before and after 2014-15 are not strictly comparable. This has particularly impacted on business visitors.

[a] Visiting friends and relatives

[b] Total excludes nights spent in offshore locations.

[c] 'Other nights' includes education, employment and 'nights in transit'

n.a. Data not available due to ABS' change to its historical data series for Overseas Arrivals and Departures

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Appendix 18.4 New South Wales Tourism Performance Scorecard 2015

NSW TOURISM PERFORMANCE SCORECARD YE DECEMBER 2015

Destination NSW

SUPPLY

ACCOMMODATION	YE Dec 2015	
ROOMS	75,710	▲ 2.3%
Greater Sydney	39,096	▲ 1.5%
Regional NSW	36,614	▲ 3.3%
OCCUPANCY RATES	YE Dec 2014	YE Dec 2015
NSW	74.7%	75.3%
Greater Sydney	85.8%	87.2%

AVIATION SEAT CAPACITY	NSW % of AUSTRALIA	CHANGE ON YE Dec 2014
NSW DOMESTIC CAPACITY	48.4%	1.7%
NSW INTERNATIONAL CAPACITY	39.5%	2.1%

TOURISM INVESTMENT

TOURISM INVESTMENT IN NSW	2014 ($B)	NSW % of AUSTRALIA
AVIATION INFRASTRUCTURE	$2.8	26%
ACCOMODATION	$2.7	32%
ARTS AND RECREATION	$3.6	26%
TOTAL	$9.1	27%

TOURISM CONTRIBUTION TO ECONOMY

TOURISM CONTRIBUTION TO NSW ECONOMY	2013/14	NSW % of AUSTRALIA
JOBS (DIRECT)	159,000	30%
JOBS (INDIRECT)	113,000	29%
TOURISM BUSINESSES	90,875	34%
TOURISM CONSUMPTION ($B)	$34.9	31%
TOURISM GROSS VALUE ADDED (DIRECT) ($B)	$12.8	32%

DEMAND - OVERNIGHT & DAYTRIP

DOMESTIC AND INTERNATIONAL		CHANGE ON YE Dec 2014
EXPENDITURE	**$30.6 billion**	▲ **9.0%**
VISITORS	**86.9 million**	▲ **7.2%**
NIGHTS	**176.8 million**	▲ **8.1%**

TOP 3 PURPOSE OF VISIT	EXPENDITURE ($B)	CHANGE ON YE Dec 2014
HOLIDAY	13.4	7.9%
VFR	5.7	3.7%
BUSINESS	4.4	6.4%

BY REGION	EXPENDITURE ($M)	CHANGE ON YE Dec 2014
Sydney	16,465	13.9%
North Coast NSW	3,420	5.4%
South Coast	2,263	3.7%
Hunter	2,319	7.3%
Central NSW	1,327	3.5%
Central Coast	917	25.8%
New England NW	757	-0.7%
The Murray	660	5.8%
Capital Country	606	-10.8%
Snowy Mountains	481	-11.3%
Riverina	556	-10.0%
Blue Mountains	572	11.9%
Outback NSW	181	-14.7%

DEMAND

INTERNATIONAL OVERNIGHT		CHANGE ON YE Dec 2014
EXPENDITURE	**$8.4 billion**	▲ **19.2%**
Spend per trip	$2,415	11.8%

TOP 10 SOURCE MARKETS	EXPENDITURE ($M)	CHANGE ON YE Dec 2014
China	2,300	39.6%
UK	739	11.4%
USA	660	19.7%
Korea	522	24.3%
New Zealand	487	7.7%
India	298	79.6%
Hong Kong	282	22.4%
Japan	256	-16.5%
Singapore	249	5.9%
Germany	207	13.3%

DOMESTIC OVERNIGHT		CHANGE ON YE Dec 2014
EXPENDITURE	**$16.1 billion**	▲ **5.1%**
Spend per trip	$573	0.7%

DOMESTIC DAY TRIP		CHANGE ON YE Dec 2014
EXPENDITURE	**$6.0 billion**	▲ **7.0%**
Spend per trip	$109	-1.8%

* Includes overnight and day-trip expenditure.

Source: Tourism Research Australia, *National and International Visitor Surveys YE December 2015 and Tourism Satellite Account 2013-14*, *Tourism Investment Monitor 2015*; STR Global Dec QTR 2015; Bureau of Infrastructure, Transport and Regional Economics, *International & Domestic Airline activity*.

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Appendix 18.5 Map of The Legendary Pacific Coast Touring Route

Source: The Legendary Pacific Coast | www.pacificcoast.com.au.

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Appendix 18.6 Main Cities, Towns and Townships in North Coast New South Wales

Source: North Coast Destination Network. North Coast of NSW Destination Management Planning–June 2013.

Local Government Area	Cities, Towns and Townships
Great Lakes	Bulahdelah, Forster, Hawks Nest, Pacific Palms, Seal Rocks, Smiths Lake, Stroud, Tea Gardens, Tuncurry Nabiac, Coomba, Wootton, Coolongolook
Manning Valley (Greater Taree)	Wingham, Taree, Old Bar & Wallabi Point, Hallidays Point, Harrington and Crowdy Head, Johns River, Croki, Lansdowne, Ghinni Ghinni, Coopernook, Mount George, Tinonee, Elands, Manning Point, Mondrook, Moorland, Hannam Vale, Killabakh, Krambach, Nabiac, Stewarts River
Greater Port Macquarie (Port Macquarie Hastings)	Lighthouse Beach, Greenmeadows, Shelly Beach - Bellevue Hill, Port Macquarie, Flynns Beach, Sancrox, Lake Innes, Innes Peninsula, Wauchope, Rural North, Camden Haven, Lake Cathie, Bonny Hills, Laurieton, Telegraph Point
Macleay Valley Coast (Kempsey Shire)	Kempsey, South West Rocks, Crescent Head, Frederickton, Dondingalong, Greenhill, Stuarts Point, Smithtown, Kundabung, Clybucca, Gladstone, Turners Flat, Bellbrook, Hat Head, Wittitrin , Willawarrin, Grassy Head
Nambucca Valley	Bowraville, Macksville, Nambucca Heads, Newee Creek, Scotts Head, Taylors Arm, Valla Beach, Warrell Creek, Eungai Creek, Missabotti
Bellingen Shire	Dorrigo, Bellingen, Urunga, Myleston, Repton, Fernmount
Coffs Coast	Coffs Harbour, Coramba, Corindi/Red Rock, Sawtell, Nana Glen, Dorrigo, Karangi, Woolgoolga, Bonville
Clarence Valley	Grafton, Brushgrove, Buccarumbi, Copmanhurst, Angourie, Banyabba, Baryulgil, Coutts Crossing, Glenreagh, Dalmorton, Eatonsville, Glenreagh, Junction Hill, Lawrence, Maclean, Iluka, Nymboida, Ulmarra, Wooli, Woombah, Yamba, Minnie Water, Seelands, Southgate, Tucabia, Tyndale, Ashby, Brooms Head, Chatsworth, Diggers Camp, Harwood, Mororo, Palmers Island, Sandon, Wooloweyah
Richmond Valley	Casino, Camira Creek, Clearfield, Coombell, Coraki, Evans Head, Leeville, Myrtle Creek, New Italy, Rappville, Stratheden, Tatham, Tomkin, Whiporie, Woodburn,Broadwater
Kyogle	Kyogle, Bonalbo, Tabulam, Woodenbong, Munmulgum, Old Bonalbo, Wiangaree, Toonumbar
Lismore and Nimbin	Lismore, Goonellabah, Nimbin, Bexhill, Clunes, The Channon, Dunoon, Eltham, Goolmangar, Wyrallah
Ballina Shire	Ballina, Lennox Head, Alstonville, Wollongbar , Wardell, Newrybar, Tintenbar
Byron Shire	Bangalow, Brunswick Heads, Byron Bay/Suffolk Park, Mullumbimby, Ocean Shores/New Brighton/South Golden Beach
The Tweed	Tweed Heads, Banora Point, Chinderah, Fingal Head, Terranora, Bogangar, Kingscliffe, Pottsville, Murwillumbah, Burringbar, Chillingham, Tumbulgum, Tyalgum, Uki, Mooball, Cabarita, Hasting Point, , Stokers Siding, Salt Village, Casuarina, Bilambil, Carool, Crystal Creek

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Appendix 18.7 Key Tourism Assets in North Coast New South Wales | 1 of 2

Source: North Coast Destination Network. North Coast of NSW Destination Management Planning–June 2013.

Nature, Outdoors and Adventure Based

- Range of significant natural attractions to include World Heritage listed national parks and State Forests, waterfalls, rainforests
- Wildlife – "up close and personal and in the wild" –
- Outdoor activities bird watching, hiking, 4WDriving, Scuba Diving, Responsible fishing/boating, cycling, canoeing, surfing
- Nature and the diversity of landscape expressed in many different ways; coast to canopy, surf and turf, 'saltwater freshwater', *the Great Divide comes closest to the ocean here*, The Green Cauldron, Australia's National Landscapes Program
- Choice of Nature based activities – walking, cycling sky-diving
- Open space
- TLPC Nature Trail
- Myall Lakes (most visited National Park in NSW outside of Sydney)
- Koala Hospital
- Ellenborough Falls
- Wetlands
- Wollumbin National Parks, Mt Warning
- Bird watching (over 350 species)
- Solitary Island Coastal Walk
- Bruxner Park Eco Tourism Project
- Outdoor, adventure based sports
- Yuraygir Coastal Walk

Coast, Beaches, Waterways, Surfing Based

- Classic Aussie surf culture including dedicated surfing reserves Angourie, Lennox Head, Crescent Head
- Pristine coastline, beaches and ocean
- 3 Marine Parks ,whale watching, dolphins and seabirds
- Swimming/Kayaking with dolphins open water
- Waterways: big rivers, lakes, marine environment, whales, dolphins
- Choice of water-based recreational activities including surfing, diving, kayaking, fishing boating
- Recreational and commercial fishing
- TLPC Surfing Safari
- Clarence River Way
- Fish Rock
- White water canoe trail and Clarence Canoe and Kayak trail
- Wilson River
- Nymbodia River
- White Water/Surf Rafting activities
- Jetty Foreshores
- South Solitary Island

Aboriginal Based

- Aboriginal culture
- Sea Acres
- Jaanning Tree
- Yarrawarra Cultural Centre
- Local Aboriginal Land Council's boat tours along the Nambucca River
- Saltwater Freshwater Festival
- Discovery Ambassador Tours
- Mutton Bird Island
- Adventure Tag Tours
- Tobwabba
- TLPC Aboriginal Stories (Mid North Coast)

Food Based

- Developing food and wine experiences () (local characters behind the food and wine experiences, variety, tour and taste concept)
- Fresh produce, agri-tourism developments
- Nambucca,Wallis Lake Oysters, Wooli Oysters
- Casino Beef Week, (Bison) and Great Lakes Beef
- Abundant of Food and Wine Events (almost one per LGA)
- Kyogle Rabbit
- Bushtucker,Bushtucker Discovery Tours, commercially produced native foods
- Awarded restaurants (Sydney Morning Herald Good Food Guide Hatted Restaurants, Restaurant and Catering Award Winners)
- Specialist producers ie vodka distillery (Red Dirt Distillery), boutique beer, wineries, cheeses, confectionery, honey, added value products, coffee, macadamias, tea
- Farm gates and Famers Markets
- Cheese and dairy producers
- Independently owned, bespoke cafes, restaurants and shops
- Boer Goats
- Abundant organic certified producers
- Yamba Prawns
- LPC Food and Wine Trail

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Appendix 18.7 Key Tourism Assets in North Coast New South Wales | 2 of 2

Source: North Coast Destination Network. North Coast of NSW Destination Management Planning–June 2013.

Arts, Culture and Heritage Based

- Significant History/Heritage
- Regional arts and culture (art galleries, major performing arts centres)
- Regional Cities
- Villages hinterland and coastal and their communities
- Historic heritage
- Vibrant arts/cultural hubs and creative industries
- Signature world class events, festivals and local markets
- Scottish town of Maclean
- Heritage town of Stroud
- Timbertown
- Glasshouse
- Colonial heritage
- Slim Dusty brand
- Trial Bay Gaol
- Tweed River Art Gallery including Margaret Olley Art Centre
- Quirky events (Mardi Grass, Tropical Fruits etc)
- Inclusive arts and cultural activities including Camp Creative (Bellingen), artists
- Creative Industries
- The Block shopping precinct Lismore with quirky arcades, laneways with art, second hand bookshops, vintage clothing and local designers
- Old Butter Factory and Emporium
- Nexus Gallery
- Historic country pubs
- National Trust historic port of whole village of Ulmarra
- TLPC Cultural, Arts and Heritage Trail

Sports Tourism Based

- Various sporting facilities ie hockey, rowing, cycling, horse racing
- Commonwealth Games
- Natural assets – some Mountain Bike trails, harbor and waterways
- Lawn Bowls
- Adventure based Sports
- Ironman

Other

- Laid back nature of the locals
- Accessibility to and from New England/ Highway
- Sense of security and safety
- Proximity to South East Queensland Markets
- Regional Touring
- Family Attractions and Education appeal
- Scenic drives/ road trips
- Geographical location – relatively easy access to significant visitor markets
- Rural blend to include farming, horse back tours
- Educational facilities like Southern Cross University, North Coast TAFE, Adult Education Colleges
- Lifestyle - lack of development, friendly, safe, healthy, sense of community
- Climate
- Higher profile destinations like Byron Bay, Nimbin, Yamba, Coffs Harbour
- Motor Cycle rides
- Maritime history
- Great assets to offer superb holidays
- Alternate lifestyle
- Health and well being
- Biodiversity of region
- Low key locals
- Lots of holiday options – switch off and relax, romantic, active and adventurous
- Bellingen Shopping
- Established Tourist Drives branching off TLPC

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Appendix 18.8 Key Stakeholders in the North Coast New South Wales Region | 1 of 2

Source: North Coast Destination Network. North Coast of NSW Destination Management Planning–June 2013.

Body	Relationship
Tourism Australia	• International Marketing TLPC • Domestic Marketing TLPC • Research • Tourism Trends • Tourism Strategy Definitions
Destination NSW	• Strategic alliance • Strategic marketing cooperation international and domestic • Digital Support • Research • Source funding • Management support • Content • Market intelligence • Marketing planning and implementation • Product development
Local Government and LTAs (RTO Members) • Great Lakes • Greater Taree (Manning Valley) • Greater Port Macquarie • Kempsey Shire (Macleay Valley Coast) • Nambucca Valley • Bellingen • Coffs Coast • Clarence Valley • Richmond Valley • Lismore and Nimbin • Kyogle • Ballina Shire • Byron Shire • The Tweed	• Industry collaboration • Visitor facilities development and management • Strategic alliance (founding members of NCDN) • Marketing participation and cooperation domestic and international programs • Cooperative Opportunity of access to development funding • Access to industry members • Community Consultation • Network development • Local service delivery • Local development/ambassador program • Marketing intelligence • Famil Hosting
Visitor Economy Business Operators	• Opportunity for access to co-operative development and marketing initiatives • Consultation • Professional development
Regional Development Associations and Economic Development Groups • Mid North Coast • Northern Rivers • Economic Development Steering Group (Port Macquarie Hastings)	• Business development and management guidance • Potential Funding channel
National Parks and Wildlife Services	• Strategic alliance • Opportunity of access to co-operative development and marketing initiatives • Consultation
State Forest	• Strategic alliance • Opportunity of access to co-operative development and marketing initiatives • Consultation

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Appendix 18.8 Key Stakeholders in the North Coast New South Wales Region | 2 of 2

Source: North Coast Destination Network. North Coast of NSW Destination Management Planning–June 2013.

Body	Relationship
Regional Airports	• Strategic alliance • Opportunity of access to co-operative development and marketing initiatives • Consultation
Gold Coast International Airport	• Strategic alliance • Opportunity of access to co-operative development and marketing initiatives • Consultation
CountryLink (NSW Rail)	• Strategic alliance • Opportunity of access to co-operative development and marketing initiatives • Consultation
Other Key Transport Providers • Bus/Coach Companies • Hire Car and Motorhome/Van Companies	• Strategic alliance • Opportunity of access to co-operative development and marketing initiatives • Consultation
Cross Border Regions and LGAs/LTAs	• Strategic alliance with TLPC • Strategic alliance with Buckets Way, Waterfall Way and Summerland Way (New England North West) • Opportunity of access to co-operative development and marketing initiatives • Opportunity to work with Gold Coast • Consultation
Southern Cross University	• Strategic alliance • Opportunity of access to co-operative development and marketing initiatives • Consultation
Arts Mid North Coast and Arts Northern Rivers	• Project development and marketing leverage • Collaborative initiatives
Corporate Business	• Seek Cooperative Advertising Partners • Campaign (ambassador)
Accredited Visitor Information Centres	• Distribution network • Cross – promotion • Customer service
Local Communities • Community Groups • Chambers of Commerce • Sporting Groups	• Destination host • Consultation on product development and marketing • Ambassador Program • Service Delivery Program • Resource • Economic growth and sustainability
Consumers / Visitors	• Economic growth and sustainabil • Repeat visitors, word of mouth

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Appendix 18.9 Roles and Responsibilities within the new Regional NSW Destination Networks Structure

Source: Destination NSW. Regional Destination Networks 2016.

Roles and Responsibilities

Destination NSW

- Renewing its focus on regional tourism with a new dedicated division
- Co-ordinating marketing campaigns in the regions with the DNs
- Providing operational funding to DNs and contestable funding to industry, LTOs and Councils and managing the Regional Flagship Events Program funding

Destination Networks

- Working as destination managers, not just destination marketers
- Developing visitor experiences and tourism product, promoting destinations and industry professional development
- Providing support, information, and coordinating services to industry, local tourism organisations and Councils
- Acting as a local conduit for DNSW to ensure information flows between the regions and DNSW, and ensuring campaigns are reflective of local tourism offering
- Reviewing RVEF applications and assisting operators in applying
- Updating and administering Destination Management Plans (DMPs)

Industry, Local Tourism Organisations and Councils

- Utilising the Destination Network as a source of information, support and as a coordinating force for the region
- Collaborating on product development, smaller scale marketing and promotional campaigns, seeking support through the RVEF (Regional Visitor Economy Fund)
- Running regional events, where applicable, supported by the expanded Regional Flagship Event Program
- Developing tourism infrastructure supported by Government regional infrastructure funding

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Appendix 18.10 Gloucester Local Government Overall Tourism Profile | 1 of 3

Source: Tourism Research Australia, International and National Visitor Surveys (4-yr annual average to the yr. ending September 2014).

INTERNATIONAL TRAVEL

Four year annual average to the year ending September 2014

Key Measures	Gloucester	NSW
Visitors (000's)	1	2,910
Nights (000's)	6	70,300
Average Length of Stay (nights)	5.5	24.2
Expenditure ($ Million)	0	6,488
Spend per visitor ($)	364	2,229
Spend per night ($)	67	92

SOURCE: International Visitor Survey, YE September 2011 to YE September 2014, TRA

DOMESTIC DAYTRIP TRAVEL

Four year annual average to the year ending September 2014

Key Measures	Gloucester	NSW
Visitors (000's)	82	52,212
Expenditure ($ Million)	8	5,548
Spend per visitor ($)	100	106

SOURCE: National Visitor Survey, YE September 2011 to YE September 2014, TRA

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Appendix 18.10 Gloucester Local Government Overall Tourism Profile | 2 of 3

Source: Tourism Research Australia, International and National Visitor Surveys (4-yr annual average to the yr. ending September 2014).

DOMESTIC OVERNIGHT TRAVEL

Four year annual average to the year ending September 2014

Key Measures	Gloucester	NSW
Visitors (000's)	96	25,194
Nights (000's)	262	84,263
Average Length of Stay (nights)	2.7	3.3
Expenditure ($ Million)	43	14,467
Spend per visitor ($)	445	574
Spend per night ($)	164	172

Purpose of Visit (visitors)	000's	LGA %	NSW %
Holiday	61	64%	42%
VFR	27	28%	37%
Business	*	*	17%
Other	*	*	6%

Purpose of Visit (nights)	000's	LGA %	NSW %
Holiday	179	68%	47%
VFR	55	21%	35%
Business	*	*	13%
Other	*	*	5%

Top 3 Transport Types (visitors)	000's	LGA %	NSW %
Private or company vehicle	91	95%	76%
Camper van or motor home	*	*	0%
Bus or coach	*	*	2%

Origin (visitors)	000's	LGA %	NSW %
Sydney	33	34%	28%
Regional NSW	55	57%	41%
Total Intrastate	88	92%	68%
Victoria	*	*	11%
Queensland	*	*	11%
ACT	*	*	5%
Other Interstate	*	*	4%
Total Interstate	*	*	32%

Origin (nights)	000's	LGA %	NSW %
Sydney	107	41%	26%
Regional NSW	132	50%	36%
Total Intrastate	239	91%	62%
Victoria	*	*	13%
Queensland	*	*	14%
ACT	*	*	5%
Other Interstate	*	*	7%
Total Interstate	*	*	38%

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Appendix 18.10 Gloucester Local Government Overall Tourism Profile | 3 of 3

Source: Tourism Research Australia, International and National Visitor Surveys (4-yr annual average to the yr. ending September 2014).

DOMESTIC OVERNIGHT TRAVEL

Four year annual average to the year ending September 2014

Top 5 Activities (visitors)	000's	LGA %	NSW %
Eat out at restaurants	38	40%	58%
Visit friends and relatives	30	31%	49%
Bushwalking or rainforest walks	30	31%	10%
General sight seeing	26	28%	25%
Visit national parks or State parks	20	21%	9%

Top 5 Accommodation Types (nights)	000's	LGA %	NSW %
Caravan/camping near road or on private property	64	25%	4%
Caravan park or commercial camping ground	51	20%	13%
Friends or relatives property	44	17%	39%
Own property (e.g. holiday house)	*	*	4%
Rented house, apartment, flat or unit	*	*	10%

Travel Party (visitors)	000's	LGA %	NSW %
Adult couple (in a relationship sense)	29	31%	27%
Travelling with Children	27	28%	26%
Friends or relatives - without children	23	24%	15%
Travelling alone	*	*	26%
Business Associates	*	*	4%
Other	*	*	2%

Age Group (visitors)	000's	LGA %	NSW %
15 - 24 years	*	*	15%
25 - 34 years	*	*	17%
35 - 44 years	21	21%	18%
45 - 54 years	21	22%	19%
55 - 64 years	20	21%	16%
65 years or over	14	14%	15%

SOURCE: National Visitor Survey, YE September 2011 to YE September 2014 , TRA

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Appendix 18.11 Great Lakes Local Government Overall Tourism Profile | 1 of 5

Source: Tourism Research Australia, International and National Visitor Surveys (4-yr annual average to the yr. ending September 2014).

INTERNATIONAL TRAVEL

Four year annual average to the year ending September 2014

Key Measures	Great Lakes	NSW
Visitors (000's)	12	2,910
Nights (000's)	54	70,300
Average Length of Stay (nights)	4.4	24.2
Expenditure ($ Million)	3	6,488
Spend per visitor ($)	617	2,229
Spend per night ($)	58	92

Purpose of Visit (visitors)	000's	LGA %	NSW %
Holiday	9	77%	56%
VFR	3	22%	27%
Business	*	*	13%
Education	*	*	5%
Employment	*	*	3%
Other	*	*	4%

Purpose of Visit (nights)	000's	LGA %	NSW %
Holiday	31	58%	32%
VFR	20	37%	24%
Business	*	*	6%
Education	*	*	26%
Employment	*	*	11%
Other	*	*	1%

Top 3 Transport Types (visitors)	000's	LGA %	NSW %
Private or company car	5	41%	28%
Rental car	4	30%	6%
Self-drive van, motor-home or campervan	2	19%	2%

Top 5 Origin Markets (visitors)	000's	LGA %	NSW %
United Kingdom	3	26%	11%
New Zealand	2	13%	13%
Germany	1	10%	4%
USA	1	10%	10%
Canada	*	*	3%

Top 5 Accommodation Types (nights)	000's	LGA %	NSW %
Home of friend or relative (no payment required)	24	45%	30%
Caravan	10	18%	1%
Rented house / apartment / unit / flat	*	*	42%
Hotel, resort, motel, motor Inn	5	9%	11%
Other non-commercial property	*	*	1%

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Appendix 18.11 Great Lakes Local Government Overall Tourism Profile | 2 of 5

Source: Tourism Research Australia, International and National Visitor Surveys (4-yr annual average to the yr. ending September 2014).

INTERNATIONAL TRAVEL

Four year annual average to the year ending September 2014

Travel Party (visitors)	000's	LGA %	NSW %
Unaccompanied traveller	6	47%	54%
Adult couple	4	35%	20%
Friends and/ or relatives travelling together	1	9%	10%
Family group - parent(s) and children	*	*	10%
School tour group (teachers and/or students)	*	*	1%
Business associates travelling together	*	*	4%

Age Group (visitors)	000's	LGA %	NSW %
15 - 24 years	2	16%	18%
25 - 34 years	3	28%	26%
35 - 44 years	*	*	17%
45 - 54 years	*	*	16%
55 - 64 years	2	18%	15%
65 years or over	2	14%	8%

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Appendix 18.11 Great Lakes Local Government Overall Tourism Profile | 3 of 5

Source: Tourism Research Australia, International and National Visitor Surveys (4-yr annual average to the yr. ending September 2014).

DOMESTIC OVERNIGHT TRAVEL

Four year annual average to the year ending September 2014

Key Measures	Great Lakes	NSW
Visitors (000's)	585	25,194
Nights (000's)	2,320	84,263
Average Length of Stay (nights)	4.0	3.3
Expenditure ($ Million)	312	14,467
Spend per visitor ($)	549	574
Spend per night ($)	134	172

Purpose of Visit (visitors)	000's	LGA %	NSW %
Holiday	394	67%	42%
VFR	156	27%	37%
Business	*	*	17%
Other	15	3%	6%

Purpose of Visit (nights)	000's	LGA %	NSW %
Holiday	1,763	76%	47%
VFR	468	20%	35%
Business	*	*	13%
Other	48	2%	5%

Top 3 Transport Types (visitors)	000's	LGA %	NSW %
Private or company vehicle	545	93%	76%
Bus or coach	*	*	2%
Air transport	*	*	17%

Origin (visitors)	000's	LGA %	NSW %
Sydney	245	42%	28%
Regional NSW	284	49%	41%
Total Intrastate	529	90%	68%
Victoria	19	3%	11%
Queensland	24	4%	11%
ACT	*	*	5%
Other Interstate	*	*	4%
Total Interstate	57	10%	32%

Origin (nights)	000's	LGA %	NSW %
Sydney	1,000	43%	26%
Regional NSW	1,067	46%	36%
Total Intrastate	2,068	89%	62%
Victoria	80	3%	13%
Queensland	110	5%	14%
ACT	*	*	5%
Other Interstate	*	*	7%
Total Interstate	252	11%	38%

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Appendix 18.11 Great Lakes Local Government Overall Tourism Profile | 4 of 5

Source: Tourism Research Australia, International and National Visitor Surveys (4-yr annual average to the yr. ending September 2014).

DOMESTIC OVERNIGHT TRAVEL

Four year annual average to the year ending September 2014

Top 5 Activities (visitors)	000's	LGA %	NSW %
Go to the beach (including swimming)	315	54%	23%
Eat out at restaurants	288	49%	58%
Visit friends and relatives	229	39%	49%
General sight seeing	179	31%	25%
Go shopping (pleasure)	145	25%	26%

Top 5 Accommodation Types (nights)	000's	LGA %	NSW %
Caravan park or commercial camping ground	645	28%	13%
Rented house, apartment, flat or unit	608	26%	10%
Friends or relatives property	515	22%	39%
Hotel, resort, motel or motor Inn	212	9%	25%
Own property (e.g. holiday house)	159	7%	4%

Travel Party (visitors)	000's	LGA %	NSW %
Travelling with Children	223	38%	26%
Adult couple (in a relationship sense)	200	34%	27%
Friends or relatives - without children	90	15%	15%
Travelling alone	53	9%	26%
Other	*	*	2%
Business Associates	*	*	4%

Age Group (visitors)	000's	LGA %	NSW %
15 - 24 years	82	14%	15%
25 - 34 years	89	15%	17%
35 - 44 years	99	17%	18%
45 - 54 years	104	18%	19%
55 - 64 years	109	19%	16%
65 years or over	103	18%	15%

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Appendix 18.11 Great Lakes Local Government Overall Tourism Profile | 5 of 5

Source: Tourism Research Australia, International and National Visitor Surveys (4-yr annual average to the yr. ending September 2014).

DOMESTIC DAYTRIP TRAVEL

Four year annual average to the year ending September 2014

Key Measures	Great Lakes	NSW
Visitors (000's)	401	52,212
Expenditure ($ Million)	44	5,548
Spend per visitor ($)	109	106

Purpose of Visit	000's	LGA %	NSW %
Holiday	205	51%	47%
VFR	117	29%	30%
Business	*	*	11%
Other	*	*	13%

Top 5 Origin Markets	000's	LGA %	NSW %
Hunter	172	43%	10%
North Coast NSW	156	39%	9%
Sydney	*	*	42%
Central Coast	*	*	6%
Blue Mountains	*	*	3%

Top 5 Activities	000's	LGA %	NSW %
Eat out at restaurants	155	39%	44%
Visit friends and relatives	118	29%	36%
Go to the beach (including swimming)	95	24%	10%
Go shopping (pleasure)	78	20%	21%
General sight seeing	*	*	15%

Age Group	000's	LGA %	NSW %
15 - 24 years	*	*	14%
25 - 34 years	*	*	16%
35 - 44 years	*	*	17%
45 - 54 years	*	*	17%
55 - 64 years	80	20%	17%
65 years or over	86	22%	19%

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Appendix 18.12 Great Lakes Local Government Area Accommodation Profile

Source: Tourism Research Australia, International and National Visitor Surveys (4-yr annual average to the yr. ending September 2014).

All Establishments (Hotels, motels and serviced apartments with 15 rooms or more)

This profile provides a summary of published data and information on tourist accommodation in this Local Government Area (LGA).

Great Lakes		SUPPLY			DEMAND		REVENUE		
		Establish-ments	Rooms	Room nights available (000)	Room nights occupied (000)	Room occupancy rate[1]	Takings from accommo-dation	Average room rate	Yield[2]
		no.	no.	no.	no.	%	$ millions	$	$
Sep Qtr	2013	21	487	45	18	39.3	2.2	122.33	48.08
	2014	22	556	51	19	37.7	2.3	116.85	44.05
	% ch	4.8	14.2	14.2	9.5	-1.6	4.6	-4.5	-8.4
Dec Qtr	2013	21	489	45	23	51.1	3.0	131.41	67.19
	2014	22	556	51	26	50.4	3.2	124.80	62.90
	% ch	4.8	13.7	13.1	11.5	-0.7	5.8	-5.0	-6.4
Mar Qtr	2014	21	489	44	24	53.5	3.2	133.88	71.68
	2015	22	556	50	27	53.1	3.5	133.58	70.91
	% ch	4.8	13.7	13.7	12.7	-0.4	12.5	-0.2	-1.1
Jun Qtr	2014	21	489	44	17	37.8	2.1	126.88	47.97
	2015	22	556	51	20	39.2	2.2	112.54	44.16
	% ch	4.8	13.7	13.7	18.0	1.4	4.7	-11.3	-7.9
Great Lakes LGA YE June	2014	21	489	178	81	45.4	10.5	129.21	58.70
	2015	22	556	203	91	45.1	11.2	123.01	55.44
	% ch	4.8	13.7	13.7	12.8	-0.4	7.4	-4.8	-5.5
North Coast TR YE June	2014	225	7,918	2,877	1,572	54.7	226.8	144.27	78.86
	2015	229	7,768	2,835	1,634	57.6	239.5	146.55	84.47
	% ch	1.8	-1.9	-1.4	3.9	2.9	5.6	1.6	7.1
Regional NSW YE June	2014	1,094	38,541	13,999	7,175	51.3	994.3	138.57	71.02
	2015	1,119	38,472	13,757	7,314	53.2	1,053.2	144.00	76.56
	% ch	2.3	-0.2	-1.7	1.9	1.9	5.9	3.9	7.8
NSW YE June	2014	1,375	75,161	27,321	17,928	65.6	3,124.8	174.30	114.37
	2015	1,435	75,184	27,103	18,144	66.9	3,243.7	178.77	119.68
	% ch	4.4	0.0	-0.8	1.2	1.3	3.8	2.6	4.6

Notes on the Table:

1. The change in occupancy rate is measured in percentage point difference.
2. Yield is average takings per room per night, for all rooms whether they are occupied or not.

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Appendix 18.13 Greater Taree City Local Government Overall Tourism Profile | 1 of 5

Source: Tourism Research Australia, International and National Visitor Surveys (4-yr annual average to the yr. ending September 2014).

INTERNATIONAL TRAVEL

Four year annual average to the year ending September 2014

Key Measures	Greater Taree	NSW
Visitors (000's)	7	2,910
Nights (000's)	50	70,300
Average Length of Stay (nights)	6.7	24.2
Expenditure ($ Million)	3	6,488
Spend per visitor ($)	390	2,229
Spend per night ($)	58	92

Purpose of Visit (visitors)	000's	LGA %	NSW %
Holiday	5	68%	56%
VFR	2	27%	27%
Business	*	*	13%
Education	*	*	5%
Employment	*	*	3%
Other	*	*	4%

Purpose of Visit (nights)	000's	LGA %	NSW %
Holiday	16	32%	32%
VFR	30	59%	24%
Business	*	*	6%
Education	*	*	26%
Employment	*	*	11%
Other	*	*	1%

Top 3 Transport Types (visitors)	000's	LGA %	NSW %
Private or company car	2	33%	28%
Rental car	2	26%	6%
Self-drive van, motor-home or campervan	1	19%	2%

Top 5 Origin Markets (visitors)	000's	LGA %	NSW %
United Kingdom	1	20%	11%
New Zealand	*	*	13%
Germany	*	*	4%
USA	*	*	10%
Netherlands	*	*	1%

Top 5 Accommodation Types (nights)	000's	LGA %	NSW %
Home of friend or relative (no payment required)	28	56%	30%
Rented house / apartment / unit / flat	*	*	42%
Hotel, resort, motel, motor Inn	4	8%	11%
Caravan	4	8%	1%
Homestay	*	*	4%

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Appendix 18.13 Greater Taree City Local Government Overall Tourism Profile | 2 of 5

Source: Tourism Research Australia, International and National Visitor Surveys (4-yr annual average to the yr. ending September 2014).

INTERNATIONAL TRAVEL

Four year annual average to the year ending September 2014

Travel Party (visitors)	000's	LGA %	NSW %
Unaccompanied traveller	3	46%	54%
Adult couple	3	36%	20%
Friends and/ or relatives travelling together	*	*	10%
Family group - parent(s) and children	*	*	10%
Business associates travelling together	*	*	4%
School tour group (teachers and/or students)	*	*	1%

Age Group (visitors)	000's	LGA %	NSW %
15 - 24 years	1	19%	18%
25 - 34 years	1	19%	26%
35 - 44 years	*	*	17%
45 - 54 years	*	*	16%
55 - 64 years	*	*	15%
65 years or over	*	*	8%

SOURCE: International Visitor Survey, YE September 2011 to YE September 2014, TRA

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Appendix 18.13 Greater Taree City Local Government Overall Tourism Profile | 3 of 5

Source: Tourism Research Australia, International and National Visitor Surveys (4-yr annual average to the yr. ending September 2014).

DOMESTIC OVERNIGHT TRAVEL

Four year annual average to the year ending September 2014

Key Measures	Greater Taree	NSW
Visitors (000's)	289	25,194
Nights (000's)	854	84,263
Average Length of Stay (nights)	3.0	3.3
Expenditure ($ Million)	115	14,467
Spend per visitor ($)	397	574
Spend per night ($)	134	172

Purpose of Visit (visitors)	000's	LGA %	NSW %
Holiday	112	39%	42%
VFR	128	44%	37%
Business	38	13%	17%
Other	12	4%	6%

Purpose of Visit (nights)	000's	LGA %	NSW %
Holiday	418	49%	47%
VFR	354	41%	35%
Business	62	7%	13%
Other	19	2%	5%

Top 3 Transport Types (visitors)	000's	LGA %	NSW %
Private or company vehicle	258	89%	76%
Railway	*	*	4%
Camper van or motor home	*	*	0%

Origin (visitors)	000's	LGA %	NSW %
Sydney	97	34%	28%
Regional NSW	158	55%	41%
Total Intrastate	255	88%	68%
Victoria	*	*	11%
Queensland	*	*	11%
ACT	*	*	5%
Other Interstate	*	*	4%
Total Interstate	34	12%	32%

Origin (nights)	000's	LGA %	NSW %
Sydney	294	34%	26%
Regional NSW	460	54%	36%
Total Intrastate	754	88%	62%
Victoria	*	*	13%
Queensland	*	*	14%
ACT	*	*	5%
Other Interstate	*	*	7%
Total Interstate	99	12%	38%

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Appendix 18.13 Greater Taree City Local Government Overall Tourism Profile | 4 of 5

Source: Tourism Research Australia, International and National Visitor Surveys (4-yr annual average to the yr. ending September 2014).

DOMESTIC OVERNIGHT TRAVEL

Four year annual average to the year ending September 2014

Top 5 Activities (visitors)	000's	LGA %	NSW %
Visit friends and relatives	152	53%	49%
Eat out at restaurants	149	51%	58%
Go to the beach (including swimming)	79	27%	23%
General sight seeing	66	23%	25%
Go shopping (pleasure)	65	23%	26%

Top 5 Accommodation Types (nights)	000's	LGA %	NSW %
Friends or relatives property	362	42%	39%
Caravan park or commercial camping ground	171	20%	13%
Hotel, resort, motel or motor Inn	144	17%	25%
Rented house, apartment, flat or unit	*	*	10%
Caravan/camping near road or on private property	*	*	4%

Travel Party (visitors)	000's	LGA %	NSW %
Adult couple (in a relationship sense)	91	31%	27%
Travelling with Children	72	25%	26%
Travelling alone	69	24%	26%
Friends or relatives - without children	40	14%	15%
Business Associates	*	*	4%
Other	*	*	2%

Age Group (visitors)	000's	LGA %	NSW %
15 - 24 years	42	14%	15%
25 - 34 years	41	14%	17%
35 - 44 years	43	15%	18%
45 - 54 years	46	16%	19%
55 - 64 years	61	21%	16%
65 years or over	57	20%	15%

SOURCE: National Visitor Survey, YE September 2011 to YE September 2014 , TRA

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Appendix 18.13 Greater Taree City Local Government Overall Tourism Profile | 5 of 5

Source: Tourism Research Australia, International and National Visitor Surveys (4-yr annual average to the yr. ending September 2014).

DOMESTIC DAYTRIP TRAVEL

Four year annual average to the year ending September 2014

Key Measures	Greater Taree	NSW
Visitors (000's)	380	52,212
Expenditure ($ Million)	42	5,548
Spend per visitor ($)	109	106

Purpose of Visit	000's	LGA %	NSW %
Holiday	173	46%	47%
VFR	119	31%	30%
Business	*	*	11%
Other	*	*	13%

Top 5 Origin Markets	000's	LGA %	NSW %
North Coast NSW	254	67%	9%
Hunter	*	*	10%
Sydney	*	*	42%
Central Coast	*	*	6%
Riverina	*	*	2%

Top 5 Activities	000's	LGA %	NSW %
Eat out at restaurants	166	44%	44%
Visit friends and relatives	140	37%	36%
Go shopping (pleasure)	125	33%	21%
General sight seeing	51	13%	15%
Pubs clubs discos etc	*	*	7%

Age Group	000's	LGA %	NSW %
15 - 24 years	*	*	14%
25 - 34 years	*	*	16%
35 - 44 years	*	*	17%
45 - 54 years	58	15%	17%
55 - 64 years	87	23%	17%
65 years or over	112	29%	19%

SOURCE: National Visitor Survey, YE September 2011 to YE September 2014, TRA

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Appendix 18.14 Greater Taree City Local Government Area Accommodation Profile

Source: Tourism Research Australia, International and National Visitor Surveys (4-yr annual average to the yr. ending September 2014).

All Establishments (Hotels, motels and serviced apartments with 15 rooms or more)

This profile provides a summary of published data and information on tourist accommodation in this Local Government Area (LGA).

Greater Taree		SUPPLY			DEMAND		REVENUE		
		Establish-ments	Rooms	Room nights available (000)	Room nights occupied (000)	Room occupancy rate[1]	Takings from accommo-dation	Average room rate	Yield[2]
		no.	no.	no.	no.	%	$ millions	$	$
Sep Qtr	2013	21	450	41	20	48.9	2.4	116.94	57.19
	2014	20	297	27	14	52.4	1.3	90.37	47.32
	% ch	-4.8	-34.0	-34.0	-29.3	3.5	-45.4	-22.7	-17.3
Dec Qtr	2013	21	452	42	21	50.7	2.8	130.95	66.42
	2014	20	297	27	15	53.9	1.3	89.59	48.33
	% ch	-4.8	-34.3	-34.3	-30.1	3.2	-52.2	-31.6	-27.2
Mar Qtr	2014	21	452	41	22	53.8	3.1	142.18	76.55
	2015	20	297	27	15	56.5	1.4	91.96	51.91
	% ch	-4.8	-34.3	-34.3	-31.1	2.6	-55.4	-35.3	-32.2
Jun Qtr	2014	21	452	41	19	46.3	2.4	126.83	58.68
	2015	20	297	27	15	54.3	1.3	91.73	49.78
	% ch	-4.8	-34.3	-34.3	-22.9	8.0	-44.3	-27.7	-15.2
Greater Taree LGA YE June	2014	21	452	165	82	49.9	10.7	129.54	64.67
	2015	20	297	108	59	54.2	5.3	90.92	49.32
	% ch	-4.8	-34.3	-34.2	-28.5	4.3	-49.8	-29.8	-23.7
North Coast TR YE June	2014	225	7,918	2,877	1,572	54.7	226.8	144.27	78.86
	2015	229	7,768	2,835	1,634	57.6	239.5	146.55	84.47
	% ch	1.8	-1.9	-1.4	3.9	2.9	5.6	1.6	7.1
Regional NSW YE June	2014	1,094	38,541	13,999	7,175	51.3	994.3	138.57	71.02
	2015	1,119	38,472	13,757	7,314	53.2	1,053.2	144.00	76.56
	% ch	2.3	-0.2	-1.7	1.9	1.9	5.9	3.9	7.8
NSW YE June	2014	1,375	75,161	27,321	17,928	65.6	3,124.8	174.30	114.37
	2015	1,435	75,184	27,103	18,144	66.9	3,243.7	178.77	119.68
	% ch	4.4	0.0	-0.8	1.2	1.3	3.8	2.6	4.6

Notes on the Table:

1. The change in occupancy rate is measured in percentage point difference.
2. Yield is average takings per room per night, for all rooms whether they are occupied or not.

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Appendix 18.15 Key Outtakes from Deloitte's 'Tourism and Hotel Market Outlook'

Source: Deloitte, Tourism and Hotel Market Outlook. Executive summary – for public release. August 2016.

Selected outtakes of relevance to the MCC sourced from the Executive Summary (direct quotes)

a) Domestic visitor numbers have grown for the 20th successive quarter (in annualised terms) and are **growing at their fastest pace in nearly two decades**.
- The big beneficiary of buoyant leisure travel is of course holiday destinations. **Visitation to regional holiday hot spots grew faster than capital cities (9.1% versus 5.9%), in an acceleration of a trend evident since the GFC.**
- As Australians pack their bags to holiday across Australia in record numbers, it isn't the big cities they are heading for – **it is regional hotspots from Northern Queensland and the Tropical Coast of NSW (which are both seeing more than half a million additional visitors annually)**, to the south west of Western Australia and Victoria's High Country (which are both growing at double digit pace).
- As a further indication of this strength, **air traffic to regional and leisure areas grew at 9% and 10% respectively**, over the last three years, compared to only 5% on inter-capital routes.
- Also of note was the fact that **growth in domestic overnight travel utilising commercial accommodation grew on par with overall growth**. That is, there were no signs from the data that travellers were switching between traditional accommodation and alternatives (such as the sharing economy).

b) International visitor trips continued to accelerate, growing at 10% over the year to June and notching a seventh consecutive year of growth. As acknowledged previously, at no time since the mid-1990s has growth been faster.
- The remarkable growth feats were not limited to the emerging markets, with Australia's **traditional source countries also posting growth that belied local economic conditions. Arrivals from the US grew at over 14%.**
- Holiday travel was again the major driver of the growth in international trips, with **leisure arrivals up by 21% and accounting for 95% of total growth in international trips.**

Full report available here:
http://www2.deloitte.com/au/en/pages/consumer-business/articles/tourism-hotel-outlook.html

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[359] Adapted from Great Lakes Council. *'Request for Quotation. Consultancy for Development of a Destination Management Plan for Great Lakes Council–01/16.'* 2016; p. 2.

[360] Modelled by 2iis Consulting based on data from the TRA, Destination NSW, MidCoast Tourism and the Australian Bureau of Statistics (ABS) Tourism Satellite Account. 2016.

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PROJECT PARTNERS & FUNDING

MidCoast Council, Gloucester Tourism, Great Lakes Tourism & Manning Valley Tourism

MidCoast Council MidCoast Council was formed in May 2016 through the merger of the former Great Lakes, Greater Taree and Gloucester Shire Councils. This Baseline Report on the future potential of Tourism in the region was funded by MidCoast Council and Great Lakes Tourism (initial Great Lakes Report from which this baseline is derived was wholly funded by GLT in April–May 2016).

The other key partners in the development of this report are the respective Tourism bodies in the Gloucester, Great Lakes and Manning Valley Regions. Gloucester and Manning Valley provided key data for specific sections of the report; The Great Lakes provided both key data and initial funding in May.

Destination Marketing Store (DMS)

Destination Marketing Store offers two of Australia's leading experts in destination branding, marketing, strategic Tourism planning and experience development. With extensive experience across the Tourism and events industry, specialising in nature and cultural Tourism, its Partners, Charlotte Prouse and Carl Solomon have worked in collaboration with all levels of government as well as communities and the not–for–profit and private sectors.

2iis Consulting

2iis is an independent consultancy that helps organisations build strategic solutions to some of the world's more complex challenges, as well as finding pathways to growth for key sectors of society.

Working on these challenges and pathways often involves a unique mix of research & analysis; strategy & organisational development; marketing & brand development; sustainability & climate change advice; and detailed project design & planning. Sometimes a project requires just one of these elements, but often a number are needed to uncover the right solution to a specific challenge.

Clients include not–for–profits, social enterprises, local councils, businesses, government departments, community organisations, cleantech innovators and academic institutions.

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