

Shoalhaven Tourism Advisory Group

Meeting Date: Monday, 30 October, 2017
Location: Osprey Training Room, Level 1, City Administrative Centre, Nowra
Time: 5.00pm

Please note: Council's Code of Meeting Practice permits the electronic recording and broadcast of the proceedings of meetings of the Council which are open to the public. Your attendance at this meeting is taken as consent to the possibility that your image and/or voice may be recorded and broadcast to the public.

Agenda

1. Apologies

2. Confirmation of Minutes

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3. Reports

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4. General Business

TA17.56	Working Groups Update <i>A verbal update to be presented by members of the Working Groups.</i>	
TA17.57	Sports Board Update <i>A verbal update to be presented by David Goodman, Chair Sports Board.</i>	

Membership

Ms Lynn Locke - Chairperson

Clr Findley – Mayor

All Councillors (Clr Alldrick & Gash – voting delegates – Clr Pakes & Kitchener – alternate voting delegates)

Mr David Goodman

Ms Annie Cochrane

Mr Matthew Forbes

Ms Catherine Shields

Ms Jo Thomas

Ms Louise Hallum

Mr Paul McLeod

Mr Rob Crow

Mr Neil Rodgers

Mr Mark Lees/Mr David Duffy – NSW National Parks & Wildlife Service representative

Quorum – 7

Purpose and delegated authority

- Inform the development, implementation and review of council priorities from the Shoalhaven Tourism Master Plan and councils corporate plan
- Represent the tourism industry and advise and make recommendations to Council on matters relating to tourism, the development of tourism and the future of tourism in the Shoalhaven.
- Promote the direct and in-direct value and benefits of tourism within the Shoalhaven and on a regional, state and national basis.
- Make recommendation on the expenditure of the annual Shoalhaven marketing budget as provided by Council.
- Appoint suitable representatives to fill casual vacancies
- Inform and recommend policy for tourism related funding programs, and where required by Council, vote on related matters.

MINUTES OF THE SHOALHAVEN TOURISM ADVISORY GROUP

Meeting Date: Monday, 28 August 2017
Location: Jervis Bay Rooms, City Administrative Centre, Bridge Road, Nowra
Time: 5.13 pm

The following members were present:

Ms Lynn Locke - Chairperson
Clr Annette Alldrick
Clr Joanna Gash
Clr Mark Kitchener
Clr Patricia White
Clr Nina Cheyne
Mr David Goodman
Ms Annie Cochrane
Ms Catherine Shields
Mr Neil Rodgers
Mr Robert Crow
David Duffy – NPWS Representative

Others present:

Coralie Bell – Tourism Manager
Shannan Perry-Hall – Tourism Events and Investment Specialist
Kristy Mayhew – Marketing Specialist

Apologies / Leave of Absence

An apology was received from Clr Findley, Matthew Forbes, Jo Thomas and Louise Hallum.

Confirmation of the Minutes

RESOLVED (David Goodman / Clr Gash)

That the Minutes of the Shoalhaven Tourism Advisory Group held on Monday 26 June 2017 be confirmed with the following amendment:

- The Accommodation Working Group members noted on page 6 be changed to Catherine Shields, Annie Cochrane and Shannan Perry-Hall.

CARRIED

Business Arising from Previous Minutes

RESOLVED (By consent)

That a copy of the summary of the expressions of interest received from consultants for the Sustainable Tourism Model (reference page 7 of the STAG minutes 26 June 2017) be distributed to the Shoalhaven Tourism Advisory Group for their information.

CARRIED

Declarations of Interest

Nil

REPORTS

TA17.34 Chair's Report

HPERM Ref:
D17/258203

The Group discussed how the Visitors Guide was distributed and it was suggested that it could be distributed via Council's newsletter "In Your Neighbourhood" and featured in rates notice newsletter.

Recommendation (Item to be determined under delegated authority)

That the Committee receive the Chair's Report for information.

RESOLVED (Catherine Shields / Cllr Alldrick)

That:

1. The Committee receive the Chair's Report for information.
2. The Visitors Guide be distributed via Council's newsletter "In Your Neighbourhood" and featured in the rates notice newsletter.

CARRIED

TA17.35 Tourism Manager's Report

HPERM Ref:
D17/252286

It was noted that there is a typographical error on page 14 of the budget report. The Group was asked to disregard the line in bold under revenue.

David Goodman requested a hard copy print out of Tourism staff structure with names and positions, in large print, be distributed at the next meeting.

Recommendation (Item to be determined under delegated authority)

That the Shoalhaven Tourism Advisory Group receive the Tourism Manager's report for information and endorse the Destination Management Operational Plan for 2017

RESOLVED (Clr Gash / Robert Crow)

1. That the Shoalhaven Tourism Advisory Group receive the Tourism Manager's report for information.
2. Printed copies of the Tourism staff structure, including names and positions (in large print) be distributed to members at the next STAG meeting.

CARRIED

TA17.36 Sustainable Tourism Model & Destination Management Operational Plan**HPERM Ref:
D17/261742**

Catherine Shields raised concerns regarding the sustainable tourism model and its perceived reliance on collection and input of data. Catherine advised she is meeting with Destination Network next week, where the region's Destination Management Planning is in progress. The Shoalhaven Destination Management Operational plan will be considered as part of this process. Catherine will advise STAG of the outcomes of the meeting.

Annie Cochrane - Arrived at 5.30pm

The Committee discussed the value of having data available and the members of the Sustainable Strategy Working Group and those who attended the workshops spoke about the following:

- Importance of gathering data for the future
- Value of the industry overall
- Growth rate of the industry
- Numbers are trending up and now is time to make sure that research is in place
- The importance of the long term sustainability of the industry
- The sustainable tourism model will be designed in partnership with stakeholders to be an on-going tool and model
- Will feature the four cornerstones of sustainable business:
 - Business
 - Community
 - Environment
 - Economy and Customer

The Working Group acted under delegated authority to endorse the Sustainable Tourism Model and a contractor has been engaged.

The Group discussed the interactive reporting tool "Dashboard".

Kristy Mayhew gave a high level overview of the 2017/18 marketing.

Recommendation (Item to be determined under delegated authority)

That Shoalhaven Tourism Advisory Group endorse the DRAFT Destination Management Operational Plan.

RESOLVED (Robert Crow / David Goodman)

That Shoalhaven Tourism Advisory Group endorse the DRAFT Destination Management Plan.

CARRIED

TA17.37 Destination Marketing**HPERM Ref:
D17/251426**

The Chair congratulated Coralie Bell and the Tourism team on the report, noting the outstanding work done by Kristy Mayhew and Shannan Perry-Hall.

Recommendation (Item to be determined under delegated authority)

That the Shoalhaven Tourism Advisory Group receive the destination Marketing Report for information.

RESOLVED (Catherine Shields / Cllr Alldrick)

That the Shoalhaven Tourism Advisory Group receive the destination Marketing Report for information.

CARRIED

TA17.38 International Marketing Analysis**HPERM Ref:
D17/251424**

The Committee discussed the alternatives with regard to an international marketing commitment.

Opportunities, changes in marketing, budget, partnering alternatives were discussed.

The Group agreed that Matt from Discover Jervis Bay should be invited to address the Group before a decision is made with regard to making an international marketing commitment.

Recommendation (Item to be determined under delegated authority)

That Shoalhaven Tourism Advisory Group

1. Commit to 6 months of international marketing with current partner and;
2. Form a working group to further investigate international marketing opportunities and report back to STAG by the end of 2017 on an appropriate international marketing strategy for 2018 and beyond.

RESOLVED (By consent)

1. An extra ordinary meeting of the Shoalhaven Tourism Advisory Group be scheduled as soon as possible.
2. Matt Cross from Discover Jervis Bay to be invited to address the extra ordinary meeting to present his international marketing plan for the next 12 months
3. Those Group members present at the extra ordinary meeting are to determine under delegated authority:
 - a. If a commitment of 6 or 12 months of international marketing with the current partner, Discover Jervis Bay will be made.
 - b. To form a working group to further investigate international marketing opportunities and report back to STAG by the end of 2017 on an appropriate international marketing strategy for 2018 and beyond.

CARRIED

TA17.39 Events and Investment**HPERM Ref:
D17/252016**

Note: Cllr Kitchener left the meeting at 6:18 pm

Recommendation (Item to be determined under delegated authority)

That the Shoalhaven Tourism Advisory Group receive the Events and Investment Report for information

RESOLVED (David Goodman / Neil Rodgers)

That the Shoalhaven Tourism Advisory Group receive the Events and Investment Report for information

CARRIED

TA17.40 Visitors Services Update**HPERM Ref:
D17/255424****Recommendation (Item to be determined under delegated authority)**

That the Shoalhaven Tourism Advisory Group receive the Visitors Services Report for information.

RESOLVED (Cllr Gash / David Goodman)

That the Shoalhaven Tourism Advisory Group receive the Visitors Services Report for information.

CARRIED

**TA17.41 Short Term Holiday Accommodation Opinion Paper
Discussion****HPERM Ref:
D17/256084****Recommendation (Item to be determined under delegated authority)**

That

1. General discussion from STAG to form a position and way forward.
2. Broadly speaking STAG would endorse the current regulatory framework and would not, at the present time, recommend or support changes or additions to this framework.

RESOLVED (Cllr Gash / David Goodman)

That the Shoalhaven Tourism Advisory Group receive the Short Term Holiday Accommodation report for information.

CARRIED

GENERAL BUSINESS

TA17.42 Accommodation Working Group Update

HPERM Ref:
D17/252973

Rob Crow provided the following update:

The Working Group met and identified the following main priorities for the short term;

- a) Accommodation Audit and survey to ascertain Shoalhaven room numbers and current use (tourist/business/long term etc).
- b) Review opportunities for temporary / pop-up accommodation on private land, success here would result in more room numbers in the Shoalhaven quickly.
- c) Write to the Destination Sydney Surrounds South Board identifying accommodation priorities and seeking assistance / advocacy with shared goals.

The accommodation audit is complete. Decided to widen the research to caravan parks with cabins as well as motels, serviced apartments and larger B&Bs. Achieved by combining Australian Tourism Data Warehouse accommodation results with internet research and local knowledge.

Letter and survey to each of the accommodation providers requesting information about room number and usage will be completed soon.

It was noted that the survey will be sent in the near future.

The Group discussed the number of accommodation places in the Shoalhaven that are housing welfare recipients and homeless people.

It was noted that some places are doing this exclusively. It was agreed that there is a need to have a clear picture on the issue.

Catherine Shields and Louise Hallum are investigating the new Destination Sydney Surrounds South and there is a meeting next week. Gareth Ward MP has set up a working group with DPAC as the lead agency, to consider private sector investment and what the barriers are inhibiting accommodation investment and crown lands for development.

Verbal update from Rob Crow on behalf of the Accommodation Working Group.

RESOLVED (By consent)

That the Shoalhaven Tourism Advisory Group receive the Accommodation Working Group update for information.

CARRIED

TA17.43 Sports Board Update

HPERM Ref:
D17/253115

David Goodman advised that the Shoalhaven Sports Board intends to attend business chamber meetings in the Shoalhaven during 2017 and 2018 to let them know about the Sports Board and what it does and invited the STAG to join them.

Coralie Bell noted she attends business chamber meetings whenever possible.

Lynn Locke advised that she will attend the Shoalhaven Business Chamber AGM to talk about what's happening in Tourism, for example, Riverfest. The Group discussed the possibility of organising an after hours event for business chambers and tourism operators.

The Tourism team advised a survey had gone to business operators to find out preferred times and locations.

Lynn raised the issue of the amount of fees charged to local groups to use the Entertainment Centre.

It was noted that Council will be briefed on this issue in the near future.

A verbal update to be presented by David Goodman, Chair Sports Board.

RESOLVED (By consent)

That the Sports Board Update be received for information.

CARRIED

Other Business

TA17.44 Additional Item - NPWS Plans of Management

David Duffy advised that Plans of Management are available and a map has also been produced showing different tenures in the Shoalhaven, including camping sites. These will be provided to the Shoalhaven Tourism Advisory Group members and Tourism by email.

There being no further business, the meeting concluded, the time being 6.44 pm.

Ms Lynn Locke
CHAIRPERSON

MINUTES OF THE SPECIAL SHOALHAVEN TOURISM ADVISORY GROUP

Meeting Date: Monday, 9 October 2017
Location: Jervis Bay Rooms, City Administrative Centre, Bridge Road, Nowra
Time: 5.00pm

The following members were present:

Ms Lynn Locke - Chairperson
Mr Matthew Forbes
Ms Catherine Shields
Mr Robert Crow
Mr Paul McLeod

Apologies / Leave of Absence

Apologies were received from Cllr Alldrick, Louise Hallum, Neil Rodgers, David Duffy, Annie Cochrane, David Goodman

At 5.30pm it was advised that a quorum had not been reached and the meetings business would be deferred to the next meeting.

TA17.48 Chair's Report

HPERM Ref: D17/344650

Group: Finance Corporate & Community Services Group
Section: Tourism

Purpose / Summary

To update members of the Shoalhaven Tourism Advisory Group.

Recommendation (Item to be determined under delegated authority)

That the Committee receive the Chair's Report for information.

A note from the Chair:

This will be our last meeting for 2017 and I would like to thank all STAG members for their support and commitment throughout the year.

Unfortunately, one of our Board Members, Jo Thomas, has resigned from STAG. Jo is expecting another baby and with lots of other commitments felt that she could not commit. We will miss Jo and her expertise.

By the time we meet the 5th Shoalhaven River Festival will be over. The Festival was an initiative of STAG and is a great tourist attraction. I hope you all came and experienced the vibe and the great entertainment and activities that took place during the Festival. We had many more attractions, over both days this year, and I'm sure the community and visitors to the area were impressed with the standard of entertainment, market stalls, Artzone and of course the Fireworks, which are always outstanding.

We have an important item to discuss and need to make a decision at this meeting as to whether or not we invest again in Discover Jervis Bay, the amount we will invest and for how long. Matt Cross gave a great presentation and it was a pity that more STAG members were unable to attend. However, I can only hope that you have all viewed the video footage that was distributed to all members so that we can make an informed decision. Catherine and Rob will be speaking briefly at the meeting regarding the presentation and their ideas on the best way forward.

The Tourism website testing model was sent out to all members and I hope that you were all able to have a look. Personally I feel it is going to be a great website, very interactive and easy to use. It will be interesting to hear your feedback at the meeting.

The Sustainability Workshop was held in both Nowra and Ulladulla. I was unfortunately unable to attend and I look forward to an update tonight from those that did attend.

Plans are underfoot for an Archer Memorial Statue. For those that are not aware Archer won the first and second Melbourne Cups and his trainer Etienne De Mestre, who trained at Terara, is still to this day the 2nd most successful trainer of Melbourne Cup winners. A sculptor has been chosen and the process of raising funds is underway. As Bryan Martin a member of the Victoria Racing Club and well known race caller said "Nowra is sitting on a

tourism gold mine and doesn't even know it". This has been reiterated by the success and growth of tourism in Nagambie where a statue of Black Caviar was unveiled in 2013. In fact this statue is the main photo on the Nagambie Lakes Tourism website. More on this exciting venture in the New Year.

I feel we have a great mix on STAG of people from all walks of life and by working together and keeping each other informed I feel we can go from strength to strength. We are very lucky to have the support of such a pro-active Tourism Team.

Looking forward to seeing you all back in 2018.

Lynn Locke

TA17.49 Membership Resignation - Jo Thomas - Shoalhaven Tourism Advisory Group

HPERM Ref: D17/319504

Group: Finance Corporate & Community Services Group
Section: Human Resources, Governance & Customer Service

Purpose / Summary

To advise the Shoalhaven Tourism Advisory Group (STAG) that Council has received a notice of resignation from Jo Thomas as a Community member.

Recommendation (Item to be determined under delegated authority)

That:

1. The Shoalhaven Tourism Advisory Group accept the resignation from Jo Thomas; and
2. The Tourism Section send a letter of appreciation to Ms Thomas thanking her for her contribution to the Committee

Options

1. As recommended

Implications: Nil

2. An alternative recommendation in addition to the acceptance of the resignation of Ms Jo Thomas.

Implications: This will be dependant upon the recommendation which is made

Background

On Monday 25 September 2017, Council received a notice of resignation from Jo Thomas from the Shoalhaven Tourism Advisory Group (STAG). Jo has been a member of the STAG since July 2016.

A recruitment process is scheduled to take place in January 2018 and this vacancy will be filled as part of that process.

No further action is required in relation to filling this vacancy.

TA17.50 Visitors Services Update

HPERM Ref: D17/336792

Group: Finance Corporate & Community Services Group
Section: Tourism

Purpose / Summary

To give an update of Visitor Information Services for June /July 2017 period.

Recommendation (Item to be determined under delegated authority)

That That the Shoalhaven Tourism Advisory Group receive the Visitors Services Report for information.

Options

1. Receive the report for information
2. Request more information

NRMA Roadshow

We attended the 2017 NRMA Roadshow at Kembla Grange. We had a stand and gave out information on our area, and answered many questions. We gave out 120 guides to visitors to the stand, as well as another 120 for a regional conference. We were happy to be part of the Roadshow where we showcased the Shoalhaven as the best part of the South Coast to participants ready to travel.

Sussex Pop Up Visitor Information Display

Sussex Inlet Tourism with the support of Shoalhaven Tourism have run the pop up Visitor Information booth over the long weekend in Sussex Inlet. The event was very successful and one we hope to continue to support and grow. There will be training in Sussex Inlet in the coming months to have some of the community formally recognised as part of the Ambassador Program.

Huskisson Mobile Tourism Van in region at Huskisson on the long weekend

Visitor services is trialling being out in region on public holidays. The mobile van was out at Huskisson on Monday of the long weekend. The day was successful with over 100 guides given and positive anecdotal feedback received from community and businesses.

Ambassador 2nd intake

We are currently recruiting for our next round of Tourism Ambassadors. 14 have expressed an interest, with 9 attending our training day on Wednesday, 18th October and others to be scheduled over the next month. The day was a huge success with the volunteers expressing positive enthusiasm to be part of our program.

The current Ambassadors have been successful in sharing their local knowledge with our many visitors and we continue to be excited about the potential of this program.

Sales and Enquires - 1st Quarter NOWRA

Nowra VIC	July to Sep 2016	July to Sep 2017	+/-	YOY
Counter Enquiries	3622	4437	815	+22%
Email Enquiries	2616	1719	-897	-34%
Phone Enquiries	2999	2753	-246	-8%
Sales \$				
Souvenirs	1752	4138	2386	+136%
Books/Maps	2831	2952	121	+4%
Local Product	2471	3885	1414	+57%
Total	7054	10975	3921	+55%
BookEasy	40002	35940	4062	-10%

Insight and comments:

- Overall, visitor numbers to the counter are up on last year by 22%. This is a very pleasing result as it shows that the number of visitors to the new VIC site has stabilised and growing in a relatively short space of time since the move.
- The reduction in emails are indicative of more people accessing their own information online.
- Sales have also shown a significant increase of over 50% year on year.
- These figures indicate the stabilisation and growing acceptance of the new location of the VIS, and the desire for local products
- Sales for BookEasy have been down during the first part of the period. This is partly due to the intense competition from other online providers, and some issues associated with the increase uptake of Channel Managers. After a promotional campaign, sales are up for the month of September YOY and expected to grow with the launch of the new shoalhaven.com website.

Sales and Enquires - 1st Quarter ULLADULLA

Ulladulla VIC	July to Sep 2016	July to Sep 2017	+/-	YOY
Counter Enquiries	3256	3242	-14	-0.4%
Email Enquiries	18	22	4	+18%
Phone Enquiries	1401	1550	149	+10%
Sales \$				
Souvenirs	3926	2430	-1496	-38%
Books/Maps	607	836	229	+37%
Local Product	1139	3654	2515	+ 220%
Total	5672	6920	1248	+22%

Insight and comments:

- Sales results for Ulladulla are up over 20% Year on Year.
- The number of souvenir stock range has been physically reduced YOY and as a result, an expected reduction in sales.
- However, it is very encouraging to see local product sales are continuing to grow at the expense of other souvenirs, confirming the desire for locally made products.

There are no exceptions to report in relation to Visitor Services

TA17.51 Events and Investment

HPERM Ref: D17/337341

Group: Finance Corporate & Community Services Group
Section: Tourism

Attachments: 1. E-mail of Appreciation - Dressage by the Sea [↓](#)

Purpose / Summary

To update the Shoalhaven Tourism Advisory Group on events and investment in the Shoalhaven region.

Recommendation (Item to be determined under delegated authority)

That the Shoalhaven Tourism Advisory Group receive the Events and Investment Report for information.

Options

1. Receive the report for information
2. Request more information

Past Supported Events (since 1 July 2016)

- Surf Lifesaving NSW IRB State Championships
- 2016 Motocross Nationals
- AFL Junior State Championships
- Surf Lifesaving IRB National Championships
- State Team Time Trials Weekend (Cycling)
- Husky Running Festival
- Men's Bowls State Pennant Finals
- Women's Bowls State Pennant Finals
- Shoalhaven River Festival
- Huskisson Triathlon Festival
- XPD World Adventure Race Championships
- Inaugural National Indigenous Football Championships
- PGA Australian Senior Championships
- Fairgrounds
- Callala Ultimate Triathlon Festival
- Big Husky Triathlon Festival
- National Pop Up Cinema
- Shoalhaven Week of Golf
- Grapest 5km Run
- Willinga Park Open Day
- Nitro Circus
- Southern Cross SUP Festival

- Burradise Festival
- Culburra Beach Surf Bash
- NSW Country Junior Rugby Union Country Champs
- IRB Surf Lifesaving
- Winter Wine Festival
- AFL Junior Championships
- Motor Cross Nationals
- Family Fishing Carnival
- State Team Time Trials
- Melbourne Cup Tour
- Chilli and Chocolate Festival
- Huskisson Running Festival
- Escape Artfest

In Progress

- Events
 - PGA Golf – Mollymook – 18-25/10/17
 - KV Folk Festival – Kangaroo Valley – 21 & 22/10/17
 - Long Course Weekend – Jervis Bay / Nowra – 28 & 29/10/17
 - River Festival – Nowra – 28 & 29/10/17
 - National Indigenous Football – Nowra – 4 & 5/11/17
 - Garden Clubs of Australia National Convention – Ulladulla – 05-10/11/17
 - Australian Junior Surfing Titles – Culburra Beach – 24-29/11/17
 - Water Polo Junior Championships – Nowra – 23-25/11/17
 - Callala Ultimate Triathlon – Callala Bay – 9 & 10/12/17
 - Fairgrounds – Berry – 9 & 10/12/17
 - Outrigger State Championships – Ulladulla - TBC
 - For a full list of events in the Shoalhaven visit <http://shoalhaven.com/events/>
- Nowra Revitalisation Community Event Workshop was held on 18th September. My Travel Research will now compile a report to be delivered to the Nowra Revitalisation Committee for consideration, there is also a survey being undertaken as part of the project <https://www.surveymonkey.co.uk/r/HelpNowra>.
- DNSW Conference Funding – Working through possible project ideas ahead of a submission.
- New event EOI for funding received / in discussion – The Beast 666, Food Truck Festival.
- Accommodation Working Group – Audit complete, surveys out to operators and result collection still progressing. Engagement with wineries on glamping opportunities taking place.
- Queens Baton Relay Event Organisation - Monday 5th February 2018
- Goodnight Island Tourism Accommodation Development – Working with owner and potential investors to re-ignite discussions and opportunities.

Results

- Tri Husky – Huskisson 24/09/17



- Escape Artfest – Ulladulla and Surrounds
 - *Participation*
 - Details TBC
 - *Funding*
 - \$2,000 to undertake data collection to prove out of area visitation and numbers.
 - *Future Involvement*
 - Considering the festival falls within the school holidays (considered peak time) it will be difficult to justify future funding from tourism. However, the event team will continue to work with organisers to ensure the event continues to develop and grow.



- 3 applications completed for DNSW Flagship Event Funding.
 - 2 successfully moved to Round 2 of the process
 - Fairgrounds Festival
 - Berry and SeeChange Festival – Huskisson.
- 1 Application submitted for DNSW Incubator Event Funding for Burradise Festival.
- Festivals Australia Funding Letters of Support – Burradise Festival (Young Coasties component) and SeeChange Festival.
- South Coast Soul Festival concept development complete and event confirmed – Yoga and Wellness Event – Jervis Bay – 11th – 13th May 2018.
- Promotion of event and development funding sources through newsletter and targeted approach.

- Winter Wine Festival – working with the event committee to overcome 2017 event concerns including the identified need for the organisers to provide more adequate traffic management plans.
- Flash Camp at Coolendel – October to February.
- Secured World Surfing League Pro Junior Event for 2018 – Dates TBD.
- Secured 2017 Water Polo NSW Junior Country Club Championships – 24th - 26th November – Nowra and Bomaderry Aquatic Facilities.
- Event Organiser secured for Queens Baton Relay Monday 5th February 2018.
- 32 events assessed, approved and permitted in the last 6 months.
- 2018 Visitor Guide Events list finalised.

Up Next

- Events currently working on, not yet confirmed;
 - Music Festivals
 - Food / Wine / Local produce events
 - River events to utilise pontoons
- Flash Camp – Continue to work on more possible sites (both Council land and private), working with International tourism operators, creating the opportunity for a year-round product with scalable bed numbers to meet demand.
- Implementation of SmartyGrants <https://www.smartygrants.com.au/> for event funding program.
- Ticket sales through Bookeasy for supported events.
- Development of an Investment / Event Funnel to track success.
- Working with Fairgrounds to ensure a smooth event, meeting with key stakeholders.
- Continue to grow the Investor Database
- Event investor familiarisations
- Industry website development and supporting information

There are no exceptions to be reported.

Dear Shannan,

**Thank you for your support of Willinga Park's 'Capricorn Australia Dressage by the Sea'
29th September – 1st October 2017**

On behalf of the Snow family and all the staff at Willinga Park, we sincerely thank Shoalhaven Council for your support of our event. The riders appreciated the bags filled with goodies, and your volunteers – well I can't speak highly enough of Chris, Lisa, Elisabeth and Jolien. They all worked really hard and always had a smile on their faces, and we just didn't want them to leave! PS please send them back!

The feedback from competitors was overwhelmingly positive, and we think they were left inspired about what the future might hold for dressage in Australia. With the help of our sponsors, traders and volunteers, Willinga Park was able to give the community a real taste of elite equestrian competition. 1700 spectators flocked to Bawley Point to watch the dressage, and we are proud to report that the event was another hugely successful one. It was a credit to everyone involved in the event. Nine horse and rider combinations were able to achieve scores of over 70% in the Grand Prix Freestyle, a result that has never before been achieved in Australia.

Your contribution is invaluable to the continuance of equestrian events of this calibre in Australia. And also to enable the local Shoalhaven community to be a part of that. So again - thank you.

Yours Sincerely,

Terry Snow, Owner of Willinga Park
And Lindsey Stewart, Events Manager

Results: can be found at <http://willingapark.com.au/draws-and-results/>

Testimonials:

"Thank you all. It was great to see such a great event on the south coast. I have never seen such beautiful horse or witnessed such an event before & to be given the opportunity to see this I thank you & we will go every time you hold an event." Maree Jackson, Spectator

"We saw a poster at Bawley Point IGA and booked tickets online. My children had the "best day of their lives!". All (competitors) let our children pat horses and then show them prep and cool-down after event. We were talked through all stages of prep, shown different horse's personalities, just fabulous. A highlight was when we were watching presentations and one of the girls receiving an award asked my daughter to hold her horse! Now they all want lessons, which they shall get. We will return to (future) events." Gabrielle McIntyre, Spectator

"Thank you to all the crew for this wonderful event. All the "red shirt" helpers could not be more helpful, plenty of smiles and nothing was too much trouble. Cannot wait to visit again for the next event." Leanne Ryan

"A huge effort and a magic event to be part of. I'm so glad I can say I was there at the first one. Thanks to everyone who worked so hard to make this happen." Pamela Bice, Competitor

Media:

- <http://www.equestrianlife.com.au/articles/Roger-Fitzhardinge-reports-from-the-final-day-at-Willinga-Park>
- <http://www.equestrianlife.com.au/articles/Roger-Fitzhardinge-reports-from-the-2nd-day-at-Willinga-Park>
- <http://www.equestrianlife.com.au/articles/First-Day-of-competition-at-Willinga-Parks-Dressage-by-the-Sea>
- <http://www.southcoastregister.com.au/story/4949048/targa-ready-for-willinga-photos/>
- <http://gallery.horsedeals.com.au/index.php?p=event&e=38886-Capricorn-Australia-Dressage-by-the-Sea-CDI>

TA17.52 Tourism Manager's Report

HPERM Ref: D17/338032

Group: Finance Corporate & Community Services Group
Section: Tourism

Purpose / Summary

To give a brief outline of the Tourism Manager's activity over August / September.

Recommendation (Item to be determined under delegated authority)

That the Shoalhaven Tourism Advisory Group receive the Tourism Manager's report for information.

Options

1. Receive the report for information.
2. Request more information from the Tourism Manager.

Things I have been across:

Destination 360 Model

What does healthy and long term sustainable tourism look like?

A large amount of time and focus has been on the beginning stages of our new model. Overall, whilst opinions on what is considered "healthy" will always be different, the project has been met with a lot of positivity by all business, community and government agencies alike. This will be a very new way of looking at tourism and is proving to already be an amazing tool for communication and collaboration. Many thanks to those members of STAG Strategy working group who have made time to be involved over the many opportunities with your thoughts and feedback helping to shape the future of tourism in our region.

What's happened on this project since we last met?

- Shoalhaven Tourism and STAG individual meetings and workshops with Simon McArthur & Associates (SM&A) to work through "what does healthy tourism look like" for our Shoalhaven across 4 key areas, economy, customer, community and environment.
- Internal one-on-one staff meetings with council stakeholders, planning, strategy, community, environment and rangers.
- Presentation to Council Section Managers
- Community Workshops in both the north and the south of the region
- Business Chamber meetings
- Presented to Jervis Bay Tourism at their AGM
- Presented to the Shoalhaven Natural Resources and Floodplain Management Committee

- Meeting with Jervis Bay Marine Park Manager

What now?

SM&A are sorting through all the stakeholder feedback and preparing a draft of optimum conditions for “healthy tourism”, ways these can be measured and recommended adaptive management. When the draft is ready we will then meet again with the STAG Strategy Working Group for feedback.

Throughout Council I have attended or presented at:

- Aboriginal Advisory Committee Meeting
- Group Directors and Section Managers meetings
- Meetings with the Mayor
- Tourism now have an Event Coordinator on a short-term contract, Monica Willis, sitting in our team Queens Baton Relay event early 2018.

Out in region:

- Tourism Team Region visits continue
- Meet and greet with the new Kiama Tourism Manager, Karen Ronning.
- Meet and greet and out in region with new Destination NSW representative
- Radio interviews
- Meeting with State Forests for potential partnership opportunities
- Delivery of Visitor Guides throughout region for school holidays

Tourism issues that have come across my desk:

- Holiday home accommodation and short-term rentals continue to be a much-debated topic with various strong opinions in the community
- Ongoing destination management concerns at key sites over summer with many towns contacting me directly including Hyams, Bendalong and Berry.

Key priorities over the next few months:

- Destination 360 Model
- Visiting Business Chambers to spread the word about tourism
- Christmas and visitors in region!

TA17.53 Future Meeting Dates for 2018

HPERM Ref: D17/338355

Group: Finance Corporate & Community Services Group
Section: Tourism

Purpose / Summary

To decide on the times, dates and regularity of the Shoalhaven Tourism Advisory Group for 2018.

Recommendation (Item to be determined under delegated authority)

That the Shoalhaven Tourism Advisory Group decide on how often meetings are to be held and agree to the proposed dates.

Options

1. Receive the report for information
2. Suggest alternative meeting date / location

Background

Traditionally STAG have not met over Dec and Jan due to peak tourism activity for industry.

Suggested meeting dates, bi-monthly

Mon 26 February 2018	NOWRA
Mon 30 April 2018	ULLADULLA
Mon 25 June 2018	NOWRA
Mon 27 August 2018	ULLADULLA
Mon 22 October 2018	NOWRA

TA17.54 Destination Marketing

HPERM Ref: D17/340575

Group: Finance Corporate & Community Services Group
Section: Tourism

Purpose / Summary

To provide a summary of Destination Marketing activity for August / September 2017.

Recommendation (Item to be determined under delegated authority)

That the Shoalhaven Tourism Advisory Group receive the Destination Marketing Report for information.

Options

1. Receive the report for information
2. Request more information

Background

Publicity Update

Trade and Industry News – Awards and Famils

2017 Savour Awards (Restaurant and Catering Association of NSW)

Regional Awards:

South on Albany - Best Contemporary Restaurant
Bannisters by the Sea – Best Tourism Restaurant
Bannisters by the Sea Pool Bar – Best Small Bar
Kohli's Nowra – People's Choice for Indian Food

Gourmet Traveller Restaurant Awards

South on Albany, Berry was top 5 in Regional Restaurants for Australia

NSW Tourism Awards – to be decided on 17 Nov at ICC Darling Harbour

Congratulations to Shoalhaven Finalists

Cupitt's Kitchen – Best Tourism, Restaurant and Catering Services

Cupitt Winery & Brewery – Best Tourism Wineries, distilleries and breweries

Big 4 Bungalow Park on Burrill Lake - Best Caravan and Holiday Parks

Mollymook Beach Waterfront – Best Hosted Accommodation

2018 James Halliday Wine Companion Awards

Cupitt's Winery and Restaurant, 1 of 3 wineries to be rated 5 stars in the 2018 James Halliday Wine Companion Awards.

DNSW Corroboree West Trade Show Famils

International agents visiting International Ready product this October

Good Food Guide 2018

St Isidore remains with one hat.

Publicity – Notable Articles (General Tourism)

Major articles listed below – many can be viewed by clicking the links, some articles still to come.

Publication	Reach	Links / Update
Getaway 30 Sept	931K	Foodscape tours – Bite around Berry https://www.9now.com.au/getaway/2017/episode-33
Sydney Weekender 10 Sept	750K	Rerun – Husky Glamping, Wild Ginger etc https://www.sydneyweekender.com.au/swe-stories/huskisson
Sydney Weekender 24 Sept	750K	Farmstay, raw food operator Berry, https://www.sydneyweekender.com.au/swe-stories/back-2-earth-retreat-berry
Canberra Times + Syndicated (Bris Times) 14 Oct	70K 706K	Best whale watching spots on the south coast https://www.brisbanetimes.com.au/national/act/where-to-see-whales-on-the-south-coast-this-spring-20171011-gyyhka.html
New Zealand Herald TBC	335K	South Coast Whale Road trip 'Dish Magazine' organised by DNSW
Australia's Best Drives TBC	NEW	New TV Show made by the same group as Luxury Travel Australia – paid for them to stay one night. Interviewed Collette Dinnigan at Cambewarra Lookout, spent the day in Jervis Bay and a little time in Mollymook.
Married at First Site Cancelled	909K	Schedule pushed the filming into Oct school holidays and Bannisters could no longer host. Shine still wants to work with us on something else.
Cosmopolitan Bride Nov mag. and website	1.2M	Similar to this – wedding location piece http://www.cosmopolitan.com.au/weddings/honeymoon-spotlight-thailand-22886
The Australian 13 October	495K	Full review – organised direct with operator http://www.theaustralian.com.au/life/weekend-australian-magazine/paperbark-camp-jervis-bay-nsw/news-story/f4b80fbc7680f99136f79fd0b4180294
The Daily Telegraph 29 September	1.2M	Big article on fishing in St Georges Basin http://www.dailytelegraph.com.au/news/nsw/st-georges-basin-now-home-to-monster-flathead-and-huge-tailor/news-story/0dcf31643ca22b5a0d0d8b4e9ff00b7f
Channel 7 News + multiple sites	1M+	Octlantis – Jervis Bay octopi living in communities https://au.news.yahoo.com/a/37143115/octlantis-jervis-bay-site-has-octopuses-filmed-living-together/
ABC Catalyst 22 August	800K	Story on seaweed heavily featuring the Shoalhaven, Nowra, seaweed etc http://iview.abc.net.au/programs/catalyst/SC1602H002S00
'Now to Love' online Bauer Media 27 Sept	200K	Best travel destinations from Sydney https://www.nowtolove.com.au/travel/destinations-cities/sydney-weekend-away-holiday-destinations-41246
Daily Telegraph 4 August	1.2M	Pelican Rocks wins best fish and chips in NSW http://www.dailytelegraph.com.au/newslocal/wentworth-courier/pelican-rocks-cafe-at-greenwell-point-win-award-for-best-fish-and-chips/news-story/768275adae3d4ddc68d16f5259db1cba
Domain News Sept 23	400K	Kangaroo Valley is the new inland Byron Bay (real estate) https://www.domain.com.au/news/why-kangaroo-valley-is-australias-inland-answer-to-byron-bay-20170923-gybuu1/

Publicity Update – Foodie Famils

We have just completed a couple of months of Foodie Famils with both traditional journalists and influencers. There has been huge coverage on social media – both Instagram and instastories mainly – but most of the articles are still in the works – we have a few here for you to read:

Publication	Reach	Links/ Update
Luxury Travel Magazine	40K Readership, 13K Facebook	2 stories coming – one on Kangaroo Valley + Nowra & one on Milton / Mollymook
Delicious Magazine	575K Readership, 745K Facebook	Fine Dining story coming – in print and online
The Fit Foodie @thefitfoodieblog	61K Readership, 89K Instagram	Waiting on a blog but many insta posts that did really well
Naturally Nutritious @naturallynutritious	144K Instagram, 2K Facebook	BLOG: melanielionello.com/blog/shoalhaven-coast
Eat Drink Play @eatdrinkplaysyd	70K readership, 41K Instagram	Article coming, Instagram posts @eatdrinkplaysyd
Wine Wankers @winewankers	500K Readership, 162K Instagram	Just left – Instagram posting 1000+ likes. Bannisters and Cupitt etc
I Ate My Way Through @iatemywaythrough	72K readership, 26K Instagram	BLOG: iatemywaythrough.com/2017/10/shoalhaven-foodie-trail-ulladulla-milton-mollymook-huskisson-and-berry/
See Taste Do	1M Readership, 20K Instagram	Two blogs: http://www.seetastedo.com/2017/09/travel-diaries-nsw-weekend-escape.html http://www.seetastedo.com/2017/09/travel-diary-things-to-see-taste-and-do.html

TA17.54

June 2018 Quarterly results
(Tourism Research Australia results)



TA17.54

Unspoilt update

Results as of Oct 5:

Campaign Duration - 54%

Visits - 582,792, 50% to target (+14% YOY)

Leads - 195,409, 49% to target (+12%YOY)

Video Views - 483,991 completed views

2018 Campaign: Shoalhaven, on behalf of the South Coast marketing partners, have applied to DNSW for a combined \$470K to be matched by Destination NSW for a total \$940K campaign. Campaign is in development now, with timings to be Autumn, Winter, Spring and couples and families as the main demographics and talks about new video to be shot with thanks to the South Coast Regional Tourism Organisation (SCRTO) have formally decided to

close and have kindly donated some funds to the group for the creation of new video for the 2018 campaign.

Adventure Activations (Spring and Autumn)

Our Favourite Walks:

10,000 A5 books printed and being distributed to operators through our Visitors Centres. The book has been very popular and there has been a huge demand. We have a small amount of social media on adventure activities and walks during Spring, and will launch a landing page and further campaign in Autumn that will include distribution in Sydney and Canberra, social media campaign, publicity with selected adventure publications.

We Are Explorers visit:

The adventure blogger group sent 6 influencers over early October to engage in a five day adventure and capture three videos and 50 images as well as an online campaign with the We Are Explorers site. The activities were based around inland adventure and will fill a gap in our marketing materials including: overnight hike in Morton National Park, Mountain Biking, and overnight Pack Rafting in Kangaroo Valley.

Video live - 'Our Stories'

Andy our inhouse videographer just completed our first series of videos for our 'Shoalhaven Stories' collection. A full series of 6 videos on food and producers has been doing really well across social media – different versions on Facebook and Instagram. Please watch our videos below if you haven't already.

FOOD SERIES videos can be viewed at:

Sam from Pelican Rocks Greenwell Point:

facebook.com/visitshoalhaven/videos/1849030441793382/

Danielle From Milk Haus Milton:

facebook.com/visitshoalhaven/videos/1840063222690104/

Goodnight Oysters Greenwell Point:

facebook.com/visitshoalhaven/videos/1807858375910589/

John from South on Albany Berry:

facebook.com/visitshoalhaven/videos/1807745329255227/

Andrew from Mavericks Coffee Ulladulla:

facebook.com/visitshoalhaven/videos/1807865692576524/

Alex from St Isidore, Milton:

facebook.com/visitshoalhaven/videos/1803804139649346/

We are now moving on to Spring videos on Nature, Wildlife and Adventure and will cover operators in the areas of:

ADVENTURE / WILDLIFE / NATURE Series:

Whale and Dolphin Watching

Kayaking and SUP

Shoalhaven Zoo experiences

Bomaderry Gorge with Aboriginal Discovery Ranger

plus some additional operators to be determined.

2018 Visitor Guide

The 2018 Visitor Guide is about to go to the printer. All content has been developed over the past few months, and proofing is underway. We made approximately \$50K on advertising and have reduced some of the free listings in the back to have more ads. Accommodation and Dining listings took up 12 pages and have been removed this year. 100K copies will be printed and be with us and in distribution for early December ready for Christmas holidays.

The design has developed over the last two years and editorially the book has stepped it up to the next level with use of imagery and design, credit to Lisa Friebe for her use of design and development of the brand identity. The guide connects with the new consumer experience of building itineraries on the website and connects to much of our video content and rich content experiences online. Please keep an eye out for the book in the coming weeks.

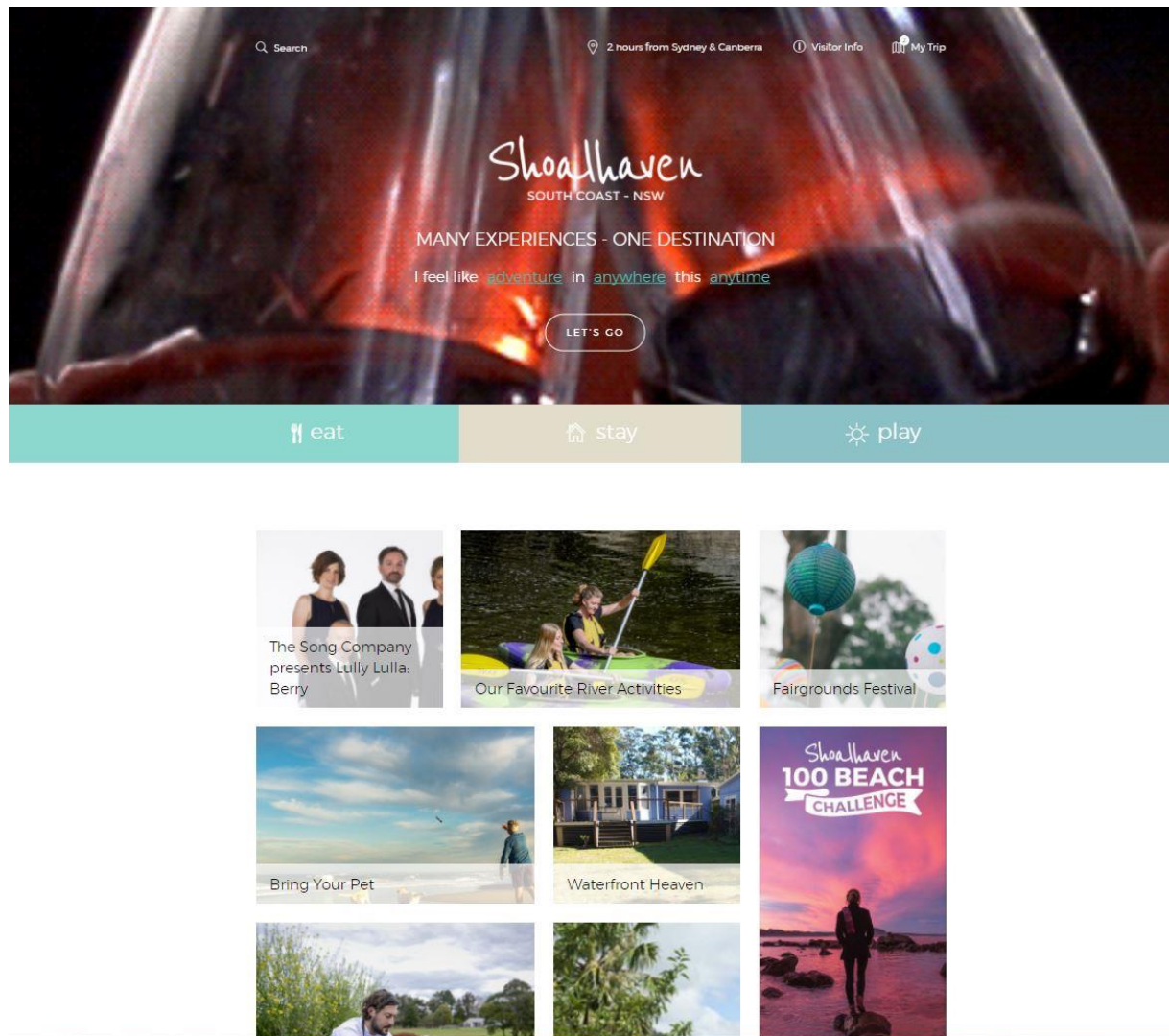
100 Beach Challenge Update

We have had two new finishers in the 100 Beach Challenge online game. A pair of Indian students saw the video of the first finisher – Shane Treacy who completed the game in three months. They took the challenge to finish the game in three weeks and did so.

The 100 Beach Challenge itinerary videos created by Paste Studios have been launched and featured via social channels with the new website. Each itinerary connects with a demographic and suggests a three-day holiday by engaging with product and operators.

Website Development Update

The website is now live on shoalhaven.com. We thank the STAG members who have been testing the site for us and are very excited to have a user friendly site that is based on building an itinerary. The team has worked very hard on launching inspirational landing pages and content along with the launch and related content is served to the user which creates an engaging experience. We encourage the STAG members to engage with the site and send any feedback direct to Coralie.



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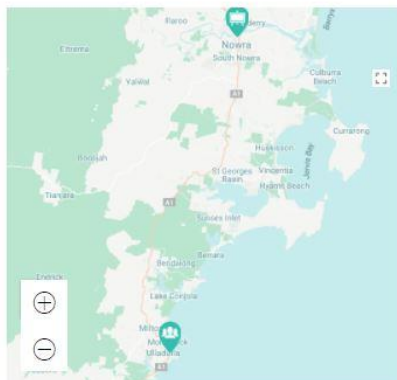
download our
visitor guide
all the juicy local
knowledge



START YOUR WISH LIST



events to explore...



Digital Marketing Update - Prepared by Georgia Herring

August 1 – September 30, 2017

Facebook @visitshoalhaven



Instagram @visitshoalhaven

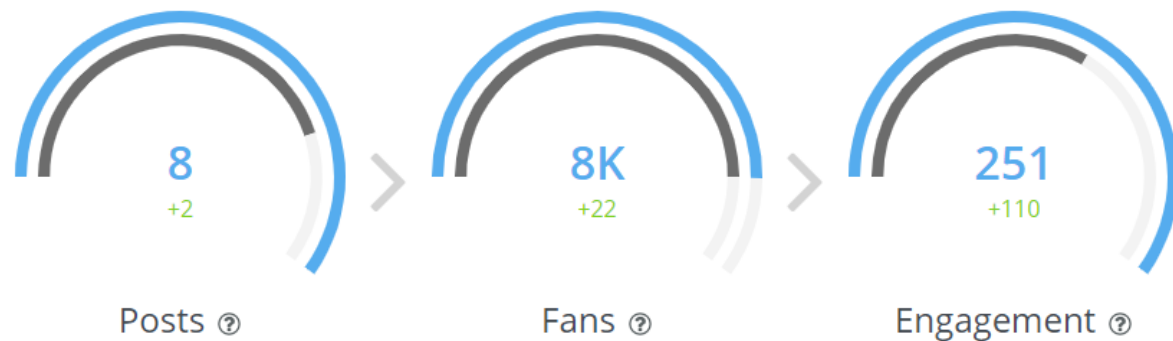
TA17.54



Twitter @visitshoalhaven



Facebook @weddingsouthcoast



Visitor EDM

August:

3433 recipients
33.2% open rate
Most clicked link – Granite Falls

September:

3453 recipients
32.8% open rate
Most clicked link – Walks Brochure

Tourism Talk

August:

1174 recipients

29.4% open rate

Most clicked link – Facebook Videos

September:

1163 recipients

29.5% open rate

Most clicked link – Walks Brochure

There are no exceptions to this report

TA17.55 International Marketing Analysis

HPERM Ref: D17/345093

Group: Finance Corporate & Community Services Group
Section: Tourism

Attachments:

1. Quarterly update June 2017 - PUBLIC VERSION [↓](#)
2. Confidential Annual Report (Confidential - under separate cover)
3. Confidential Contract (Confidential - under separate cover)
4. Research - Trade and Consumer Sediment and the potential of the Chinese Market (Confidential - under separate cover)
5. Shoalhaven Travel Experience Research - Travel Reviews - Social Listening (Confidential - under separate cover)
6. 17/18 Partnership Proposal (Confidential - under separate cover)

Purpose / Summary

International Marketing Program for 2017/2018

Recommendation (Item to be determined under delegated authority)

That the Shoalhaven Tourism Advisory Group

1. Commit to 6 months of international marketing with current partner and;
2. Form a working group to further investigate international marketing opportunities and report back to STAG by the end of 2017 on an appropriate international marketing strategy for 2018 and beyond.

Options

1. Commit to 6 months of international marketing with current partner, and, form a working group to further investigate international marketing opportunities and return to STAG with recommendations on strategy for 2018 and beyond.

Implications: Continue in market whilst compiling research and a more in-depth market review, potentially diversify international marketing strategy. Potential to test the market with quotes from other international marketing companies.

2. Leave as is with current international marketing business partner for the next 12 months.

Implications: The existing partner has performed very well to date. However International marketing is a critical growth area and an examination of opportunities should be considered. Not recommended.

3. Do not continue with current partnership and create a new international marketing strategy.

Implications: Diversify international marketing strategy, resourcing is a consideration long term. A review will take time and there will be a period when the region is not being promoted, risk losing traction in a growing market, not recommended.

Background – Current Business Partner relationship

Asia marketing with current business partner

- Shoalhaven Tourism has been working with the one international marketing business partner for several years. This partner promotes the region into primarily Asian countries as 'Jervis Bay'.
- Markets serviced by our partner are China, Korea, Singapore, Malaysia, Indonesia, Vietnam, Taiwan, Hong Kong, Indonesia, India.
- Investment primarily markets up to 40 Shoalhaven products (Mainly Jervis Bay and North) to wholesalers and agencies in international offices and at trade shows.
- The typical traveller has pre-booked a package and is coming to the Shoalhaven ex Sydney for 1-2 days maximum. They experience a few products and then return.
- Packages are booked through international agents who take commissions and our business partnership services those agency relationships to continue getting bookings.
- An international bi-lingual website is maintained (inspirational, no booking platform)

Recent Results - Financial year 2016/7

Attachment 1 – Public quarterly partners report

Attachment 2 - CONFIDENTIAL, Commercial in Confidence – Annual wrap up report

Strengths:

- Built strong relationships with wholesalers
- Local business, happy to assist in advocacy across the whole region for international tourism
- Good for awareness and potential return higher yield trips as FIT
- Represents 40 products in region to several Asian markets
- Asian market is growing but off a very low base so figures are still small
- Forecasts are for the Asia market to boom

Weaknesses:

- Low yield and day trip market from Sydney – product is highly discounted
- Low visitor nights' return (average stay is 1.26 nights)
- Need more cheap hotels to continue growing this market and many nights re currently places out of the Shoalhaven
- Difficult to get return on investment figures for FIT efforts.
- Asia is a highly volatile market which requires a high level of active maintenance to grow.

2016 review and research

In 2016, Council undertook a review of consumer sentiment and market potential in the Chinese market. This report involved desktop research, interviews with key stakeholders, an audit of consumer sentiment and recommendations on future opportunities.

Attachment 4 for the full report

Attachment 5 for a summary of consumer sentiment, travel reviews.

Current Situation

Our current business partner has approached Shoalhaven Tourism to partner for another 12 months, with contract deliverables reasonably similar to last year and a decision needs to be made about plans for the next 12 months.

Attachment 3 - CONFIDENTIAL, Commercial in Confidence – last year's contract

Attachment 6 – CONFIDENTIAL, 2017/18 Partnership Proposal

Trends and ResearchMarketing Trends – International [excerpt from DMP]

For the **OVERSEAS MARKET**, the Shoalhaven represents the quintessential “Aussie experience” – pristine beaches, natural wonders, aboriginal cultural experiences, iconic Australian wildlife and a fast-growing food and wine scene that has achieved recognition both nationally and internationally. The proximity to Sydney and the growing international focus of Canberra provides an opportunity as key market segments package regional visits with the Aussie City “must Do’s”. There is also an increasing tendency of the international ‘millennial generation’ more likely to travel by themselves outside capital cities than their parents, who often preferred traditional tours.

Traditional Markets

European, UK, USA, New Zealand markets have been drawn to Australia for many years due to a cultural and VFR connection as well as traditional marketing such as TV ads in the 90s. Most are still growing with barely any maintenance and together hold a large share of the market.

Emerging Markets

There has been a recent push and investment into the Asia market which shows high potential for the future and high growth. Research also indicates high forecast growth in Independent travellers from China, Korea and in the longer term, India.

Types of travellers

Markets must either be FIT (Free Independent Travellers) or come on organised bus tours (often day trips from Sydney). Bus tourists are relatively low yield but may come back again as FIT (Asia market). FIT can come for anywhere between 2 and 30 nights so more analysis should be done into these higher yield markets. The business market is a potential high yield market from Sydney and Canberra if product development can meet demand potential.

International Visitor Survey results 2015/6

Our research consultant utilised Tourism Research Australia results from 2015/6 to ascertain the visitors, visitor nights (and therefore yield) and the growth on previous biannual period.

Key insights:

- Traditional markets are still our largest visitor groups
- Traditional markets stay longer and therefore spend more
- Asia markets have strong growth but off low bases
- Current Asia market stay for very short periods of time in region



International Product Analysis

Based on this same International Visitors Survey as above, we have created a growth-share matrix, also known as a product portfolio mix. This business model helps us to identify opportunities and analyse the businesses opportunities. Based on market size and growth, the following matrix has been collated.

Key insights:

- All of our international funds are placed in high risk markets with high growth (traditionally called 'question marks')
- Traditional markets make up the most favourable for growth and market share but we don't invest anything into maintaining these markets. (traditionally called 'stars')
- Overall we invest all of our international our marketing funds into high risk markets and don't market at all to our 'established and growing stars'.

Risky with high potential

(low market share and high growth)

- Korea (191% growth, 4K/yr.)
- India (300% growth, 2K/yr.)
- Indonesia (536% growth, 2K/yr.)
- Hong Kong (354% growth, 7K/yr.)
- China (354% growth, 6.2K/yr.)
- Malaysia (36% growth, 3.3K/yr.)

Established and growing

(High market share and high growth)

- New Zealand (52% growth, 35K/yr.)
- Canada (150% growth, 20K/yr.)
- United Kingdom (19% growth, 63K/yr.)
- Scandinavia (71% growth, 12K/yr.)
- France (51% growth, 14K/yr.)

Not likely to profit

(low market share and low growth)

- Italy (30% decrease, 3k/yr.)
- Japan (40% decrease, 3k/yr.)
- Netherlands (18% decrease, 7K/yr.)
- Switzerland (65% decrease, 1.3K/yr.)

Established but in downturn

(high market share and low growth)

- USA (0% growth, 28K/yr.)
- Germany (-13% decrease, 20K/yr.)

Future thinking

International Marketing Opportunities:

- New flights to Canberra International Airport provide a new Singapore-Canberra-Wellington flight route, just 2 hours from the Shoalhaven.
- The new Badgery's Creek airport will provide a closer connection to International travellers and will be open by 2030.
- China is one of the largest inbound markets to Sydney but the vast majority don't travel regionally.
- The Western Sydney market makes up 10% of Australia's population and the diversity of these communities is broad and vast, offering access to an international VFR market.
- Our largest opportunity remains international travellers ex Sydney and Grand Pacific Drive is marketed internationally.
- The Sydney – Melbourne Touring Route is currently marketed to an international FIT drive market and we are a participant but at a very low investment level.
- The Capital to Coast touring route markets internationally and Visit Canberra, Sapphire Coast and Eurobodalla invest well. We currently do not.
- There is also a growing number of agencies that can be contracted for international marketing and social media marketing.

Summary

There are many international marketing opportunities available to the Shoalhaven, so many more than several years ago when the channels for direct marketing such as online, didn't exist. There is also cultural move toward FIT travellers in Australia with a new more adventurous generation that can feel confident researching and planning their own trips online. These FIT travellers are higher yield than the bus day-trippers or overnights and have less impact on the capacity of our small towns.

In short, the marketing team recommend an investment of some time in a complete review of the international marketing opportunities available and what new ideas for international markets currently not utilised by Shoalhaven Tourism could be uncovered. A review considering the new Sustainable Tourism Model outcomes could be timely considering potential additional measures of success.

DISCOVER JERVIS BAY – 2017 JUNE QUARTER UPDATE



DISCOVER JERVIS BAY



"the trusted voice of international tourism for the South Coast"



DISCOVER JERVIS BAY – 2017 JUNE QUARTER UPDATE

INTRODUCTION

HIGHLIGHTS

The previous DJB March quarter report showed record numbers of International visitors, especially overnight, across what is known as International High Season. It should be noted the April, May, June period is considered Asian low season yet our ability to attract International visitors continues to flourish and especially attracting high growth in overnight visitation.

During the quarter DJB attended Australian Tourism Exchange (ATE) in Sydney and invited partners of DJB to attend under day passes to feel the scope of competition and the size of the inbound arena we compete in every day.

Key highlights (June quarter 16 verses June 17)

Total Room Nights + 115%

Archer Resort Accommodation +254%

Jamberoo Resort + 198 %

Bigfoot 4WD Tours +104%

Coolangatta Winery +43%

Dolphin Watch +4.97%

Summation – The more overnight stays created, the more opportunity for more product attraction inclusion.

Matt Cross

General Manager

Discover Jervis Bay

DISCOVER JERVIS BAY – 2017 JUNE QUARTER UPDATE

PERFORMANCE

	June Quarter 2017	% chg from June Qtr 2016
<i>Accommodation</i>		
- Actual rooms placed	2441	+211%
- Rooms not placed	364	-29.4%
Total room nights	2805	
<i>Products</i>		
- Archer Resort	1608	+254%
- Marketview WG	Contract is only Dec to Mid Feb	
- Jamberoo Resort Kiama	235	+46%
- Dolphin Watch Cruises	8086	+4.97%
- Bigfoot 4WD Tours	1271	+104%
- Coolangatta Wines	1664	+43%
- Sage Hotel WG	346	New Partner
<i>Catering/Restaurants</i>		
- Total Meals Served	9370	+16%
- Eastern Tiger Buffet	4078	+16 %
- House of Guanzhou	380	New Partner
- Club Jervis Bay	2501	+1.7%

TRADE SHOWS ATTENDED & INTERNATIONAL SALES MISONS

Australian Tourism Exchange- ATE – May 2017

DNSW in partnership with Tourism Australia hosted ATE in Sydney over 14-19 May. The planning and hosting of famils (details below) lasts the best part of 5 weeks, with DJB officers scheduling meetings, pre communication of the proposed meeting, attendance at actual event, Pre and Post Famils and the all important follow up with each agent after the event.

With direct and indirect meetings over the period DJB met with well over 100 wholesale agencies.

Attendance at such event is financially costly and draining on time and resources. To showcase the scope of competition and the position and respect of DJB in the marketplace, DJB invited product partners to attend under a very cost effective day pass visitation.

DISCOVER JERVIS BAY – 2017 JUNE QUARTER UPDATE

In attendance was:

Coralie Bell - Shoalhaven Tourism Manager

Louise Hallum - STAGG member

Stuart King - Director
Discover Jervis Bay

Blair Briggs -
Mowbray Farm



FAMILS

02/4/17 AUS China, Director and guest wholesaler destination inspection.

05/4/17 Korean ITO 20 year anniversary dinner.

16/4/17 China ITO Shoalhaven Zoo, Nowra Tree Adventure, Eastern Tiger Buffet.

16/4/17 China SIC Day tour company, DWC, Bigfoot and Coolangatta Winery.

16/4/17 China VVIP Shopping inspection Faml Visit Overnight hosting.

29/4/17 China FIT- Online agency meeting DJB looking at API and website direct connection.

03/5/17 Euro 4.0 star + high-end inspection Jervis Bay and Sth Highlands products.

07/5/17 DNSW pre ATE Coolangatta Winery, Bigfoot, DWC and Huskisson Hotel Lunch.

11/5/17 Vietnamese Airlines Famil.

13/5/17 Shanghai China wholesaler over night famil- all destinations.

13/5/17 DNSW pre ATE Euro Sing Malay Famil.

DISCOVER JERVIS BAY – 2017 JUNE QUARTER UPDATE

13/5/17 Indian Wholesaler Famil.

19/5/17 BJ Wholesaler and 2 Korean wholesaler combined famil Overnight all attractions.

20/5/17 TA Indonesia and 3 wholesaler, new opportunity, new market - full destination Overnight.

29/5/17 Southern China SZ Major wholesaler family famil and key staff Mowbray Farm.

03/6/17 Vivid GZ HK Famil overnight.

05/6/17 Vivid BJ wholesaler overnight.



ITO SALES CALLS

18-21 June - Melbourne - 15 agencies, mix of Vietnam, Chinese and Sth East Asian, full update across entire destination. This coincides with our new office, representative based in Malaysia, two pronged approach to market.

22 June - Sydney ITO x 5 meetings.

UPDATE ON DJB PARTNERS

NEW PARTNER : PARKHAVEN RESORT NOWRA

BACKGROUND: Formally know as Parkhaven Motel, this 30 room, 4.0 star hotel located in Nowra will have new owners from 12 July.

DJB was approached on how to upgrade and modify the existing property to allow the introduction of International business.

PRODUCT DEVELOPMENT : The current rooms feature a queen and a single bed, DJB offered advice to capture the International markets, needing at least 1 King bed, with option of splitting into two equal size king singles. As the hotel requires, they can add a king split and a king single to make a family or triple room. All new bedding with arrive on 12 July!

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Additionally the previous name of 'Motel', is not acceptable to International markets, hence the new owner has been working for the property to be rebranded into Parkhaven 'Resort', this will be reflected across all websites and signage throughout the hotel.

OUTCOME : First booking has been placed to hotel, pending all the above being finalised. DJB will undertake hotel inspection and photography session after 12 July and will be a mass social media release to our agencies.

ISSUES

NEED TO ATTRACT INVESTORS

Council staff meeting with Gareth Ward, Lord Mayor and relevant planning staff.

DJB briefed Council on the underlying growth and International hotel demand.

Lord Mayor and relevant Council staff spoke of their understanding and also the work done already behind the scenes within Council to open the door for consortiums or developers to approach Council with appropriate Tourism Infrastructure, namely hotel accommodation applications.

No major projects are on the table as yet.

There was discussion about the "Gateway" site immediately to the north of Council and to the east of the Shoalhaven Conference Centre. Most agreed this site has great synergies with tourism infrastructure and would be a natural backbone to the existing Entertainment Centre.

There was discussion on Council possibly doing their own initial DA to offer an easier road for a possible developer, this idea had mixed feelings.

Gareth tabled that this site would need feedback from RMS as they may need land for road widening due to Nowra Bridge redevelopments.

Knowing this is likely the best, key site within the Nowra CBD, DJB is in regular contact to Gareth Ward seeking responses from RMS- no further information to date.

DJB PRODUCT PARTNER WORKSHOPS

Planned for mid 2017.

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ONLINE BOOKING SYSTEM

INTERNATIONAL- FIT ONLINE BOOKING CHINA

Ongoing - DJB has successfully listed key destination attractions on 5 major Chinese wholesalers websites and booking engines. Some new agencies noted at ATE and the proposed Aug/Sept sales missions will provide deeper feedback. DJB will retain resources our Chinese staff member and proposes to continue this growth and finding new agencies to connect.

INTERNATIONAL- FIT ONLINE BOOKING KOREA

Ongoing - Look for appropriate staff member. DJB proposes to hire a Korean staff member to facilitate a similar start to connecting to Korean online agencies.

OUTLOOK

FORECAST OF COMING EVENTS

1. High season planning has commenced .
2. DJB planning International sales calls to cover China, Vietnam, Korea and additionally DNSW Missions (as appropriate) and FIT Wholesaler Trade Shows.
3. Planning DJB Workshop - discussion on DJB hosting events in Sydney, bringing our clients all together for destination update and product representation.

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