

Shoalhaven Tourism Advisory Group

Meeting Date: Monday, 01 May, 2017

Location: Jervis Bay Rooms, City Administrative Centre, Bridge Road, 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

Membership

Ms Lynn Locke - Chairperson

Clr Findley - Mayor

Clr Aldrick

Clr John Wells

Clr Jo Gash

Clr John Levett

Clr Greg Watson

Clr Mark Kitchener

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

Ms Imelda Dover – NSW National Parks & Wildlife Service representative

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, 10 April 2017
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 Mark Kitchener
Mr David Goodman
Ms Annie Cochrane
Mr Matthew Forbes
Ms Catherine Shields
Ms Jo Thomas
Mayor Amanda Findley
Ms Louise Hallum
Mr Paul McLeod
Mr Rob Crow
Ms Imelda Dover – NPWS Representative

Others Present:

Clr White
Clr Cheyne
Helen Waterhouse – Community Development Officer
Coralie Bell – Section Manager, Tourism
Kristy Mayhew – Tourism Marketing Specialist
Shannan Perry-Hall – Tourism Investments and Events Specialist
Colin Waller – Destination Network Chair

The Chairperson welcomed the new members and thanked past members. The new members introduced themselves.

Apologies / Leave of Absence

An apology was received from Neil Rogers, Clr Alldrick, Clr Wells and Clr Watson

Confirmation of the Minutes

RESOLVED (Clr Gash / David Goodman)

That the Minutes of the Shoalhaven Tourism Advisory Group held on Monday 27 February 2017 be confirmed.

CARRIED

Note: Clr Gash left the meeting at 5:32pm

Note: Amanda Findley left the meeting at 5:32pm

Declarations of Interest

Nil

PRESENTATIONS

TA17.9 Livv's Place Mollymook Presentation, Helen Waterhouse

HPERM Ref:
D17/100024

Helen Waterhouse provided a presentation and spoke about the benefits to be gained from Livv's Place to tourism in the Shoalhaven. The playspace is expected to open by the Christmas holiday season and it is hoped there will be a 2 week festival at Christmas similar to Sculptures by the Sea.

For more information and to follow the progress of Livv's Place visit Council's website
<http://getinvolved.shoalhaven.nsw.gov.au/Mollymook-beach-reserve-inclusive-playspace>

Presentation on Livv's Place Park project in Mollymook.

REPORTS

TA17.10 New Members of the Shoalhaven Tourism Advisory Group

HPERM Ref:
D17/92533

Recommendation (Item to be determined under delegated authority)

1. Receive the report for information and formally acknowledge and thank retiring members for their valued contribution to the Shoalhaven Tourism Advisory Group, Steve Bartlett, Melissa McManus, Michelle Bishop, Matt Cross and Stuart King.
2. Change the Terms of Reference to reflect additional National Parks and Wildlife Service position.

RESOLVED (Clr Kitchener / Catherine Shields)

1. Receive the report for information and formally acknowledge and thank retiring members for their valued contribution to the Shoalhaven Tourism Advisory Group, Steve Bartlett, Melissa McManus, Michelle Bishop, Matt Cross and Stuart King.
2. Change the Terms of Reference to reflect additional National Parks and Wildlife Service position.

CARRIED

TA17.1 Tourism Managers Report**HPERM Ref:
D17/29356****Recommendation (Item to be determined under delegated authority)**

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

RESOLVED (Annie Cochrane / Catherine Shields)

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

CARRIED

TA17.2 Destination Marketing Update**HPERM Ref:
D17/23962**

Kristy Mayhew advised the Committee that the new Shoalhaven Tourism website is in development and is expected to be launched in June 2017.

Recommendation (Item to be determined under delegated authority)

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

RESOLVED (Catherine Shields / Louise Hallum)

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

CARRIED

TA17.3 Events and Investment Update**HPERM Ref:
D17/30526**

The Committee was advised that Flash Camp will be at Coolendel over Easter and members interested in visiting should contact Shannan Perry-Hall. Also, Nitro Circus Live will be at Shoalhaven Rugby Park on 22 April 2017.

Recommendation (Item to be determined under delegated authority)

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

RESOLVED (Matthew Forbes / Annie Cochrane)

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

CARRIED

TA17.4 Visitor Services Update**HPERM Ref:
D17/37114****Recommendation (Item to be determined under delegated authority)**

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

RESOLVED (Paul McLeod / David Goodman)

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

TA17.5 Chair's Report**HPERM Ref:
D17/36558**

The Chair thanked Catherine Shields and Coralie Bell and the Tourism team for their continued hard work.

Lynn spoke about her meeting with National Parks and Wildlife Service regarding the Great Southern Coastal Walk and advised that the application for funding through the "Regional Growth Environment and Tourism Fund" is being supported. The Walk is from Bawley Point to Maloneys Beach at Batemans Bay.

The 100 beach challenge continues to be very successful and will run for approximately one year.

The Chair recognised the error of the inclusion of Steve Bartlett's name on page 35 of the report.

Recommendation (Item to be determined under delegated authority)

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

RESOLVED (David Goodman / Paul McLeod)

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

CARRIED

OTHER BUSINESS**TA17.11 Additional Item - Environmental & Tourism Grants, Tourism Master Plan, 2017 LGNSW Conference, LGNSW Inclusive Tourism Conference, Walking Promotions, Unspoilt Campaign**

Coralie Bell advised the Committee:

- Council resolved at its meeting on 21 March 2017 to make applications for the following projects to the NSW State Government Restart NSW – Environment and Tourism Grants program:
 - Project - Round the Bay walk incl. Moona Moona Creek, Way Finding, Callala Bay - \$1M
 - Project – Woollamia – Maintaining the Tourism Fleet - \$2.242M
 - Project – South Nowra Rotary Park - \$600,000
 - Project – Nowra Showground Enhancements \$1.05M
 - Project – Beach Erosion Ulladulla Harbour - \$750,000
 - Project – Additional Boating Facilities Greenwell Point - \$3M
 - Project – Shoalhaven Heads River Road Precinct - \$750,000.
- The Tourism Master Plan is due to be reviewed and will be replaced with a sustainable

tourism plan, EOI to go out this month. Feedback will be sought from the Committee in the near future.

- The 2017 NSW Local Government Conference was held in Taree on 12-14 March and focussed on inclusive tourism.
- LGNSW Inclusive Tourism Conference will be held at the Shoalhaven Entertainment Centre on 10 May 2017 and will be a business and marketing opportunity.
- Walking Promotions is at the final consultation stage.
- Formal FOI for the Unspoilt Campaign has been approved and the campaign is in development.

The Chair encouraged members to participate on working groups.

TA17.12 Additional Item - Meetings, Member Induction, Workshop

The Committee agreed that a member induction should be scheduled at 3pm prior to the next Committee meeting and a workshop be scheduled in early May 2017 to discuss strategic directions planning of the STAG.

The Committee also agreed that Committee meetings be held in Ulladulla every third meeting.

Recommended

1. STAG member induction
 - a. An induction meeting be scheduled at 3pm on 1 May 2017 (prior to the next Committee meeting)
 - b. Visuals of the new Shoalhaven Tourism website and information regarding the walking track to be provided in addition to the induction.
2. A workshop be scheduled in early May 2017 to discuss strategic directions planning of the STAG.
3. A copy of the draft Shoalhaven Arts Board Strategic Plan be emailed to members for their information.
4. STAG meetings be held in Ulladulla every third meeting.

TA17.13 Additional Item - Shoalhaven Motorsport Complex, Visiting Journalists, Council Budget, Gungah Event, South Coast Food Alliance Event

Shoalhaven Motorsport Complex

The Chair raised the issue of the Shoalhaven Motorsport Complex and Cllr White provided an update.

Visiting Journalists

Annie Cochrane noted that there have been several large groups of Asian journalists visiting places such as Bannisters and Coolangatta over the last few months. It was also noted that, via Destination NSW, the Sydney Weekender and Getaway also visited Bannisters.

Council Budget

David Goodman asked if it was possible for the full annual marketing budget to be made available to members. It was noted that a summary has been provided as requested in the past. Cllr White noted that Council's budget will be on public exhibition from 28 April to 26 May 2017 and members will be able to submit comments during that time. The budget will be finalised at the June 2017 Council meeting.

Gunyah Event

Paul McLeod advised the Committee that the “Gunyah” event held on Saturday 8 April 2017 at the Jervis Bay Maritime Museum at Huskisson, was very well received.

South Coast Food Alliance event

Jo Thomas spoke about the South Coast Food Alliance event that was held to celebrate the South Coast’s local growers and producers in October 2016. The event was very successful with 150 attending.

There being no further business, the meeting concluded, the time being 6.46pm.

Ms Lynne Locke
CHAIRPERSON

TA17.14 Tourism Manager's Report

HPERM Ref: D17/129692

Group: Finance Corporate & Community Services Group
Section: Tourism

Purpose / Summary

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

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

Things I have been across;

Throughout Council

- Bomaderry Sports Precinct and community hub
- Horses on beaches
- Promotion of Council owned walking tracks
- Budgets and forecasts
- International Delegations
- Nowra branding and portrait project
- Formal request to quote for your Sustainable Tourism Plan is now in market
- Cruise ships and the potential for Shoalhaven
- Queens Birthday Baton Relay event planning
- Various discussions and meetings about the reviews to holiday homes in the state.

Out in Region

- Huskisson main street upgrades
- Site visits; Bomaderry, Nowra, Greenwell Point, Currarong, Culburra Beach,
- Met with Gareth Ward MP, Col Waller, Catherine Shields and Discover Jervis Bay in Huskisson about the need for hotels in our region
- Willinga Park had their open day

I have attended

- Western Sydney Tourism Conference
- Nitro Circus
- Local Government Tourism Conference, presenting on Inclusive Tourism

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
- Inclusive Tourism
- Developing capability for developing conferences and events
- Finalising recruitment for a new content creator for the next 12 months
- Induction and strategic planning for STAG

TA17.15 Destination Marketing Update

HPERM Ref: D17/127053

Group: Finance Corporate & Community Services Group
Section: Tourism

Attachments: 1. Tourism Monitor to YE December 2016 [↓](#)

Purpose / Summary

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

Latest Tourism Figures (YOY Dec 2016)

Data from Tourism Research Australia's National and International Visitor Surveys show that in 2016 the Shoalhaven is now the most visited Local Government Area outside of Sydney City LGA. More than Byron Bay, Blue Mountains, Manly, Port Stephens, or any other LGA. Previously we were the most visited regional LGA but this quarter we have surpassed that with excellent growth. With total 2016 visitation of 3.34 million people – the year on year increase was 19%.

The Shoalhaven hosted 1.45 million domestic overnight visitors in 2016 – an increase of 8% year on year. These visitors accounted for a massive 4.5 million visitor nights during the year. Average length of stay increased to 3.1 nights. This was an extremely positive result given overall South Coast Region nights and length of stay declined. There were 1.85 million domestic day visitors in the year ending December 2016, a 29% increase compared to the same period last year. These Day Trip visitors contribute to almost one third of our visitor economy spending around \$125 per day each, while Domestic Overnight spend around \$136 per night each. This shows how integral tourism is to the great business community, not just tourism operators but hospitality and retail as well. Infographic below provides a snap shot. **See Attachment 1 for the full report.**



* Visitor volume data extracted from Tourism Research Australia; National Visitor Survey & International Visitor Survey; Years ending December 2015 & December 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 is coming along well, due for launch in June 2016. The design, information, architecture and scope of works have been finalised and we are updating our content ready to input into the back end throughout May and early June. Below are some explanations and screengrabs of the itinerary function which is a leading feature. Features also include: a transparent inclusion of accessibility information throughout; live chat function; submit your own event function; 'if you like this, you might like this' recommendation function; 'our stories' content area as well as access to all content via search and a more basic and simple navigation (play, stay, eat). We are also working with this web company to redesign our customer databases with a custom made CRM to replace tourspots and all the disparate customer and operator databases we have.

Image 1: The website visitor can browse Eat, Stay, Play categories in a traditional linear manner but they are encouraged to 'be inspired' by selecting parameters of their holiday which brings up suggested activities and related experiences. For example I might choose to come with my family/my partner and engage in relaxation/adventure in a certain area at a certain time. From here they will be able to 'pick' activities to add to their 'itinerary'

TA17.15

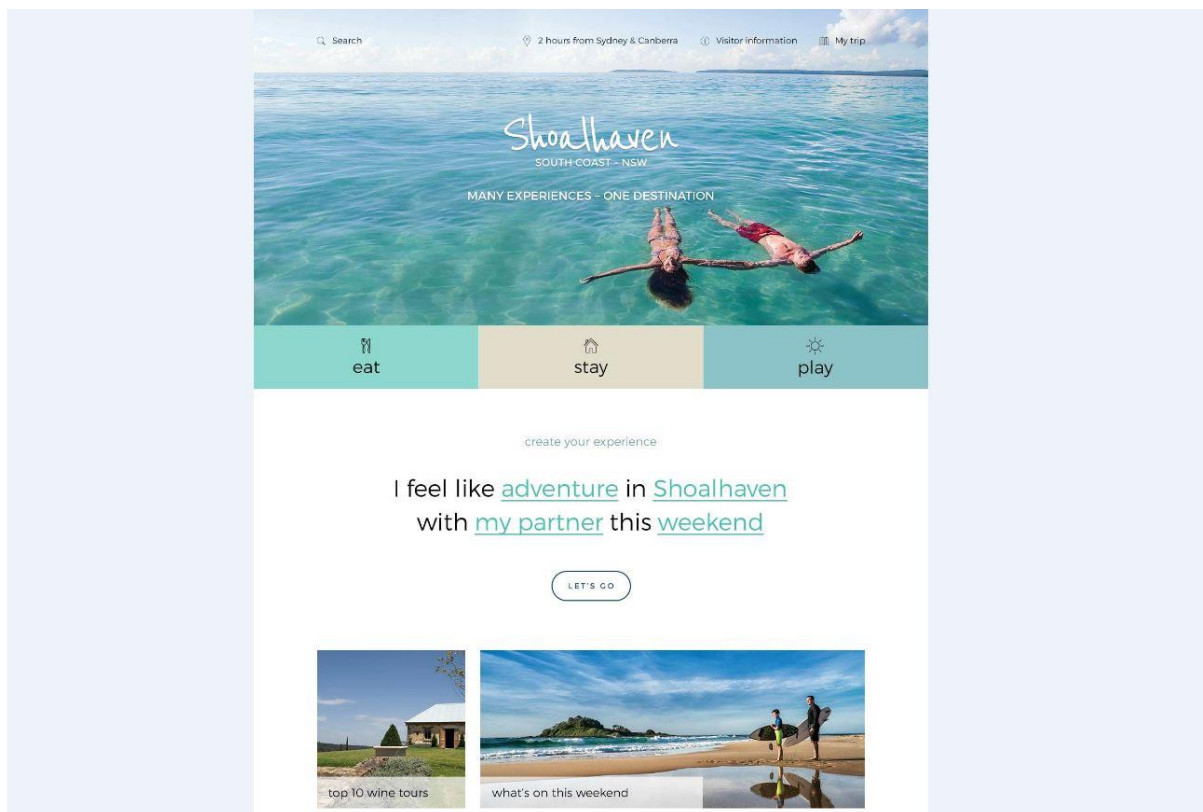


Image 2: The website has been designed with an 'Itinerary Builder' as the main call-to-action' on the homepage which encourages people to build a minimum three-day itinerary by selecting products in a logical road trip order. These products will come up in a list that can be re-ordered, added to, subtracted, saved, shared and booked.

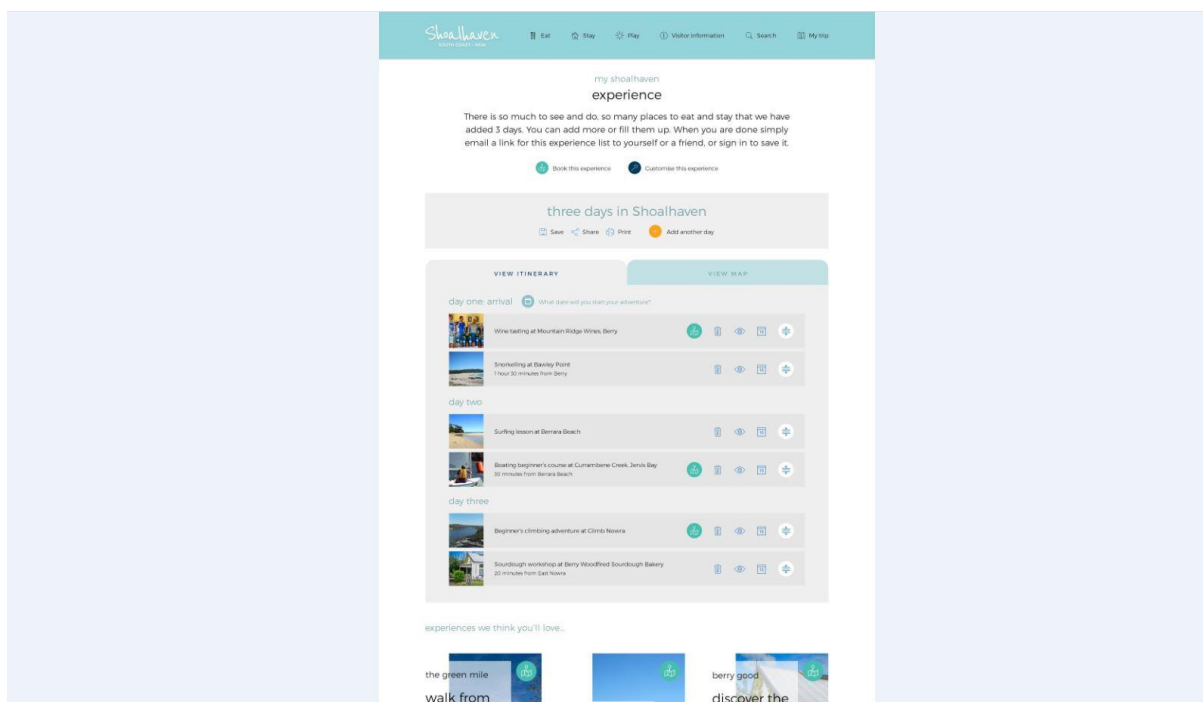


Image 3: This is the map view of the previous itinerary which allows you to see the logical flow of your trip and add or change things if necessary. There is also a function to 'switch to navigation' so that you can jump in your car and use the itinerary as a base to drive you to the Shoalhaven.

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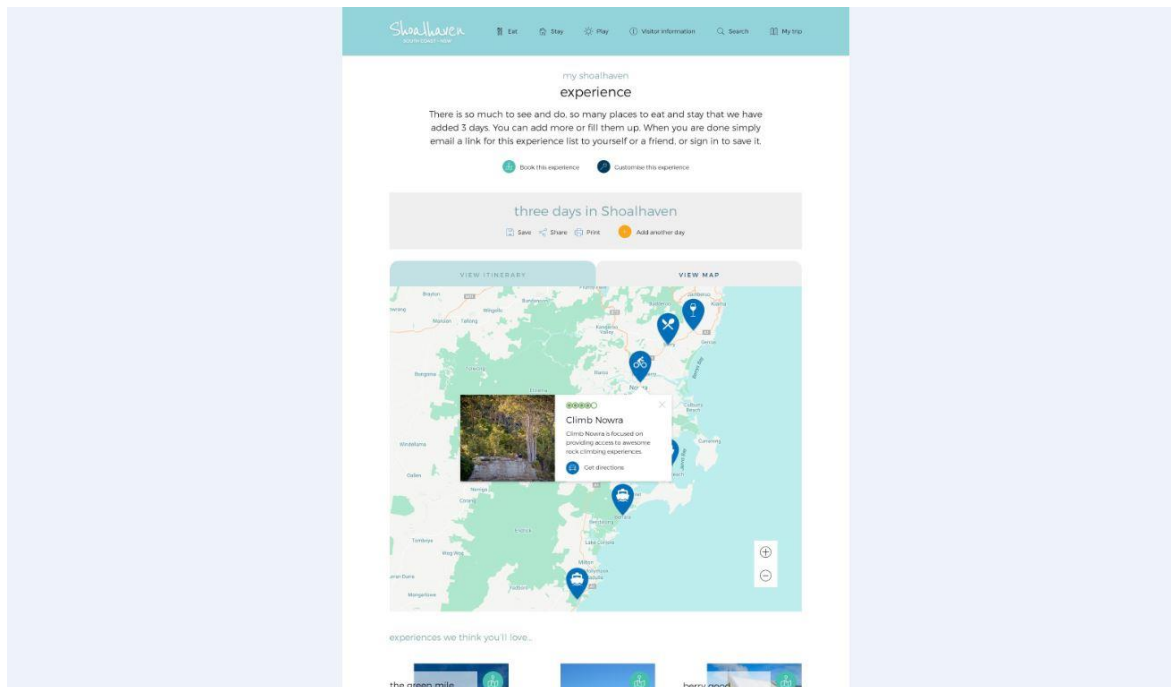


Image 4: Shows the functionality of adding new items to your itinerary as you browse through general listings and see something you like.

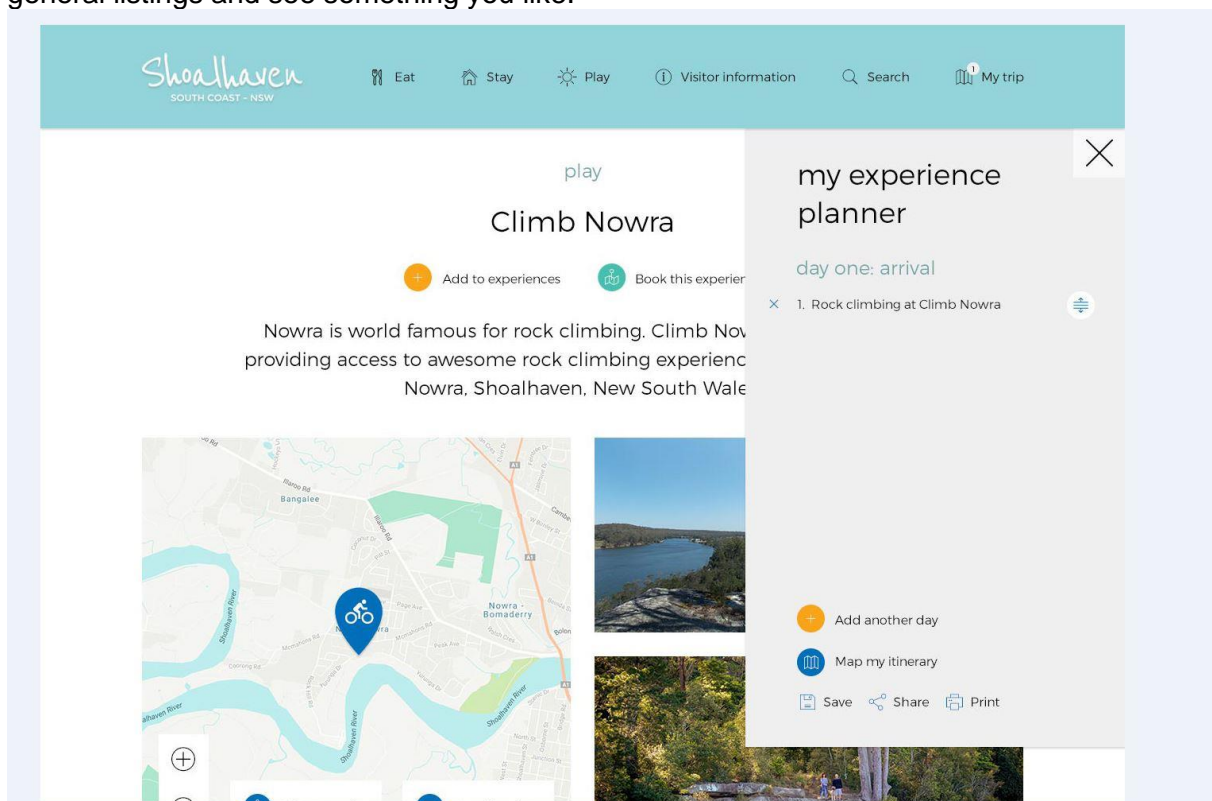


Image 5: This shows the 'print view' which brings up a thumbnail of each experience for a visual representation, plus contains the booking or contact details, address and also a small line of text with a 'recommendation' from us or a local like "Try their Bliss Burger, it's to die for" etc.

TA17.15

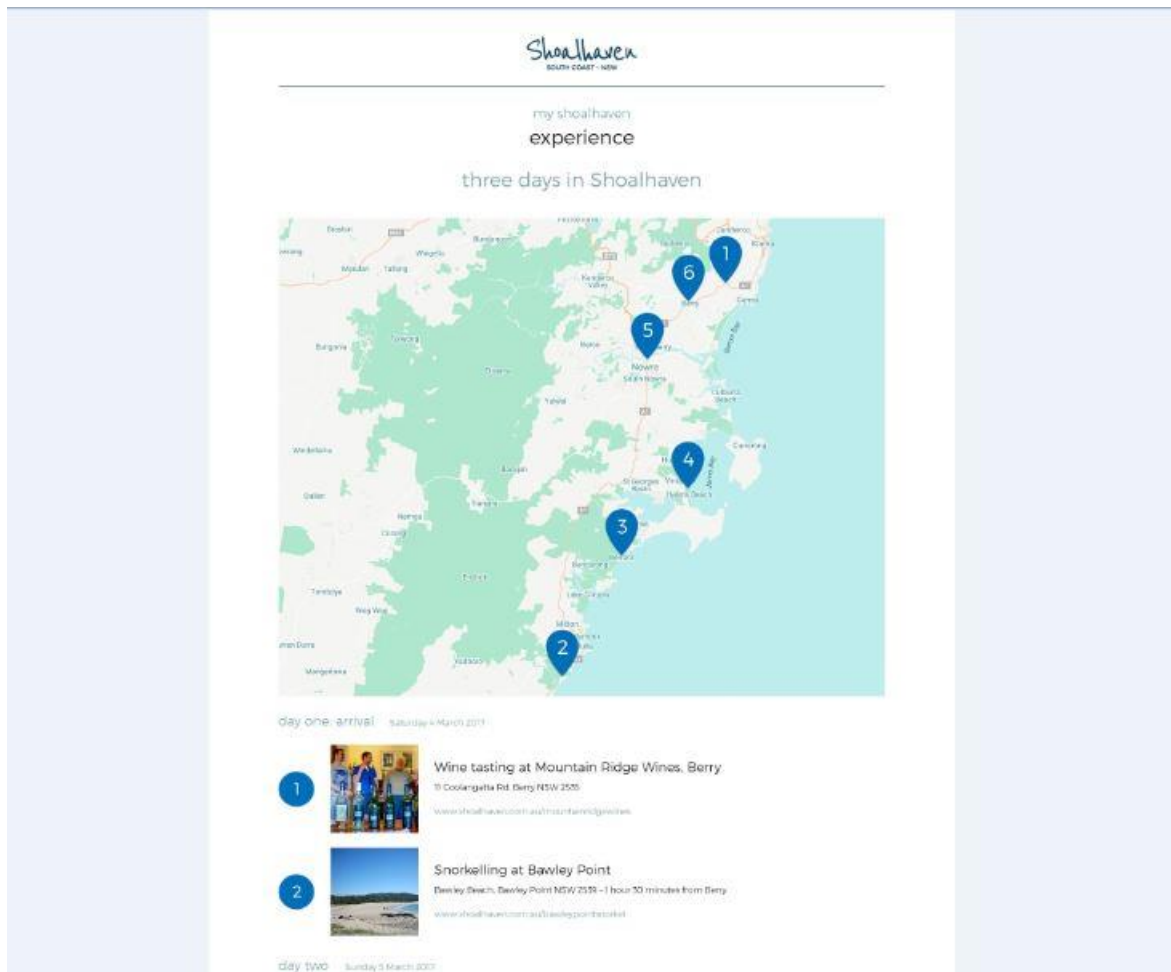
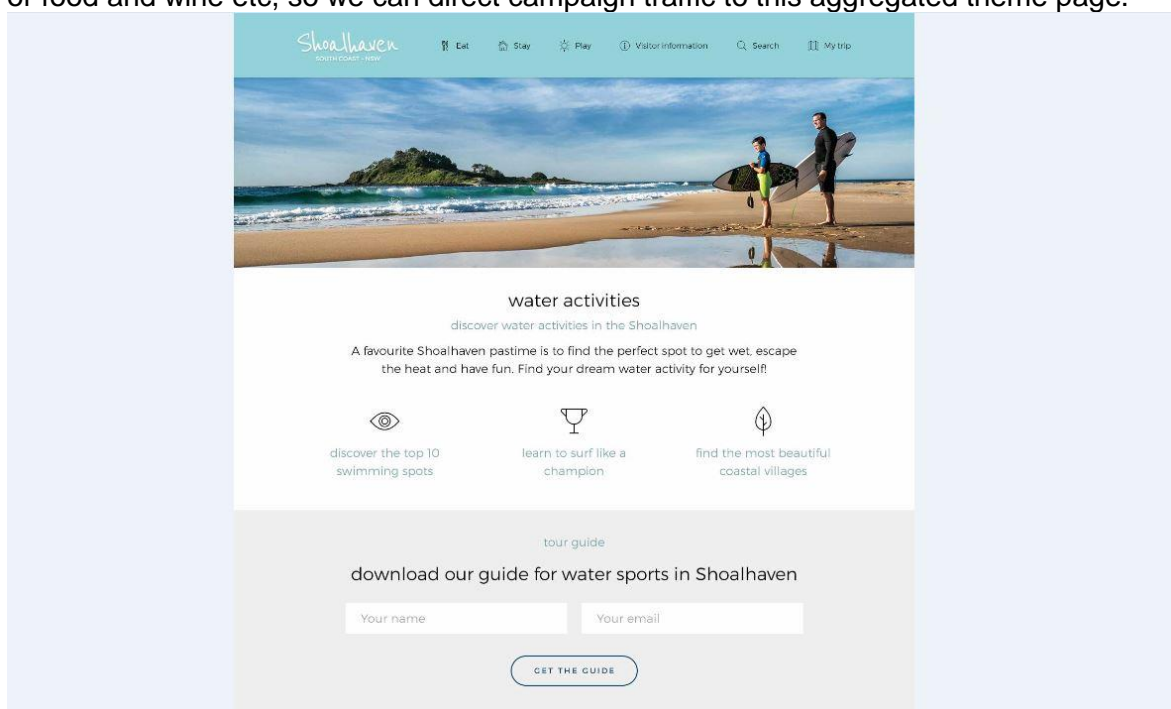


Image 6: This shows the view of a 'landing page' based on a featured activity such as surfing or food and wine etc, so we can direct campaign traffic to this aggregated theme page.



TA17.15

100 Beach Challenge -

The 100 Beach Challenge is our 2017/18 marketing campaign to engage both locals and visitors in exploring lesser known areas of the Shoalhaven, whilst engaging in an online game that encourages them to tick off beaches and share them with the #100BeachChallenge hashtag online. The challenge is going really well with 451 registered players online, many more playing on the hard copy pull out of the Visitor Guide, and 507 photos on Instagram using the hashtag #100beachchallenge, all of beautiful Shoalhaven beaches. The site has had 776 unique users in the last quarter, 2545 sessions and 9644 page views. 100beachchallenge.com

Video Campaign and Road Trip Competition:

We have commissioned a Video Campaign to promote the challenge and encourage yield alongside beach adventures. The videos will be a road trip style and show a three-day itinerary through the Shoalhaven including eat, stay and play as well as beaches. There are 5 demographics for the series: Young Explorers; Contemporary Family; Grey Nomads; Weekend Warriors (DINKS); Local Shoalies. The series is being produced by PASTE Studios in an inspirational no dialogue clips similar to the following that they did for Fairgrounds festival: <http://pastestudios.com/portfolio-item/fairgrounds-festival-2016/>

The videos will be targeted to their particular demographics online and feature a call to action to play the 100 beach Challenge, but also to visit our new website and create their own 'dream road trip' in the form of a 3-day itinerary. They build and submit their 'road trip' online for their chance to win that itinerary. This will encourage interaction with the new website as well as holiday inspiration and product engagement for potential visitors.

We Are Explorers Partnership:

We are hosting 'We Are Explorers', and well respected online Adventure community and blog who are going to go to the most remote and spectacular beaches and tackling the challenge in adventurous ways, from kayaks, cliff walks etc. The fam includes: two photographers, one videographers, two adventurers for four days in the Shoalhaven. The partnership includes two short (30sec) and one long (90sec) videos, Advertising (100,000) and EDM (12,000) takeovers on their website; 6 images on their Instagram (28K); and an article on their website shared across Facebook (\$50K). The 'adventurers' and photographers coming also have a huge following of their own and will be posting to their own accounts as well.

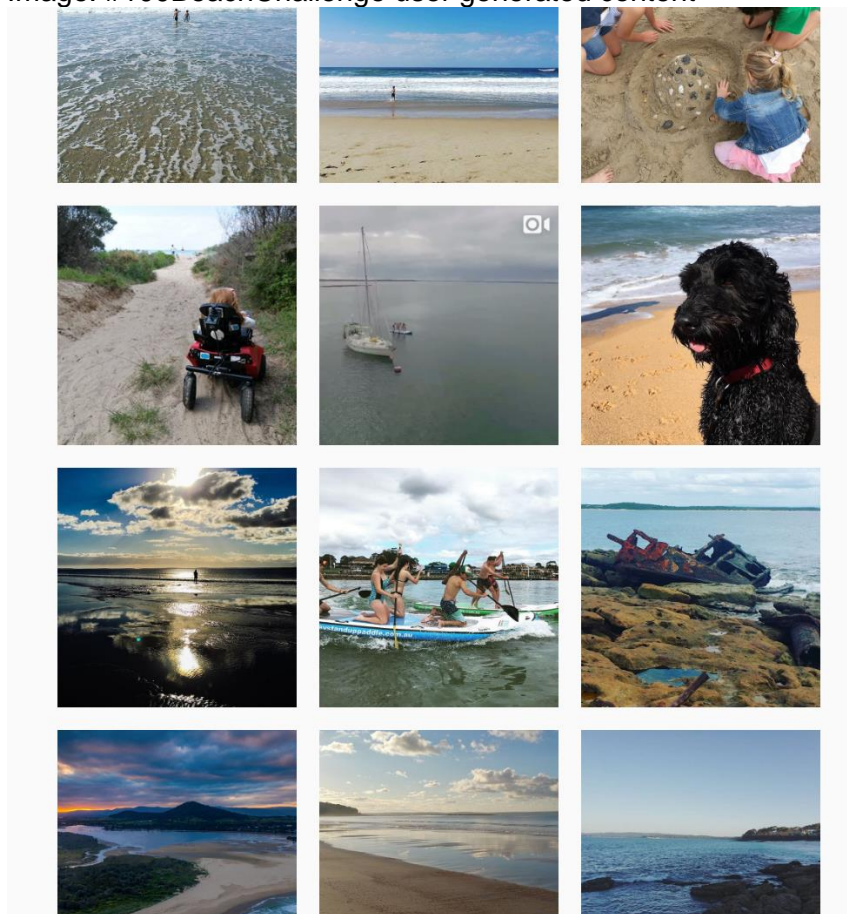
Publicity and Influencers:

We launched the challenge to media earlier this year and received a great response across over 30 outlets including news and blogs Australia-wide. We are also working with well-known individual photographers on a 100 Beach Challenge famil program that will roll out over the next few months. Will Patino will be coming with his family in August and has 164K followers on Instagram. Will will be hosted by us, unpaid but agree to post photos of his trip. Each photo he posts gets over 5000 likes so having him here for a few days will prove to be fruitful in terms of reach.

Image: Visitors to 100BeachChallenge site breakdown (Jan – Mar)

1. Sydney	1,024 (53.53%)
2. Canberra	646 (33.77%)
3. Nowra	74 (3.87%)
4. Melbourne	43 (2.25%)
5. Central Coast	34 (1.78%)
6. Wollongong	27 (1.41%)
7. Newcastle	15 (0.78%)
8. Brisbane	11 (0.58%)
9. (not set)	9 (0.47%)
10. Kiama	5 (0.26%)

Image: #100BeachChallenge user generated content



Unspoilt –

Our application for cooperative marketing from the new Destination NSW marketing program has been approved. This allows the successful continuation of the Unspoilt campaign which

has been in market since 2012. Shoalhaven has a continued investment of \$140K this year, along with all South Coast partners (Kiama, Shellharbour, Eurobodalla and Sapphire Coast) are contributing with a slightly increased total budget this year. The primary target market is couples who travel in off-season from Sydney and Canberra. The marketing mix includes using the best of our previous Unspoilt still images in high impact in Winter including billboards in Sydney and Canberra plus 'baseline advertising' across web, search and social media from June. Video assets are being developed for the first time to go live in early Spring showcasing 'itineraries' - relating to food, wine and soft adventure - throughout the South Coast online and possibly on digital billboards. We are also investigating television as an option across Regional NSW networks. The South Coast partners all agree that a component of funds go into Publicity activities.

Content – Katie Rivers Photography finishes up

Katie Rivers has recently finalised her 12-month role as our 'in-house' photographer, providing us with over 20,000 photographs for our image library over this time. This is an outstanding result as we now have a continuity in the look and feel of our images as well as providing these images back to operators and businesses free of charge. The feedback has been fantastic, and Katie's skill in photographing natural moments that include people within the environment has been a great asset. Browse Katie's photos here. <https://www.flickr.com/photos/visitshoalhaven/>

Content – New Digital Content Producer role recruiting

A 12-month role was created for a Digital Content Creator and interviews are occurring on 24 April. This role is strategically on staff to create a bank of video and written blog content as well as assist with writing for publicity etc. We require the incumbent to be skilled in the 360 of video making from producing to shooting and editing, and most importantly, have journalistic and community engagement skills to be able to talk to locals, operators and visitors about their tourism experiences. 'Our Stories' is an important part of our new website build so talking to locals about their favourite things to do in the Shoalhaven will be first off the bat. We have had some great applicants so it will be exciting to see who ends up part of the team.

Publicity

ATE Famils: DNSW has been organising famils for international delegates as part of the Australian Tourism Exchange event in Sydney. They have been very impressed with the amount of uptake of famils for the South Coast this year. Between 7 and 19 May the Shoalhaven will host 17 international delegates from media and travel companies across China, India, Germany, Chile, Hong Kong, France, and Singapore. Our international ready product such as Coolangatta Winery, Greenwell Point Oysters, Jervis Bay – dolphin tours and Glamping etc..

Influencers:

Andrea Chong came as a guest of DNSW from Singapore with 280K followers on Instagram. She came to Bannisters and Paperbark Camp. See picture below.

Not Quite Nigella is one of the top 10 food bloggers from Sydney and recently came to Huskisson for a dog friendly foodie trip. She has more than 50K Instagram followers. She was hosted by the Hawkes Nest Villas and the Butcher in Vincentia. A great initiative by these operators! <http://www.notquitenigella.com/2017/03/18/huskission-jervis-bay-things-to-do-dog-friendly/>

Television:

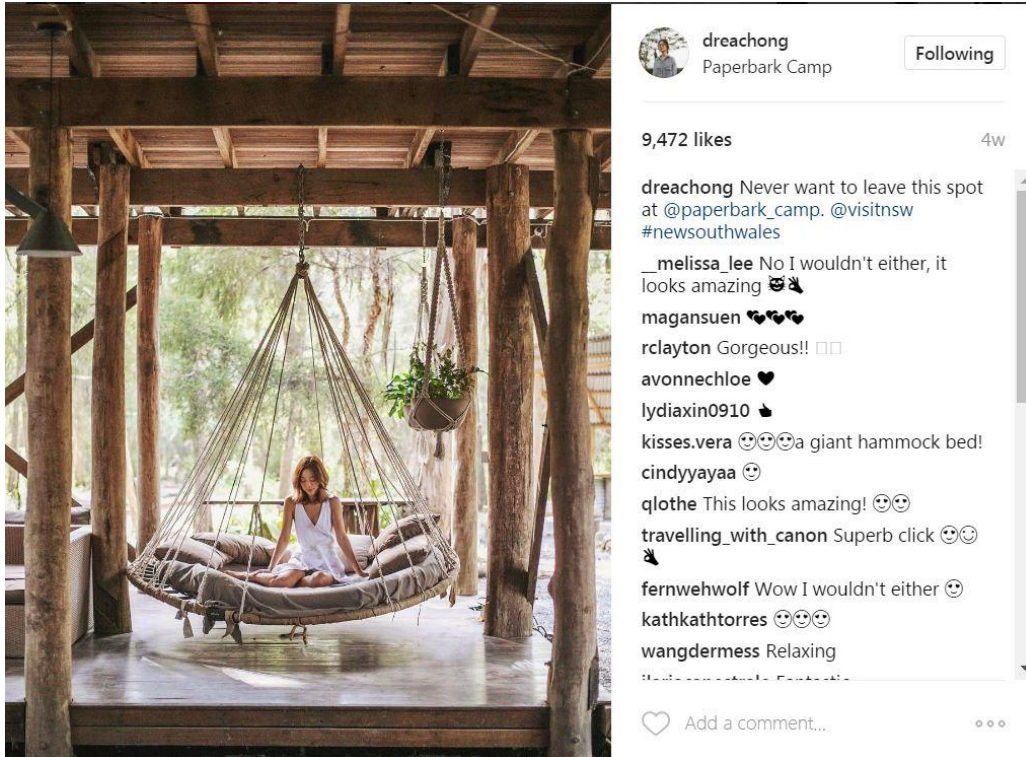
Sydney Weekender – Recent DNSW supported Sydney Weekender episodes include: Cupitts Award winning winery and restaurant; Lake Conjola walking tours; Glamping at Huskisson; Cooking Classes at Kangaroo Valley.

Getaway – filmed nine short video pieces across the region, partly funded by DNSW including Stand Up Paddle Boarding in Huskisson, Bannisters in Mollymook and much more.

Other:

Broadsheet - Are coming to do a road trip feature through the South Coast as a part of the Unspoilt Campaign. They have a huge high end hipster reach throughout Australia.

Tim the Yowie Man's 'Pie Trail' video – We are hosting Tim the Yowie Man (the adventurer of Canberra Times fame) to do a 'Pie Trail' with a film crew through the Shoalhaven. He will come through the Highlands and Eurobodalla but most pies will be in our region as we are assisting with accommodation.



TA17.15

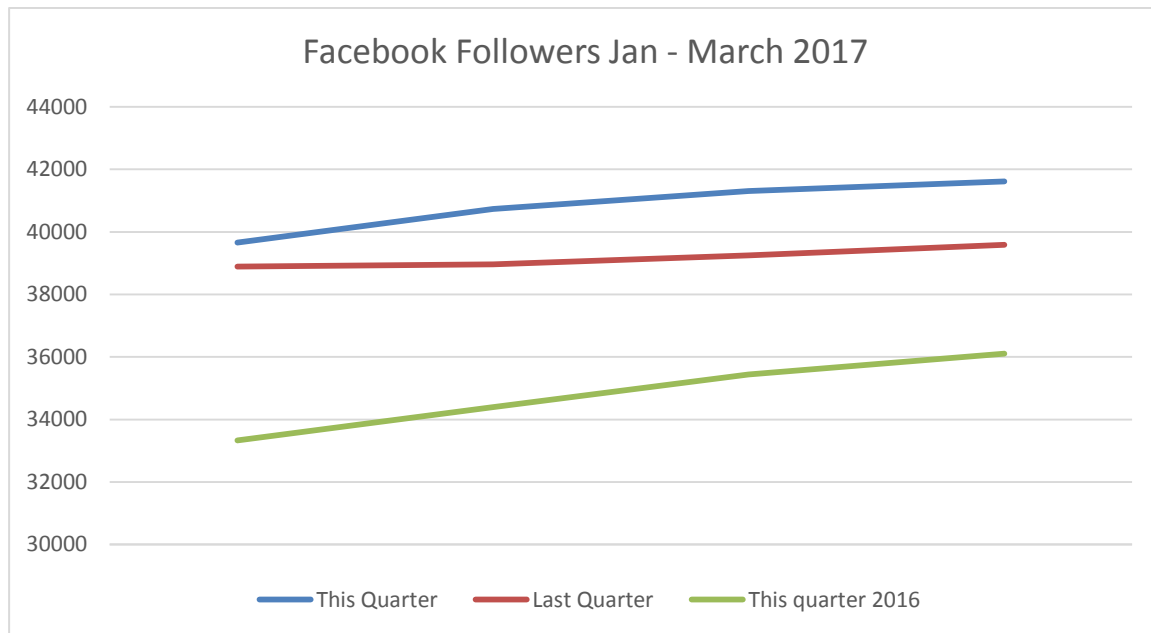
Visitor Services Marketing -

The Volunteer Ambassadors: The program has around 20 applicants that Joe Puglisi will be working with to induct in early May. Marketing completed a big push through media, print, and radio and we are happy with the applicants the campaign has brought in.

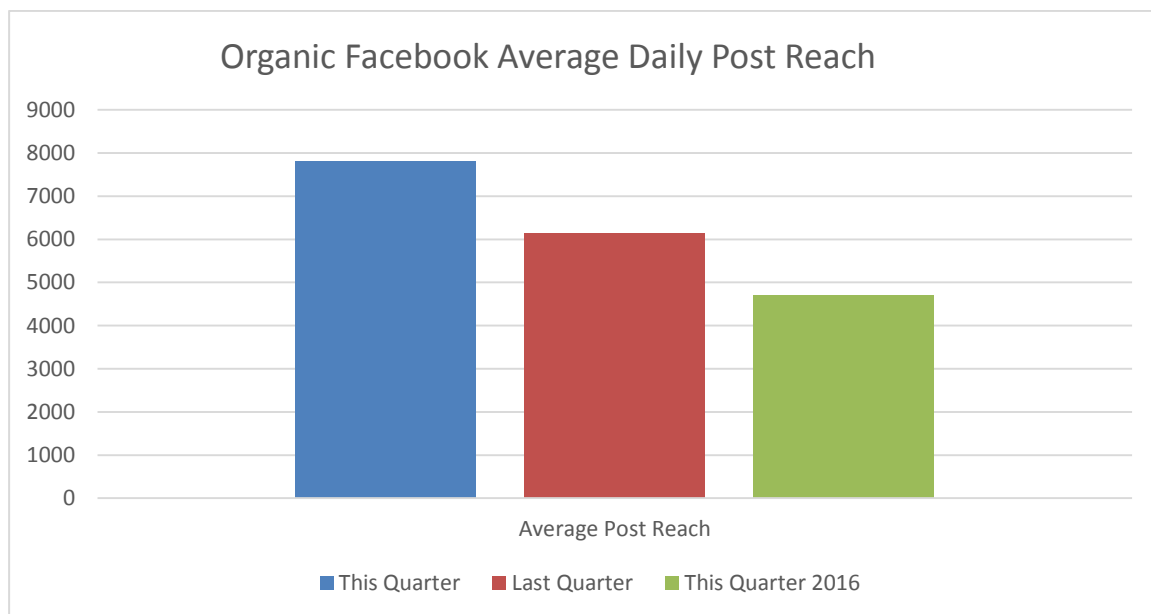
New brochures have gone to print: Apart from our Visitor Guide, we have developed a suite of smaller guides based on Kayaking, Surfing, and Pets on Holidays. These have been very popular, so we have done a refresh of content and images and have 5K of each going to print.

Digital screens now for sale ads: The digital kiosks in the Nowra Visitor and Entertainment Centre are now for sale to operators. We have an average of 10,000 people through the centre each month and the ads cost \$200. That's around \$50 per week. We will gain enough money in income to offset cost of these screens.

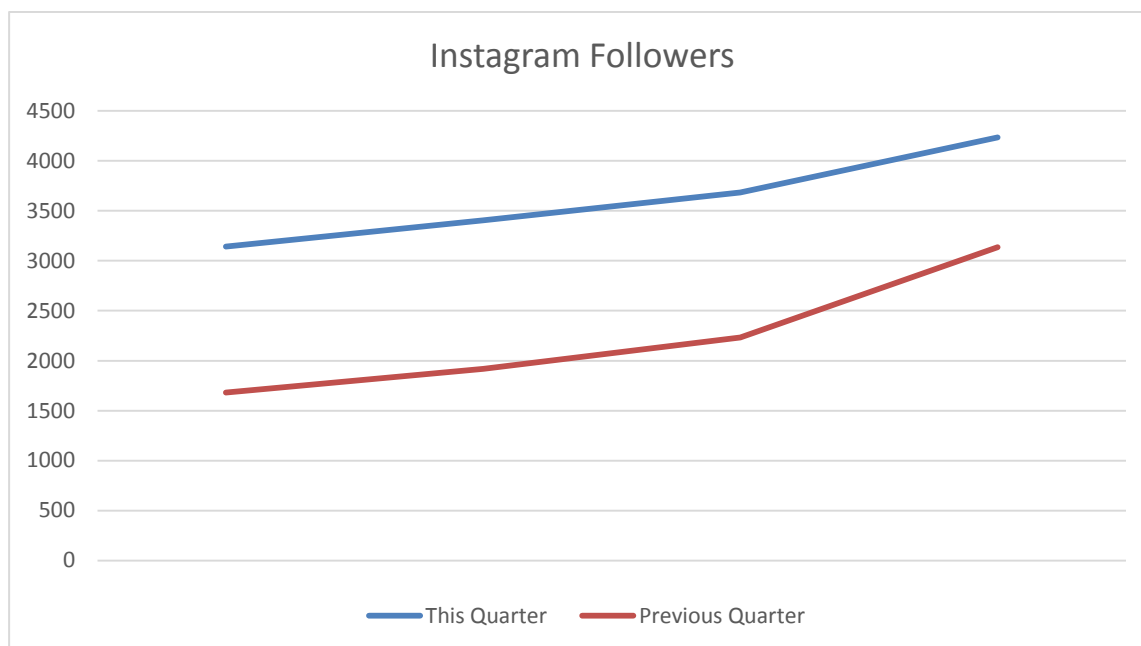
Digital Marketing Report (prepared by Georgia Herring)
Social Media Report – January 1 2017 – March 31 2017



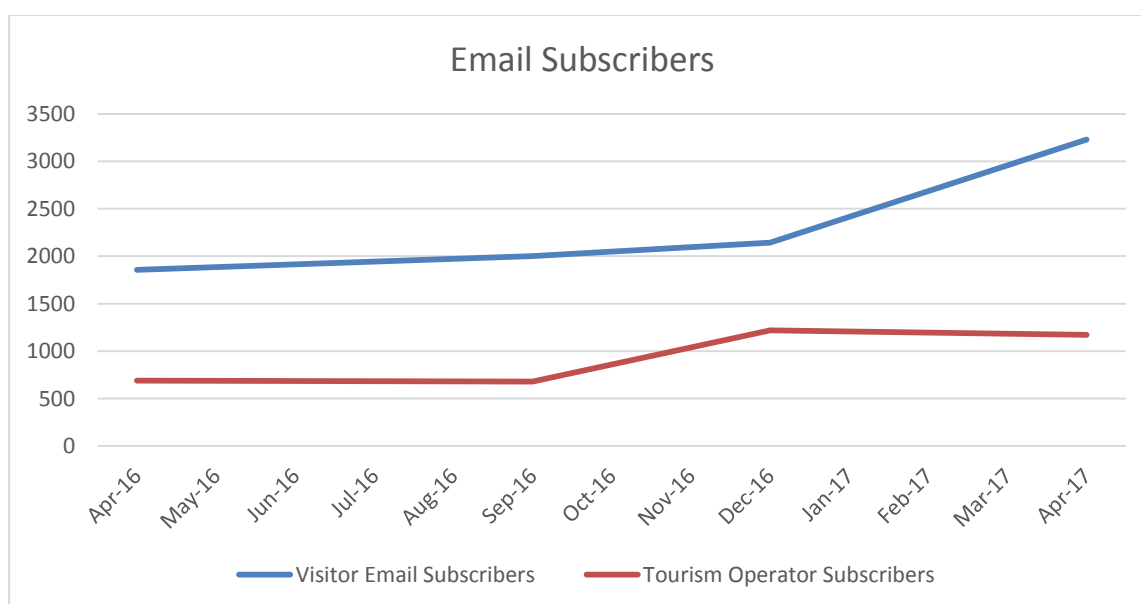
Our Facebook follower growth was strongest over January which coincides with the launch of our 2017 Visitor Guide online campaign.



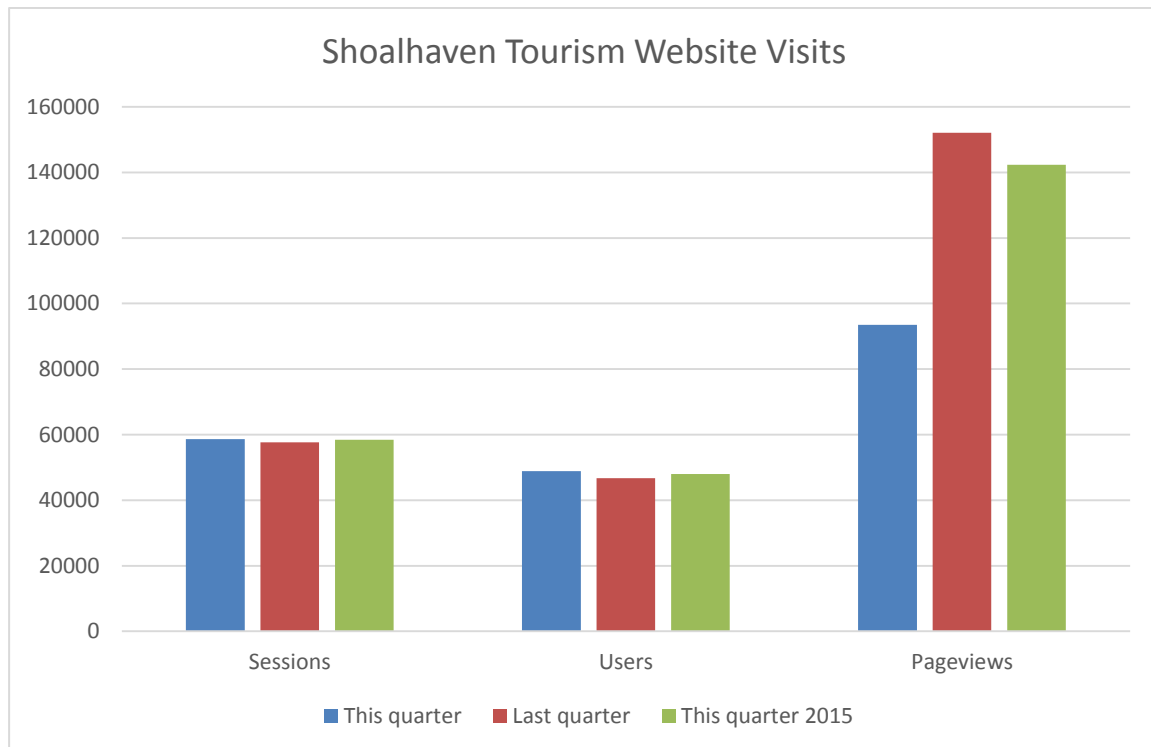
The number of people seeing our posts is increasing steadily due to more strategic content, resulting in more likes and shares and therefore overall reach into existing and new audiences.



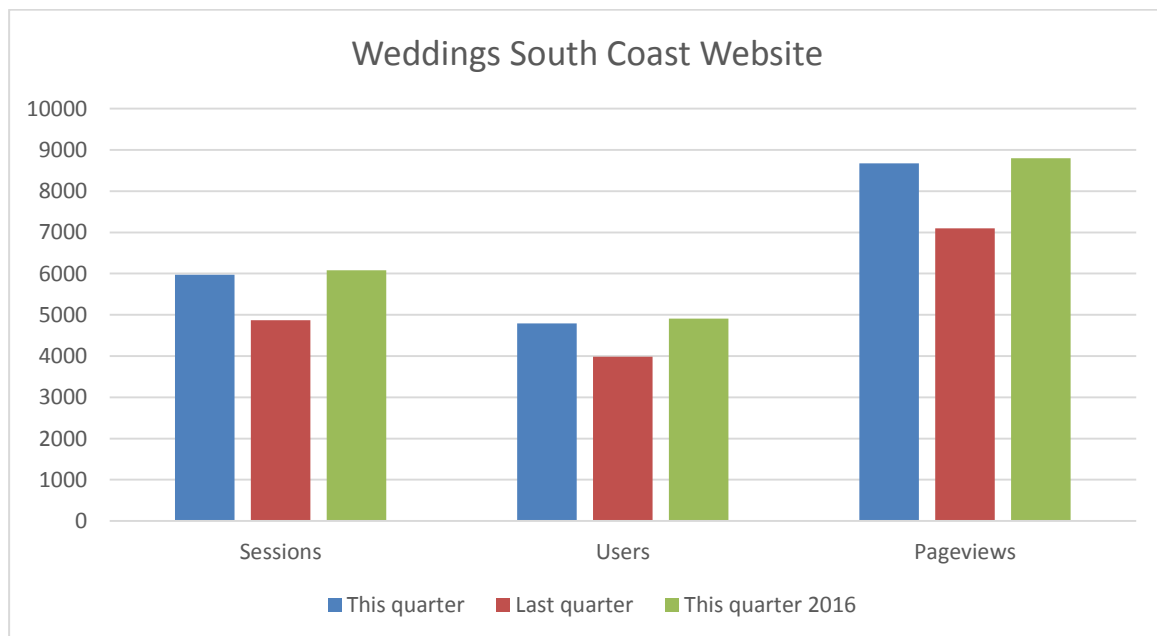
Our Instagram followers have been rising steadily, with a steeper increase in March that is due to the Flash Camp Instagram competition as well as the launch of our 100 Beach Challenge favourite weekly featured photos.



Our Visitor Guide campaign which began in December has led to a rise in visitor email subscribers.



Users of the website has increased as well as number of sessions. A reduction in page views could be caused by either people finding what they are looking for faster, or by people choosing to bounce off the site, possibly due to how outdated it is compared to competitors. This problem should be resolved by the new website.



The South Coast Weddings Website needs an overhaul, which will be built into next financial year's strategy.

Up Next -

- Shoalhaven Foodie Trails Famil + PR campaign
- 100 Beach Challenge VFR campaign
- CRM development

- 2017/2018 planning and budget development
- New Billboards reskin
- Bushwalking Brochure
- Bird Walks Brochure



SHOALHAVEN TOURISM MONITOR

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

Year ending December 2016



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

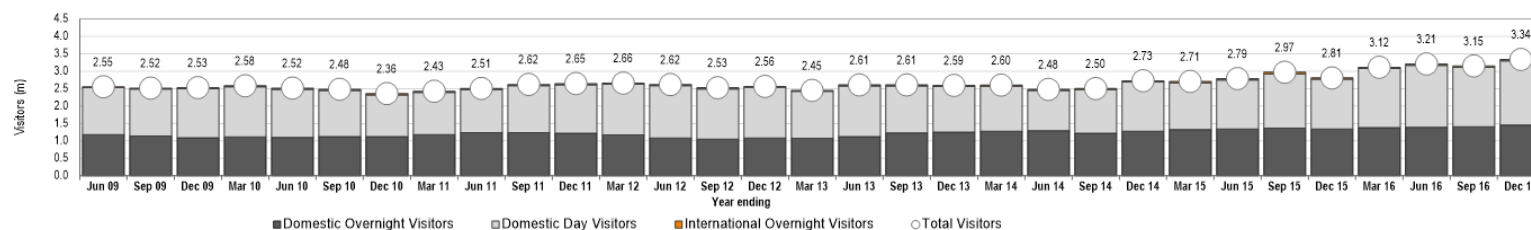
Shoalhaven Tourism Monitor

Year ending December 2016

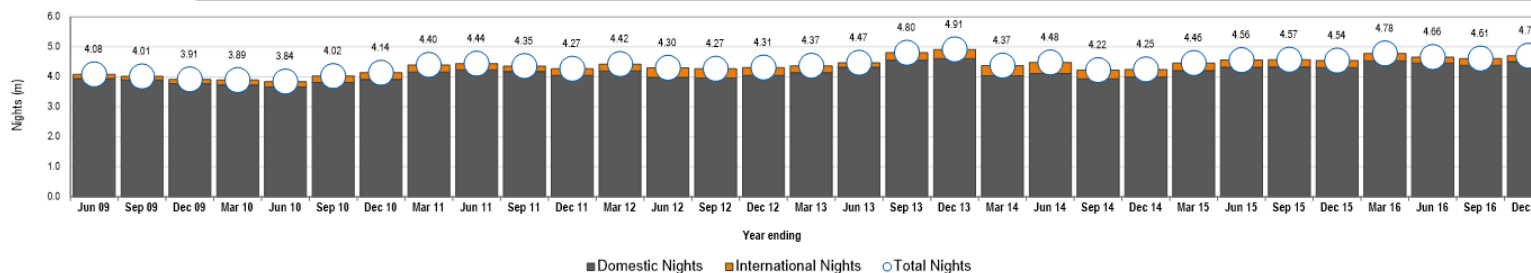
SUMMARY

Shoalhaven
SOUTH COAST - NSW

	Visitors (m)																															
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	Dec 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	1.45	
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	1.85	
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	0.043	
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	3.34	
Change vs same period prev. year					-1.5%	-1.3%	-5.8%	-5.0%	-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%	18.9%	



	Visitor Nights (m)																															
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	Dec 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	4.50	
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	0.20	
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	4.70	
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%	6.2%	6.9%	7.2%	2.2%	0.8%	3.6%	



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

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Shoalhaven Tourism Monitor

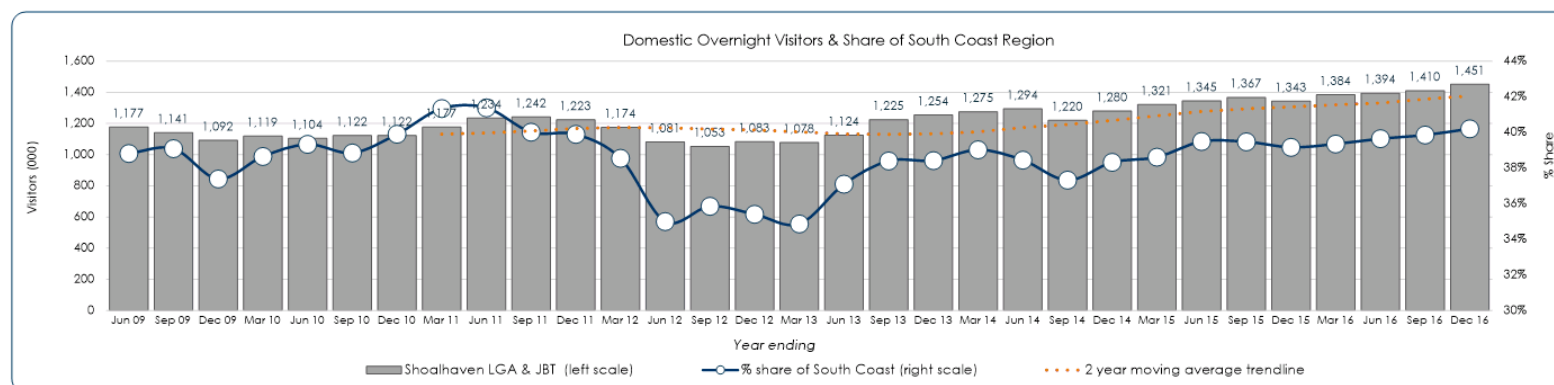
Year ending December 2016

Shoalhaven
SOUTH COAST - NSW

Domestic Overnight Visitors																																SOUTH COAST - NSW			
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	Dec 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	1,451				
% 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%	16.3%	15.1%	-0.4%	2.1%	3.6%	3.9%	12.0%	4.9%	4.8%	3.6%	3.1%	8.0%				
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	2,578	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	3,122				
% 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%	6.0%	5.2%	3.0%	3.6%	3.4%	4.9%				
% 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%	46.5%				
South Coast Tourism Region (000)	3,032	2,919	2,921	2,895	2,807	2,888	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	3,366	3,269	3,340	3,421	3,406	3,463	3,429	3,517	3,516	3,538	3,609				
% 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%	2.8%	3.2%	2.2%	5.2%				
% share of South Coast Tourism Region	38.8%	39.1%	37.4%	38.7%	39.3%	38.9%	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%	40.2%				
SHADING LEGEND: <div><div></div> Above average</div>																																			
*The Market Reference Group includes SAZs in Kiama, Southern Wingemba, Eurobodalla, Northern coastal Sega Valley & Bradwood SAZ. Shoalhaven and JBT are also included for share calculation purposes.																																			

SHADING LEGEND: Above average

*The Market Reference Group includes SAZs in Kiama, Southern Wingecambee, Eurobodalla, Northern coastal Bega Valley & Braidwood SAZ. 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 DECEMBER 2016:

- 1.45 million for the year ending December 2016 is this is the HIGHEST FOR ANY 12 MONTH PERIOD in the Monitor and clearly above average.
- The 8.0% increase compared to the same period last year is the 9th consecutive period-on-period increase. Although the change is not statistically significant, the growth trend over more recent years support a conclusion that a substantial increase did occur.
- Visitor volume in the Market Reference Group and the South Coast Tourism Region both recorded period-on-period growth (although not as high as for SJBT).
- SJBT's share of both were similar to that recorded in the YE December 2015. Share of the South Coast Region shows consistent and steady improvement.
- The two year moving average trendline follows the positive direction of visitor volume and share. This emphasises the steady growth over more recent years.

Shoalhaven Tourism Monitor

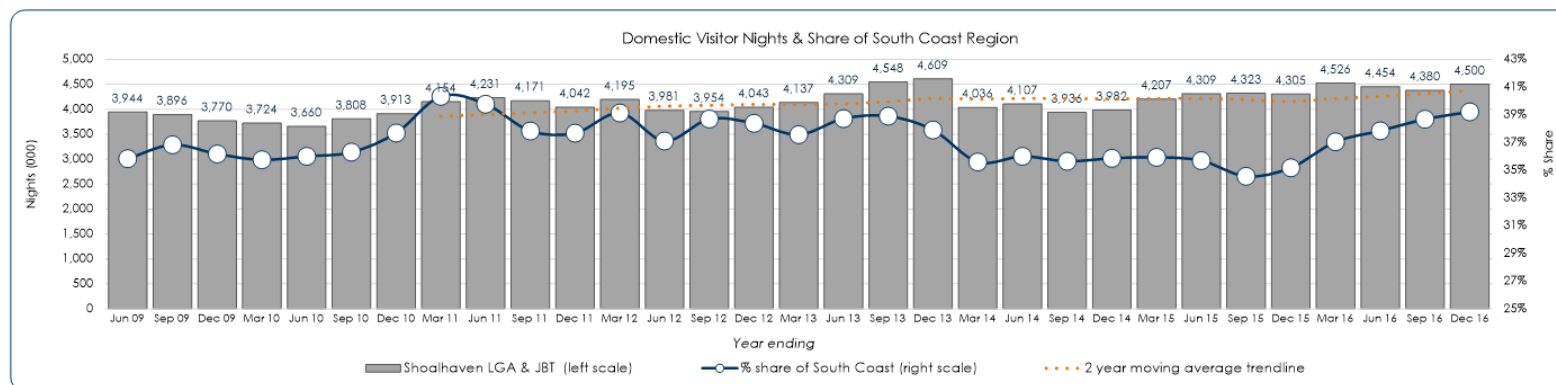
Year ending December 2016



Domestic Visitor Nights																														SOUTH COAST - NSW	
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	Dec 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	4,500
% 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%	4.5%
Market Reference Group* (000)	9,641	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	9,546	9,644	9,284	9,249	9,929	10,340	10,418	10,256	10,580	10,080	9,945	9,976
% change vs same period prev. year					-8.2%	-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%	-2.7%
% 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%	45.1%
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	11,474
% 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%	-5.8%	-8.7%	3.2%	5.8%	13.3%	10.2%	4.3%	-2.5%	-9.5%	-5.2%
% 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%	39.2%
SHADING LEGEND:		<div><div></div> Above average</div>																													
*The Market Reference Group includes SA2s in Kiama, Southern Wingecarbee, Eurobodalla, Northern coastal Soga Valley & Bradwood SA2. Shoalhaven and JBT are also included for share calculation purposes.																															

SHADING LEGEND: Above average

*The Market Reference Group includes SAZs in Kiama, Southern Wingecarribee, Eurobodalla, Northern coastal Bega Valley & Braintree SAZ. 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 DECEMBER 2016:

- Domestic overnight visitors are estimated to have been spent 4.5 million nights in the SJB region in the year ending December 2016. This is the now 8th consecutive estimate greater than 4 million - the first time this has ever been achieved since records began (1998).
- This represents another on-paper increase compared to the same period last year (although the change is not statistically significant).
- This growth - once again - 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 year ending December 2015.
- This has seen SJB's share of both the Market Reference Group and the South Coast Region nights rise further. This adds further weight to the proposition noted in the previous Monitor that a positive share trend has formed. This, in short, means that SJB is following better than 'market'.

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Shoalhaven Tourism Monitor

Year ending December 2016

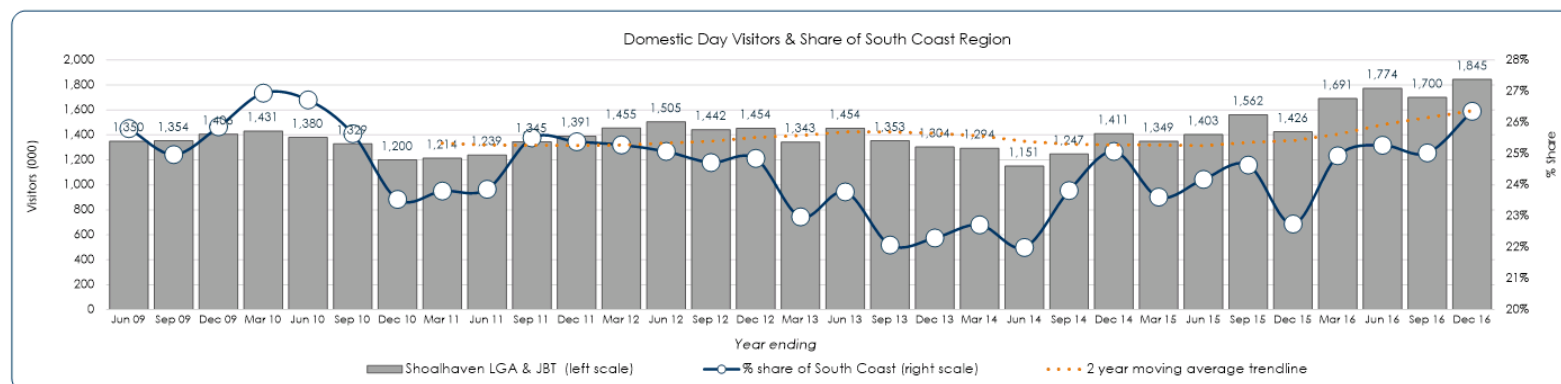
Shoalhaven
SOUTH COAST - NSW

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	Dec 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	1,845
% 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%	29.4%
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	4,641
% 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%	-9.4%	5.9%	8.1%	10.5%	19.1%	0.6%	10.8%	21.2%	7.2%	19.0%
% 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%	39.8%
South Coast Tourism Region (000)	5,232	5,422	5,437	5,312	5,164	5,184	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	7,000
% 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%	11.6%
% share of South Coast Tourism Region	25.8%	25.0%	25.9%	26.9%	26.7%	25.8%	23.5%	23.8%	23.9%	25.5%	25.4%	25.3%	25.1%	24.7%	24.8%	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%	26.4%

SHADING LEGEND: Above average

*The Market Reference Group includes SA2s in Kiama, Southern Wingecarbee, 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 DECEMBER 2016:

- Domestic day visitor volume remains well above average. A NEW DAY VISITOR RECORD has been set with the addition of the year end December 2016 data.
- The 29.4% increase compared to the same period last year is statistically significant using the most rigorous test.
- Both the Market Reference Group and the South Coast Tourism Region hosted more domestic day visitors than in the year ending December 2015 but their rate of growth was much lower than that of SJBT.
- SJBT's share of both the Market Reference Group and the South Coast are higher than the same period last year. Share of the South Coast has risen to levels not seen since 2010. A clear growth trend in share has formed over recent years - recovering from a low point in 2014.
- The latest results are ANOTHER ABOVE AVERAGE 'QUADRELLA' with visitor volume, growth, and both market share measures being above average.

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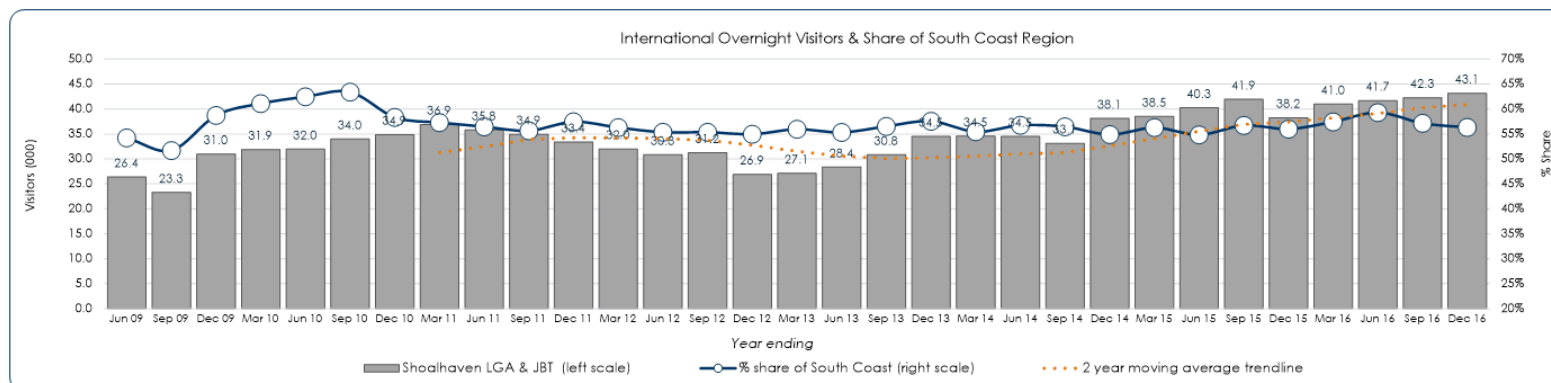
Shoalhaven Tourism Monitor
Year ending December 2016

Shoalhaven
SOUTH COAST - NSW

		International Overnight Visitors																																SOUTH COAST - NSW			
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	Dec 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	26.9	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	43.1					
% 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%	26.2%	27.3%	21.5%	7.4%	10.5%	11.5%	16.8%	26.6%	0.3%	6.4%	3.5%	0.8%	12.8%					
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	66.4	72.8	73.3	78.3	79.3	79.7	82.2					
% 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%	13.6%						
% 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%	52.5%					
South Coast Tourism Region (000)		100	98	105	106	103	108	111	120	121	119	115	108	105	105	102	100	104	108	112	114	111	107	114	117	125	128	129	136	134	140	148					
% 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%	12.9%						
% 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%	56.3%					
SHADING LEGEND																																					
		Above average																																			
		*The Market Reference Group includes SA2s in Kiama, southern Wingecarribee, Eurobodalla, Northern coastal Segr Valley & Braidwood SA2s. Shoalhaven and JBT are also included for share calculation purposes.																																			

SHADING LEGEND: Above average

* The Market Reference Group includes SAs in Kiama, Southern Wingecarbee, Eurobodalla, Northern coastal Bega Valley & Braidwood SAs. 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 DECEMBER 2016:

- Just over 43,000 international visitors spent at least one night in SJBT during the ending December 2016. This extends a modest but clear growth trend.
- This change compared to the same period last year is not statistically significant. However based on the growth trend an increase is more likely than not.
- Market Reference Group and the South Coast Tourism Region international volume both increased - with a growth rate similar to that of SJBT.
- SJBT's share of the Market Reference Group was just below that of the same period last year and is slightly below average. The change is not considered significant.
- Share of the South Coast Region is almost the same as the year ending December 2015 and marginally lower than recent periods. The changes are not considered significant - especially given the very narrow share 'bandwidth' evident over an extended period of time.

Shoalhaven Tourism Monitor

Year ending December 2016

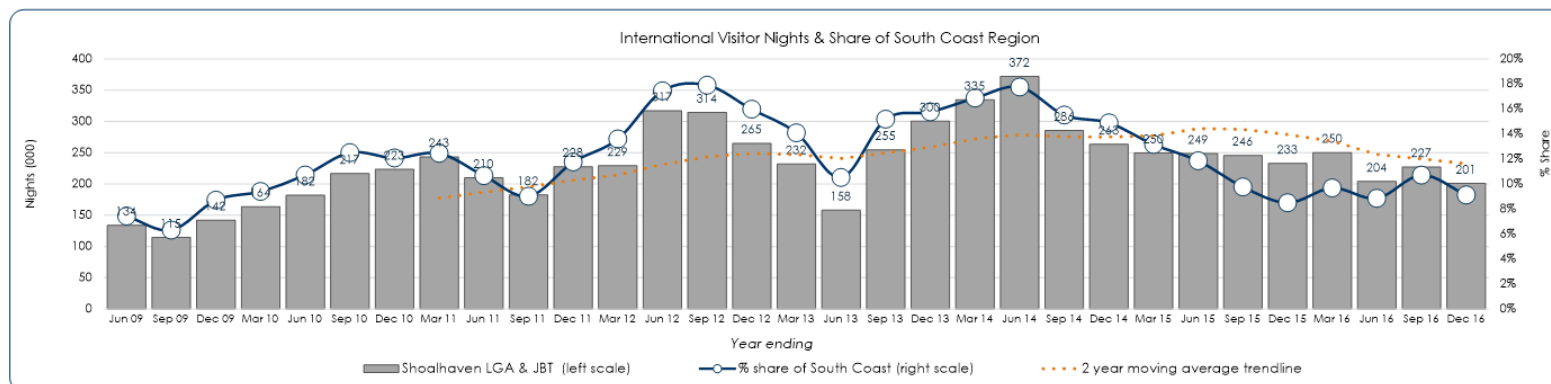
Shoalhaven
SOUTH COAST - NSW

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	Dec 16
Shoalhaven & JBT (000)	134	115	142	184	182	217	223	243	210	182	228	229	317	314	265	232	158	255	300	335	372	268	263	250	249	246	233	250	204	227	201
% change vs same period prev. year					36.1%	89.0%	57.0%	46.6%	15.4%	-15.8%	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%	-17.8%	-7.5%	-13.7%
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	526
% 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%	-8.4%
% 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%	38.2%
South Coast Tourism Region (000)	1,799	1,814	1,833	1,742	1,697	1,731	1,850	1,955	1,969	2,021	1,937	1,686	1,817	1,757	1,660	1,646	1,504	1,677	1,906	1,984	2,098	1,841	1,789	1,896	2,098	2,516	2,742	2,584	2,305	2,121	2,204
% 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%	-19.6%
% 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%	15.8%	16.9%	17.8%	15.5%	14.9%	13.2%	11.8%	9.8%	8.5%	9.7%	8.9%	10.7%	9.1%

SHADING LEGEND: Above average

*The Market Reference Group includes SA2s in Kiama, Southern Wingecarbee, 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 DECEMBER 2016:

- International visitors spent at just over an estimated 200,000 nights in SJBT during the year ending December 2016.
- This estimate is below the Monitor average and an on-paper decrease compared to the same period last year. The change cannot be confirmed using standard statistical significance tests but based on data over recent years a decline is likely.
- Market Reference Group nights volume was also lower than year ending December 2015 but the drop was smaller in percentage terms than SJBT.
- Nights volume in the South Coast Region was almost 20% lower than the same period last year (on-paper). The change passes relaxed significance tests.
- SJBT's share both regions remained below average. Market Reference Group share was lower than the same period last year. South Coast share was up slightly.

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Shoalhaven Tourism Monitor

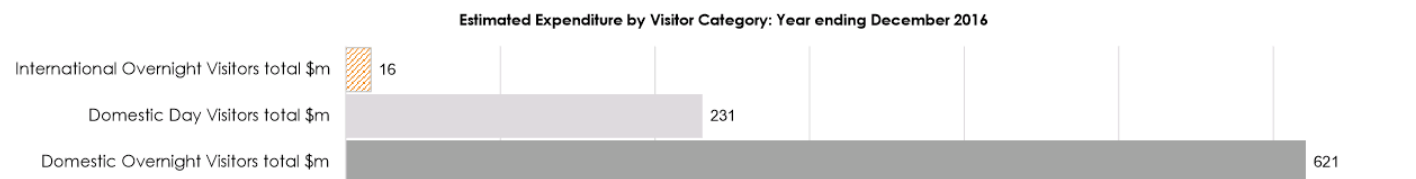
PART B - EXPENDITURE ESTIMATES



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 DECEMBER 2016: **868** million



TOTAL EXPENDITURE

	Jun 16	Sep 16	Dec 16
Domestic Overnight Visitors total \$m	534	555	621
Domestic Day Visitors total \$m	167	166	231
International Overnight Visitors total \$m	22	21	16
TOTAL \$m	722	743	868

EXPENDITURE PER VISIT

	Jun 16	Sep 16	Dec 16
Domestic Overnight Visitors \$ per visit	383	394	428
Domestic Day Visitors \$ per visit	94	98	125
International Overnight Visitors \$ per visit	523	499	378

EXPENDITURE PER NIGHT

	Jun 16	Sep 16	Dec 16
Domestic Overnight Visitors \$ per night	117	125	136
International Overnight Visitors \$ per night	90	80	70

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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TA17.16 Events and Investment

HPERM Ref: D17/123124

Group: Finance Corporate & Community Services Group
Section: Tourism

Attachments: 1. XPD Post Event Report [↓](#)
2. XPD Media Coverage (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
- Big Husky Triathlon Festival
- National Pop Up Cinema
- Shoalhaven Week of Golf
- Grapest 5km Run

- Willinga Park Open Day
- Nitro Circus

In Progress

- Events
 - Southern Cross SUP Festival – Sussex Inlet – 28/04/17
 - Burradise Festival – Culburra Beach – 13 & 14/05/17
 - Culburra Beach Surf Bash – 13/05/17
 - NSW Country Junior Rugby Union Country Champs – Nowra – 20 & 21/05/17
 - IRB Surf Lifesaving – Ulladulla – 19 & 20/05/17
 - Winter Wine Festival – Various Locations – 10 & 11/06/17
 - AFL Junior Championships – Nowra – 1 & 2/07/17
 - Motor Cross Nationals – Nowra – 1-3/07/17
 - Family Fishing Carnival – Sussex Inlet – 7 & 8/07/17
 - State Team Time Trials – Nowra – 16/07/17
 - Huskisson Running Festival – Huskisson 19 & 20/08/17
 - PGA Golf – Mollymook – 18-25/10/17
 - KV Folk Festival – Kangaroo Valley – 21 & 22/10/17
 - 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
 - Long Course Weekend – Jervis Bay / Nowra – 10-12/11/17
 - Australian Junior Surfing Titles – Culburra Beach – 24-29/11/17
 - Fairgrounds – Berry – 2 & 3/12/17
 - For a full list of events in the Shoalhaven visit
<http://shoalhavenholidays.com.au/events/>
- Public exhibition period has closed for Event Policy – report to Council on submissions being developed before official implementation
- Willinga Park – support with research around Bawley Point occupancy and traffic counts, working with the Willinga Park team to determine possible future of events and accommodation development
- Shoalhaven Events Capacity and Capability Review
- Working with possible investors and developing links with local real-estate agents to facilitate desired outcomes.
- Business Events and Conferences Guide and associated information distribution

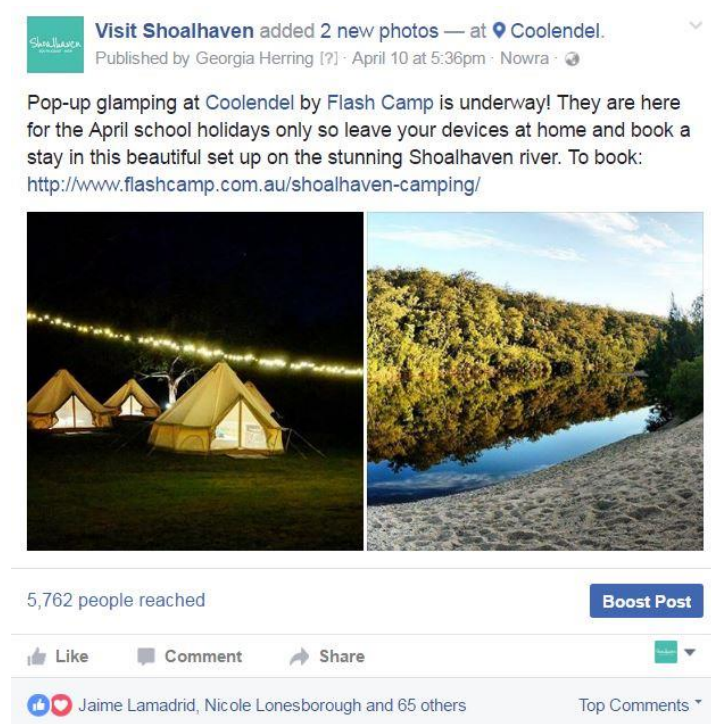
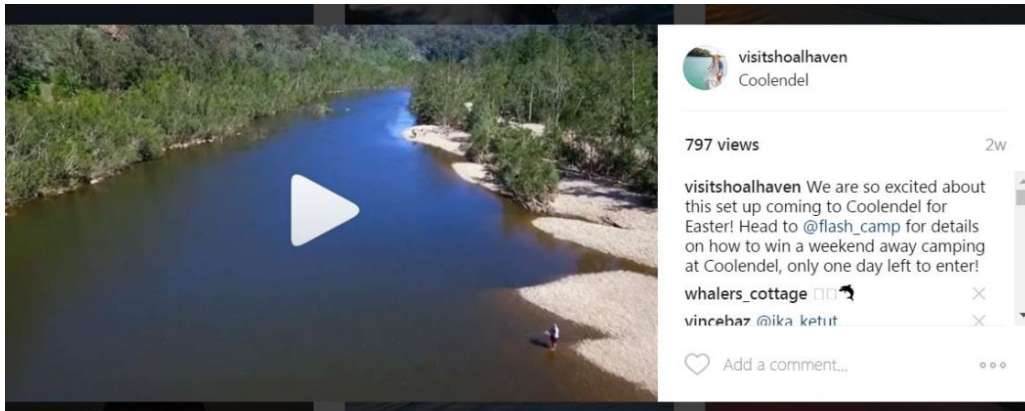
Results

- Updated EOI for Funding forms – with direct links to criteria for funding
- 6 funding applications submitted by event owners/operators with supporting documentation and letters of support from tourism
- Supporting statements and documentation for Regional Growth – Environment and Tourism Fund applications for Round the Bay Walk and Nowra Showground Upgrades
- XPD World Adventure Race Results are in - Total visitation directly related to the event was 661 people with a total bed nights of 8,425 – please find the Post Event Report and Media Coverage attached.
- Successful funding of \$149,000 for The Jerriwerri Indigenous Ecotourism Enterprise Development Project through the Tourism Demand Driver Infrastructure Fund.
- Nitro Circus – Rugby Park

- Approx. 5,500 tickets sold
- Over 14,000 social reach through ticket giveaway
- Some lessons learnt around managing almost 6,000 people at Rugby Park in terms of traffic management and crowd management



- Flash Camp – Coolendel
 - 126 sold of 270 room nights available with only a two week promotion lead time
 - Total visitation of 157 guests in 15 tents
 - [Olli Benz](#) for Glue Store featured a social media travel story
 - Social media influencer [Tara Milktea](#) visited, just one of her Instagram posts about Coolendel received 35,000 likes
 - Good social media reach educating people about what the Shoalhaven has to offer.



Up Next

- Events
 - Empire Touring – Music Festival – Nowra
 - Health / Wellness / Lifestyle Festival
 - Food / Wine / Local produce event
- Flash Camp – Working 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
- Continue to work with marketing to attract and secure events that are in line with our promotional focus
- Streamlined sponsorship agreement process
- Finding opportunities for planned investor familiarisations
- Continue to research and promote event funding sources





POST EVENT REPORT ADVENTURE RACING WORLD CHAMPIONSHIP 2016

INTRODUCTION

The XPD Expedition Race was chosen by the Adventure Racing World Series management as the host of the Adventure Racing World Championship 2016. It was held from 8-18th November 2016 in the Shoalhaven NSW and was supported by the Destination New South Wales (DNSW).

SUMMARY OF THE ORGANISATION, PROMOTION, MARKETING AND STAGING OF THE EVENT

Geocentric Pty Ltd (Geocentric Outdoors) organised an event called the XPD Expedition Race held from 8 - 18 November 2016 in the Shoalhaven region of New South Wales, Australia. This event is the host of the Adventure Racing World Championship (ARWC) 2016. The event involves teams of four mountain biking, trekking, kayaking over a 600km course. 669+ participants, staff, media, volunteers and supporters attended.

Geocentric Outdoors have been running outdoor adventure events for over 15 years and are considered an industry leader in outdoor adventure races. This event was run by a combination of full and part time staff, volunteers and specialist contractors. Geocentric employed 12 key staff to plan and run the event. It engaged 54 volunteers to act in the capacity of event officials at the event.

Arrival and departure of teams was through Sydney. Operational and administrative headquarters during the race was located in Ulladulla at the Civic Centre. Event control, communications, timing etc were based there.

The adventure racing course was discussed in detail with all identified land managers and organisations and all necessary permissions were obtained. These included:

- Shoalhaven City Council.
- Eurobodalla Shire Council (Batemans Bay).
- Palerang Shire Council (Nerriga).
- Goulburn Mulwaree Council (Bungonia).
- Office of Environment & Heritage – NSW National Parks and Wildlife Service.
- Department of Primary Industries - NSW Marine Parks.
- Roads and Maritime Services NSW.
- Forestry Corporation of NSW.
- WaterNSW.
- New South Wales Police Force.
- Roads and Maritime Services NSW.
- Royal Australian Navy
- Private land holders/ lease holders.

Marketing and promotion was undertaken in accordance with the plans attached.



Destination
NSW

Shoalhaven
SOUTH COAST - NSW





The event was successfully staged from the 8-18 November 2016 in accordance with the following schedule:

DATE	TIME/ ACTIVITY
31 OCT 2016 (MONDAY)	Course outline & logistic plan released online - www.xpd.com.au
6 NOV 2016 (SUNDAY)	1200 (midday) Transfer departs Sydney International Airport Terminal for Ulladulla (approx 3 hours travel time)
7 NOV 2016 (MONDAY)	1200 (midday) Transfer departs Sydney International Airport Terminal for Ulladulla (approx 3 hours travel time)
8 NOV 2016 (TUESDAY)	0900 - 1300 Volunteer Officials training 1600 - 1900 Prologue starting at HQ and finishing at Mollymook beach (All teams - bring running shoes/ water bottle/ jacket if cool) 1900 - 2000 Official Welcome and Opening Ceremony (Mollymook beach - All teams, Officials, Media, Family & Friends)
9 NOV 2016 (WEDNESDAY)	0900 - 1500 Team registration and checks (each team allocated specific time - approx 2hrs per team) 1000 Media briefing
10 NOV 2016 (THURSDAY)	Prior to 0730 Boxes/ Trunks/ Paddle Bags brought to HQ 0730 Team "LOCK DOWN" - Map and Race Notes handout 1000 Close of Compulsory phone sealing 1000 Close of Equipment hand in 1015 Buses depart for start line (approx 1hr drive) 1230 Race Start!!!
14 NOV 2016 (MONDAY)	Afternoon/ evening winning team expected to finish
18 NOV 2016 (FRIDAY)	1300 Course closes 1300 - 1600 Athlete forum at HQ - all athletes welcome. 1300 - 1800 Teams utilising the airport transfer must pack their bike boxes into trucks. No bike boxes loaded Saturday prior to departure. 1800 Presentations and dinner (please confirm any family/ friends attending at registration)
19 NOV 2016 (SATURDAY)	0900 Transfers depart race HQ for Sydney International Airport (approx 3 hours travel time)

TA17.16 - Attachment 1



RESULTS OF THE EVENT

See attached results document.

MEDIA COVERAGE

See attached Media Coverage Summary. Note that this summary is a first draft and will continue to be updated as more sources of media exposure are identified.

FINANCIAL ACCOUNT

See attached Financial Report

BUSINESS GENERATED

Based on an average daily spend, estimated business generated by visitation is $8,425 \times \$243 = \$2,047,275$

TELEVISION BROADCAST

A one hour television documentary was produced and is currently being distributed throughout Australia and internationally. See attached Anticipated Television Broadcast Summary. Actual distribution summary will be forwarded when available.

REGISTRATION ANALYSIS

An analysis of registrations and overall attendance was conducted. Attached is a spreadsheet of countries and postcodes of all athletes who attended.

A summary of attendance is as follows:

- 95 adventure racing teams attended (380 athlete)
- 83 of the teams were in the Premier Mixed category and 12 teams were in the All Male category
- 21 different countries were represented by the teams attending
- 54 volunteer event officials attended
- 12 staff were employed by Geocentric Outdoors
- 14 VIPs attended the event
- 55 Media attended the event
- 154 Friends and family were recorded as attending the event.

A survey was conducted by the event organisers to determine the number of nights all those involved in the event stayed in the Shoalhaven. Total visitation was **661** people with a total bed nights of **8,425**. Data file attached.



CONCLUSION

Hosting the 2016 Adventure Racing World Championship was only possible through the support of Destination NSW and Shoalhaven City Council.

The event on the whole was a huge success and positively promoted the adventure tourism opportunities of the Shoalhaven.

Geocentric Outdoors was privileged to receive the support of Destination NSW and Shoalhaven City Council and would certainly be excited if opportunities arose for future events that could promote and bring benefit to NSW and the Shoalhaven.

Craig Bycroft
Event Organiser/ Director
Geocentric Outdoors
www.geocentricoutdoors.com.au

0419 427 244 (mobile)
+61 419 427 244 (international)
(07) 5445 2217 (fax)

Geocentric Pty Ltd
PO Box 542, BUDERIM, QLD 4556
AUSTRALIA

TA17.17 Visitors Services Report

HPERM Ref: D17/129870

Group: Finance 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

In Progress

- Ambassadors program, recruitment and training
- New Visitors Services Supervisor Training
- Several staff have completed merchandising training
- Staff famils continue
- Mystery Shops of both Nowra and Ulladulla continue with great results consistently delivered

Ambassador Programme

The Ambassador programme is proceeding well, with selection of first intake to be completed by 30 April. The first training/induction day is scheduled for Monday 8th May, with commencement at the Nowra Visitors Centre soon after.

Depending on meeting selection criteria there will be about 12 in the initial uptake with many more having expressed an interest.

Coming up

- Refresh of Ulladulla merchandising and signage
- Review of Nowra operations for February and March to identify opportunities.

Results this quarter

Figures Jan – March 2017

Bookeasy

January	\$21,393
February	\$18,958
March	\$12,678

	Nowra	Ulladulla
<u>Counter</u>		
January	3650	2200
February	2650	1560
March	2230	1516

Emails

January	958	n/a
February	864	n/a
March	837	n/a

Phone

January	1111	902
February	1104	533
March	1506	582

Merchandise Sales

January	\$2,762	\$3,237
February	\$2,267	\$3,188
March	\$3,104	\$3,485

Note:

Figures are on track with forecasts being met due to move of the Nowra VIC

All sales have shown an increase in the last 6 months with local produce being the outstanding performer with sales increasing over 100% on last year, although reporting off a low base.

Ulladulla Library has seen a continuing improvement in Visitor Information Services.

TA17.18 Chair's Report

HPERM Ref: D17/129355

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:

It was great to meet the new STAG members at the last meeting. I am sure they will carry on the fantastic work undertaken by our previous members. The enthusiasm they demonstrated makes me believe our new Board will be dynamic.

The new Tourism figures showing a 19% increase in this area are exciting particularly for the STAG team. Many of the marketing incentives undertaken have ensured our area is becoming the place to visit outside of Sydney.

I hope that our STAG members will be the faces of the community attending events and making themselves known to the community.

I would like to encourage all our members to spend some time in the new Visitor Information Centre to view first hand what is on display, meet the staff and come back to the meetings with their comments and ideas.

Nitro Circus was a very well supported event in the Shoalhaven and I am sure many of the attendees were from outside the Shoalhaven.

The 100 Beach challenge has proved very successful and the upcoming Walking track booklet, highlighting 13 walks in the Shoalhaven, will be an exciting addition to our collection of things to do in the Shoalhaven.

The creation of a strategic plan is a priority and will assist with shaping the way forward for STAG.

I encourage all members to view the draft economic development plan. Tourism is rated 11th in the report. This is a little difficult to comprehend and perhaps STAG needs to have some input. Obviously this is up to the members.

The STAG Induction and workshop will be a good opportunity for STAG members to network and get to know each other and the Tourism team. It will also be a good chance for new members to have input and put forward their ideas on our future.

Once again welcome to all the new members. I sincerely hope you will enjoy your time on STAG and that you will enjoy being part of the growing future of tourism in the Shoalhaven.

Lynn Locke