

## Shoalhaven Tourism Advisory Group

**Meeting Date:** Monday, 27 February, 2017  
**Location:** Meeting Room 2 - Ulladulla Civic Centre, Princes Highway Ulladulla  
**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

TA17.7	Verbal report - Council amenities and waste update <i>Verbal update on amenities maintenance and rubbish collection in the Shoalhaven Region</i> <b>Brett Carter</b> , Assets and Works, Park Operations <i>Rubbish collection in public spaces, council parks and areas.</i> <b>Brad Davis</b> , Assets & Works, Asset Management Cleaning of public amenities in Council managed public properties	
TA17.8	Verbal Report, Brett Carter, Unit Manager - PARKS AND FACILITIES <i>After lots of feedback and talk from Tourism business and visitors over our busy season about cleaning of amenities and rubbish pick up schedules, Brett will give a verbal update on schedules and strategy of Parks and Facility cleaning.</i>	



**Membership**

Clr Alldrick  
Clr John Wells  
Clr Jo Gash  
Clr John Levett  
Clr Greg Watson  
Clr Mark Kitchener  
Ms Lynn Locke - Chairperson  
Mr David Goodman  
Ms Michelle Bishop  
Ms Melissa McManus  
Mr Stephen Bartlett  
Mr Matt Cross  
Ms Annie Cochrane  
Mr Matthew Forbes  
Ms Catherine Shields  
Ms Jo Thomas

Quorum – Majority of the members

**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, 24 October 2016  
**Location:** Jervis Bay Rooms, City Administrative Centre, Bridge Road, Nowra  
**Time:** 5.00pm

The following members were present:

Ms Lynne Locke - Chairperson  
Clr Joanna Gash  
Clr John Wells  
Clr Mark Kitchener  
Mr David Goodman  
Ms Catherine Shields  
Ms Michelle Bishop – arrived 5.15pm  
Ms Melissa McManus  
Mr Stephen Bartlett  
Mr Matt Cross  
Ms Annie Cochrane – arrived  
Mr Matthew Forbes  
Ms Jo Thomas

Others Present:

Clr White  
Clr Proudfoot  
Clr Pakes  
Coralie Bell – Tourism Manager  
Shannan Perry-Hall – Tourism Events and Investment Specialist  
Joe Puglisi – Visitor Services Manager  
Kristy Mayhew – Marketing Specialist  
Georgia Herring – Digital Marketing Assistant

### Apologies / Leave of Absence

Apologies were received from Clr Watson, Clr Findley

### Confirmation of the Minutes

**RESOLVED** (David Goodman / Clr Gash)

That the Minutes of the Shoalhaven Tourism Board held on Monday 25 July 2016 be confirmed.

CARRIED

**Declarations of Interest**

Nil

**REPORTS****TA16.1 Tourism Manager's Report****HPERM Ref:  
D16/316064****Recommendation (Item to be determined under delegated authority)**

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

**RESOLVED** (Matt Cross / Stephen Bartlett)

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

CARRIED

**TA16.2 Destination Marketing****HPERM Ref:  
D16/316136****Recommendation (Item to be determined under delegated authority)**

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

**RESOLVED** (Clr Wells / Melissa McManus)

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

CARRIED

Note:

Surfing has been a really popular campaign along with the Spring Unspoilt. The new visitors guide will be going out in December.

The focus is on the new website [www.shoalhaven.com.au](http://www.shoalhaven.com.au) and the summer campaign 100 Beach Challenge.

Note: Michelle Bishop arrived at the meeting.

**TA16.3 Events and Investment****HPERM Ref:  
D16/316082****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 / Michelle Bishop)

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

CARRIED

Note:

The Golf Courses used in the Shoalhaven Week of Golf event will be: Nowra, Shoalhaven Heads, Worrigea and St Georges Basin.

Staff will report back to the Committee in relation to the funds for the Indigenous Football Championships.

#### **TA16.4 Visitors Services**

**HPERM Ref:  
D16/316148**

##### **Recommendation (Item to be determined under delegated authority)**

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

**RESOLVED** (Stephen Bartlett / Matt Cross)

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

CARRIED

Note:

New staff are arriving in the next few weeks, which will provide more services for the public as the ticketing is taking time, with new staff will have more time for tourism.

Receiving mostly positive comments from the public in relation to the new VIC.

If businesses bring in brochures we don't put them all out due to space. However we do have digital display if businesses send an electronic brochure.

#### **TA16.5 New Member Inductions**

**HPERM Ref:  
D16/320203**

##### **Recommendation (Item to be determined under delegated authority)**

That the Shoalhaven Tourism Advisory Group receive the report for information.

**RESOLVED** (Clr Wells / Melissa McManus)

That the Shoalhaven Tourism Advisory Group receive the report for information.

CARRIED

#### **TA16.6 Future Meeting Dates**

**HPERM Ref:  
D16/320141**

##### **Recommendation (Item to be determined under delegated authority)**

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

**RESOLVED** (David Goodman / Michelle Bishop)

That the future meetings for the Shoalhaven Tourism Advisory Group be held bimonthly.

CARRIED

Note: The meetings begin in February 2017 and not coincide with any conflicting appointments. The first meeting be held in Ulladulla.

Note: Annie Cochrane arrived 5.30pm

**TA16.7 Chair's Report****HPERM Ref:  
D16/320401****Recommendation (Item to be determined under delegated authority)**

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

**RESOLVED** (Michelle Bishop / Melissa McManus)

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

CARRIED

Note:

New members are encouraged to attend any events in the Shoalhaven as a STAG representative.

The Events Calendar on the Web is updated.

Tourism Induction workshops are available for new members and any others interested, to contact the Tourism Manager.

The Riverfest was very good, ran smoothly this year and the parade was well received. Locals want to see local entertainment and the Fireworks were fantastic. The market stalls and the food were great with lots of variety. The pontoon was well used and we have different ideas for use next year. The colour run attracted lots of participants and thanks go out to the team and volunteers.

The Navy wish to be further involved in the event next year.

**TA16.8 STAG Working Group Updates****HPERM Ref:  
D16/316147**

Note: Clr Gash left the meeting at 5.40pm

Note: Clr Wells left the meeting at 5.40pm

**Recommendation (Item to be determined under delegated authority)**

That the Committee receive the Working Group report for information.

**RESOLVED** (Michelle Bishop / Annie Cochrane)

That the Committee receive the Working Group report for information.

CARRIED

We need the Wedding Industry to be working together cohesively. We have a good wedding website and need to bring it back to one major wedding expo event for the region. A meeting will be held after Christmas to look at how this will work seek industry feedback.

The walking group are working to create a brochure including the iconic walks of the Shoalhaven and we are seeking feedback from the National Parks. Also working on a joint partnership for joint funding a southern walks project.

**TA16.9 Industry Presentation: International Tourism in the Shoalhaven.****HPERM Ref:  
D16/319582**

Note: Cllr Alldrick left the meeting at 6.06pm

Note: David Goodman left the meeting at 6.06pm

Note: Cllr Pakes left the meeting at 6.06pm

Note: Cllr Proudfoot left the meeting at 6.06pm

Note: Cllr Kitchener left the meeting at 6.06pm

**RESOLVED** (Lynne Locke / Catherine Shields)

That the presentation from Matt Cross be received for information.

Note:

Matt Cross provided a presentation on Discover Jervis Bay and regional and international destination marketing.

**GENERAL BUSINESS****TA16.10 Representative for the Business and Employment Development Committee**

A representative from the STAG is to be nominated to be a member of the Business and Employment Development Committee.

**RESOLVED** (Michelle Bishop / Melissa McManus)

That Steve Bartlett be the nominated representative from STAG on the Business and Employment Development Committee.

CARRIED

**TA16.11 Long Table Feast - Earth Wind Fire Water**

Annie Cochrane advised the Meeting of a recent event that took place in Milton. Long table feast and the event raised approximately \$28,000 for Jindilara respite care.

We are wanting to put the Shoalhaven on the map as a food destination.

**TA16.12 South Coast Tourism Awards**

Catherine Shields advised that the South Coast Tourism Awards are being held on Wednesday 26 October 2016 and we have a few finalists from the Shoalhaven. The event is being held at the HARS Aviation Museum – Illawarra Airport.

Southern food operators operating as the "Food Alliance" are also State finalists for the Unspoilt Campaign.



Note: Michelle Bishop left the meeting at 6.37pm

There being no further business, the meeting concluded, the time being 6.43pm.

Ms Lynne Locke  
CHAIRPERSON

## TA17.1 Tourism Managers Report

**HPERM Ref:** D17/29356

**Group:** Corporate & Community Services Group  
**Section:** Tourism

**Attachments:** 1. Tourism Action Plan Summary FEB 2017 [↓](#)  
2. Green Plaque Project, progress report Jan 2017. [↓](#)

### Purpose / Summary

To give a brief outline of Tourism Manager Activity over the last quarter.

### Recommendation

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

### Tourism Manager Update

Wow, what a busy season! From all accounts, all I keep hearing is that we are busy and that people are everywhere. After having three weeks off I am now back and running full pace.

*Throughout council I have been across;*

- Walking working group meetings
- "Walking on country" Aboriginal video project
- Budget training
- Fees and Charges updates
- Council quarterly reporting
- Arts Centre promotional project
- International delegation council to council meetings

*Out in region*

- VIC staff out in region in Husky and Hyams in partnership with the ranger's services
- Catch up with neighbouring LGA tourism groups and Book Easy
- Site visit at Terry Snows equine property – Willinga Park
- On the ground, Visitors Guide distribution
- Meetings with National Parks
- Hyams Beach CCB meetings on issues with traffic and tourism
- Met with Illawarra Business Chamber representatives

- Met with Sussex Inlet community about promotion of the region
- Anthony Lavour from Destination NSW was in region presenting outcomes of the unspoilt campaign to regional councillors
- Met with Kangaroo Valley tourism about their priorities and how we can help
- Met with Redhead Village Association - Manyana and Bendalong community group about tourism related issues.
- ... and let's not forget the Christmas parties all over the place!
- Beach Wheelchair launch
- Disability Inclusion Action Plan

*Tourism issues that have come across my desk;*

- Drawing room rocks continues to have access issues
- Brogers Creek swimming hole, local issues with access
- Bendalong, traffic and access, plus concerns with surf schools
- Huskisson main street upgrade requests from local business community
- Amenities, cleaning and rubbish collections over busy periods
- Traffic issues at Lake Tabourie, google maps access issue, now resolved.

*As a team tourism have delivered;*

- New website contractor engaged and currently in development
- Formally a new permanent position in our team structure for a graphic designer, interviews completed early Fe 2017.
- Formal approval for a contacted Multi Media contract position
- Visitors services to over 9000 enquiries out in region!
- Ongoing features in media including 4 major articles in Canberra Times
- Visitors Guide out in region with consistent positive feedback
- New STAG member's recruitment - in progress now

*I have attended and / or presented at;*

- Adventure World Race – opening ceremonies and more
- South Coast Tourism Awards
- Kiama Tourism After Hours
- NSW Tourism Awards with the 'Unspoilt' campaign 2016 a finalist.

*Tourism Grants approved;*

<i>Applicant</i>	<i>Grant</i>	<i>Project</i>	<i>Date</i>	<i>\$ amount</i>	<i>Approved</i>
Jervis Bay Tourism & Promotions	Precinct Marketing	Jervis Bay Tourism Visitor Free Maps - Edition 4	19/12/2016	\$4,997.50	Approved. Required a print run before Christmas.
Berry District Historical Society	Tourism Development Funding	Green Plaque Project – Historical buildings in Berry	10/10/2016	\$5000	Approved, see Attachment 2 for progress report.

Sussex Inlet Chamber of Commerce & Tourism	<i>Precinct Marketing</i>	Jacobs Drive Street Banners	6/2/17	\$2,293.50	<i>Approved.</i>
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*Key priorities over the next few months;*

- Website development
- New Tourism Master Plan / Sustainable Tourism Plan
- 17/18 budget planning and forecasts
- 17/18 business plans
- Local Government Tourism Conference (presenting)
- Inclusive Tourism
- Developing capability for developing conferences and events

Please see Attachment 1: Tourism Action Plan Summary FEB 2017 for an updated overview of business plan actions and status as requested.

## Tourism Delivery Plan Update

### Tourism Management

Thinking about it / not yet started	Working on / ongoing	Completed
	<b>Industry feedback and contact:</b> Survey scheduled for end of October  <b>Collaborative networking activities:</b> regular industry one-on-one contact, attendance and presentations at industry meetings; regular industry contact via email newsletter; regular attendance at STAG and relevant council meetings as needed.  <b>Ensure delivery of all KPIs, milestones and business:</b> regular staff meetings; up to date performance management and EPR's; reporting and delivery in line with requirements of council	<b>Business Plan</b>

### Infrastructure

Thinking about it / not yet started	Working on / ongoing	Completed
	<b>Ensure tourist basic infrastructure are of high standard and meet demand;</b> discussion and working with Assets on delivery of strategic plans  <b>Promote tourism infrastructure development grants</b> for improvement of infrastructure needs.  <b>Work with Council, National Parks, State and State Forests to identify possible upgrades and promotion opportunities;</b> in line with strategies outlined in the Master Plan. E.g. have met with National Parks new tourism rep Imelda and am in regular contact plus working with National Parks on a joint funding application for the southern Shoalhaven walk  <b>Inclusive tourism;</b> database updates and promotion in partnership with it's heaven. Advocate for inclusive tourism and facilitate training as needed.  <b>Identify opportunity's in line with council and the master plan to attract tourism investment.</b> For example; Corporate branded hotel in Nowra, High quality ecotourism accommodation, power to key event areas. Research underway.	<b>Events and Investment strategy</b>

### Marketing - overall

Thinking about it / not yet started	Working on / ongoing	Completed
	<b>Networking and knowledge sharing:</b> Attend all local tourism groups/ committee meetings to share information about tourism activities  <b>Facilitate industry training and upskilling</b>  <b>Review and update marketing collateral,</b> both online and in print with focus on packaging and consumer needs.  <b>Leverage funding:</b> review, develop and implement income generating component to leverage funding and partnership opportunities.  <b>Advertising &amp; PR programs;</b> unspoil 2017 in development  <b>Advertising &amp; PR programs:</b> Visiting Family and Friends 100 Beach Challenge campaign, scheduled for Winter, now in development.  <b>Direct Marketing:</b> develop and grow customer database and direct marketing schedule, both industry and visitor  <b>VIS Support:</b> assist in Visitor's Mobile services development.  <b>Update billboards</b> and screen content in public areas, and utilise for paid advertisements  <b>Support key events</b> to drive visitation of key markets at low peak times; Formal marketing support their structure created for event marketing support plus a linking of event and marketing strategies to promote and attract events that connect with our brand - surfing, wellbeing, music festivals  <b>Marketing support and brand integration for towns and villages:</b> via Precinct Marketing Grants; photography support, famils both by exec team and via staff and ongoing dialogue with tourism orgs  <b>Formal internal and external communications plan</b> currently in development	<b>Marketing Plan</b>  <b>Consolidation of collateral</b> including internal and external comms.  <b>Advertising &amp; PR programs;</b> 2016 unspoil campaign  <b>VIS Support:</b> upgrade all materials to reflect new branding  <b>VIS Support;</b> assist with all marketing for VIS's including installation of touch screen directories  <b>PR Campaign:</b> culinary delights  <b>Brand;</b> review of brand and addition of "many experiences, one destination"  <b>Brand;</b> upgrade all materials to reflect new branding  <b>Brand;</b> upgrade all materials to reflect new branding  <b>Leverage Funding:</b> Research RVEE funding from DNSW for other marketing and development projects. Unspoil 2016 \$140k received. Also scheduled to apply 2017.  <b>Advertising &amp; PR programs;</b> 2017 Visitors Guide  <b>Advertising &amp; PR programs;</b> surfing campaign now completed

### Marketing - Digital

Thinking about it / not yet started	Working on / ongoing	Completed
Develop conversation guidelines	Website upgrade	Digital Marketing Strategy

	<p>Work in partnership with VIS Manager to understand market dynamics and desires and create relevant digital solutions.</p> <p>Strategic content plans and monitoring</p> <p>Analyse post responses and FB analytics to tailor and boost FB likes</p> <p>Create new blog content; fortnightly aim</p> <p>Develop an advertising schedule across social media in line with key messages</p> <p>Search Marketing: Create seasonal campaigns with SEO and SEM - google and Bing; continue baseline google ads for general search traffic.</p>	<p>Social media application forms for community posting requests</p> <p>Host a team brainstorm on planned social media posts</p> <p>Develop structured content plan template including associated imagery and boosts / ads</p> <p>Develop relationship with DNSW Digital Team for greater exposure</p> <p>Confirm core Admin team with access to passwords (x2 members needed).</p> <p>Develop new video and photographic content for website and operators</p> <p>Search Marketing: surfing PR campaign currently in market</p>
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Marketing - Product & Packaging		
Thinking about it / not yet started	Working on / ongoing	Completed
Assist in facilitating trade networking events	<p>Offer operator training in Marketing, PR and Digital</p> <p>Bookeasy packaging: develop new branded product packaging for the domestic market</p> <p>Campaign: one major campaign encompassing drives, trails or tours. 100 beach challenge is currently being developed</p> <p>International marketing: support Discover Jervis Bay in acquisition of Asia Market</p>	Bookeasy; upgrade online booking system

Visitors Services		
Thinking about it / not yet started	Working on / ongoing	Completed
<p>Develop satellite services program and implement.</p> <p>Research bilanguage services for internationals</p>	<p>Develop business plan with emphasis on high level of visitors services and retail trade to drive visitation.</p> <p>Recruitment of new VIC staff; part time and casual staff.</p> <p>Develop local ambassador and roving volunteer programs</p> <p>Drive sales, bookings and visitation through VIC</p> <p>Partner with relevant organisations for income generating opportunities</p> <p>Support marketing on delivery of guides and advertising.</p> <p>Mobile van to disseminate information where tourists are e.g. events, city centres</p> <p>Actively recruit new businesses onto book easy and drive sales</p> <p>Effective stock control and management</p> <p>Redesign and distribute Bushwalking Guides</p>	<p>Move current Nowra VIC into the SEC in line with new direction of VIS</p> <p>Recruitment and staffing structure; including roles, responsibilities and areas of recruitment</p> <p>Review mix of marketing material in VIC; decrease printed material by 50% and increase digital material</p> <p>Install touch screen directories and market visitor services to visitors</p> <p>New signage, uniforms and advertising in VICs</p> <p>Redesign and distribute surfing Guides</p>

Events and Investment		
Thinking about it / not yet started	Working on / ongoing	Completed
	<p>Develop and manage event sponsorship opportunities calendar to ensure event possibilities are not missed</p> <p>Drive investment in events</p> <p>Advocate for a single point of contact for enquiries about development opportunities and their status</p> <p>Streamline the events support process to ensure sufficient time is dedicated to attracting tourism investment</p> <p>Drive investment in tourism; create a tourism investor database and undertake investor familiarisations as required.</p> <p>Leveraging funds in partnership programs</p> <p>Develop core suite of materials including event prospectus tailored to core markets</p> <p>Identify key volunteer run events, developing a framework of support over a 3 year period to ensure sustainability and growth</p>	<p>Develop and implement a strategic Events and Investment plan</p> <p>Investment transparency; formalise criteria based on Event and Investment Aims</p> <p>Investment transparency; review our partnership with Sports Marketing Australia</p> <p>Investment transparency; continue to use REMPLAN to assess ROI</p> <p>Develop a streamlined events marketing support process</p> <p>Fine-tune the sponsorship agreement process and funding applications</p> <p>Investment transparency; develop a formalised reporting mechanism to measure effectiveness of event</p>

**THE BERRY GREEN PLAQUES PROJECT****PROGRESS REPORT FOR THE SHOALHAVEN TOURISM GRANT****JANUARY 2017**

Following the arrival of the formal and favourable response from Council's Heritage Advisor, Ms Louise Thom and Council's Planning and Development Group, the Society contacted Phoenix Foundry and ordered the 12 Plaques.

We have received the first proofs from Phoenix Foundry and the Project Committee is in the process of 'proofing' them. It has been suggested to have a title on each plaque to identify the building, as well as the building's already agreed upon information. Three of the buildings that are privately owned, or run by a Church Council or Assoc., have approached – CWA, Presbyterian Manse & Uniting Church, as to their thoughts on our suggested titles for their buildings.

Once the 12 proofs have been finalised and accepted they will be sent back to Phoenix Foundry for their examination and we expect the making of plaques to take 3 weeks.

The Society has put an article on the Project's progress in the February Town Crier, acknowledging the Council Tourism Grant and including the Council Tourism Logo. We are preparing an article for the February edition of our Society's Newsletter – The Chronograph, which will again include the acknowledgment of the Council Tourism Grant and will include the Council Tourism Logo.

Closer to time of installation, an article is planned for the South Coast Register,.

The Society has received a very encouraging email from Bruce Baskerville, Public Historian with the Royal Australian Historical Society praising the project.

One of our local supporters, The Berry Community Arts Centre (BCAC) has been given update on project and they are going to donate \$1000 towards the project which will also assist with the costs for publicity, cost of Newspaper articles and planned upgrade of museum publications to allow inclusion of plaque information.

Annette Frohling  
Committee Member & Project Coordinator  
Berry & District Historical Society  
31 January 2017

## TA17.2 Destination Marketing Update

**HPERM Ref:** D17/23962

**Group:** Corporate & Community Services Group  
**Section:** Tourism

**Attachments:** 1. Tourism Monitor Year Ending Sept 16 [↓](#)

### Purpose / Summary

To provide a summary of Destination Marketing activity over the last quarter, October – January 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

### Progress Report

#### Latest Tourism Figures (YOY Sept 2016)

We are pleased to report that the Tourism Research Australia figures for the year ending September 2016 have been released and are once again showing positive growth across most KPI indicators although nights in region continue to struggle. Some comparative regional benchmarks include; strong declines reported from NSW Central Coast; The Shoalhaven has one third of all the visitation (10 Million) for the entire south coast (Wollongong to Victorian Border).

One other key highlight is that these figures include our last Winter period, of which we focus much of our marketing on. Jobs and visitor spend are increasing and the perception of tourism within the Shoalhaven community is reported to be increasing in positivity since the new team has been in place, evidenced by the decrease in negativity in community noticeboards by locals. **See Attachment 1 for the full report.**





\* Visitor volume data extracted from Tourism Research Australia; National Visitor Survey & International Visitor Survey; Year ending September 2016. Spend is modelled visitor expenditure (Tourism Research Australia). Jobs estimates: contact author as required. Estimates subject to sample error and other assumptions. ©Data copyright remains property of Tourism Research Australia

### New Website -

The Shoalhaven Tourism website has been old and tired for some time and in need of complete overhaul. We are pleased to report that after a competitive EOI process we have engaged in a website redevelopment contract with Feel Creative. [wefeel.com.au](http://wefeel.com.au). We received over 30 applications, meeting with the top three to make the important decision. Feel are a digital agency that thinks outside the box and are more than web developers, understanding the creative and marketing processes and having worked for a range of clients from Sony through to [Brimbank Council](http://brimbankcouncil.vic.gov.au). Their approach was by far the most innovative, and based on user experience and itineraries. They will be pushing us to use the latest technologies and integrate our services from inspirational content all the way through to booking. We aim to complete this project in mid-2017, and look forward to keeping you updated as it progresses.

### 100 Beach Challenge -

In order to showcase our brand, the diverse and vast beach product of our region and to disperse people throughout the region (and free up hot spots), we created the [100 Beach](#)

**Challenge.** The soft launch was a 6 page pull out in the visitor guide and go live on a fully mobile geo-locative game based on google maps in which you: check in to the beach (within 500m of a dropped pin), upload a photo and share your check in on social media. We will be doing an official launch in February and March with a PR campaign, video and activations throughout the year for both the Visitor and VFR market. We are excited that there already 87 people playing online plus many more playing with the hard copy book pull out. Watch this space as we use it as a platform to build the brand and engagement into the future.

### **Walking on Country -**

Tourism is working in collaboration with our Aboriginal Liaison Officer to create a video for promotion of Aboriginal culture and heritage in the Shoalhaven region. We are sharing the costs and have worked closely on storyboards and are supporting staff to project manage this video into a successful creative project that highlights both local Aboriginal culture in our region and Aboriginal tourism operators. This project will go through extensive community consultation and we are only at the beginning stages of location scouting and creating a short video to start more formal consultation.

### **Recruitment –**

Permanent Graphic Design Position – position has been filled. Welcome Lisa to the team as an official permanent member of staff.

1 year contract for a multimedia content creation position has been approved for recruitment when our photography contract is finished, in March 2017.

### **Publicity -**

**Final Surfing Report –** LBPR is entering this campaign in the ‘2017 Mumbrella CommsCan Awards’ – the largest PR and communications awards in Australia. The final figures came to exposure of over 103 pieces of Media coverage with 6 pieces pending including Jetstar magazine. Tyler Wright has also been nominated for the top sporting award in the world – ‘The Laureus’ and mentioned the Shoalhaven and Culburra Beach in an interview with triplej Breakfast recently. She continues to be our ambassador post campaign due to the synergy of the partnership.

### **TV highlights -**

- Getaway are visiting Jervis Bay in February and we are assisting with an itinerary
- Travel Channel US visited Jervis Bay on 12 January for a ‘Secret Beaches’ feature for US TV.
- 2 x Sydney Weekender pieces locked – Conjola and Cupitts episode aired in Feb + visit to Jervis Bay for Glamping is on the cards.

### **Canberra Focus -**

In the development of the Canberra market, we have fostered a direct relationship with Tim the Yowie Man who writes adventure and travel based stories for the Canberra Times. He will be in region again in March for some more winter focussed activities in Murramarang NP. In assisting him with itineraries and story ideas last December, we received three double page spread articles:

- “Dreaming of a White Christmas” we provided vials to collect and compare white sands from all 18 Jervis Bay beaches. *Just up the hill from the wharf is the landmark Husky Pub, where, while searching for a white-coloured cocktail on the drinks menu, I line-up my cache of sand-filled test tubes along the bar. "They all look the same," is the most common response from other patrons, many interrupting their own sundowners to pass judgement on the white sands.*

<http://www.canberratimes.com.au/act-news/canberra-life/tim-the-yowie-man-dreaming-of-a-white-christmas-20161219-gtehz3.html>

- “Beautiful Booderee” a story on the rich indigenous history and iconic landmark hole in the wall. Excerpt: *A surprising number of Canberrans have not heard of Booderee National Park, despite the fact it attracts almost half a million visitors per year – more than Uluru and Kakadu national parks combined.*  
<http://www.canberratimes.com.au/act-news/canberra-life/tim-the-yowie-man-beautiful-booderee-20170105-gtmqjf.html>
- “Booderee’s Rich History” Tim covered the attractions in the park and also talked with the Freemans of Wreck Bay about their tourism product, such as Aunty Julie’s campfire yarns etc. Excerpt: *Don’t underestimate how long you will want to stay here. With 3.7 km of walking tracks, knock-out picnic shelters, barbecues and lots of green grass for the kids to roll on, you could easily enjoy the tranquillity of this man-made haven all day.*  
<http://www.canberratimes.com.au/act-news/canberra-life/tim-the-yowie-man-booderees-rich-heritage-20170109-gto1ge.html>

### **Visitor Services Marketing -**

Marketing is working closely with visitor services on a number of visitor experience initiatives.

- In November, we did a big email push to operators to sign up to BookEasy and upgrade to ‘a ‘Gold Operator’ in order to be involved with Packaging. We will further push this in winter and develop packages for sale in the coming months.
- We are undertaking a rationalisation of events, tours, exhibition and what to do on our current website. Making these events more tourism and less community focussed.
- Marketing provided communications and logistic support for roving rangers in Hyams and Huskisson as well as collaborating on the development of the ambassador’s program
- Investigation a new CRM database that can synchronise with all the communications needs of tourism, feed into our website and also replace tour spots.
- We need new Brochures – Pets on Holidays, Kayaking and Surfing. These will be updated and reprinted. We had a huge response from both visitors and operators on how in demand these publications are.

### **Collaboration and Partnerships -**

As always, marketing works closely with Operators and Tourism Bodies within the region to align messaging and promote the successes and winners of the region to visitors. Some new relationships have been developing below

- NPWS – connect with campaigns such as Young Adult and The Ocean is Calling + Share resources regarding images, video and PR famils
- Forestry – talk to State Forest about how to utilise resources and build product development
- Birdlife – working on a new flier for top 10 bird trails for the Shoalhaven
- Berry Chamber – Assisting with Signage design, and google trails for TASOC info

### **Up Next -**

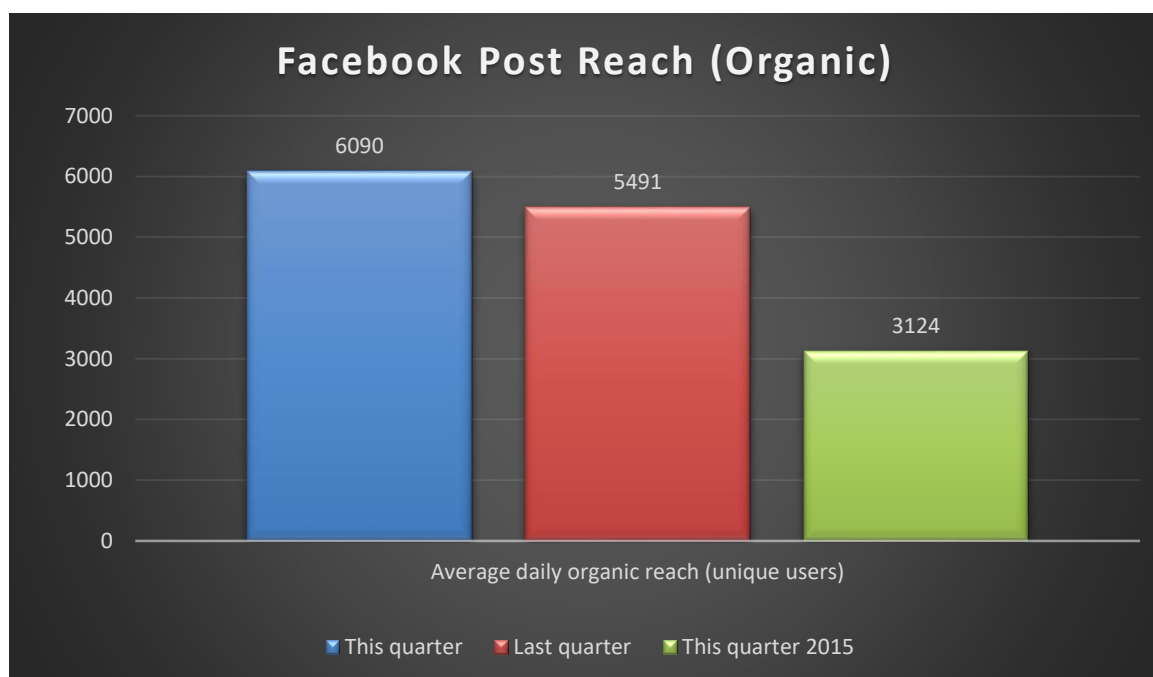
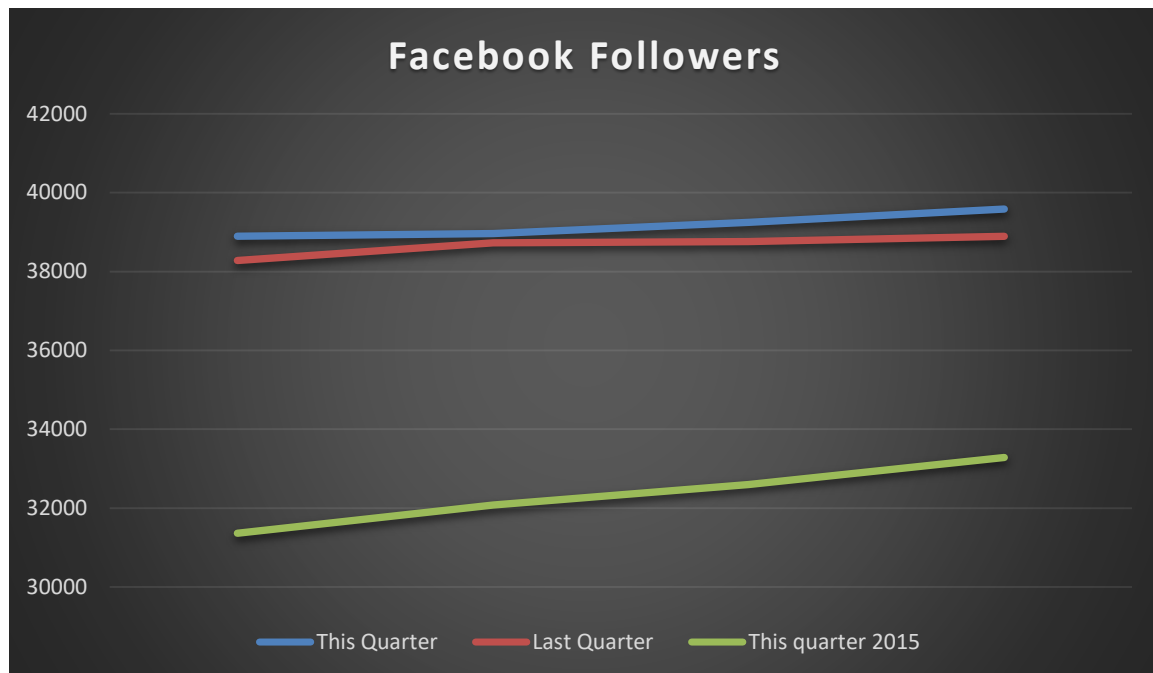
- 2017/2018 Business Plans
- Re-Branding and reinvigorating relationships with the Satellite VICs with Joe
- 100 beach Challenge promotional development
- Website metadata tagging and content production (Launch mid 2017)
- Unspoilt – new campaign for Winter and Spring, hopefully with video content, TBC.

- Preparing the 2018 Visitor Guide media kit and content early.

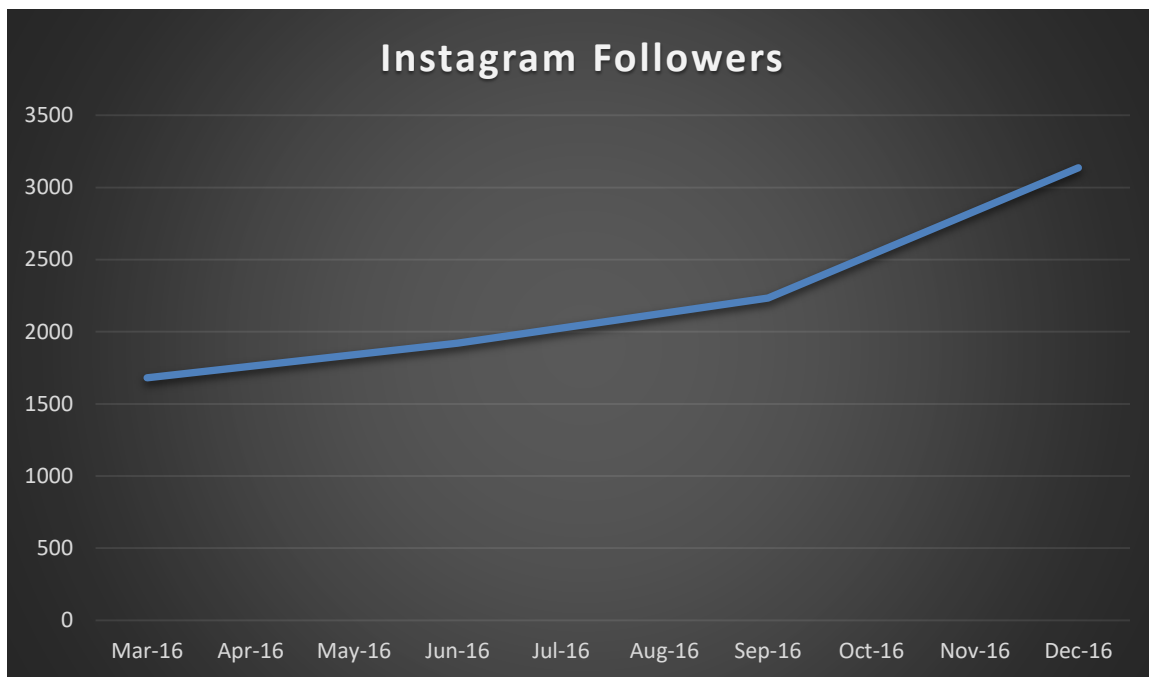
### Digital Marketing Report – prepared by Georgia Herring

Our Visitor Guide campaign is going well, with 1197 downloads of the PDF and 596 hard copy requests so far as direct conversions. Our most successful Facebook advertisement has reached 196 000 people so far.

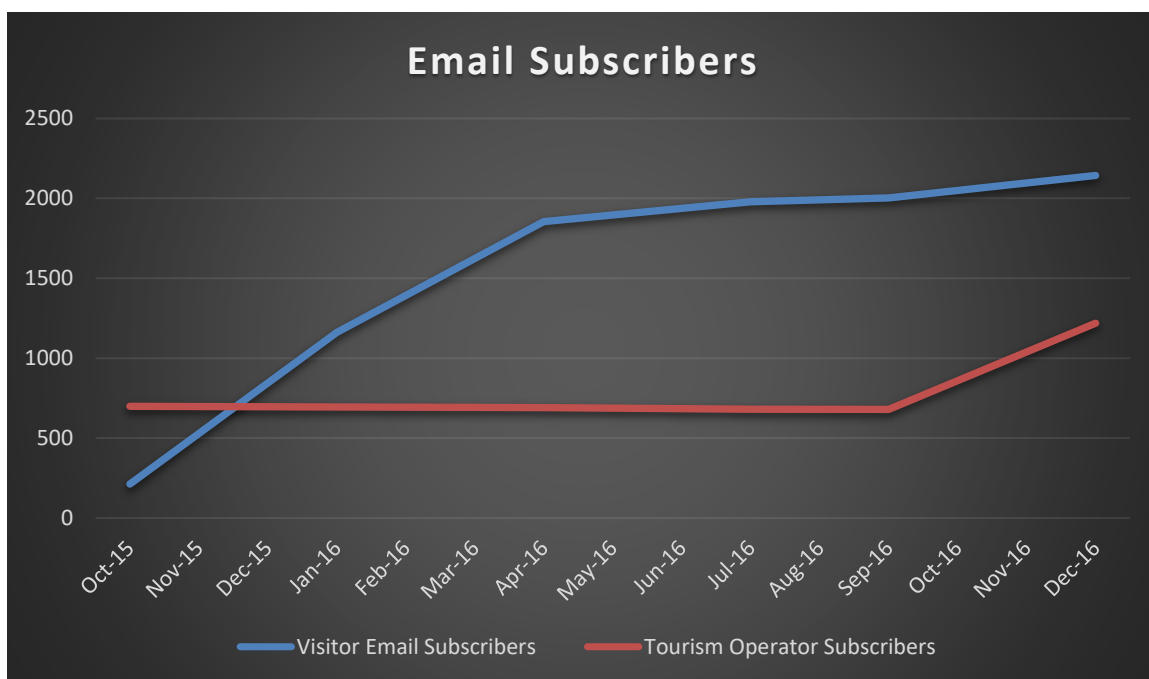
### Social Media Report – October 1 2016 – December 31 2016



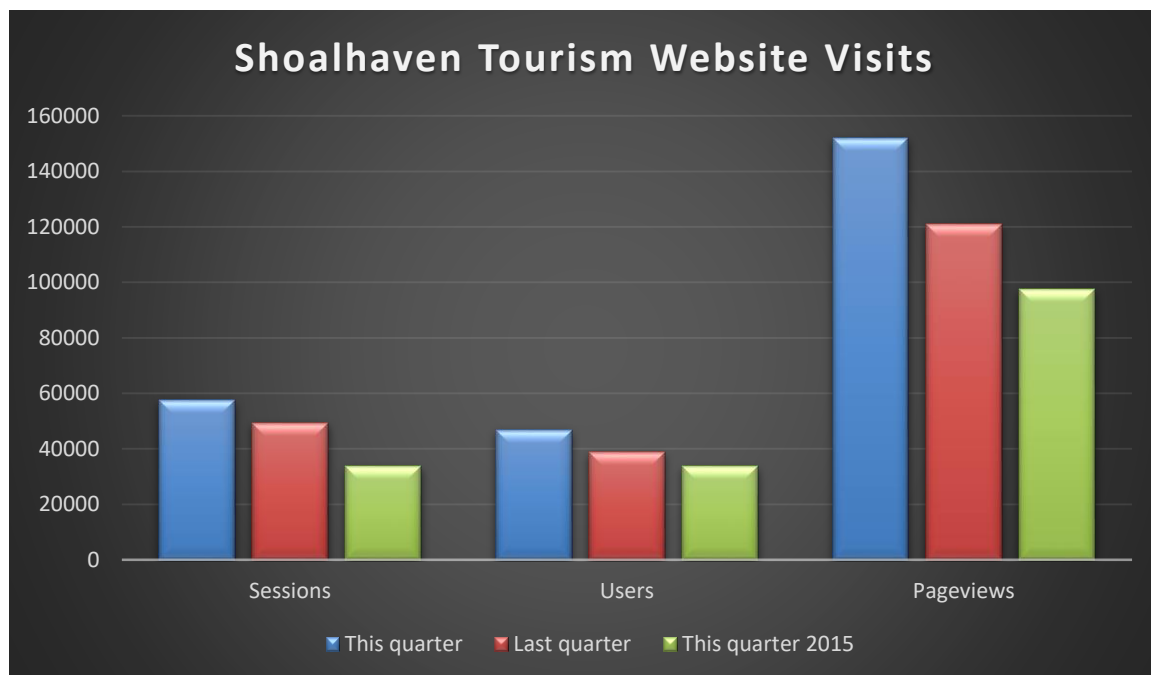
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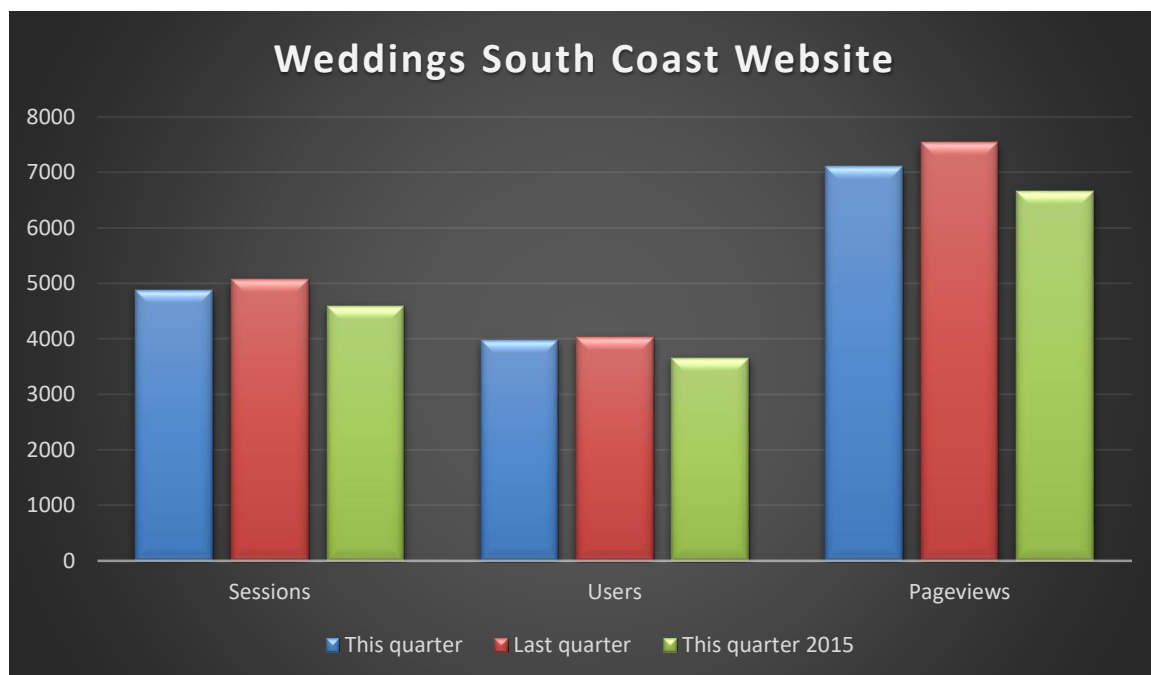
#### Shoalhaven Tourism Email Subscribers



## Shoalhaven Tourism Website



## Weddings South Coast Website





## **SHOALHAVEN TOURISM MONITOR**

Monitoring Shoalhaven LGA and Jervis Bay Territory  
Visitation and Market Share.

Year ending September 2016



**TOURISM STRATEGY DEVELOPMENT SERVICES**  
TOURISM MARKET RESEARCH ANALYSIS & STRATEGY DEVELOPMENT  
Est 1995  
ABN: 78661014505



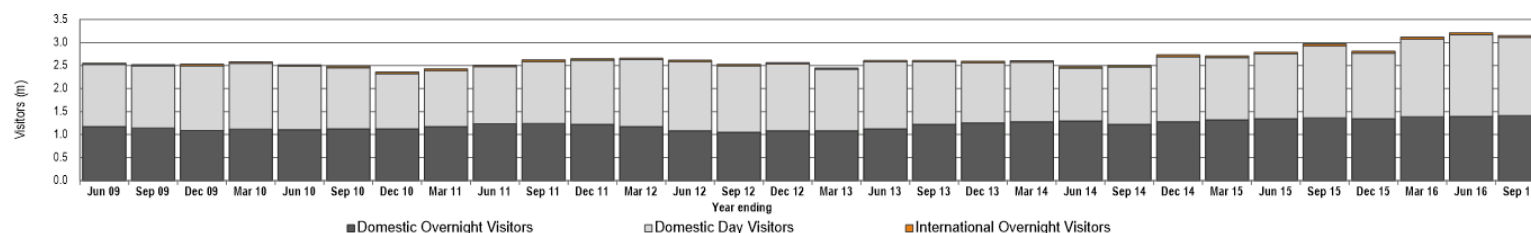
# Shoalhaven Tourism Monitor

Year ending September 2016

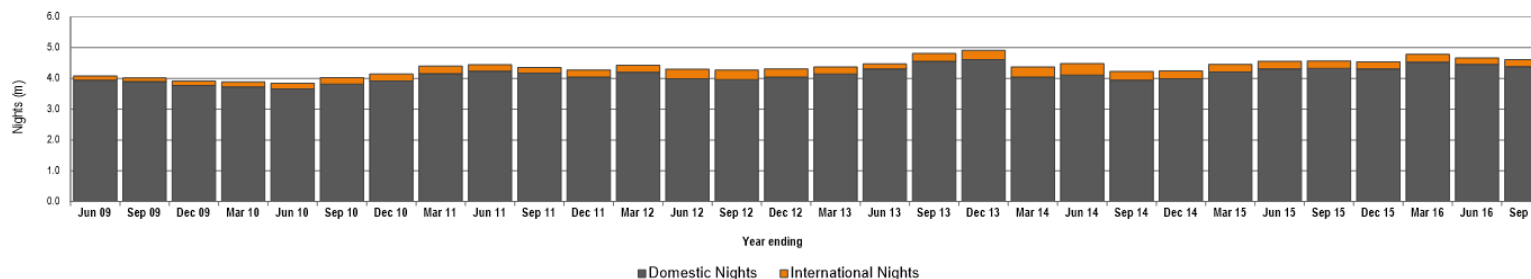
## SUMMARY



Year ending >	Jun 09	Sep 09	Dec 09	Mar 10	Jun 10	Sep 10	Dec 10	Mar 11	Jun 11	Sep 11	Dec 11	Mar 12	Jun 12	Sep 12	Dec 12	Mar 13	Jun 13	Sep 13	Dec 13	Mar 14	Jun 14	Sep 14	Dec 14	Mar 15	Jun 15	Sep 15	Dec 15	Mar 16	Jun 16	Sep 16
Domestic Overnight Visitors	1.18	1.14	1.09	1.12	1.10	1.12	1.12	1.18	1.23	1.24	1.22	1.17	1.08	1.05	1.08	1.08	1.12	1.23	1.25	1.28	1.29	1.22	1.28	1.32	1.35	1.37	1.34	1.38	1.39	1.41
Domestic Day Visitors	1.35	1.35	1.41	1.43	1.38	1.33	1.20	1.21	1.24	1.35	1.39	1.46	1.51	1.44	1.45	1.34	1.45	1.35	1.30	1.29	1.15	1.25	1.41	1.35	1.40	1.56	1.43	1.69	1.77	1.70
International Overnight Visitors	0.026	0.023	0.031	0.032	0.032	0.034	0.035	0.037	0.036	0.035	0.033	0.032	0.031	0.031	0.027	0.027	0.028	0.031	0.034	0.035	0.034	0.033	0.038	0.039	0.040	0.042	0.038	0.041	0.042	0.042
TOTAL VISITORS	2.55	2.52	2.53	2.58	2.52	2.48	2.36	2.43	2.51	2.62	2.65	2.66	2.62	2.53	2.56	2.45	2.61	2.61	2.59	2.60	2.48	2.50	2.73	2.71	2.79	2.97	2.81	3.12	3.21	3.15
Change vs same period prev. year					-1.5%	-1.3%	-6.8%	-6.0%	-0.3%	5.5%	12.3%	9.6%	4.3%	-3.6%	-3.2%	-8.0%	-0.4%	3.3%	1.1%	6.3%	-4.9%	-4.2%	5.3%	4.0%	12.5%	18.8%	2.9%	15.0%	15.1%	6.1%



Year ending >	Jun 09	Sep 09	Dec 09	Mar 10	Jun 10	Sep 10	Dec 10	Mar 11	Jun 11	Sep 11	Dec 11	Mar 12	Jun 12	Sep 12	Dec 12	Mar 13	Jun 13	Sep 13	Dec 13	Mar 14	Jun 14	Sep 14	Dec 14	Mar 15	Jun 15	Sep 15	Dec 15	Mar 16	Jun 16	Sep 16
Domestic Nights	3.94	3.90	3.77	3.72	3.66	3.81	3.91	4.15	4.23	4.17	4.04	4.20	3.98	3.95	4.04	4.14	4.31	4.55	4.61	4.04	4.11	3.94	3.98	4.21	4.31	4.32	4.31	4.53	4.45	4.38
International Nights	0.13	0.11	0.14	0.16	0.18	0.22	0.22	0.24	0.21	0.18	0.23	0.23	0.32	0.31	0.27	0.23	0.16	0.25	0.30	0.33	0.37	0.29	0.26	0.25	0.25	0.25	0.23	0.25	0.20	0.23
TOTAL NIGHTS	4.08	4.01	3.91	3.89	3.84	4.02	4.14	4.40	4.44	4.35	4.27	4.42	4.30	4.27	4.31	4.37	4.47	4.80	4.91	4.37	4.48	4.22	4.25	4.46	4.56	4.57	4.54	4.78	4.66	4.61
Change vs same period prev. year					-5.8%	0.3%	5.7%	13.1%	15.6%	8.2%	3.2%	0.6%	-3.2%	-1.9%	0.9%	-1.3%	3.9%	12.5%	14.0%	0.0%	0.3%	-12.1%	-13.5%	2.0%	1.8%	8.2%	6.9%	7.2%	2.2%	0.8%



Source: Data-extracted from Tourism Research Australia's National and International Visitor Survey datasets. All data, and the differences between data points, and percentage share calculations are subject to sample survey error.

SHADING LEGEND: Above average

Prepared by Peter Valerio. Copyright remains with Tourism Research Australia & Commonwealth of Australia. Acknowledgements required. Data cannot be sold.

PAGE 1



## Shoalhaven Tourism Monitor

Year ending September 2016

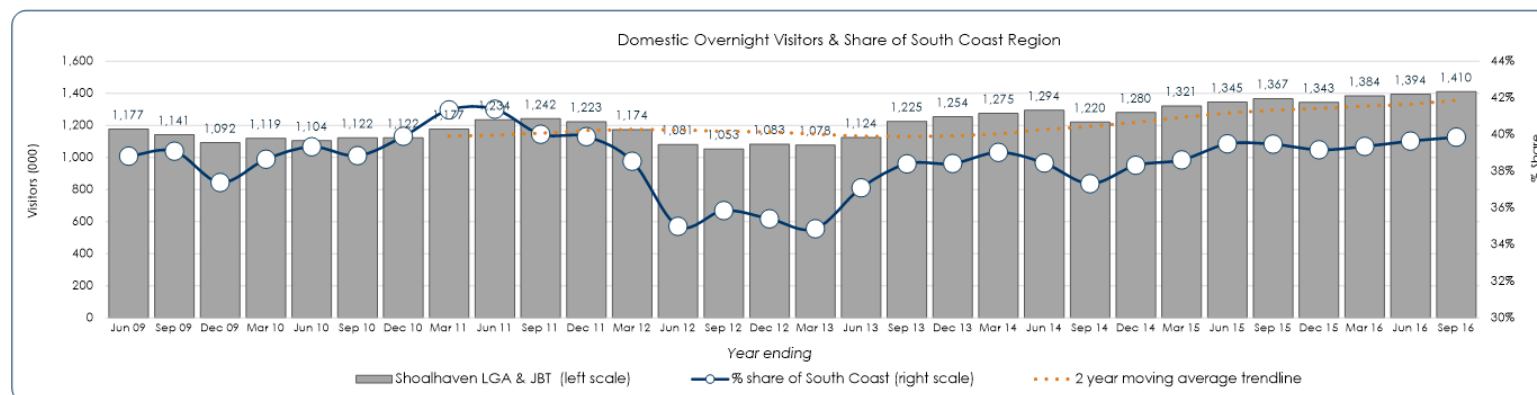


### Domestic Overnight Visitors

Year ending >	Jun 09	Sep 09	Dec 09	Mar 10	Jun 10	Sep 10	Dec 10	Mar 11	Jun 11	Sep 11	Dec 11	Mar 12	Jun 12	Sep 12	Dec 12	Mar 13	Jun 13	Sep 13	Dec 13	Mar 14	Jun 14	Sep 14	Dec 14	Mar 15	Jun 15	Sep 15	Dec 15	Mar 16	Jun 16	Sep 16
Shoalhaven & JBT (000)	1,177	1,141	1,092	1,119	1,104	1,122	1,122	1,177	1,234	1,242	1,223	1,174	1,081	1,053	1,083	1,078	1,124	1,225	1,254	1,275	1,294	1,220	1,280	1,321	1,345	1,367	1,343	1,384	1,394	1,410
% change vs same period prev. year					-6.2%	-1.7%	2.7%	5.2%	11.8%	10.7%	9.0%	-0.3%	-12.4%	-15.2%	-11.4%	-8.2%	4.0%	16.3%	15.8%	18.3%	15.1%	-0.4%	2.1%	3.6%	3.9%	12.0%	4.9%	4.8%	3.6%	3.1%
Market Reference Group* (000)	2,687	2,580	2,565	2,527	2,497	2,535	2,454	2,525	2,621	2,668	2,680	2,551	2,566	2,468	2,502	2,608	2,576	2,763	2,829	2,751	2,828	2,773	2,828	2,986	2,975	2,996	2,976	3,075	3,081	3,098
% change vs same period prev. year					-7.1%	-1.7%	-4.3%	-0.1%	5.0%	5.2%	9.2%	1.0%	-2.1%	-7.5%	-6.6%	2.2%	0.5%	12.0%	13.1%	5.5%	9.7%	0.4%	0.0%	8.5%	5.2%	8.0%	5.2%	3.0%	3.6%	3.4%
% share of Market Reference Group	43.8%	44.2%	42.6%	44.3%	44.2%	44.3%	45.7%	46.6%	47.1%	46.6%	45.6%	46.0%	42.1%	42.7%	43.3%	41.3%	43.6%	44.3%	44.3%	46.3%	45.8%	44.0%	45.3%	44.2%	45.2%	45.6%	45.1%	45.0%	45.2%	45.5%
South Coast Tourism Region (000)	3,032	2,919	2,921	2,895	2,807	2,868	2,812	2,847	2,982	3,104	3,066	3,046	3,089	2,937	3,059	3,092	3,030	3,190	3,264	3,267	3,368	3,289	3,340	3,421	3,406	3,463	3,429	3,517	3,516	3,538
% change vs same period prev. year					-7.4%	-1.1%	-3.7%	-1.7%	6.2%	7.5%	9.0%	7.0%	3.6%	-5.4%	-0.2%	1.5%	-1.9%	8.6%	6.7%	5.7%	11.1%	2.5%	2.3%	4.7%	1.2%	5.9%	2.7%	2.6%	3.2%	2.2%
% share of South Coast Tourism Region	38.8%	39.1%	37.4%	38.7%	39.3%	39.9%	39.9%	41.3%	41.4%	40.0%	39.9%	38.5%	35.0%	35.9%	35.4%	34.9%	37.1%	38.4%	38.4%	39.0%	38.4%	37.3%	38.3%	38.6%	39.5%	39.5%	39.2%	39.4%	39.6%	39.9%

SHADING LEGEND: Above average

\*The Market Reference Group includes SA2s in Kiama, Southern Wingecarribee, Eurobodalla, Northern coastal Bega Valley & Braidwood SA2. Shoalhaven and JBT are also included for share calculation purposes.



Source: Data-extracted from Tourism Research Australia's National and International Visitor Survey datasets. All data, and the differences between data points, and percentage share calculations are subject to sample survey error.

### KEY POINTS FOR YEAR ENDING SEPTEMBER 2016:

- 1.41 million for the latest year end period is this is the highest for any 12 month period in the Monitor and clearly above average.
- The 3.1% increase compared to the same period last year is the 8th consecutive period-on-period increase. Although the change is not statistically significant, as noted in the previous Monitor a series of increases such as this support a conclusion that it is not the result of sample survey error.
- The Market Reference Group and the South Coast Tourism Region both recorded period-on-period growth.
- SJBT's share of both varied little compared the YE September 2015.
- The two year moving average trendline is continues it's gradual incline - reflective of a period of stability and steady growth.

# Shoalhaven Tourism Monitor Year ending September 2016

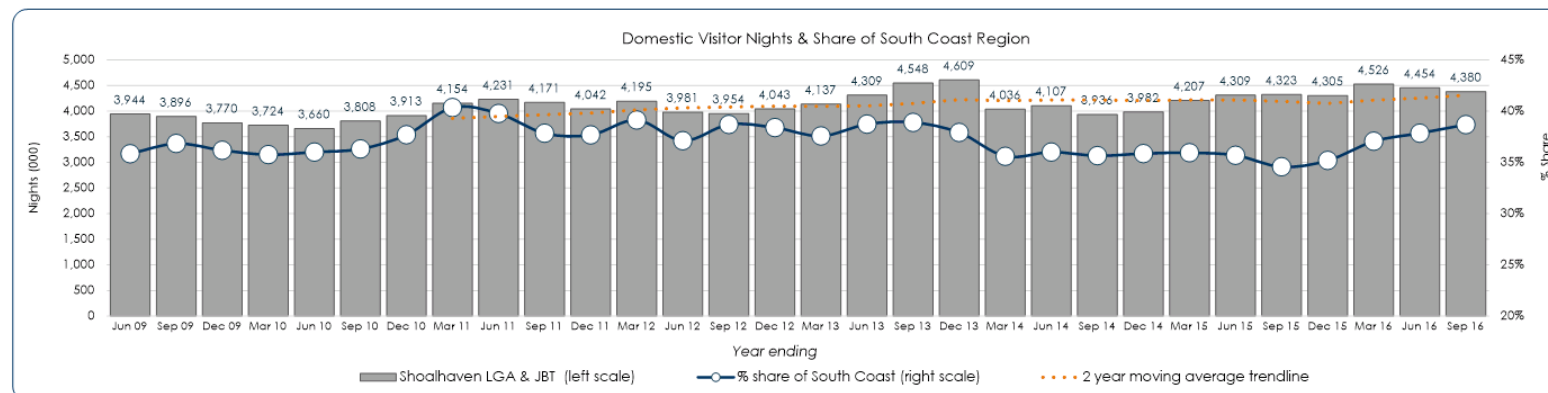


## Domestic Visitor Nights

Year ending >	Jun 09	Sep 09	Dec 09	Mar 10	Jun 10	Sep 10	Dec 10	Mar 11	Jun 11	Sep 11	Dec 11	Mar 12	Jun 12	Sep 12	Dec 12	Mar 13	Jun 13	Sep 13	Dec 13	Mar 14	Jun 14	Sep 14	Dec 14	Mar 15	Jun 15	Sep 15	Dec 15	Mar 16	Jun 16	Sep 16
Shoalhaven & JBT (000)	3,944	3,896	3,770	3,724	3,660	3,808	3,913	4,154	4,231	4,171	4,042	4,195	3,981	3,954	4,043	4,137	4,309	4,548	4,609	4,036	4,107	3,936	3,982	4,207	4,309	4,323	4,305	4,526	4,454	4,380
% change vs same period prev. year					-7.2%	-2.3%	3.8%	11.5%	15.6%	9.5%	3.3%	1.0%	-5.9%	-5.2%	0.0%	-1.4%	8.2%	15.0%	14.0%	-2.4%	-4.7%	-13.5%	-13.6%	4.2%	4.9%	9.8%	8.1%	7.6%	3.4%	1.3%
Market Reference Group* (000)	9,841	9,341	9,193	9,126	9,042	9,311	9,153	9,387	9,635	9,758	9,632	9,419	9,370	8,939	9,105	9,576	9,650	10,358	10,704	9,548	9,644	9,284	9,249	9,929	10,340	10,418	10,256	10,580	10,080	9,945
% change vs same period prev. year					-6.2%	-0.3%	-0.4%	2.9%	6.6%	4.8%	5.2%	0.3%	-2.8%	-8.4%	-5.5%	1.7%	3.0%	15.9%	17.6%	-0.3%	-0.1%	-10.4%	-13.6%	4.0%	7.2%	12.2%	10.9%	6.6%	-2.5%	-4.5%
% share of Market Reference Group	40.9%	41.7%	41.0%	40.8%	40.5%	40.9%	42.8%	44.3%	43.9%	42.7%	42.0%	44.5%	42.5%	44.2%	44.4%	43.2%	44.7%	43.9%	43.1%	42.3%	42.6%	42.4%	43.1%	42.4%	41.7%	41.5%	42.0%	42.8%	44.2%	44.0%
South Coast Tourism Region (000)	11,005	10,577	10,421	10,416	10,164	10,489	10,382	10,297	10,638	11,024	10,727	10,721	10,727	10,218	10,531	11,011	11,127	11,691	12,157	11,338	11,407	11,041	11,103	11,706	12,072	12,507	12,237	12,214	11,768	11,322
% change vs same period prev. year					-7.6%	-0.8%	-0.4%	-1.1%	4.7%	5.1%	3.3%	4.1%	0.8%	-7.3%	-1.8%	2.7%	3.7%	14.4%	15.4%	3.0%	2.5%	-5.6%	-8.7%	3.2%	5.8%	13.3%	10.2%	4.3%	-2.5%	-9.5%
% share of South Coast Tourism Region	35.8%	36.8%	36.2%	35.8%	36.0%	36.3%	37.7%	40.3%	39.8%	37.8%	37.7%	39.1%	37.1%	38.7%	38.4%	37.6%	38.7%	38.9%	37.9%	35.6%	36.0%	35.6%	35.9%	35.9%	35.7%	34.6%	35.2%	37.1%	37.8%	38.7%

SHADING LEGEND: Above average

\*The Market Reference Group includes SA2s in Kiama, Southern Wingecarribee, Eurobodalla, Northern coastal Bega Valley &amp; Braidwood SA2. Shoalhaven and JBT are also included for share calculation purposes.



Source: Data extracted from Tourism Research Australia's National and International Visitor Survey datasets. All data, and the differences between data points, and percentage share calculations are subject to sample survey error.

## KEY POINTS FOR YEAR ENDING SEPTEMBER 2016:

- 4.3 million nights are estimated to have been spent in the SJBT region in the latest year ending period. This is the 7th consecutive estimate greater than 4 million - the first time this has ever been achieved.
- This represents a small on-paper increase compared to the same period last year. This change is not statistically significant.
- This growth was in contrast to visitor nights volume in both the Market Reference Group and the South Coast Tourism Region. Both recorded lower estimates than the same period last year.
- This has seen SJBT's share of both the Market Reference Group and the South Coast Region nights increase. It is reasonable to identify the recent run of share increases as

**Shoalhaven Tourism Monitor**  
Year ending September 2016

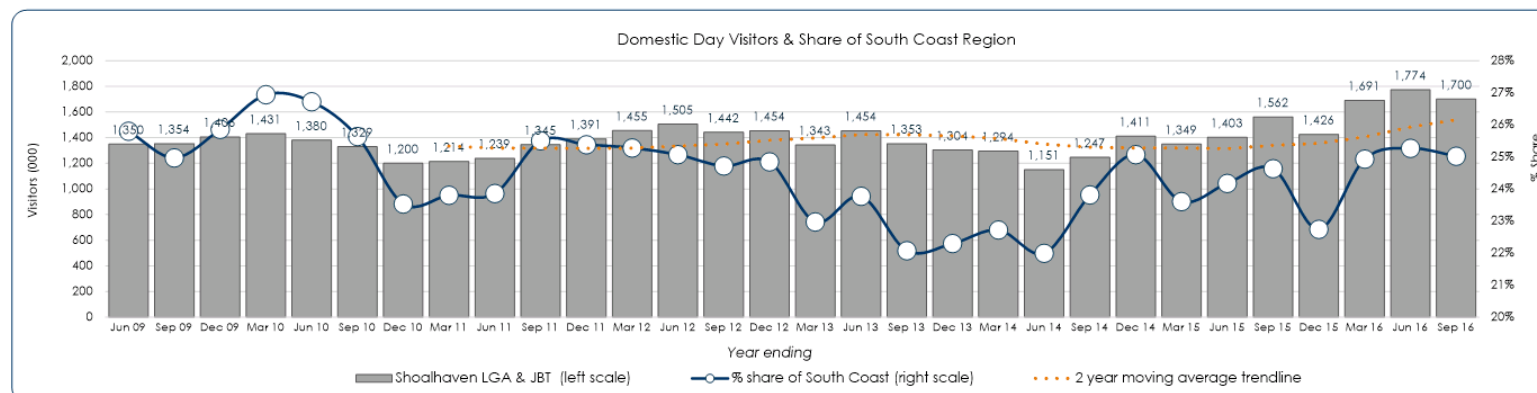


**Domestic Day Visitors**

Year ending >	Jun 09	Sep 09	Dec 09	Mar 10	Jun 10	Sep 10	Dec 10	Mar 11	Jun 11	Sep 11	Dec 11	Mar 12	Jun 12	Sep 12	Dec 12	Mar 13	Jun 13	Sep 13	Dec 13	Mar 14	Jun 14	Sep 14	Dec 14	Mar 15	Jun 15	Sep 15	Dec 15	Mar 16	Jun 16	Sep 16
Shoalhaven & JBT (000)	1,350	1,354	1,406	1,431	1,380	1,329	1,200	1,214	1,239	1,345	1,391	1,455	1,505	1,442	1,454	1,343	1,454	1,353	1,304	1,294	1,151	1,247	1,411	1,349	1,403	1,562	1,426	1,691	1,774	1,700
% change vs same period prev. year					2.2%	-1.8%	-14.7%	-15.2%	-10.2%	1.2%	15.9%	19.9%	21.5%	7.2%	4.5%	-7.7%	-3.4%	-6.2%	-10.3%	-3.6%	-20.8%	-7.8%	8.2%	4.3%	21.9%	25.3%	1.1%	25.4%	26.4%	8.8%
Market Reference Group* (000)	3,541	3,650	3,748	3,697	3,452	3,470	3,521	3,606	3,895	3,946	3,892	4,041	4,102	4,120	4,055	3,902	3,922	3,825	3,658	3,583	3,435	3,464	3,875	3,874	3,795	4,126	3,900	4,294	4,599	4,422
% change vs same period prev. year					-2.5%	-4.9%	-6.1%	-2.5%	12.8%	13.7%	10.5%	12.1%	5.3%	4.4%	4.2%	-3.4%	-4.4%	-7.2%	-9.8%	-8.2%	-12.4%	-8.4%	5.9%	8.1%	10.5%	19.1%	0.6%	10.8%	21.2%	7.2%
% share of Market Reference Group	38.1%	37.1%	37.5%	38.7%	40.0%	38.3%	34.1%	33.7%	31.8%	34.1%	35.7%	36.0%	36.7%	35.0%	35.9%	34.4%	37.1%	35.4%	35.6%	36.1%	33.5%	36.0%	36.4%	34.8%	37.0%	37.9%	36.6%	39.4%	38.6%	38.4%
South Coast Tourism Region (000)	5,232	5,422	5,437	5,312	5,164	5,164	5,099	5,100	5,193	5,274	5,480	5,755	6,003	5,834	5,852	5,846	6,116	6,129	5,848	5,695	5,233	5,236	5,628	5,714	5,803	6,341	6,270	6,782	7,020	6,794
% change vs same period prev. year					-1.3%	-4.4%	-6.2%	-4.0%	0.6%	1.7%	7.5%	12.8%	15.6%	10.6%	6.8%	1.6%	1.9%	5.1%	-0.1%	-2.6%	-14.4%	-14.6%	-3.8%	0.3%	10.9%	21.1%	11.4%	18.7%	21.0%	7.1%
% share of South Coast Tourism Region	25.8%	25.0%	25.9%	26.9%	26.7%	25.6%	23.5%	23.8%	23.9%	25.5%	25.4%	25.3%	25.1%	24.7%	24.6%	23.0%	23.8%	22.1%	22.3%	22.7%	22.0%	23.8%	25.1%	23.6%	24.2%	24.6%	22.7%	24.9%	25.3%	25.0%

SHADING LEGEND:   Above average

\* The Market Reference Group includes SA2s in Kiama, Southern Wingecarribee, Eurobodalla, Northern coastal Bega Valley & Braidwood SA2. Shoalhaven and JBT are also included for share calculation purposes.



Source: Data-extracted from Tourism Research Australia's National and International Visitor Survey datasets. All data, and the differences between data points, and percentage share calculations are subject to sample survey error.

**KEY POINTS FOR YEAR ENDING SEPTEMBER 2016:**

- Domestic day visitors continue at well above average levels. The latest period is only the second time since records began that day visitors reached the 1.7 million mark.
- The 8.8% increase compared to the same period last year, whilst positive, is not statistically significant.
- Both the Market Reference Group and the South Coast Tourism Region recorded similar growth - extending the 'boom' in the day trip market.
- SJBT's share of both the Market Reference Group and the South Coast are slightly higher than the same period last year. The increases are not, however, considered significant.

# **Shoalhaven Tourism Monitor** Year ending September 2016

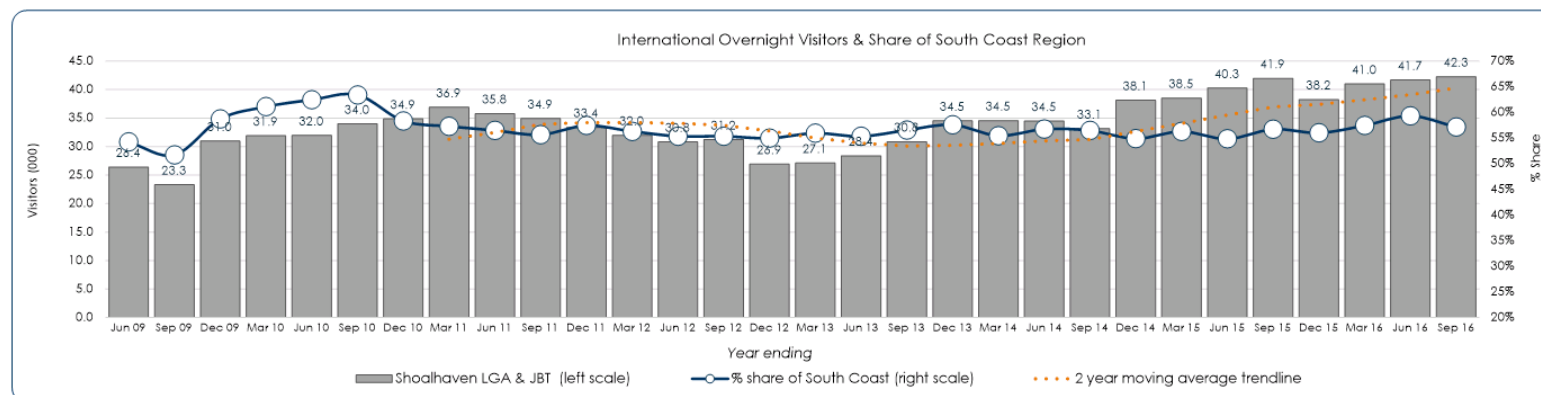


## **International Overnight Visitors**

Year ending >	Jun 09	Sep 09	Dec 09	Mar 10	Jun 10	Sep 10	Dec 10	Mar 11	Jun 11	Sep 11	Dec 11	Mar 12	Jun 12	Sep 12	Dec 12	Mar 13	Jun 13	Sep 13	Dec 13	Mar 14	Jun 14	Sep 14	Dec 14	Mar 15	Jun 15	Sep 15	Dec 15	Mar 16	Jun 16	Sep 16		
Shoalhaven & JBT (000)	26.4	23.3	31.0	31.9	32.0	34.0	34.9	36.9	35.8	34.9	33.4	32.0	30.8	31.2	28.9	27.1	28.4	30.8	34.5	34.5	34.5	33.1	38.1	38.5	40.3	41.9	38.2	41.0	41.7	42.3		
% change vs same period prev. year					21.1%	45.8%	12.5%	15.7%	12.0%	2.7%	-4.3%	-13.3%	-13.9%	-10.5%	-19.3%	-15.2%	-8.0%	-1.3%	28.2%	27.3%	21.5%	7.4%	10.5%	11.5%	16.8%	26.6%	0.3%	6.4%	3.5%	0.8%		
Market Reference Group* (000)	54.3	50.7	61.9	64.7	64.5	67.0	64.8	68.9	68.1	66.5	66.0	59.6	57.8	58.1	55.9	55.8	57.4	61.1	64.4	63.0	63.0	60.4	62.6	66.1	68.4	72.8	72.3	78.3	79.3	79.7		
% change vs same period prev. year					32.1%	4.7%	6.4%	5.6%	-0.8%	1.9%	-13.5%	-15.1%	-12.5%	-15.3%	-6.4%	-0.7%	5.2%	15.3%	13.0%	9.8%	-1.2%	-2.8%	4.9%	8.5%	20.6%	15.5%	18.4%	15.8%	9.5%			
% share of Market Reference Group	48.6%	46.0%	50.1%	49.3%	49.6%	50.7%	53.8%	53.6%	52.6%	52.5%	50.6%	53.7%	53.3%	53.7%	48.2%	48.6%	49.4%	50.4%	53.5%	54.8%	54.7%	54.8%	60.8%	58.3%	58.8%	57.6%	52.9%	52.4%	52.6%	53.0%		
South Coast Tourism Region (000)	100	98	105	106	103	106	111	120	121	119	115	106	105	105	102	100	104	108	112	114	111	107	114	117	125	128	129	136	134	140		
% change vs same period prev. year					7.7%	5.4%	13.5%	16.8%	13.0%	3.4%	-12.0%	-13.3%	-12.1%	-11.5%	-5.8%	-0.7%	3.0%	10.0%	14.0%	7.0%	-1.1%	2.0%	3.4%	12.3%	20.0%	13.2%	16.0%	7.1%	8.7%			
% share of South Coast Tourism Region	54.2%	51.7%	58.7%	61.1%	62.5%	63.4%	58.3%	57.3%	56.5%	55.7%	57.4%	56.3%	55.3%	55.4%	55.0%	55.9%	55.3%	56.5%	57.6%	55.4%	56.7%	56.5%	54.9%	56.3%	54.8%	56.7%	56.0%	57.4%	59.3%	57.1%		
SHALHAVEN & JBT																																
*The Market Reference Group includes SAZs in Kiama, Southern Winecountry, Eurobodalla, Northern coastal, North Green Gables, Eurobodalla SAZ, Shoalhaven and JBT are also included for share calculation purposes																																

SHADING LEGEND: Above average

\*The Market Reference Group includes SA2s in Kiama, Southern Wingecambee, Eurobodalla, Northern coastal Bega Valley & Braidwood SA2. Shoalhaven and JBT are also included for share calculation purposes.



Source: Data-extracted from Tourism Research Australia's National and International Visitor Survey datasets. All data, and the differences between data points, and percentage share calculations are subject to sample survey error.

## **KEY POINTS FOR YEAR ENDING SEPTEMBER 2016:**

- Just over 42,000 international visitors spent at least one night in SJBT during the latest year ending period.
- This represents a small increase compared to the same period last year - a change that is not statistically significant.
- Market Reference Group and the South Coast Tourism Region's international volume both increased period-on-period at a higher rate than SJBT.
- SJBT's share of the Market Reference Group and South Coast Region are, therefore, lower than they were in the same period last year.
- Share of the Market Reference Group and share of the South Coast has decreased marginally compared to the same period last year. The changes are not considered significant.

**Shoalhaven Tourism Monitor**  
Year ending September 2016

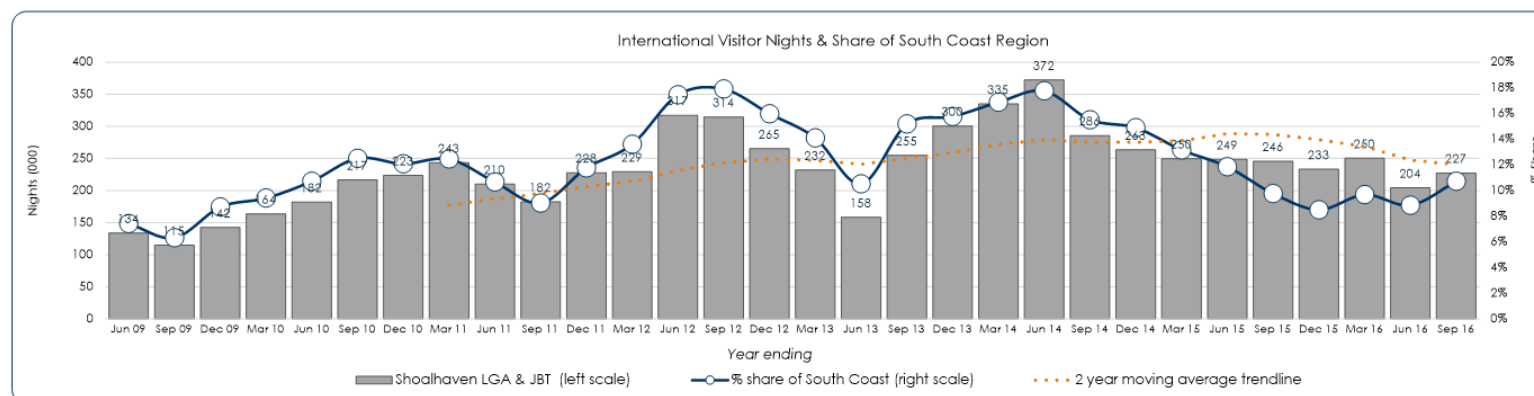


**International Nights**

Year ending >	Jun 09	Sep 09	Dec 09	Mar 10	Jun 10	Sep 10	Dec 10	Mar 11	Jun 11	Sep 11	Dec 11	Mar 12	Jun 12	Sep 12	Dec 12	Mar 13	Jun 13	Sep 13	Dec 13	Mar 14	Jun 14	Sep 14	Dec 14	Mar 15	Jun 15	Sep 15	Dec 15	Mar 16	Jun 16	Sep 16
Shoalhaven & JBT (000)	134	115	142	164	182	217	223	243	210	182	228	229	317	314	265	232	158	255	300	335	372	286	263	250	249	248	233	250	204	227
% change vs same period prev. year					36.1%	89.0%	57.0%	48.6%	15.4%	-15.6%	1.9%	-5.8%	51.0%	72.5%	16.4%	1.1%	-50.1%	-19.0%	13.3%	44.4%	135.1%	12.1%	-12.3%	-25.5%	-33.2%	-14.0%	-11.5%	0.3%	-17.9%	-7.5%
Market Reference Group* (000)	384	352	429	556	578	617	618	550	488	433	437	396	522	555	501	488	403	483	579	578	600	528	506	577	556	606	562	577	573	542
% change vs same period prev. year					50.5%	75.3%	44.2%	-1.1%	-15.6%	-29.7%	-29.3%	-28.0%	7.1%	28.0%	14.5%	23.3%	-22.8%	-13.0%	15.6%	18.3%	48.9%	9.4%	-12.5%	-0.2%	-7.5%	14.8%	11.0%	0.1%	3.1%	-10.6%
% share of Market Reference Group	34.8%	32.6%	33.2%	29.5%	31.5%	35.1%	36.1%	44.3%	43.1%	42.1%	52.1%	57.9%	60.7%	56.7%	53.0%	47.5%	39.2%	52.7%	51.9%	58.0%	62.0%	54.0%	52.0%	43.3%	44.7%	40.5%	41.4%	43.3%	35.6%	41.9%
South Coast Tourism Region (000)	1,789	1,814	1,833	1,742	1,897	1,731	1,850	1,955	1,969	2,021	1,937	1,886	1,817	1,757	1,660	1,648	1,504	1,677	1,908	1,984	2,098	1,841	1,769	1,886	2,098	2,516	2,742	2,584	2,305	2,121
% change vs same period prev. year					-5.7%	-4.5%	13.3%	12.3%	16.0%	16.7%	4.7%	-13.8%	-7.7%	-13.1%	-14.3%	-2.4%	-17.2%	-4.5%	14.8%	20.6%	39.3%	9.8%	-7.2%	-4.4%	0.1%	36.7%	55.0%	36.3%	9.9%	-15.7%
% share of South Coast Tourism Region	7.4%	6.3%	8.7%	9.4%	10.7%	12.5%	12.1%	12.4%	10.7%	9.0%	11.8%	13.6%	17.4%	17.9%	16.0%	14.1%	10.5%	15.2%	15.6%	16.9%	17.8%	15.5%	14.9%	13.2%	11.8%	9.8%	8.5%	9.7%	8.9%	10.7%

SHADING LEGEND: Above average

\*The Market Reference Group includes SA2s in Kiama, Southern Wingecarribee, Eurobodalla, Northern coastal Bega Valley & Braidwood SA2. Shoalhaven and JBT are also included for share calculation purposes.



Source: Data-extracted from Tourism Research Australia's National and International Visitor Survey datasets. All data, and the differences between data points, and percentage share calculations are subject to sample survey error.

**KEY POINTS FOR YEAR ENDING SEPTEMBER 2016:**

- International visitors spent at just over an estimated 227,000 nights in SJBT during the latest year ending period.
- This estimate is below the Monitor average and an on-paper decrease compared to the same period last year. The change cannot, however, be confirmed using standard statistical significance tests.
- Market Reference Group nights volume and that of the South Coast Region reported a double-digit decreases period-on-period.
- SJBT's share of both regions remained below average at a percentage similar to that in the year ending September 2015.

## Shoalhaven Tourism Monitor

### PART B - EXPENDITURE ESTIMATES



#### IMPORTANT NOTE:

Expenditure data is collected in the National and International Visitor Survey's at a trip level; not for specific destinations. Estimates for specific destinations are the result of the application of Tourism Research Australia's expenditure allocation

**TOTAL ESTIMATED VISITOR EXPENDITURE FOR YE SEPTEMBER 2016: 743 million**



#### TOTAL EXPENDITURE

	Jun 16	Sept 16
Domestic Overnight Visitors total \$m	534	555
Domestic Day Visitors total \$m	167	166
International Overnight Visitors total \$m	22	21
<b>TOTAL \$m</b>	<b>722</b>	<b>743</b>

#### EXPENDITURE PER VISIT

	Jun 16	Sept 16
Domestic Overnight Visitors \$ per visit	383	394
Domestic Day Visitors \$ per visit	94	98
International Overnight Visitors \$ per visit	523	499

#### EXPENDITURE PER NIGHT

	Jun 16	Sept 16
Domestic Overnight Visitors \$ per night	117	125
International Overnight Visitors \$ per night	90	80

#### Sources:

Visitor volume data-extracted from Tourism Research Australia's National and International Visitor Survey datasets.  
Expenditure estimates (per visitor and per night) from Tourism Research Australia utilising the TRA expenditure allocation model

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## TA17.3 Events and Investment Update

**HPERM Ref:** D17/30526

**Group:** Corporate & Community Services Group  
**Section:** Tourism

**Attachments:** 1. DRAFT Event Policy with links and appendix documents (under separate cover) [↗](#)

### 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

### Event and Investment Update

#### Past supported events (since 1st 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

### In Progress

- Events
  - National Pop Up Cinema – Nowra – 02 – 07/02/17
  - Outrigger State Titles – Ulladulla – 11 – 12/02/17
  - Shoalhaven Week of Golf – Shoalhaven – 12 – 17/02/17
  - Big Husky Triathlon Festival – Huskisson – 17 – 19/02/17
  - Grapest 5km Run – Coolangatta Estate – 04/03/17
  - Mud Muster – Nowra – 18/03/17
  - Willinga Park Open Day – Bawley Point – 18 – 19/03/17
  - Nitro Circus – Nowra – 22/04/17
  - Southern Cross SUP Festival – Sussex Inlet – 28/04/17
  - Culburra Beach Surfing Bash – Culburra Beach – 14/05/17
  - NSW Country Junior Rugby Union Country Champs – Nowra – 20 – 21/05/17
  - Winter Wine Festival – Various Locations – 10 – 11/06/17
  - For a full list of events in the Shoalhaven visit  
<http://shoalhavenholidays.com.au/events/>
- The revised DRAFT Events Policy and updated Event Application Forms have been finalised. A report will go to the February Strategy and Assets meeting of Council meeting for comment, and if approved will then go on public exhibit for comment for 28 days before it can be formally adopted.  
**See Attachment 1 for a copy of the DRAFT policy.**
- Working with possible investors and developing links with local real-estate agents to facilitate desired outcomes.
- Working with Flashcamp on a glamping accommodation site and related experiences for 2017/2018
- To compliment the 100 Beach Challenge online game and marketing campaign we are in the process of seeking expressions of interest from suitably qualified event operators to run the Shoalhaven 100 Beach Challenge Event. We are looking forward to working with an experienced event team to develop a signature annual event that showcases the Shoalhaven to a wide audience. The expression of interest documentation will be sent out this week to over 30 researched event management companies Australia wide.

### Up Next

- Business events and conference guide
- Continue to work with marketing to attract and secure events that are in line with our promotional focus, we are currently working on a Health and Wellness Festival, long table dinners and surfing events
- Work with Fairgrounds to secure state and national funding
- Streamlined sponsorship agreement process
- Research event funding sources

### Results

- Estimated economic benefit from secured events this quarter is \$5.4 million, with sponsorship of \$37,000 across 12 events
- Updated EOI For Funding forms
- Shoalhaven Events Capacity and Capability Review
- Event marketing support schedule to wring the life out of event opportunities
- River Festival Event Management Plan
- Continuing to build robust relationships with enthusiastic like-minded investors passionate about the Shoalhaven



## TA17.4 Visitor Services Update

HPERM Ref: D17/37114

**Group:** Corporate & Community Services Group  
**Section:** Tourism

### Purpose / Summary

To give an update of Visitor Information Services over the last quarter.

### Recommendation (Item to be determined under delegated authority)

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

### Options

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

### Mobile Visitor Centre Programme

The Visitors Centre teamed up with the Council Rangers to deliver tourist information and car parking assistance to the large volume of visitors to the Hyam's' Beach and Huskisson area.

The programme ran for 3 weeks over Christmas and the 'long weekend' at end of January. In total, just under 9,000 inquiries were handled (6,400 at Hyam's, 2,500 at Huskisson).

The VIC staff gave out information about the immediate and general area around Jervis Bay, assisted with parking and logistics. They offered information on many issues including where to eat, cafes, kayak hire, walks, transport, pet friendly beaches, fishing/surfing spots, things to do in the area etc. etc.

The feedback was very positive, both with locals and visitors. We are currently working with the Rangers to identify opportunities to continue the program at key times throughout the coming year.

### Visitor Guides Distribution Update

Overall, the Visitor Guide this year has been very well received. Over 25,000 guides have been distributed since late December. This represents an increase of 80% on this time last year. This is a result of an expansion of our distribution markets and the acceptance by operators as to the benefits of the guide as a promotional/information tool for their guests. The guides have been sent to almost all VIC's within the state of NSW and some to regional Victoria. They have also been distributed to many accommodation providers, holiday rental agents and to cafes, as well as supplementary visitor's centres. Demand has been so high with local businesses we have a constant stream of requests coming in for more books with many operators commenting the book is "the best they have ever seen".

### In Progress

- Nowra VIC has now taken over box office evening shifts from SEC
- Lindsay Conway, one of our Visitors Service Supervisors, is going on maternity leave next month. We wish her well.

### Coming up

- Formal staff famils are beginning next Wednesday 8th February
- Ambassador Programme almost ready to commence
- Review of Supplementary centres
- Focus on packaging and its viability in assisting operators to cross promote their businesses.

### Results this Quarter

Figures Oct - Dec 2016

#### Bookeasy

October	\$15,520
November	\$12,399
December	\$ 22,673

	Nowra	Ulladulla
<u>Counter</u>		
October	1482	1487
November	1689	1650
December	2140	1720

#### Emails

October	935	n/a
November	921	n/a
December	987	n/a

#### Phone

October	1177	531
November	1431	569
December	1321	710

#### Merchandise Sales

October	\$2101	\$2931
November	\$1717	\$4891
December	\$ 3713	\$4183

Note:

Figures are on track with forecasts being met due to move of the Nowra VIC  
While merchandise sales are stabilising, there has been a huge increases YOY in local produce sales with Nowra up by 250% and Ulladulla up 950%.

With the placement of staff at the Ulladulla Library we are seeing a change in attitude within the staff, becoming more tourism focussed as well as the continuing focus on the library.

## TA17.5 Chair's Report

**HPERM Ref:** D17/36558

**Select:** Lynn Locke, Chair

### **Recommendation (Item to be determined under delegated authority)**

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

### **A note from the Chair**

It will be great to meet with you all again since our last meeting in October and after what has been another boom season for the Shoalhaven.

The summer tourism figures I am sure will show that we remain the most popular tourist area.

There were great reports of the success of the Ambassadors that were around providing information to visitors to the area. I believe copies of the Shoalhaven Guide ran low as many tourists grabbed their copy of this fantastic publication.

Congratulations to the Tourism Team on the innovation of the 100 Beach Challenge and providing a pull out in the back of the Visitor's Guide. From all accounts this has proved very popular and will continue to run with many of the beaches having record visitation.

The STAG Induction was held in November and I hope it gave some insight to those that attended.

Congratulations must go to our Board Members Steve Bartlett and Catherine Shields both whom have been appointed to Destination Network Boards as part of the Destination NSW new initiative to replace the previous Regional Tourism Organisations. Both these members will prove invaluable to the Network Board with their knowledge of business and tourism.

We will in the near future revisit the wedding industry with a meeting of local participants to see if they have moved forward from our last catch up.

The removal of the pontoons from the river was a small set back. Prior to them being removed the amount of use they were getting and the number of people taking advantage of this great addition was quite outstanding. Plans are underway to have them reinstalled within the next 2-3 months.

The number of international tourists to the area was also noticeable over the Christmas/New Year period. Matt Cross has been instrumental in creating awareness of the Shoalhaven to overseas travellers and it is now paying off in all areas of the Shoalhaven.

Board positions will soon become vacant and we will be advertising accordingly.

This year should be an exciting year for Tourism and I look forward to hopefully working with you all.

Lynn Locke

## **TA17.6      Industry Presentation**

**HPERM Ref:**      D17/29440

**Select:**            Matt Cross, Discover Jervis Bay

### **Details**

Formal presentation to be given by Matt Cross, Discover Jervis Bay (10 min only).

1. Overview of history and current partnership with Shoalhaven Tourism
2. Highlights of current marketing activity and results achieved by DJB,
3. What's next, looking forward to the future of international tourism.