

Shoalhaven Tourism Advisory Group

Meeting Date: Monday, 15 February, 2021

Location: Council Chambers / Microsoft Teams

Attachments (Under Separate Cover)

Index

3. Reports

TA21.1	Tourism Manager Update	
	Attachment 1 NSW Visitor Economy Strategy 2030	2
TA21.2	Destination Marketing	
	Attachment 1 Adventure Campaign Strategy.....	39





PREMIER'S FOREWORD



The visitor economy is one of NSW's major exports, contributing \$38 billion to our Gross State Product and employing almost 300,000 people. The presence of visitors adds to the State's prosperity and liveability, enhancing the vibrancy of our public spaces and the lifestyle of local residents.

While NSW has long been – and remains – Australia's top performing state for visitor numbers, nights and expenditure, the 2019/20 summer bushfires and the COVID-19 pandemic have greatly impacted the tourism sector.

This has prompted the NSW Government to revisit our strategic planning for the sector, including a refresh of our *2030 Visitor Economy Industry Action Plan*. Our ambitions for the sector have not changed but we are updating the roadmap to achieve them.

This relaunched *2030 Visitor Economy Strategy* positions us proudly on the world stage, ready to capture a global market when international travel resumes.

Our aim is to make NSW the premier visitor economy of the Asia Pacific. After all, our State has many great assets and an agile tourism industry – a winning combination that brings that goal well within our reach.

Gladys Berejiklian
Premier of NSW

Sydney Harbour in Summer

NSW VISITOR ECONOMY STRATEGY 2030

MINISTER FOR TOURISM'S FOREWORD



The NSW Government issued its first Visitor Economy Industry Action Plan in 2012 and set a target for overnight visitor expenditure of \$36.6 billion by 2020. A new plan for 2030 was issued in late 2018 which set ambitious new targets of tripling overnight visitor expenditure to \$55

billion. With overnight visitor expenditure at record levels of \$35 billion in 2019, NSW was on track to achieve the 2020 target and on a steady trajectory to 2030.

As 2019 drew to a close, no one foresaw the disruption of the visitor economy that would result from the catastrophic bushfires over summer and the spread of COVID-19. Following years of drought in some parts of NSW, these events dealt the visitor economy a crippling blow. The NSW Government acted quickly with targeted stimulus packages assisting those most affected.

At the time of writing in late 2020, the visitor economy of NSW is deep in crisis and the roadmap to 2030 is neither linear nor tracking as originally expected. This new and uncertain world requires a fresh, new strategy to aid recovery in the near term and turbocharge visitor economy growth when travel patterns resume their normal rhythm.

The new Visitor Economy Strategy for 2030 has been developed against this background. It is a considered yet ambitious plan to achieving the 2030 targets with a bold new vision for NSW to become the premier visitor economy of the Asia Pacific.

These goals are both challenging and aspirational but entirely achievable if Government and industry work together in a new spirit of partnership to chart a shared future. Key to this will be the establishment of a new Visitor Economy Senior Officers Group which will be led by Destination NSW to ensure the visitor economy is central to decision making within government and that it grows in a coordinated and sustainable way.

There are many exciting innovations underway or in planning – from new brands for Sydney and NSW to a new data-driven, visitor-first approach to visitor economy planning, and a new 24-Hour Economy Strategy to create a vibrant, world-class night time economy across Greater Sydney. Other innovations include a fast-tracked approach to digital transformation; a laser focus on promoting our strengths and investing in new visitor experience assets; and the largest ever investment in securing new sporting, cultural and business events to become known worldwide as the events capital of the Asia Pacific.

Regional NSW will be key to the future of the state's visitor economy and a focus of the strategy. The Government will strengthen its commitment to the regions with dedicated funding programs and industry support and continuing investment in visitor economy infrastructure through Special Activation Precincts like the one in the Snowy Mountains to create a new alpine and adventure tourism playground.

We will continue to invest in the evolving visitor economy of Western Sydney with the development of the Western Parklands City, Western Sydney Aerotropolis and new Western Sydney International (Nancy-Bird Walton) Airport. These assets, when completed in the next few years, will transform the visitor economy of Western Sydney, becoming a drawcard for visitors to NSW and a major source of visitor economy jobs.

Despite the current challenges, the future is bright for the NSW visitor economy and this strategy will be a key enabler of its recovery and growth. The investments we make and the actions we deliver particularly over the next three to four years will restore confidence in the visitor economy and set the course for a prosperous and vibrant future to 2030 and beyond.

On behalf of the NSW Government I would like to express my gratitude to the Board of Destination NSW and the VEIAP 2030 Taskforce who have helped shape this new strategy as well as the many stakeholders in Government and industry who have contributed to its development.

Stuart Ayres
Minister for Jobs, Investment, Tourism
and Western Sydney

CONTENTS

Premier's Foreword	3
Minister for Tourism's Foreword	4
Acknowledgment of Country	6
Highlights	8
Vision for the NSW Visitor Economy to 2030	10
The Strategy at a Glance	12
The Visitor Economy Explained	14
Strategic Context	16
Vision for the NSW Visitor Economy in 2030	18
Visitor Expenditure Targets	20
Guiding Principles	28
Strategic Pillars	30
• Strategic Pillar 1. Road to Recovery	32
• Strategic Pillar 2. Build the Brand	34
• Strategic Pillar 3. Showcase Our Strengths	36
• Strategic Pillar 4. Invest in World-Class Events	44
• Strategic Pillar 5. Facilitate Growth	46
Focus on Outcomes	50
Optimism for the Future	53
Appendix 1 - Delivering on the Strategy	54
Appendix 2 - Domestic and International Markets Profile	66
Appendix 3 - Visitor Infrastructure Framework	68
Destination NSW	70
Destination Networks	71

Naru Beach, Lake Macquarie

NSW VISITOR ECONOMY STRATEGY 2030



8

HIGHLIGHTS

- > **NSW aims to be the premier visitor economy of the Asia Pacific by 2030.**
- > **The target for 2030 is \$65 billion in total visitor expenditure.**
- > **Regional NSW is key to the future contributing \$25 billion to the total.**
- > **The day trip market, worth an estimated \$10 billion by 2030, is a new focus.**
- > **The strategy has three phases – Recovery Phase to 2024, Momentum Phase to 2026, Accelerate Phase to 2030.**
- > **The domestic market will be the primary focus until international travel resumes.**

9

- > **The strategy is flexible and principles based. It puts visitors first, accelerates digital innovation, focuses on our competitive strengths, fosters collaboration and will be delivered with agility.**
- > **The five core strategic pillars are Road to recovery, Build the brand, Showcase our strengths, Invest in world-class events, and Facilitate growth.**
- > **Destination NSW will lead a coordinated, whole of government approach to achieving the targets and vision.**
- > **The strategy will deliver economic prosperity, create new jobs and enhance the lifestyles of the people of NSW.**

10

11

VISION FOR THE NSW VISITOR ECONOMY TO 2030

The NSW Government's vision is to be the premier visitor economy in the Asia Pacific contributing \$65 billion in total visitor expenditure by 2030, with \$25 billion in regional expenditure.

AMBITIONS

				
Economic prosperity, jobs and lifestyle opportunities for the people of NSW	A compelling destination brand and iconic and world-renowned visitor experiences	Sustainable visitor destinations and world-class infrastructure	Vibrant tourism, transport, retail, sports, events, 24-hour economy, arts and creative industries	Globally connected business and education sectors

OUTCOMES

	Grow the NSW visitor economy		8% Contribution to Gross State Product (GSP) by 2030 (6% in 2019)		+10% Visitor economy job growth by 2030 (296,000 jobs in 2019)
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VISITOR EXPENDITURE TARGETS

Total Visitor Expenditure \$65 Billion by 2030 From \$43 billion in 2019	Domestic Day Trips \$10 Billion by 2030 From \$8.3 billion in 2019	Overnight Visitor Expenditure \$55 Billion by 2030 From \$35 billion in 2019	Total Domestic Visitor Expenditure \$47 Billion by 2030 From \$31.9 billion in 2019	Regional Overnight Visitor Expenditure \$25 Billion by 2030 From \$20.5 billion in 2019	Total International Visitor Expenditure \$17 Billion by 2030 From \$11.4 billion in 2019
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Houseboat, Hawkesbury River

NSW VISITOR ECONOMY STRATEGY 2030

12

THE STRATEGY AT A GLANCE

Phases of the strategy

	RECOVERY PHASE TO 2024	The focus of this phase is to assist businesses and the industry to rebuild. The goal is to return total visitor expenditure to pre-COVID levels (\$43 billion in 2019).
	MOMENTUM PHASE TO 2026	A number of major infrastructure projects will be completed during this period, including the new Western Sydney Airport in 2026. This will provide a major stimulus to grow and expand the visitor economy in NSW. Visitor expenditure is expected to grow strongly during this time to reach over \$50 billion by 2026.
	ACCELERATE PHASE TO 2030	By 2030, the momentum gained through the increased capacity and investment in the visitor economy over the previous phases will accelerate growth, with visitor expenditure targeted to reach \$65 billion.

Guiding Principles

PUT THE VISITOR FIRST	ACCELERATE DIGITAL INNOVATION	LEAD WITH OUR STRENGTHS	MOVE FAST, BE RESPONSIVE AND AGILE	COLLABORATE WITH INDUSTRY AND GOVERNMENT
We have put the visitor front and centre of this strategy. A greater understanding of potential visitors by segment will deliver high performance marketing solutions and improve the visitor experience.	We will use technology to deliver personalised marketing to potential visitors, streamlined interactions between government and industry, and to enhance the visitor experience.	We will focus on the distinctive character and features of NSW and our people to help us stand out in a crowded market.	We will build agility into the way we operate so we can take advantage of opportunities as they emerge and adapt to changing conditions.	We will foster greater engagement and cooperation with the industry to deliver the vision and take a whole-of-government approach to growing the NSW visitor economy.

📍 Bushrangers Bay, Shell Cove

13

Strategic Pillars

ROAD TO RECOVERY

A comprehensive program of marketing and industry development will ensure NSW recovers quickly from the impacts of COVID-19, bushfires, drought and floods and elevates its status as the premier visitor economy in the Asia Pacific.

Key result areas

- Return visitation and expenditure to pre-COVID levels by 2024
- Sustainable and resilient visitor economy businesses

BUILD THE BRAND

Compelling new brands will be developed for Sydney and NSW to provide a strong foundation for differentiation, consumer messaging, local pride and competitiveness to turbocharge recovery and accelerate future growth.

Key result areas

- Greater brand awareness in target markets
- Increased demand to visit Sydney and NSW
- Improved response to campaign activity
- Increased community satisfaction

SHOWCASE OUR STRENGTHS

NSW is a state of breathtaking diversity and bucket list visitor attractions and experiences. We will focus on existing strengths and develop new opportunities to ensure place making, destination marketing, events and visitor experiences drive visitation.

Key result areas

- Increased average length of stay and yield (spend per visitor)
- Growth in visitation and expenditure for regional destinations
- Higher levels of repeat visitation

INVEST IN WORLD-CLASS EVENTS

An accelerated investment in signature sporting and cultural events such as the 10 World Cups and Vivid Sydney as well as business events will help position Sydney and NSW as the events capital of the Asia Pacific, drive visitation and enhance the social wellbeing of NSW residents.

Key result areas:

- Increased economic impact and visitor attendance at events
- Greater promotion of Sydney and NSW as an events destination
- Increased community and visitor satisfaction with events

FACILITATE GROWTH

Investing in infrastructure, job creation, industry resilience and sustainability, future planning, and better ways to do business will ensure the continued growth and future prosperity of the NSW visitor economy.

Key result areas:

- Increased public and private sector investment in visitor infrastructure
- Improved access to visitor destinations and visitor attractions
- Increased visitor satisfaction with accommodation and experiences

NSW VISITOR ECONOMY STRATEGY 2030

14

THE VISITOR ECONOMY EXPLAINED

The visitor economy encompasses the direct and indirect contributions to the economy resulting from a person (a visitor) travelling outside their normal place of residence.

The visitor economy supports more than

107,115 businesses

and over

296,000 jobs

Tourism Gross State Product was equivalent to

6% NSW GSP

\$7 billion

Contribution to NSW Gross Regional Product (GRP)

In NSW, the visitor economy supports more than 107,115 businesses and over 296,000 jobs. It is the state's fifth largest employment group, accounting for approximately seven per cent of total jobs. In 2018/19, the visitor economy contributed \$38 billion (6 per cent) to NSW Gross State Product (GSP).

The activity of the visitor economy provides direct revenue for businesses in NSW, and tax revenue for governments to spend on services for the community. The community also benefits through job creation, investment in public amenities and services, and lifestyle enhancements. The visitor economy not only sustains existing businesses, it also creates new businesses and population growth, and supports cultural activities and the arts.

The visitor economy is the lifeblood of many regional communities contributing \$7 billion to NSW Gross Regional Product (GRP).

The visitor economy is a major source of income for many – particularly for women and young people who make up a significant proportion of the workforce. Visitors, especially in the business and scientific communities, add intellectual capital to the state, which enhances our ability to thrive in other sectors of the economy.

The economic benefit of the visitor economy to NSW is clear, but it is also important to highlight the social benefit delivered through a vibrant visitor sector. Positive travel experiences and connections with community are important contributors to social wellbeing, as are the shared experiences that come with entertainment, hospitality and events from sporting to cultural.

The visitor economy of NSW is not owned by any one stakeholder or business sector. It is co-owned and curated by a range of stakeholders including visitors, businesses, governments, residents, hosts and the community. Only when all these stakeholders work together can the potential of the visitor economy be fully realised.



📍 Murrumbidgee National Park, South Durras, Eurobodalla

15

The visitor economy is everyone's business

Visitors come to NSW for many reasons: to holiday; visit family and friends; to attend an event; experience arts and culture; to study or learn; to participate in sport, entertainment, employment, business meetings; for presentations and conferences and work incentives or rewards; for shopping or health purposes.

The visitor economy benefits many industry sectors

Planes, trains, marine transport, car hire, taxis, coach and bus services, roads, airports, wharves, cruise terminals, transport hubs, event stadia, venues and facilities.

Events from major to local festivals, from conferences to sport. Attractions across the range of experiences. Services such as travel agents, visitor information centres, local and state governments and financial institutions.

Accommodation from major chains to short term rentals, restaurants and cafes from 5-star to the corner coffee shop. Shops from luxury brands and centres to the local grocer. Educational institutions from universities, schools, colleges to private learning centres. Health from formal medical facilities to wellness and wellbeing businesses. Workplaces and businesses that employ visitors or otherwise service their needs.

📍 Outback Astronomy, Broken Hill

NSW VISITOR ECONOMY STRATEGY 2030

STRATEGIC CONTEXT

The visitor economy is central to the NSW Government's economic plans.

The NSW 2040 Economic Blueprint provides direction for continued economic success in a changing world. It sets out the vision for NSW to become Australia's first trillion-dollar state by 2030 and its first \$2 trillion state after 2040. The visitor economy is key to realising this vision. It is and will continue to be a major contributor to economic prosperity, encouraging investment, creating jobs and enhancing the lifestyle of NSW residents.

The importance of the visitor economy is highlighted in a number of NSW Government strategies and plans, as follows, as well as the plans of many local governments statewide.

- › Global NSW Strategy
- › 20-Year Economic Vision for Regional NSW
- › The Greater Sydney Region Plan: A Metropolis of Three Cities
- › 24-Hour Economy Strategy
- › NSW Infrastructure Strategy 2018-2038
- › Future Transport Strategy 2056
- › Smart Places Strategy
- › Study NSW International Education Strategy

The NSW Government has outlined its vision for the visitor economy in two consecutive *Visitor Economy Industry Action Plans* – one for the period to 2020 and a subsequent plan to 2030. However, due to the COVID-19 pandemic, the visitor economy is facing an unprecedented challenge. This means the growth trajectory to 2030 will be vastly different from the previous decade, and the original 2030 plan requires a total refresh.

Revitalising the state's visitor economy will require strong leadership from the NSW Government. This new strategy articulates how the Government will lead the coordinated response to today's challenges and drive visitor economy growth into the future.

RESPONDING TO COVID-19, BUSHFIRES, AND DROUGHT

Years of drought and bushfires in the summer of 2019-20 had already disrupted the visitor economy and communities across NSW when, in March 2020, the COVID-19 pandemic created a global health and economic crisis. Around the world, borders closed, halting international travel. Restrictions were imposed on domestic travel and state borders were shut. Cruise ports were closed and bans were placed on mass gatherings.

The NSW and Commonwealth Governments responded quickly by providing support to individuals, households and businesses. Despite unprecedented levels of public funding and tax breaks, the future for many NSW citizens will be difficult without a clear strategy to reboot the visitor economy.

The uncertainty created by COVID-19 means we need to establish a new strategic framework for the visitor economy in NSW; a clear roadmap for recovery that enables Government and industry to act with urgency and confidence, while not being so prescriptive as to constrain innovation and fresh thinking. Consumer trends and market conditions need to be considered differently. New market opportunities will need to be pursued.

RISKS

For the NSW Government to achieve the aspirations and targets in the *Visitor Economy Strategy 2030*, it will need to continually monitor the external environment for changes in economic conditions in Australia and overseas. It will also need to respond in an agile way to other factors such as natural events or epidemiological and geopolitical crises. The Government will proactively monitor the environment for such occurrences and respond rapidly to mitigate their impact on the visitor economy.

EVOLVING TRENDS AND MARKET CONDITIONS

The Need for Health and Safety

Following COVID-19 we expect visitors to feel an increased need for health and safety. With its vast land mass and wide-open spaces, NSW has a wealth of options for travellers who want to avoid crowds and heavily populated areas. The state also offers an abundance of world-class health and wellness experiences. A heightened global concern about climate change and environmental issues will increase visitor demand for more eco-friendly, green and sustainable destinations and experiences.

The Acceleration to Digital

The adoption of digital technology and e-commerce was rapid even before COVID-19, and this trend has accelerated since the onset of the pandemic. This type of disruption will continue to drive innovation and the emergence of new enterprises, business opportunities and ways of operating like we have seen in the sharing economy in recent years. Tourism businesses will need to innovate, adapt, and transform, as they have in the past, but at a much faster rate. Distribution channels and the delivery of visitor experiences will also need to evolve to keep pace with technology changes and consumer behaviour.

The Ageing Population

Australia's ageing population will present workforce challenges but also opportunities for the visitor economy through an increase in older travellers. Destinations, products and services need to adapt to be more inclusive and accessible to all people. This will be addressed through the principle of 'visitor first', a focus on visitor needs, their safety and wellbeing, and investment in infrastructure that makes it easier for older visitors to explore and enjoy more of NSW.

The Growing Middle Class

The world's middle-class is growing rapidly, particularly in China and India, driving increased demand for international travel. New markets, consumer trends, preferences, needs and aspirations will be identified through a program of strategic research, data analytics and new commercial partnerships.



Brokenwood Wines, Pokolbin

18
19


VISION FOR THE NSW VISITOR ECONOMY IN 2030

The vision is to be the premier visitor economy in the Asia Pacific contributing \$65 billion in total visitor expenditure by 2030, with \$25 billion in regional overnight expenditure.


NSW is already the leading visitor economy in Australia in terms of domestic and international visitation and total value. It has the largest number of visitor economy-related businesses and supports the most sector-wide jobs.

NSW will remain the number one visitor economy in Australia and seek to increase its lead, to become the premier visitor economy in the Asia Pacific. Our leadership position will be measured in terms of growth in visitor expenditure, visitor satisfaction, economic contribution and job creation. It will also be evident in the achievement of these ambitions.

AMBITIONS



Economic prosperity, jobs and lifestyle opportunities for the people of NSW



A compelling destination brand and iconic and world-renowned visitor experiences



Sustainable visitor destinations and world-class infrastructure



Vibrant tourism, transport, retail, sports, events, 24-hour economy, arts and creative industries



Globally connected business and education sectors

The NSW Government's strategy for the visitor economy reflects this bold vision and aspiration. The people of NSW are at its heart. That is, the visitor economy will deliver significant social as well as economic benefits for the people of NSW.

Growing the visitor economy of regional NSW is also key to the vision. Regional NSW is already the largest, most diverse regional economy in Australia, and further Government investment in the visitor economy will accelerate its growth and diversification. New products and experiences based on the unique character of each region will create distinctive and compelling visitor destinations throughout the state.

The vision will be realised through a new visitor-centric and data-led strategy that will revitalise the industry, enable its recovery, and then accelerate growth. Deeper engagement with commercial partners and visitor economy stakeholders, at home and overseas, will help cement the state's leading position. In a world of continual disruption and uncertainty, the visitor economy will need to become more resilient and sustainable. The NSW Government will support businesses to weather natural disasters and other crises through additional services to help improve operational performance, mitigate risk and achieve business continuity.

Furthermore, as the NSW Government's tourism and major events agency, Destination NSW will take a leadership role in ensuring NSW Government agencies, the Commonwealth and local government and industry collaborate to grow the visitor economy sustainably. The visitor economy will be understood and valued by all levels of government and the community.

THE TARGETS

\$65billion

in total visitor expenditure by 2030

\$25billion

in regional overnight expenditure by 2030

📍 Bondi Icebergs, Bondi Beach

NSW VISITOR ECONOMY STRATEGY 2030

20

VISITOR EXPENDITURE TARGETS

The original Visitor Economy Industry Action Plans set targets focused on growing Overnight Visitor Expenditure (OVE) from \$18 billion in 2019 to \$36.6 billion in 2020 and \$55 billion in 2030. The initiatives in those plans focused on high yield international markets and increased length of stay. The impact of COVID-19 requires a fresh approach.

In the early stages of recovery there will be a focus on the domestic market, while restrictions on international travel remain in place and the future for inbound is unclear. A particular focus will be Australians who would typically travel overseas enticing them to holiday at home and explore NSW.

VISITOR EXPENDITURE TARGET

In this strategy, the 2030 target has been expanded to cover both day trips visitors and overnight visitors, to capture the full value of all visitors to NSW. The target for Total Visitor Expenditure is \$65 billion by 2030.

REGIONAL TARGET

The regional target has been retained to reflect an enduring focus on growing the visitor economy of regional NSW. The target for Regional Overnight Visitor Expenditure is \$25 billion by 2030.

Total Visitor Expenditure
\$65 Billion
by 2030
From \$43 billion in 2019

Domestic Day Trips
\$10 Billion
by 2030
From \$8.3 billion in 2019

Overnight Visitor Expenditure
\$55 Billion
by 2030
From \$35 billion in 2019

Regional Overnight Visitor Expenditure
\$25 Billion
by 2030
From \$20.5 billion in 2019

© Travelling Hawkesbury River

21

PHASES OF THE STRATEGY

Current modelling indicates that visitor numbers and visitor expenditure may take three to four years to recover, depending on the duration and impact of the COVID-19 pandemic. This strategy has been developed, and will be reviewed, in three distinct phases.

ASSUMPTIONS FOR THE TARGETS

A number of assumptions have been made in setting the targets and determining the phases of the strategy:

- › that visitor numbers and expenditure will return to pre-COVID levels by 2024
- › that subsequent pandemics or geopolitical events will not disrupt domestic and international travel
- › that the appeal of Sydney and NSW will continue to strengthen and marketing of the destination will be highly effective
- › that airlines and travel and tourism providers will survive the pandemic

Overall, in 2019, international markets accounted for 26 per cent of Total Visitor Expenditure in NSW while the intrastate market (i.e. NSW residents) accounted for 50 per cent and the interstate market 24 per cent. Although the value of domestic markets is large, it could be larger – up to \$10 billion – if we were able to convert expenditure on international travel to holidays in NSW while travel restrictions are in place. This could replace some of the lost value from the slow return of international visitors during the Recovery Phase up to 2024 and consequently, will be a focus of this strategy over the next three to four years.

More information for the various market groupings is in **Appendix 2**



RECOVERY PHASE TO 2024

The focus of this phase is to assist businesses and the industry to rebuild. The goal is to return total visitor expenditure to pre-COVID levels (\$43 billion in 2019).



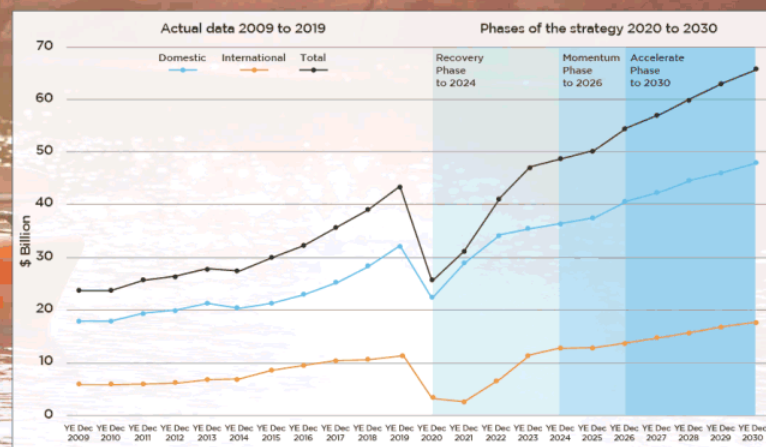
MOMENTUM PHASE TO 2026

A number of major infrastructure projects will be completed during this period, including the new Western Sydney Airport in 2026. This will provide a major stimulus to grow and expand the visitor economy in NSW. Visitor expenditure is expected to grow strongly during this time to reach over \$50 billion by 2026.



ACCELERATE PHASE TO 2030

By 2030, the momentum gained through the increased capacity and investment in the visitor economy over the previous phases will accelerate growth, with visitor expenditure targeted to reach \$65 billion.



NSW VISITOR ECONOMY STRATEGY 2030

22

VISITOR EXPENDITURE TARGETS

DOMESTIC MARKETS

Domestic markets contribute the largest share of Total Visitor Expenditure in NSW. They are targeted to generate \$47 billion in Total Visitor Expenditure by 2030. There will be a heavy reliance on these markets in the Recovery Phase.

The intrastate market (i.e. NSW residents) has been, and will continue to be, a core market as it is larger in volume and value than all the interstate markets combined. We will deliver compelling holiday-at-home marketing campaigns as part of this strategy especially in the Recovery Phase. This will include the activation and promotion of unique night-time economy hubs across Greater Sydney as part of the 24-Hour Economy Strategy.

Queensland and Victoria are, and will continue to be, core markets with each state generating more than 35 per cent of the domestic interstate market for NSW. Residents of both states have a high visit rate and a high propensity to return. This strategy will target Queenslanders and Victorians to make NSW their destination of first choice.

Western Australia and South Australia are markets of growing importance to NSW despite the barriers of distance, time, and cost. ACT is a strategically important market with a high repeat visitation. These markets will continue to be a focus.

Total Domestic
Visitor Expenditure
\$47 Billion
by 2030

From \$31.9 billion in 2019

INTRASTATE	CORE MARKETS	EMERGING	STRATEGICALLY IMPORTANT
NSW residents	Queensland and Victoria	Western Australia and South Australia	ACT

23

📍 Coolangatta Estate, Shoalhaven Heads

NSW VISITOR ECONOMY STRATEGY 2030

24

VISITOR EXPENDITURE TARGETS

INTERNATIONAL MARKETS

While the domestic markets account for the largest share of Total Visitor Expenditure in NSW, international markets are expected to grow at a faster rate after the Recovery Phase, to contribute \$17 billion by 2030.

China, USA, UK, South Korea, India, New Zealand, Japan, Hong Kong, Taiwan and Singapore have traditionally been the top 10 markets for NSW. We expect these will continue to be core markets over the next 10 years, subject to economic conditions and geopolitical factors.

Our data science capabilities will identify the optimal mix of source markets, most appealing propositions and most effective communication channels to reach potential visitors from each market.

However, NSW cannot rely exclusively on traditional markets continuing to send travellers its way. While Indonesia, Malaysia, Germany, France and Canada currently sit outside the top 10, they have the potential to grow in both volume and value to the state.

Additional opportunities in India, South East Asia, South and Central America and Europe will be explored, especially new high value consumer segments. This is also a cluster of second tier emerging and watch list markets that could be targeted in the future. Other long stay visitor markets such as international students and Working Holiday Makers will be crucial in the Recovery Phase.

Total International
Visitor Expenditure
\$17 Billion
by 2030

From \$11.4 billion in 2019

25

CORE MARKETS	EMERGING 1
Top 10 core markets + Indonesia, Germany, Malaysia	Canada, France, Vietnam
EMERGING 2	WATCH LIST
Brazil, Italy, Philippines, Thailand, Scandinavia, Switzerland	Fiji, Ireland, Netherlands, Spain, New Caledonia, Belgium, South Africa, Argentina, Bangladesh, Nepal, Sri Lanka, Israel, Austria, Poland, Pakistan, Chile, United Arab Emirates, Colombia, Saudi Arabia, Mexico, Cambodia, Russia, Qatar



INTERNATIONAL EDUCATION

The international student market is big business for NSW. In 2019, the state welcomed more than 245,000 international students who stayed more than 29 million nights and spent \$4.7 billion. At 41 per cent of total international visitor expenditure they account for the largest share. NSW is also proud to be the number one choice for international students to Australia with the largest share of total international education visitors at 38 per cent. International students choose NSW for its dynamic and multicultural education sector, world-class teaching, infrastructure and research facilities and global connections as well as the enviable lifestyle and natural beauty it offers. Their friends and families also contribute to the visitor economy when they visit NSW and explore the state together. Through close engagement with Study NSW, our universities, Technical and Further Education (TAFE) institutions and other community-based and private registered training organisations, NSW will continue to grow this market segment. The positive experience international students will have of studying in NSW will nurture a deep personal connection to the state that will encourage them to become regular visitors to Sydney and NSW for leisure and business in the years to come.

Lighthouse Beach, Port Macquarie

NSW VISITOR ECONOMY STRATEGY 2030

26

27

VISITOR EXPENDITURE TARGETS

At 75 million visitors and over \$8.3 billion in value the day tripper segment is significant for NSW.

DAY TRIP VISITORS

To reflect its contribution, day trip expenditure will be included in Total Visitor Expenditure in future visitor economy reporting. This will expand the metrics for the visitor economy beyond the single measure of Overnight Visitor Expenditure used in previous Visitor Economy Industry Action Plans.

Day trip visitors are particularly important for regional NSW. In 2019, regional NSW recorded about 47 million or 57 per cent of domestic day trip visitors. This visitation was worth about \$5.2 billion to the visitor economy of regional NSW.

The NSW Government recognises the importance of day trip visitation to the visitor economy as a whole and will work with stakeholders to develop initiatives to grow the value of this segment.

Domestic
Day Trips
\$10 Billion
by 2030
From \$8.3 billion in 2019



📍 Countryside, Ardlethan

NSW VISITOR ECONOMY STRATEGY 2030

GUIDING PRINCIPLES

Five Guiding Principles inform the NSW Government's policy and investment in the visitor economy. They focus the coordinated effort and resources of Government on those areas that will have the greatest impact.

PRINCIPLE 1 PUT THE VISITOR FIRST

We have put visitors front and centre of this strategy to enable better targeted marketing, experience design and industry support through a greater understanding of potential visitors.

Every visit should be an unforgettable one that inspires and encourages visitors to keep exploring and returning to NSW. Consumer trends and visitor needs will inform experience design, event development, infrastructure investment and marketing. This visitor-centric approach will involve:

- › A deep understanding of the needs and aspirations of potential visitors
- › Tracking and analysis of evolving consumer preferences and trends
- › A dynamic market prioritisation and segmentation approach
- › Working with industry to deliver exceptional visitor experiences
- › Personalised marketing and communications to guide visitors to experiences in NSW that match their specific interests and needs and encourage them to return.

PRINCIPLE 2 ACCELERATE DIGITAL INNOVATION

We will use technology to deliver personalised marketing to potential visitors, streamlined interactions between government and industry, and to enhance the visitor experience.

In the contemporary economy, digital innovation is key to competing successfully. The NSW Government will invest in and deploy best-in-class digital and data science thinking and practice. This will be done across three categories of activity:

- › On the demand side, develop a strong understanding of core visitor markets, then communicate the visitor experience offering through contemporary digital channels (web, social media, and emerging channels)
- › On the supply side, make it easier for industry stakeholders to do business with the NSW Government through a streamlined single portal 'one-stop shop' approach to information, funding, and services
- › In terms of digital infrastructure, develop and deliver tailored programs to guide and support industry stakeholders to improve their own digital competency, product design and experience delivery.

PRINCIPLE 3 LEAD WITH OUR STRENGTHS

We will focus on the distinctive character and features of NSW to help us stand out in a crowded market and drive visitation.

Competition from other destinations will be intense as they try to recover the visitation lost due to COVID-19. Even destinations previously grappling with 'over-tourism' will be vying for share post COVID-19. Travellers will align their values with those of the destinations they plan to visit, seeking out authentic experiences based around communities, arts, screen and culture.

The NSW Government will identify potential new markets and visitor segments (those interested in our signature experiences and wide-open spaces), effectively communicate the appeal and diversity of the state's offering and support the industry to deliver exceptional visitor experiences.

PRINCIPLE 4 MOVE FAST, BE RESPONSIVE AND AGILE, WHILE TAKING A LONGER-TERM VIEW

Being proactive, responsive, and quick to market will enable us to adapt to changing consumer trends and market conditions and take advantage of new opportunities as they emerge.

The world is changing at a rapid pace. The destabilising effects of the COVID-19 pandemic and geopolitical situation will heighten uncertainty about the future. It is more important than ever to adopt a more agile and innovative approach, enabling speed and efficiency in responding to these changes. Adjustments to the Government's visitor economy plans will be guided by foresight and scenario planning, aimed at achieving the longer-term targets.

PRINCIPLE 5 COLLABORATION BETWEEN THE INDUSTRY AND GOVERNMENT

We will foster greater cooperation and engagement with the industry to deliver the vision and take a whole-of-government approach to growing the NSW visitor economy.

Now more than ever, the visitor economy of NSW needs strong leadership from Government. Collaboration, coordination and communication across the NSW Government, with local councils, the Commonwealth Government, Tourism Australia, the Destination Networks, the industry and community is crucial for NSW to remain competitive and on top. As the lead agency for the NSW visitor economy, Destination NSW has engaged with industry and government stakeholders in the development of this strategy and will continue to engage extensively throughout its implementation.

A whole-of-government approach will be embedded in visitor economy planning with the establishment of a new Visitor Economy Senior Officers Group, to ensure visitor economy strategies are coordinated across government, to monitor performance against targets, and respond to emerging issues. New approaches to industry engagement and consultation will inform the development of new NSW Government initiatives and programs for the visitor economy.



"A strong sense of community pride and a clear articulation of the unique characteristics and experiences available in NSW will be critical"

📍 Mutawintji National Park, Mutawintji

NSW VISITOR ECONOMY STRATEGY 2030

30
31

STRATEGIC PILLARS

Unprecedented times like the present demand a smart and agile response.

Five Strategic Pillars underpin the NSW Government's vision to be the premier visitor economy in the Asia Pacific.

A detailed list of strategies and actions relating to each Strategic Pillar is in **Appendix 1**. They aim to address the following Key Result Areas and, in doing so, will contribute to realising the vision and achieving the visitor expenditure targets.

Funding and resourcing for initiatives will be prioritised at each phase of the strategy to deliver the biggest impact across these areas.





ROAD TO RECOVERY

A comprehensive program of marketing and industry development will ensure NSW recovers quickly from the impacts of COVID-19, bushfires, drought and floods and elevates its status as the premier visitor economy in the Asia Pacific.

Key result areas

- Return visitation and expenditure to pre-COVID levels by 2024
- Sustainable and resilient visitor economy businesses



BUILD THE BRAND

Compelling new brands will be developed for Sydney and NSW to provide a strong foundation for differentiation, consumer messaging, local pride and competitiveness to turbo-charge recovery and accelerate future growth.

Key result areas

- Increased demand to visit Sydney and NSW
- Greater brand awareness in target markets
- Improved response to campaign activity
- Increased community satisfaction



SHOWCASE OUR STRENGTHS

NSW is a state of breathtaking diversity and bucket list visitor attractions and experiences. We will focus on existing strengths and develop new opportunities to ensure place making, destination marketing, events and visitor experiences drive visitation.

Key result areas

- Increased average length of stay and yield (spend per visitor)
- Growth in visitation and expenditure for regional destinations
- Higher levels of repeat visitation



INVEST IN WORLD-CLASS EVENTS

An accelerated investment in signature sporting and cultural events such as the 10 World Cups and Vivid Sydney as well as business events will help position Sydney and NSW as the events capital of the Asia Pacific, drive visitation and enhance the social wellbeing of NSW residents.

Key result areas

- Increased economic impact and visitor attendance at events
- Greater promotion of Sydney and NSW as an events destination
- Increased community and visitor satisfaction with events



FACILITATE GROWTH

Investing in infrastructure, job creation, industry resilience and sustainability, future planning, and better ways to do business will ensure the continued growth and future prosperity of the NSW visitor economy.

Key result areas

- Increased public and private sector investment in visitor infrastructure
- Improved access to visitor destinations and visitor attractions
- Increased visitor satisfaction with accommodation and experiences

📍 Glasshouse Rocks, Narooma

NSW VISITOR ECONOMY STRATEGY 2030

32

STRATEGIC PILLAR 1. ROAD TO RECOVERY



A targeted and agile response to the cumulative effects of the COVID-19 pandemic, drought, floods, bushfires on the NSW visitor economy is essential for NSW to recover quickly and elevate its status as the premier visitor economy in the Asia Pacific.

Current modelling indicates that it may take three to four years to achieve a full visitor economy reset. We expect the *Road to Recovery* strategy will evolve over this time in response to market conditions, tracking and analysis of consumer trends and new opportunities that may arise.

It will take a coordinated whole-of-government effort to achieve the visitor economy reset. This includes a mix of supply and demand driving programs and industry development initiatives encompassing Sydney and regional NSW. The program will focus initially on opportunities in the domestic market, while borders are closed and plans for international markets are refined.

Destination NSW will lead the *Road to Recovery* program, working closely with NSW Government departments and agencies, the Commonwealth Government, local councils, Destination Networks, industry, and the community.

The NSW Government's roadmap for rebooting the visitor economy covers five key areas, as follows.

Key Areas

1. SUPPORT BUSINESSES	2. DRIVE DEMAND	3. RESTORE ACCESS	4. DEVELOP AND GROW THE VISITOR ECONOMY WORKFORCE	5. INFRASTRUCTURE
<ul style="list-style-type: none"> › Grants and funding › Digital 'one-stop shop' portal › Specialist business advisory services and toolkits › Customised training and on-demand delivery › Support regional development through Destination Networks › Helping businesses develop crisis and business continuity plans 	<ul style="list-style-type: none"> › New Sydney and NSW brand › Omnichannel marketing programs › Conversion campaigns with industry partners › PR and Visiting Media programs › Expanded regional road trips program › New digital assets (stills and video) › Investment in metro and regional events › 24-Hour Economy Strategy 	<ul style="list-style-type: none"> › Expanded intrastate and interstate air services › Resumption of international air services, commencing with bi-lateral travel bubbles › Improved road infrastructure and wayfinding signage › Improved multimodal transport services and connectivity 	<ul style="list-style-type: none"> › Needs-based industry development programs › Programs that enhance the appeal of a career in the visitor economy › Hospitality and tourism skills and service delivery training › Quality assurance programs › Working Holiday Maker dispersal to regional NSW 	<ul style="list-style-type: none"> › Infrastructure planning › Infrastructure funding › Investment attraction › Streamlined approval processes

33



WHAT WE WILL DO

- › Deliver a suite of consumer and industry programs to reboot the visitor economy.
- › Promote Sydney and NSW through striking new marketing campaigns, world-class events and a renewed focus on the 24-hour economy.
- › Support visitor economy businesses to adapt, recover and flourish by providing a comprehensive suite of grants, training and business advice programs delivered through a new one-stop shop.
- › Bolster visitor destinations through the largest investment in transport and visitor infrastructure and access in Australia.

Illawarra Fly Treetop Adventures, Knights Hill

NSW VISITOR ECONOMY STRATEGY 2030

34

STRATEGIC PILLAR 2. BUILD THE BRAND



Compelling new brands will be developed for Sydney and NSW. They will provide a strong foundation for differentiation, consumer messaging and competitiveness, turbocharging the recovery and growth of the visitor economy. The brands will be the essence of why domestic and international visitors choose to visit NSW.

A new family of brands will be designed to give the Sydney and regional destination brands the flexibility to complement each other yet accommodate their individual identities and appeal to different target audiences. They will also help support the growth of other industries, trade and exports identified in the *Global NSW Strategy*.

The brands (and potential sub brands) will showcase the people, places, culture and visitor experiences that express their true personality. They will build an emotional connection with the target audience and help overcome travel barriers (time, distance, cost). They will serve as a badge of identity that fosters local pride and has

strong appeal to the target visitor segments. The brands will be visitor centric, data-led and informed by comprehensive consumer research.

In developing the brand, the NSW Government will address the following five key areas.

Key Areas

1. BRAND PERCEPTION	2. BRAND REPUTATION	3. BRAND IDENTITY	4. BRAND PROMISE	5. BRAND SYMBOLS
Is in the mind of visitors, based on their previous experience and engagement with Sydney and NSW	The individual and collective opinions about Sydney and NSW and how we try to influence them	What Sydney and NSW stand for and want to be known for	The experiences visitors can expect to get every time they visit Sydney and NSW	The visual reference for Sydney and NSW (logo, wordmark, lock-ups, co-branding, colors, style guide, tone of voice, tag lines, etc.)



35



WHAT WE WILL DO

- › Develop and launch a compelling new brand for Sydney and NSW based on robust consumer research and data analysis.
- › Consistently use the new brand to promote Sydney and NSW as an exciting place to visit, invest, do business and study.
- › Work with industry and across government to ensure that all aspects of the visitor journey deliver on the brand promise, including products, experiences and events.

BridgeClimb Sydney

NSW VISITOR ECONOMY STRATEGY 2030

36

STRATEGIC PILLAR 3. SHOWCASE OUR STRENGTHS



NSW is a state of breathtaking diversity and bucket list visitor experiences.

We will focus on our existing strengths and develop new opportunities to ensure place making,

destination marketing, events and visitor experiences drive visitation. Increasing adoption of digital

technology by tourism operators will ensure NSW continues to deliver world leading visitor experiences.

Our Strengths Today

1. ICONS AND HIDDEN GEMS	2. SMALL-TOWN CHARM	3. VIBRANT CONTEMPORARY CULTURE	4. RECONNECT IN NATURE	5. WORLD-CLASS FOOD AND DRINK
<ul style="list-style-type: none"> › Iconic Sydney destinations and attractions › Secret precincts and places › World-class events and festivals › Vibrant retail precincts 	<ul style="list-style-type: none"> › Small towns with soul › Beach and the hinterland › Events with personality › Self-drive tourism (road trips) › History and heritage › Coastal cruising › Local, handmade and artisanal 	<ul style="list-style-type: none"> › Living Aboriginal culture › Significant cultural infrastructure › Art, music, screen and live performance › LGBTQIA+ culture and events 	<ul style="list-style-type: none"> › National Parks › Bush and outback stargazing › Up close with marine life › Iconic walks, rail and mountain bike trails and cycling › Changing colours of the seasons › Luxury stays/ glamping › Caravan and camping 	<ul style="list-style-type: none"> › From the producers (paddock to plate and agri-tourism) › Winery, brewery, distillery experiences › World-class dining in spectacular settings



📍 Cinco, Sydney Dance Company. Image: Wendell Tedboro

37

SYDNEY AND NSW: A DIVERSE AND DISTINCTIVE DESTINATION

A GLOBAL ICON

Sydney is Australia's only global city: it's the international gateway to our nation and a powerhouse metropolis of Aboriginal and colonial history, architectural icons, urban beaches, dynamic dining and the sparkling Sydney Harbour. Beyond the tourism favourites, visitors can discover urban wilderness in the Royal Botanic Garden, thrilling surf breaks at Bondi, edgy art galleries, warehouse breweries, world-renowned dining and a vibrant 24-Hour Economy. Only in Sydney can you dine under the soaring sails of the Opera House, explore the Blue Mountains National Park on the fringe of the city, and see the cityscape transform into an outdoor light gallery for Vivid Sydney.

STUNNING BEACHES AND COASTAL COMMUNITIES

NSW is a water lovers' playground with inner-city coves, epic surf breaks and boating on Sydney Harbour. The state has myriad running routes along the water, through bushland and edging the harbour. In coastal hubs like Wollongong and Newcastle, the city-side beaches buzz with intimate bars and waterside dining. Only in NSW is marine life so close to major towns, with whales breaching off Eden, dolphins diving off Port Stephens and sea turtles in Byron Bay. You can even dive with sharks in the heart of Sydney. The sparkling beaches in NSW are often hedged by lush hinterland, rolling farmland and quaint villages to explore.

AUTHENTIC AUSTRALIAN EXPERIENCES

As Australia's most geographically diverse state, NSW offers a spectacular range of outdoor nature experiences like hiking through coastal bushland, diving amongst fur seals, skiing the alpine slopes, having a picnic amongst the vines or marvelling at the stars in the outback. Keen beach goers and surfers love NSW too, with around 890 ocean and bay beaches in the state. For wine connoisseurs, NSW is home to over 14 wine regions, notably Australia's oldest wine region, the Hunter Valley. The state of NSW also boasts a vibrant events calendar — from truffle hunting in New England to the Tamworth Country Music Festival and the Deni Ute Muster where people bring their utes to celebrate Aussie culture on one of the flattest plains on earth.

THE NUMBER ONE EDUCATION AND BUSINESS DESTINATION IN AUSTRALIA

Sydney is one of the most popular cities in the world for international students to gain their degrees. In fact, almost 40 per cent of all international students choose to study in Sydney and regional NSW. This is partly due to the wonderful lifestyle on offer, but also reflects the number of universities we have here, along with their reputation for academic excellence and global standing. Sydney is Australia's hub of finance, commerce and media, it's home to large corporations and host to large-scale international business events. More than 64 per cent of all Australia's tech start-ups also begin their lives in Sydney. (Source: NSW Government).

A DINING DESTINATION

The produce of a place shares the story of a destination, and NSW has a rich food culture, from oysters to lamb and orchards. From mouth-watering plates prepared harbourside by some of Australia's top chefs to paddock-to-plate and agri-tourism experiences in country towns statewide, NSW bursts with flavour. To enhance the foodie experience, there are cool climate wines, inner-city brewed beers and botanical spirits crafted in the hinterland. NSW is uniquely positioned to deliver a world-class culinary experience.

STRONG, VIBRANT AND DIVERSE ABORIGINAL CULTURE

NSW is home to the largest Aboriginal population in Australia represented by more than 80 different tribal groups each with a unique story to tell. With such cultural diversity on offer, NSW can guide visitors on some of the most authentic and accessible adventures in the nation. Throughout Sydney and regional NSW, Aboriginal tourism operators offer visitors deep and diverse experiences that are potentially life changing — from ancient Songlines and Dreaming stories to medicinal plants and bush tucker. With connections to generations of Aboriginal people who have access to thousands of years of accumulated knowledge, wisdom and lore, NSW's Aboriginal tourism operators offer visitors unique cultural encounters.

📍 Stand-up Paddleboarding, Lord Howe Island

NSW VISITOR ECONOMY STRATEGY 2030

38

39

STRATEGIC PILLAR 3. SHOWCASE OUR STRENGTHS

REGIONAL NSW

Regional NSW has something for every traveller's taste with an abundance of attractions that reflect its people, geography, history and diversity. Destinations like the North Coast, Blue Mountains, Hunter Valley, Southern Highlands and South Coast attract millions of visitors each year. But there is so much more to see and experience in regional NSW and so much more still to discover.

Ironically, the COVID-19 pandemic is creating a positive legacy for the visitor economies of regional NSW by encouraging Sydneysiders and NSW residents to explore their own backyard and return time and again. Offering the safety of its wide-open spaces and uncrowded towns with distinctive local charm, regional NSW is well placed to take advantage of this unprecedented situation.

Strategic investments by the NSW Government, local councils and the private sector in visitor infrastructure, transport and destination marketing now and into the future will further enhance the appeal of regional NSW, aid its recovery in the near term and lay the foundation for richer economic and social benefits for decades to come.

When international borders re-open, regional NSW will be poised to leverage this investment to attract new visitor segments or a greater share of traditional markets. The continuing success of regional NSW is key to achieving the visitation and expenditure targets for 2030 as well as the vision of this strategy.

“Regional NSW is uniquely located to reimagine tourism for thousands of travel ready Australians who are making plans to holiday inside our borders.

As Australians prepare to break free from restrictions regional NSW is preparing to welcome them back into wide-open spaces.

We are waking up out of a pandemic and into a regional renaissance where regional tourism will feature as a key pillar to economic recovery.

Our record investment in regional infrastructure combined with the natural beauty of our state makes regional NSW a great place to visit and even harder place to leave..”

John Barilaro
Deputy Premier and Minister for
Regional NSW

Hot Air Ballooning, Mudgee

NSW VISITOR ECONOMY STRATEGY 2030

40

STRATEGIC PILLAR 3. SHOWCASE OUR STRENGTHS



Emerging strengths

To further grow the visitor economy, the NSW Government will focus on developing new strengths to augment the state's existing range of visitor experiences.

New strengths will be developed in line with evolving trends and market conditions through innovation in visitor experience design, new infrastructure or adaptive reuse of

heritage assets, and new consumer positioning. The new strengths will elevate the competitive positioning of NSW and create new business opportunities and job growth.

NEW ICONS	ECO-WELLBEING	EVERYONE'S INVITED
<ul style="list-style-type: none"> Western Sydney Airport, Western Parklands City and the Aerotropolis 24-Hour Economy New visitor attractions statewide New event infrastructure and content New urban and regional precincts and places 	<ul style="list-style-type: none"> Eco-tourism Sustainability Volun-tourism Wellness tourism 	<ul style="list-style-type: none"> Accessible products and places Liveable, connected cities and regions



📍 Lentil As Anything, Newtown

WHAT WE WILL DO

- Prioritise funding and industry support for new products and experiences that reinforce the strengths.
- Implement new needs-based industry development programs to facilitate the digital transformation of visitor economy businesses, enhance the quality of visitor experiences, and sustainability and resilience of visitor economy businesses.
- Deliver marketing and PR campaigns that emphasise and reinforce the distinctive character and features of NSW visitor destinations.



24-HOUR ECONOMY STRATEGY

Sydney is Australia's only truly global city. A renewed focus on Sydney nightlife, live music and entertainment is being fostered through the NSW Government's 24-Hour Economy Strategy – activating the city throughout the day and night. A vibrant and flourishing 24-hour tempo will drive tourism, create jobs and support new businesses. The new brands for Sydney and NSW will showcase the city's world-class hospitality, culture, arts and live music scene. New major events and activations will breathe new life into our entertainment precincts.

A 24-Hour Economy Coordinator-General will drive collaboration between the NSW Government, local government and industry, and a Neon Grid will connect entrepreneurs with visitor economy opportunities across Greater Sydney.

📍 Winston Surfshirt, Enmore Theatre. Image: Jordan Munns.

NSW VISITOR ECONOMY STRATEGY 2030

42

STRATEGIC PILLAR 3. SHOWCASE OUR STRENGTHS



A METROPOLIS OF THREE CITIES

To meet the needs of a growing and changing population, the NSW Government has a bold 40-year vision to develop the Greater Sydney region into three distinct cities – the Western Parklands City,

Central River City and Eastern Harbour City. Most residents will live within 30 minutes of their jobs, education and health facilities, services and great places. Each city will become a distinct visitor

destination in its own right, with a diverse and appealing range of visitor experiences on offer in addition to the icons and outdoor lifestyle for which Sydney is globally renowned.



📍 Innovation Quarter Westmead, render



“In a rapidly changing region, the pandemic has intensified the need to adapt and plan for long-term prosperity. NSW is ahead of the curve. Our extraordinary people, instinct for innovation, and secure, diverse economy will cement our place as Australia's global gateway, and we will keep bringing the best of Australia to the world - and the world to NSW.”

Dominic Perrottet, NSW Treasurer

43

WESTERN PARKLANDS CITY

The NSW Government is committed to delivering transformative change in the Western Parklands City through expanding and fast-tracking opportunities at the Aerotropolis and surrounding local government areas. The Western Parklands City Authority will bring a renewed focus on investment and collaboration between local, state and federal governments. The visitor economy is pivotal to the future economic prosperity of the Western Parklands City with the new Western Sydney International (Nancy-Bird Walton) Airport opening in 2026.

📍 Jetpack Adventures, Penrith



NSW VISITOR ECONOMY STRATEGY 2030

44

STRATEGIC PILLAR 4. INVEST IN WORLD-CLASS EVENTS



Signature sporting, arts, screen and cultural events such as the 10 World Cups, the Sydney Biennale and Vivid will help position Sydney and NSW as the events capital of the Asia Pacific.

The people of NSW will enjoy the social and economic benefits of the Government's investment in events and the world-class infrastructure built to stage them.

The NSW Government will continue to invest in events and event infrastructure that:

- › directly contribute to and grow the NSW visitor economy
- › drive increased visitation from domestic and international target markets

› enhance the reputation of Sydney and NSW as flourishing knowledge economies.

Events make a significant contribution to the NSW economy and support thousands of jobs. During the Recovery Phase events will play a critical role in bringing visitors back to Sydney and regional NSW for day trips and extended stays. Major infrastructure upgrades and new builds including sporting stadiums, cultural institutions and entertainment facilities will also

contribute to achieving the vision and Visitor Expenditure Targets. Business events will enhance the state's profile as a vibrant knowledge economy on the global stage.

The NSW Government will curate and promote an unrivalled events and entertainment calendar for Sydney and NSW covering the following categories of events.

Key Areas

1. VENUE PROGRAMMING	2. REGIONAL AND LOCAL EVENTS	3. MAJOR EVENTS	4. BUSINESS EVENTS	5. GLOBAL MEGA EVENTS
Compelling content and productions that draw regular patrons to the venue.	Events that bring local or interstate visitors and help to define the local character of a town or region.	Regular or one-off large-scale events that attract domestic and international visitors and underpin the Sydney and NSW brand.	Events that contribute to the state's visitor, knowledge, and industry economies, and provide opportunities to showcase local capability and attract investment and talent to NSW.	One-off, large-scale events that attract a significant number of international visitors and position Sydney and NSW on the global stage.

45



WHAT WE WILL DO

- › Secure and host world-class business, sports, arts and cultural events that appeal to high-value travellers and position Sydney and NSW as the events capital of the Asia Pacific.
- › Invest in and nurture iconic home-grown events that reflect the vibrancy of NSW visitor destinations.
- › Provide the best events facilities in Australia, and a whole-of-government approach, making it easy to produce events in NSW.

Vivid Sydney

NSW VISITOR ECONOMY STRATEGY 2030

46

STRATEGIC PILLAR 5. FACILITATE GROWTH



Investing in world-class infrastructure, future planning, and better ways to do business will ensure the continued growth and future prosperity of the NSW visitor economy. The NSW Government will implement programs and initiatives in the following five areas to facilitate long-term growth.

Key Areas

1. REGULATION AND PLANNING REFORM	2. TRANSPORT AND ACCESS	3. VISITOR INFRASTRUCTURE	4. BUSINESS CAPACITY BUILDING AND SUPPORT	5. SKILLS AND WORKFORCE
<ul style="list-style-type: none"> Local government responsibilities Regulation and licensing Major event facilitation Planning approvals Land use planning 	<ul style="list-style-type: none"> Multi-modal transport planning Airports and air services Roads and road signage Cruise ports Public transport 	<ul style="list-style-type: none"> Infrastructure planning and land banking Major projects pipeline Project funding and facilitation Investment attraction Technology solutions 	<ul style="list-style-type: none"> Business advice Industry standards and professionalism Product innovation and adaptation 24hour economy 	<ul style="list-style-type: none"> Future workforce needs Career pathways Visas / migration Taxation and industrial relations

As the lead NSW Government agency for the visitor economy, Destination NSW will coordinate and amplify delivery of these programs and initiatives across all levels of Government. Destination NSW will be supported in this facilitation role by the Destination Networks which act as a conduit between the NSW Government and the local governments and tourism businesses in their regions.

They will continue to play an important role in delivering regional funding and industry development programs, and in identifying infrastructure needs and investment opportunities.

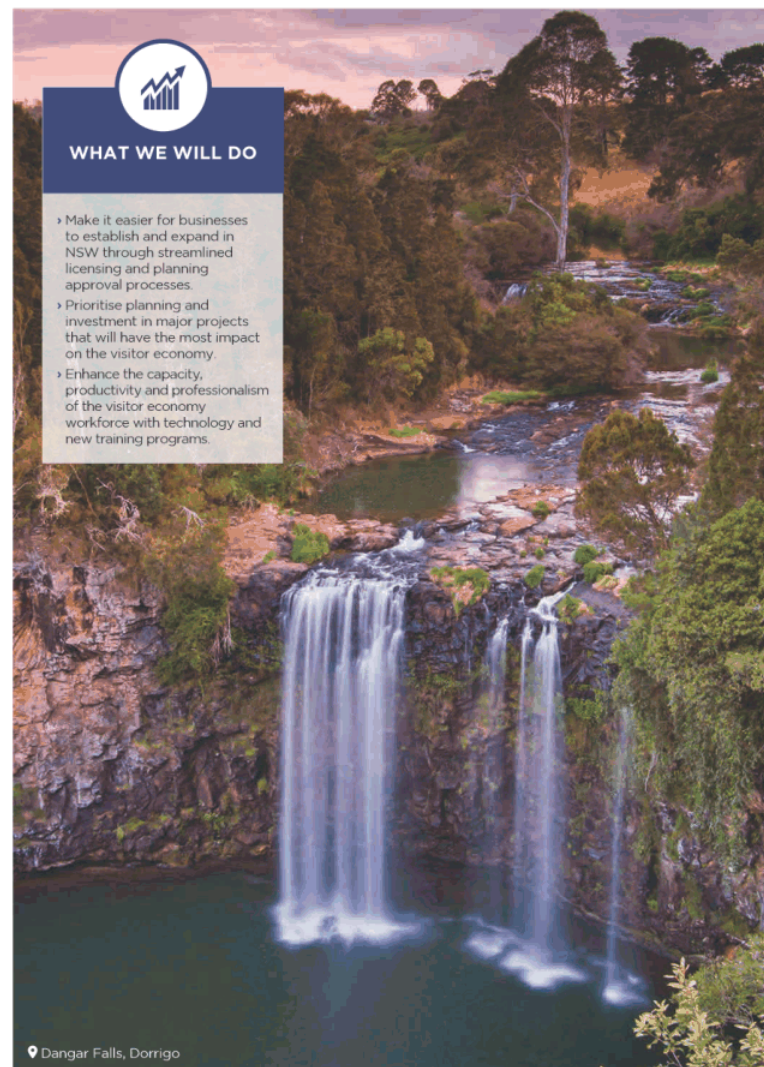
Different levels of government intervention will be required depending on the nature of the infrastructure.

The NSW Government will use the Visitor Infrastructure Framework, summarised below, and the criteria in **Appendix 3** to guide infrastructure planning and prioritise investment in visitor economy infrastructure at a state-wide, regional and local level where it will make the most impact.

	LOW INTERVENTION REQUIRED *	HIGH INTERVENTION REQUIRED
HIGHER IMPACT ON THE VISITOR ECONOMY	<ul style="list-style-type: none"> Campgrounds Caravan parks Hotels and motels Tourist attractions 	<ul style="list-style-type: none"> Airports and airport facilities Cruise and marine Cultural and sporting facilities Digital infrastructure Telecommunications Natural attractions
LOWER IMPACT ON THE VISITOR ECONOMY	<ul style="list-style-type: none"> Cafes, restaurants and bars Entertainment facilities Tourism activities Wineries 	<ul style="list-style-type: none"> Public toilets and car parking Public transport Road transport Urban public spaces

* Higher levels of intervention may be required depending on the project, precinct, land availability and proponent.

47



WHAT WE WILL DO

- Make it easier for businesses to establish and expand in NSW through streamlined licensing and planning approval processes.
- Prioritise planning and investment in major projects that will have the most impact on the visitor economy.
- Enhance the capacity, productivity and professionalism of the visitor economy workforce with technology and new training programs.

📍 Dangar Falls, Dorrigo

NSW VISITOR ECONOMY STRATEGY 2030

48

49

STRATEGIC PILLAR 5. FACILITATE GROWTH



EXPERIENCE DEVELOPMENT AND INVESTMENT ATTRACTION TO GROW THE VISITOR ECONOMY

Many of the best-known icons, venues and natural attractions that draw visitors to Sydney and NSW are owned and managed by the state government. Thousands of tour operators and commercial businesses help to activate these assets through the operation of tours, activities and events, providing the world-class visitor experiences for which Sydney and NSW is world renowned.

The NSW Government is accelerating the recovery of the visitor economy through significant investment in new infrastructure and product and experience development, and by fast-tracked planning assessments for major projects such as the new Sydney Fish Market. This will help rebuild business confidence, encourage private sector investment and support new and expanded products and services that enhance the appeal of Sydney and regional NSW. Funding programs and business advice will help businesses to 'build back better', innovate and adapt to changing market conditions.

The NSW Government's investment attraction strategy targets industries that grow the economy and leverage NSW's natural endowments. Planning is well advanced for the first tourism Special Activation Precinct (SAP) in the Snowy Mountains, creating Australia's premier alpine and adventure tourism playground. The NSW Government will plan, coordinate and deliver the SAP by making land ready for investors and building enabling infrastructure.

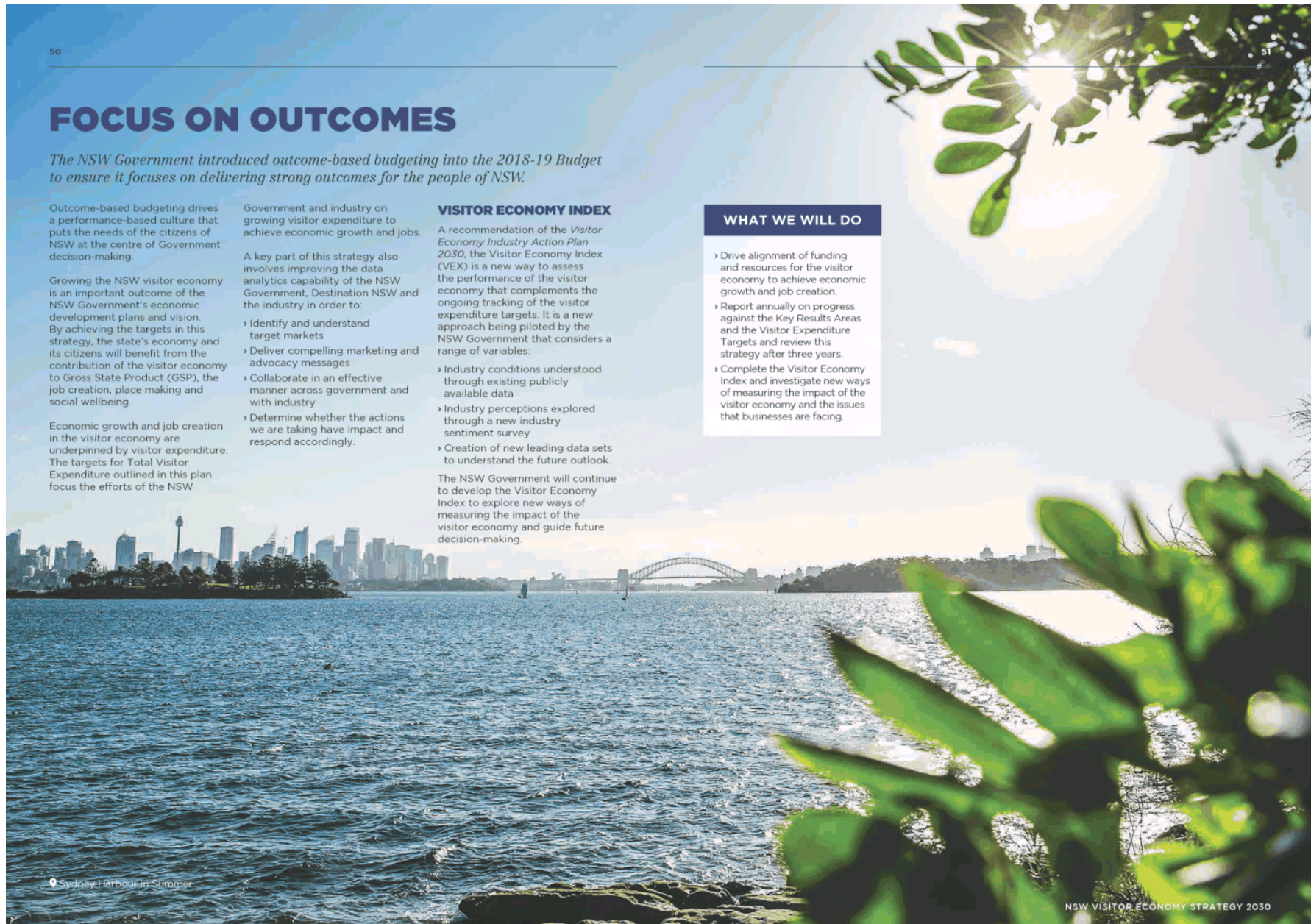
The NSW Government's investor concierge service and investment attraction experts help businesses to establish, innovate and grow. There is a strong focus on Lighthouse Precincts, such as the Western Sydney Aerotropolis and Tech Central, and opportunities for investment in new visitor attractions and hotels.

NSW is home to many of Australia's leading technology enabled industries. There is scope to attract foreign investment and expand capability in the tourism and travel tech sector building on NSW's existing strengths in media, film, Artificial intelligence, machine learning and robotics. This will expand the range of job opportunities for NSW residents, improve productivity and innovation, and facilitate compelling new visitor experiences.



📍 Dubbo City Regional Airport

NSW VISITOR ECONOMY STRATEGY 2030



50

FOCUS ON OUTCOMES

The NSW Government introduced outcome-based budgeting into the 2018-19 Budget to ensure it focuses on delivering strong outcomes for the people of NSW.

Outcome-based budgeting drives a performance-based culture that puts the needs of the citizens of NSW at the centre of Government decision-making.

Growing the NSW visitor economy is an important outcome of the NSW Government's economic development plans and vision. By achieving the targets in this strategy, the state's economy and its citizens will benefit from the contribution of the visitor economy to Gross State Product (GSP), the job creation, place making and social wellbeing.

Economic growth and job creation in the visitor economy are underpinned by visitor expenditure. The targets for Total Visitor Expenditure outlined in this plan focus the efforts of the NSW

Government and industry on growing visitor expenditure to achieve economic growth and jobs.

A key part of this strategy also involves improving the data analytics capability of the NSW Government, Destination NSW and the industry in order to:

- › Identify and understand target markets
- › Deliver compelling marketing and advocacy messages
- › Collaborate in an effective manner across government and with industry
- › Determine whether the actions we are taking have impact and respond accordingly.

VISITOR ECONOMY INDEX

A recommendation of the *Visitor Economy Industry Action Plan 2030*, the Visitor Economy Index (VEX) is a new way to assess the performance of the visitor economy that complements the ongoing tracking of the visitor expenditure targets. It is a new approach being piloted by the NSW Government that considers a range of variables:

- › Industry conditions understood through existing publicly available data
- › Industry perceptions explored through a new industry sentiment survey
- › Creation of new leading data sets to understand the future outlook.

The NSW Government will continue to develop the Visitor Economy Index to explore new ways of measuring the impact of the visitor economy and guide future decision-making.

WHAT WE WILL DO

- › Drive alignment of funding and resources for the visitor economy to achieve economic growth and job creation.
- › Report annually on progress against the Key Results Areas and the Visitor Expenditure Targets and review this strategy after three years.
- › Complete the Visitor Economy Index and investigate new ways of measuring the impact of the visitor economy and the issues that businesses are facing.

📍 Sydney Harbour in Summer

NSW VISITOR ECONOMY STRATEGY 2030



54

APPENDIX 1 – DELIVERING ON THE STRATEGY: DETAILED ACTION PLAN

NO.	STRATEGIES AND ACTIONS	LEAD AGENCY	SUPPORT PARTNERS	TIMING
Focus on outcomes				
0.01	Publish an annual report card on the implementation of the Visitor Economy Strategy actions and review this strategy after three years.	Destination NSW	› All lead agencies	2021-2030
0.02	Establish a Senior Officers Group to coordinate visitor economy policy, programs and initiatives across the NSW Government.	Destination NSW	› Relevant NSW Government agencies	2021-2030
0.03	Drive alignment of funding and resources for the visitor economy to achieve economic growth and job creation.	Destination NSW	› Destination Networks	2021-2030
0.04	Complete the Visitor Economy Index and investigate new ways of measuring the impact of the visitor economy and the issues that businesses are facing.	Destination NSW	› Destination Networks	2021-2030

55

Strategic pillar 1. Road to recovery

NO.	STRATEGIES AND ACTIONS	LEAD AGENCY	SUPPORT PARTNERS	TIMING
Support businesses				
1.01	Develop and deliver a program of business support and industry development comprising grants and funding, business planning, training and other tools to assist businesses to recover, be resilient and sustainable, improve digital capability and encourage investment in new product and experience design.	Destination NSW	› NSW Treasury › Destination Networks › Office of Local Government › Tourism Australia › Austrade › Department of Regional NSW › National Parks and Wildlife Service (NPWS) › Department of Planning, Industry and Environment	2021-2024
1.02	Attract increased private sector investment in visitor economy infrastructure.	NSW Treasury	› Destination NSW › Department of Regional NSW › Destination Networks	2021-2024
1.03	Create a dynamic digital one-stop shop for all NSW Government information and resources about the visitor economy including data and insights on target markets and visitor segments.	Destination NSW	› NSW Treasury › Office of Local Government › Department of Customer Service › Department of Regional NSW › Transport for NSW › Department of Planning, Industry and Environment › NPWS › Destination Networks	2021-2022

56

NO.	STRATEGIES AND ACTIONS	LEAD AGENCY	SUPPORT PARTNERS	TIMING
Drive demand				
1.04	Create marketing campaigns that showcase our strengths to grow visitation to Sydney and regional NSW.	Destination NSW	<ul style="list-style-type: none"> › Department of Regional NSW › NPWS › Destination Networks › Industry 	2021-2024
1.05	Secure new festivals, sporting events, blockbuster musicals, exhibitions and business events for Sydney and regional NSW to accelerate the sector's recovery, visitor numbers and expenditure.	Destination NSW	<ul style="list-style-type: none"> › Office of Sport › Venues NSW › Create NSW › Department of Regional NSW › Business Events Sydney › Local councils › NPWS 	2021-2024
1.06	Refresh visitNSW.com, sydney.com and other consumer-facing digital assets to deliver a best in class user experience and increase leads to tourism businesses.	Destination NSW	<ul style="list-style-type: none"> › Industry › Destination Networks › Department of Regional NSW 	2021-2022
1.07	Co-invest in conversion campaigns with industry partners including airlines, airports, car rental companies, online travel agencies, and other relevant stakeholders.	Destination NSW	<ul style="list-style-type: none"> › Industry › Tourism Australia › NPWS 	2021-2024
1.08	Deliver an expanded road trip program and support more regional events to facilitate regional dispersal.	Destination NSW	<ul style="list-style-type: none"> › Destination Networks › Transport for NSW › Department of Regional NSW › Local Government › NPWS › Industry 	2021-2024

57

NO.	STRATEGIES AND ACTIONS	LEAD AGENCY	SUPPORT PARTNERS	TIMING
1.09	Deliver the NSW Government's 24-Hour Economy Strategy to grow the night-time economy.	NSW Treasury	<ul style="list-style-type: none"> › Department of Premier and Cabinet › Destination NSW › Create NSW › Transport for NSW › Department of Regional NSW › Department of Planning, Industry and Environment › Local Councils › Destination Networks 	2021-2030
1.10	Invest in high impact consumer public relations opportunities and editorial partnerships.	Destination NSW	<ul style="list-style-type: none"> › Tourism Australia › Industry › NPWS 	2021-2024
1.11	Invest in new content in the form of images and video to showcase Sydney and NSW's current and emerging strengths.	Destination NSW	<ul style="list-style-type: none"> › Department of Regional NSW › Tourism Australia › NPWS › Industry › Destination Networks 	2021-2024
1.12	Partner with Tourism Australia and cross border agencies to grow visitation to Sydney and NSW.	Destination NSW	<ul style="list-style-type: none"> › Cross-Border Commissioner › Tourism Australia › Industry › Destination Networks 	2021-2024

58

NO.	STRATEGIES AND ACTIONS	LEAD AGENCY	SUPPORT PARTNERS	TIMING
Restore access				
1.13	Develop a new aviation strategy to grow regional, interstate, and international airline capacity and deliver world-class airport visitor experiences.	Destination NSW with Department of Regional NSW	› Sydney and regional airports	2021-2024
1.14	Advocate to the Commonwealth that Sydney and NSW be prioritised in bi-lateral 'travel bubble' agreements where appropriate and on the basis of health advice.	Destination NSW with Department of Premier and Cabinet	› Department of Regional NSW	2021-2024
1.15	Deliver safe, accessible, affordable, and convenient multimodal transport systems that support the visitor economy.	Transport for NSW	› Destination NSW › Department of Regional NSW	2021-2030
1.16	Invest in road networks, wayfinding and cruise and maritime infrastructure to deliver a quality visitor experience and encourage regional dispersal.	Transport for NSW	› Port Authority of NSW › Placemaking NSW › Department of Regional NSW › NPWS › Local councils	2021-2030
Develop and grow visitor economy workforce				
1.17	Deliver an expanded program of NSW First industry development workshops to help tourism businesses to develop, promote, and sell in the current and future B2B and B2C environment.	Destination NSW	› Destination Networks › NSW Treasury › Industry	2021-2030
1.18	Establish a whole-of-government approach to deliver training, mentoring and industry development programs tailored to the needs of the visitor economy workforce.	Destination NSW	› Department of Education › NSW Treasury › Department of Regional NSW › Industry/private education providers › NPWS › Destination Networks › TAFE NSW	2021-2030

59

NO.	STRATEGIES AND ACTIONS	LEAD AGENCY	SUPPORT PARTNERS	TIMING
Infrastructure				
1.19	Finalise the NSW Tourism Infrastructure Strategy aligned with the State Infrastructure Strategy.	Destination NSW	› NSW Treasury › Infrastructure NSW › Department of Regional NSW › Department of Planning, Industry and Environment › Transport for NSW › NPWS	2021
1.20	Identify priority visitor economy projects and develop business cases for related infrastructure guided by the Tourism Infrastructure Strategy and fast track their approval and delivery.	Destination NSW	› Infrastructure NSW › Department of Planning, Industry and Environment › NSW Treasury › Department of Regional NSW › NPWS › Greater Sydney Commission › Destination Networks	2021-2030
1.21	Accelerate reform of planning processes, planning instruments and simplify licensing and regulatory processes to make it easier for investors and businesses to establish or expand their operations in NSW.	Department of Planning, Industry and Environment	› Department of Customer Service › Department of Regional NSW › Destination NSW	2021-2030

60

Strategic pillar 2. Build the brand

NO.	STRATEGIES AND ACTIONS	LEAD AGENCY	SUPPORT PARTNERS	TIMING
2.01	Develop and roll out a new destination brand for Sydney and NSW.	Destination NSW	› Destination Networks › NPWS	2021
2.02	Consistently use the brands in marketing and communications for Sydney and NSW visitor destinations.	Destination NSW	› Local Tourism Organisations › Local councils › NPWS	2021-2030
2.03	Incorporate the brand messages into marketing campaigns, digital assets and collateral targeting investors, business events and international students.	NSW Treasury	› Business Events Sydney › Destination NSW › NPWS › Department of Regional NSW	2021-2030
2.04	Develop and deliver style guides and toolkits for stakeholders and industry explaining the brand and how to apply the brand symbols.	Destination NSW	› Destination Networks	2021-2030
2.05	Demonstrate how to deliver on the brand promise through customer service training and industry development programs.	Destination NSW	› Destination Networks › NPWS	2021-2030
2.06	Regularly assess the impact of the brand through campaign tracking and consumer research.	Destination NSW	› NPWS	2021-2030

61

Strategic pillar 3. Showcase our strengths

NO.	STRATEGIES AND ACTIONS	LEAD AGENCY	SUPPORT PARTNERS	TIMING
3.01	Develop and promote funding programs for new products and visitor experiences that showcase the strengths of Sydney and NSW.	Destination NSW	› Department of Regional NSW › Destination Networks	2021-2030
3.02	Upskill tourism businesses to enable the greater use of digital technology to promote and deliver world-class visitor experiences.	Destination NSW	› Destination Networks › NSW Treasury › Industry › NPWS	2021-2030
3.03	Partner with the NSW Aboriginal Tourism Operators Council (NATOC) and Aboriginal tourism stakeholders to make NSW Australia's premier destination for Aboriginal tourism by showcasing and developing authentic, accessible, high-quality and compelling visitor experiences.	Destination NSW	› NATOC › Aboriginal Affairs › Destination Networks › NPWS › Industry	2021-2030
3.04	Develop and deliver an annual state-wide program of workshops, mentoring and other business support to foster the growth and sustainability of the Aboriginal cultural tourism sector.	Destination NSW	› NATOC › Destination Networks › NSW Treasury › NPWS › Industry	2021-2030
3.05	Collaborate with the cruise sector to develop new opportunities for Sydney and regional NSW outlined in the Cruise Development Plan.	Destination NSW with Transport for NSW	› Port Authority of NSW › Department of Regional NSW › NPWS	2021-2030
3.06	Grow NSW's share of international students and their visiting family and friends through collaboration and coordination with stakeholders in government, industry and the education sector.	Study NSW	› Destination NSW › Department of Education › Public and private education providers › Destination Networks	2021-2030

62

NO.	STRATEGIES AND ACTIONS	LEAD AGENCY	SUPPORT PARTNERS	TIMING
3.07	Provide toolkits, advice, and support to help businesses become more resilient, sustainable, to adopt environmentally friendly practices and adapt to climate change.	Destination NSW	<ul style="list-style-type: none"> › Resilience NSW › Department of Planning Industry and Environment › Department of Regional NSW › NPWS 	2021-2030
3.08	Finalise and deliver the NSW Nature-based Tourism Strategy.	Destination NSW	<ul style="list-style-type: none"> › Department of Planning, Industry and Environment › Department of Regional NSW › NPWS 	2021-2022
3.09	Grow the eco-wellbeing, eco-tourism and volunteer tourism sectors through industry development activities and product development support.	Destination NSW	<ul style="list-style-type: none"> › Destination Networks › Department of Planning, Industry and Environment › Department of Regional NSW › NPWS 	2021-2030
3.10	Develop and promote accessible tourism products, experiences, and visitor precincts.	Destination NSW	<ul style="list-style-type: none"> › Destination Networks › NSW Treasury › Infrastructure NSW › Department of Planning, Industry and Environment › Department of Regional NSW › Transport for NSW › NPWS 	2021-2030
3.11	Review the current Western Sydney Visitor Economy Strategy and develop and deliver a new Destination Management Plan	Destination NSW	<ul style="list-style-type: none"> › Western Parklands City Authority › Placemaking NSW › Industry › NPWS 	2021-2030

63

Strategic pillar 4.

Invest in world-class events

NO.	STRATEGIES AND ACTIONS	LEAD AGENCY	SUPPORT PARTNERS	TIMING
4.01	Secure the remaining two World Cups and deliver all 10 events of the 10 World Cups in 10 Years initiative with international acclaim.	Destination NSW	<ul style="list-style-type: none"> › Office of Sport › Venues NSW 	2021-2030
4.02	Secure and retain a calendar of world-class arts, entertainment, sport and business events to cement the state's position as the event capital of Australia.	Destination NSW	<ul style="list-style-type: none"> › Department of Premier and Cabinet › Office of Sport › Venues NSW › Placemaking NSW › NPWS › Create NSW › Local councils › Industry › Destination Networks 	2024-2030
4.03	Create vibrant places and drive visitation by activating government-owned assets such as stadia, cultural institutions, parks and public spaces with compelling new event content.	Destination NSW	<ul style="list-style-type: none"> › Department of Planning, Industry and Environment › Office of Sport › Venues NSW › Create NSW › Department of Regional NSW › NPWS › Transport for NSW › Local councils › Industry › Destination Networks 	2021-2030
4.04	Invest in new sporting, arts, cultural and event infrastructure and facilities and new event content to optimise their utilisation.	Infrastructure NSW	<ul style="list-style-type: none"> › Office of Sport › Venues NSW › Create NSW › Destination NSW › Placemaking NSW › Department of Regional NSW › Local councils › Industry 	2021-2030

64

NO.	STRATEGIES AND ACTIONS	LEAD AGENCY	SUPPORT PARTNERS	TIMING
4.05	Ensure NSW has a streamlined and efficient legislative framework to facilitate events.	Destination NSW	<ul style="list-style-type: none"> › Department of Premier and Cabinet › Department of Customer Service › Department of Planning, Industry and Environment › NPWS 	2021-2030
4.06	Deliver an industry development program to build organiser capacity in planning and running events especially in regional NSW.	Destination NSW	<ul style="list-style-type: none"> › Destination Networks › Department of Regional NSW 	2021-2030
4.07	Secure and establish global and national conferences, incentive programs and corporate events for Sydney that are aligned with trade and industry development priorities identified in the <i>Global NSW Strategy</i> .	Destination NSW	<ul style="list-style-type: none"> › Business Events Sydney › NSW Treasury › Placemaking NSW › NPWS 	2021-2030
4.08	Incentivise domestic and international conference organisers to undertake delegate pre- and post-touring to destinations outside Sydney and hold satellite meetings in regional NSW.	Destination NSW	<ul style="list-style-type: none"> › Business Events Sydney › Destination NSW › Placemaking NSW › Department of Regional NSW › NPWS › Destination Networks 	2021-2030
4.09	Secure and support conferences, incentive programs and corporate events for regional NSW to distribute the benefits of high yield business visitors across the state.	Destination NSW	<ul style="list-style-type: none"> › Department of Regional NSW › NPWS › Destination Networks 	2021-2030

65

Strategic pillar 5. Facilitate growth

NO.	STRATEGIES AND ACTIONS	LEAD AGENCY	SUPPORT PARTNERS	TIMING
Regulation and planning reform				
5.01	Advocate to the Commonwealth Government on matters which will assist the NSW Government to achieve its visitor economy targets (including but not limited to aviation issues, bushfire recovery, black spot mitigation, infrastructure, border control, visas, skilled migration, labour awards and conditions).	Destination NSW	<ul style="list-style-type: none"> › Department of Premier and Cabinet › NSW Treasury › Transport for NSW › Department of Regional NSW › NPWS 	2021-2030
5.02	Develop annual cross-border plans with jurisdictions adjacent to the borders of NSW e.g. ACT, Victoria and Queensland.	Cross-Border Commissioner	<ul style="list-style-type: none"> › Department of Regional NSW › Destination NSW › Destination Networks 	2021-2030
Transport and access				
5.03	Explore improvements in regional aviation and airport facilities to attract new airlines and/or increase current airline capacity to regional cities and towns.	Destination NSW with Department of Regional NSW	<ul style="list-style-type: none"> › Infrastructure NSW › Department of Regional NSW › Destination Networks 	2021-2030
5.04	Invest in new road and rail infrastructure to improve access to regional cities and towns.	Transport for NSW	<ul style="list-style-type: none"> › Infrastructure NSW › Department of Regional NSW 	2021-2030
Visitor infrastructure				
5.05	Investigate the creation of tourism-focused Special Activation Precincts in regional NSW.	Department of Regional NSW	<ul style="list-style-type: none"> › Department of Planning, Industry and Environment › NPWS › Destination NSW 	2021-2030
5.06	Ensure that visitor economy infrastructure needs are reflected in strategic land use plans and regional plans, for example, to ensure hotel supply meets future market demand.	Department of Planning, Industry and Environment	<ul style="list-style-type: none"> › Local councils › Destination NSW › Destination Networks › Placemaking NSW › Transport for NSW 	2021-2030
5.07	Update Destination Management Plans to complement and help deliver visitor economy outcomes identified in the Regional Economic Development Strategies.	Destination Networks	<ul style="list-style-type: none"> › Department of Regional NSW › Destination NSW › NPWS 	2021-2023

66

APPENDIX 2 - DOMESTIC AND INTERNATIONAL MARKETS PROFILE

(Domestic)

INTRASTATE	CORE MARKETS	EMERGING	STRATEGICALLY IMPORTANT
NSW residents	Queensland and Victoria	Western Australia and South Australia	ACT
<ul style="list-style-type: none"> › The largest market in terms of both volume and value › 26 million overnight trips and 69 million day trips in 2019 › \$21 billion in expenditure in 2019 › 2030 Target: \$31.9 billion 	<ul style="list-style-type: none"> › Combined generated 9.3 million overnight visitors and 4.2 million day trips in 2019 › Delivered over \$7.6 billion in 2019, almost 24 per cent of domestic expenditure, 73 per cent of interstate expenditure 2030 Target: \$11.6 billion (Queensland: \$5.7 billion; Victoria: \$5.9 billion) 	<ul style="list-style-type: none"> › Combined 1.3 million overnight visitors and 50,000 day trips in 2019 › Delivered around \$1.5 billion of visitor expenditure in 2019, having grown over 35 per cent since 2015 › 2030 Target: \$2.2 billion (WA: \$1.1 billion; SA: \$1.1 billion) 	<ul style="list-style-type: none"> › There is high repeat visitation from the ACT › 1.8 million overnight visitors and 1.6 million day trips in 2019 › Almost \$1 billion in visitor expenditure in 2019 and a growth rate of 23 per cent since 2015 › 2030 Target: \$1.6 billion

67

(International)

CORE MARKETS	EMERGING 1	EMERGING 2	WATCH LIST
Top 10 core markets + Indonesia, Germany, Malaysia	Canada, France, Vietnam	Brazil, Italy, Philippines, Thailand, Scandinavia, Switzerland.	Fiji, Ireland, Netherlands, Spain, New Caledonia, Belgium, South Africa, Argentina, Bangladesh, Nepal, Sri Lanka, Israel, Austria, Poland, Pakistan, Chile, United Arab Emirates, Colombia, Saudi Arabia, Mexico, Cambodia, Russia, Qatar.
These markets delivered over \$8.9 billion of visitor expenditure in 2019 which equates to over 77 per cent of the current value of international tourism into NSW. This was achieved with visitors exceeding 3.3 million, over 75 per cent of all international visitors.	These markets delivered over \$560 million of visitor expenditure in 2019 which equates to 5 per cent of the current value of international tourism into NSW. This was achieved with 250,000 visitors, 5.7 per cent of all international visitors.	These markets delivered \$740 million of visitor expenditure which equates to 6 per cent of the current value of international tourism into NSW. This was achieved with 306,000 visitors, 7 per cent of all international visitors.	Combined, these markets (as at December 2019) represent \$982 million of visitation value (8.6 per cent of total NSW inbound value) with over 418,600 visitors annually (9.5 per cent of NSW inbound).

68

APPENDIX 3 – VISITOR INFRASTRUCTURE FRAMEWORK

(Assessment Criteria)

The NSW Government uses Cost Benefit Analysis to assess the social, economic and environmental impacts of infrastructure proposals including visitor economy infrastructure. Where feasible, Cost Benefit Analysis will be used to prioritise proposals. The following considerations are designed to help guide prioritisation and decision-making.

ASSESSMENT CRITERIA	KEY CONSIDERATIONS
Creates growth opportunities from domestic and international markets	<p>Facilitate growth in demand and address capacity constraints to develop a nationally and globally competitive visitor economy.</p> <ul style="list-style-type: none"> › The investment addresses identifiable capacity constraints or supports growth in demand as informed by national and international benchmarking, Regional Economic Development Plans and Destination Management Plans. › The investment supports the 2030 Visitor Expenditure Targets and aligns with the Sydney and NSW brand.
Supports a prosperous NSW	<p>Create economic benefits that outweigh the economic costs.</p> <ul style="list-style-type: none"> › The investment generates economic benefits either in the form of increased tourism expenditure, which benefits NSW economy through higher employment and value added. › The investment generates economic benefits for local residents through access to additional infrastructure and amenities. › The investment generates increased opportunities for direct and indirect employment. › The economic benefits outweigh the costs to the government of supporting the infrastructure.
Aligns and supports other infrastructure strategies and plans	<p>Recognise alignment and support for other government strategies.</p> <ul style="list-style-type: none"> › Promotes urban and regional development. › Creates sustainable commercial opportunities for indigenous cultural businesses and support Indigenous tourism. › Supports accessible, inclusive, and special interest tourism and encouraging skill development in the sector. › Develops and renew regional government assets. › Aligns with the objectives in REDs, DMPS and local government policies and plans.

69

ASSESSMENT CRITERIA	KEY CONSIDERATIONS
Supports equity and access for all	<p>Distribute benefits to disadvantaged and local communities.</p> <ul style="list-style-type: none"> › The infrastructure utilises universal design principles and promotes accessibility. › Promotes increased participation of disadvantaged young people. › Promotes increased participation of Aboriginal people. › Sustains jobs and generates additional jobs in the visitor economy and associated supply chains. › Supports and benefits local groups.
Fosters a sustainable visitor economy	<p>Ongoing financial viability and contribution to a sustainable and resilient visitor economy.</p> <ul style="list-style-type: none"> › The investment generates revenue to support operation and management that is likely to minimise unexpected government outlays. › Promotes year-round visitation and grows capacity to reduce reliance on visitation in peak seasons. › Incorporates environmentally sustainable features (such as renewable energy, waste reduction, water, and energy efficiency). › Improves the public realm and adds to the sense of place and community. › Is built in an appropriate location with appropriate materials and responds to the changing climate including more extreme and frequent natural disasters such as bushfires, flood, coastal erosion and inundation.

70

DESTINATION NSW

Destination NSW is the lead agency, champion and voice for the visitor economy within the NSW Government.

It spearheads a whole-of-government approach to visitor economy growth, working with various departments and agencies to market NSW as a destination, to secure and deliver major events, invest in visitor economy infrastructure and support the diverse ecosystem of visitor economy businesses that operate throughout the state.

Destination NSW engages and collaborates extensively with other arms of state government, local councils, the Commonwealth Government, local tourism organisations and the industry to realise NSW's vision to be the premier visitor economy in the Asia Pacific.

The *Destination NSW Act 2011* confers broad powers and functions to the agency to align and focus efforts towards this achieving this vision.

The agency influences and shapes the visitor economy through strategic research, policy and thought leadership, stakeholder engagement and consultation, commercial partnerships and its judicious investment in visitor experiences, business support, marketing and events. It supports the Minister for Jobs, Investment, Tourism and Western Sydney and is managed by a skills-based Board.

Destination NSW is also the major investor in Business Events Sydney (BE Sydney) for the purpose of securing more international and domestic conventions, incentive travel reward programs, corporate events and exhibitions for Sydney and regional NSW.

As the lead government agency for the visitor economy, Destination NSW has led the development of this *Visitor Economy Strategy 2030*, in consultation with stakeholders from industry and all three tiers of government. It will be responsible for leading its delivery in partnership with government and industry and will report annually on its progress.

71

DESTINATION NETWORKS

The six Destination Networks help grow the visitor economy of regional NSW by engaging at the coalface with local governments and tourism businesses.

The Destination Networks are the champions of the visitor economy in their regions, proactively engaging with stakeholders to identify, prioritise and facilitate opportunities for regional visitor economy growth. They also play a key support role for Destination NSW in the delivery of its industry development and visitor experience and regional event funding programs.

The Destination Networks will support Destination NSW in implementing the *Visitor Economy Strategy 2030* to achieve the visitation and expenditure targets for regional NSW. The Destination Management Plan for each Destination Network will be aligned with the strategy.

The Destination Networks are:

- › Destination North Coast
- › Destination Sydney Surrounds North
- › Destination Sydney Surrounds South
- › Destination Southern NSW
- › Destination Riverina Murray
- › Destination Country & Outback NSW



“We have a laser focus on delivering economic and social benefits for the people of NSW through strong and enduring partnerships with industry and by ensuring that the broader priorities of government support visitor economy growth.”

Steve Cox
Destination NSW CEO

Stockton Sand Dunes, Worimi Conservation Lands

NSW VISITOR ECONOMY STRATEGY 2030

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Adventure Campaign Plan

One destination
#unspoilt

Shoalhaven
SOUTH COAST - NSW

Research – Nature Based Tourism

- The Nature-based tourism (NBT) industry is currently experiencing positive and sustainable growth in some regions - increasing 4% per annum since 2010. 2015 saw significant growth in the number of international visitors to state and national parks (13% growth from 2014).
- The potential of NBT growth is yet to be fully realised. Globally, immersive experiences in nature are one of the fastest growth areas and Australia needs to continue to focus on tourism products and experiences that appeal to both international and domestic travellers, rather than relying on passive viewing of nature.
- Additionally, whilst the industry is strong, only select regions are receiving the benefits. This can be attributed to NBT not being executed properly – reflected in Australia dropping from its global position #1 to #9.
- Regional Australia is suffering from declining resource sector jobs and investment, a dwindling revenue base and demographic shifts as people move to seek employment opportunities in cities. The
- Nature-based tourism industry can assist regions to grow sustainable employment, resilient economies and incentives for growth.

Source: Ecotourism Australia Manifesto

Research – Wellness Tourism

- Estimated at \$639.4 billion in 2017, wellness tourism is a fast-growing tourism segment that has been growing by 6.5% annually from 2015-2017 (more than twice the growth rate for general tourism)
- Growth has been driven by an expanding global middle class, growing consumer desire to adopt a wellness lifestyle, rising interest in experiential travel, and increasing affordability of flights and travel options.
- Wellness travelers spend more per trip than the average tourist, and this holds true for both domestic and international travelers. In 2017, international wellness tourists on average spent \$1,528 per trip, 53% more than the typical international tourist.
- Importantly, the nature and focus of wellness tourism marketing and development has become more targeted and authentic.
- As more consumers adopt wellness as part of their value system, they will increasingly filter their travel experiences through a holistic wellness lens, and they will increasingly become interested in the wellbeing of the people in the places that they visit.

https://globalwellnessinstitute.org/wp-content/uploads/2018/11/GWI_GlobalWellnessTourismEconomyReport.pdf

Background

Key Issues + Challenges	Opportunities + Motivation
<ul style="list-style-type: none"> Shoalhaven and Jervis Bay is under-represented in media and industry in terms of Paid/Guided Adventure experiences 	<ul style="list-style-type: none"> Product development has us at a place where we do have some key product across a number of areas, not a lot but there is more waiting if we stimulate demand
<ul style="list-style-type: none"> We have numerous Adventure landing pages but nothing that brings it all together online 	<ul style="list-style-type: none"> After 2020 our world has changed. People are more stressed and disconnected from themselves, the outdoors and each other. We can provide experiences to remedy this.
<ul style="list-style-type: none"> Seasonality and intention to travel in cooler weather. 	<ul style="list-style-type: none"> Yield – guided adventure creates yield of nature product

Campaign rationale

- Nature-based adventure is a key feature of the South Coast's offering
- Autumn is the perfect time to adventure with warm waters yet cool for longer adventures
- Adventure gets your out in nature and promotes wellness and wellbeing, wither soft or epic adventure, it's the perfect way to feel, look and get better after a tough year
- The Shoalhaven is 70% National Parks and Forests, with 100 beaches
- Guided nature experiences provide a deeper connection, higher yield and promote a more responsible and connected traveller
- Dovetail into DNSW Roadtrips campaign that has a strong push toward bookable experiences and continued Holiday Here This Year campaigns
- Work with operators to get them to the next level of bookable or commissionable, and get new product onboard

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Inspiration

CHALLENGE	CONNECTION	WELLNESS
Feel	Do	Learn / Share
Breathe	Rock Climb	Tread lightly
Relax	Kayak	Share on insta
Unwind	Stand Up Paddle	Path less trodden
Nature therapy	Surf	New hidden spots
Forest Bathing	Dive	Cultural education
Mother Earth Father Sky	Snorkel	Calmness
Connect to Country	Bushwalk	Rebooted
Yourself	Biking	
Locals	Cultural tours	
Oceanic Negative Ions	Eco cruises	
Meditate	Tree Adventures	
Escape the City		
Path less trodden		

2019 UNSPOILT WORD CLOUD



Shoalhaven

Look & Feel

- In our normal diamonds style
- Lots of browns and blues from inland to the sea!
- Active people in shots but also reflective imagery to show wellness
- Showcase wildlife and epic landscapes
- Work with dichotomy of soft and hard aspects, wet and dry aspects
- Mainly Millennial and Gen Z audience with a touch of family
- Think instagramable!
- Bring a softness to the adventure – so less sweaty men and more peaceful young ladies



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Product

CULTURE

Djiriba Waagura
Nura Gunyu
Gadu
Bugiya Narway
Booderee NP
Ngaran Ngaran
Coomee Nulunga

shoalhaven.com/discovery

*Much is bookable bespoke but still developing online presence

KAYAK

Jervis Bay Kayak and Paddle Sports
Kangaroo Valley Kayaks
Kangaroo Valley Safaris
Paddle and Portage
Shoalhaven.com/kayak

SUP

Sussex Inlet SUP
Jervis Bay Stand Up Paddle
SUP with George
Coastal Paddle Sport

BIKING

Australian Cycling Tours
*not much guided tours available but we have good tracks in State Forest and accessible pathways in or cute towns
shoalhaven.com/cycling-and-mountain-biking

BUSHWALKING

Big Nature Adventures
Region X
*Many self Guided walks here too
shoalhaven.com/walks

EVENTS

Cool Climate Wines, Canoes,
Canpaes
Elite Energy Triathalons

CLIMB

Climb Nowra
Outdoor Raw – who also do cliffnics
Big Nature Adventures
South Coast Indoor Climb

SURF

Pam Burridge
Mollymook Surf School
JB Surf School
Busted Surf Co
Shoalhaven.com/surf

FAMILY / INCLUSIVE

Summer Boomnetting on Jervis
Bay Wild
Dolphin watch
Trees Adventure

Shoalhaven

Objectives

Industry / Brand	Visitation
Drive awareness of Shoalhaven guided adventure product	Drive year round visitation
Inspire generation of new products and experiences	Spend more, stay longer in region
Drive nature-based product awareness	Attract a sustainable, environmental visitor
Promotion of bookable product and packaging	Encourage itineraries and trails
Fresh new product in market	Inspire repeat Visitation

Shoalhaven

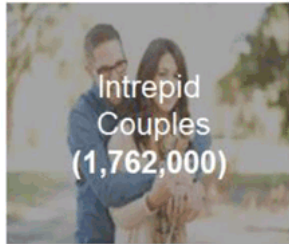

Target Markets

Profile/Demographic	Key Channel	Messaging
Gen Z Under 25	Social media Insta + Tik tok Website PR – blogs + Youth Mags	<ul style="list-style-type: none"> - Breathe. Adventure in nature to reconnect - Find yourself in Unspoilt coastal waterways, and ancient hinterland escarpments - Connect with country, authentic local guides, and return home fresh and rejuvenated
Gen Y Under 40	Social Media – Insta + FB Website PR – Blogs +	<ul style="list-style-type: none"> - Breathe. Adventure in nature to reconnect - Find yourself in Unspoilt coastal waterways, and ancient hinterland escarpments. - Connect with country, authentic local guides, and return home fresh and rejuvenated
VFR All ages including Gen X + Baby Boomers	Local Radio Brochures PR – Local	<ul style="list-style-type: none"> - Find a new perspective of the Shoalhaven with a local guide - Find a new adventure playground or buy an experience as a gift
Families Syd/Canberra/regional centres	Facebook Website PR – traditional TV, papers	<ul style="list-style-type: none"> - Have fun and get wild in the Shoalhaven - Breathe fresh clean air and try new nature adventures that both you and the kids will enjoy

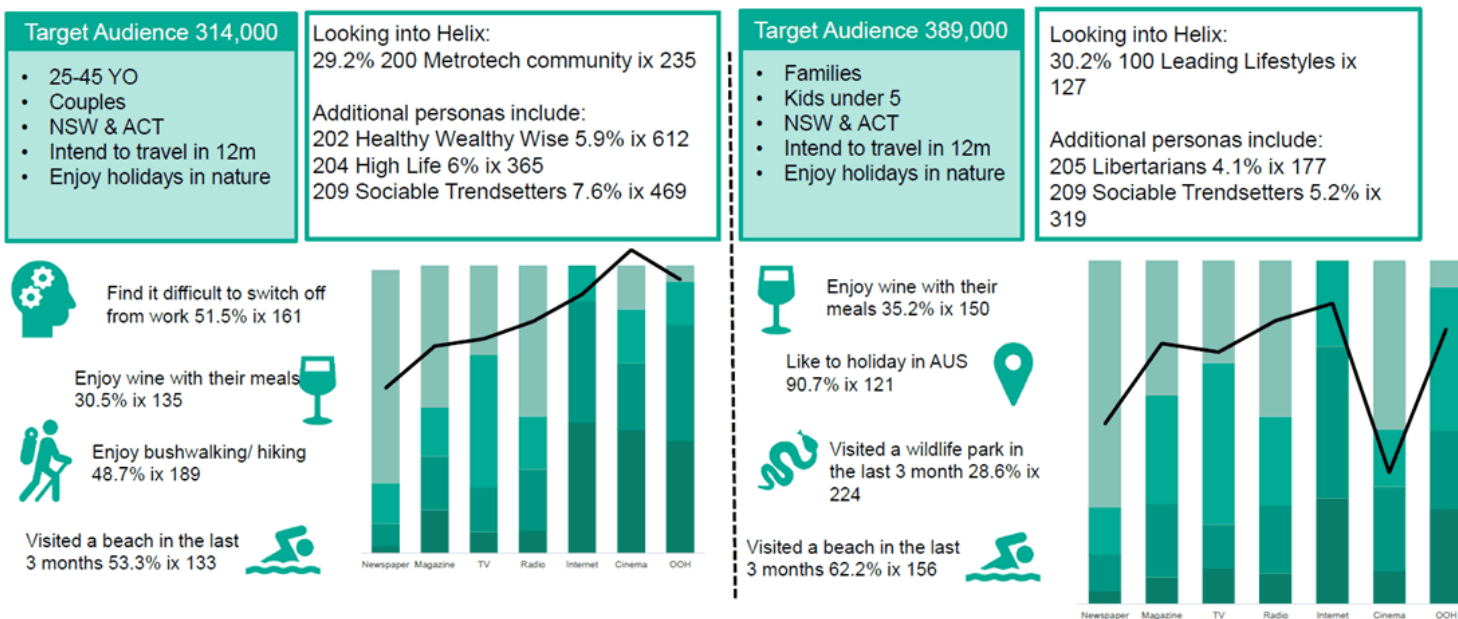
Target market weighting: Gen Z	Gen Y	VFR	Families
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Psychographics

	Primary: Intrepid Couples	Secondary: Progressive Families
Geographic	Residing in Sydney, Regional NSW, ACT and Regional VIC	
	 <p>Intrepid Couples (1,762,000)</p>	 <p>Progressive Families (1,756,000)</p>
Travel Behaviours and Attitudes	Escaping is the main motivation behind their holidays with 77.5% like to take holidays away from crowds	66.5% said their last trip was based around a particular activity with keeping the children entertained as a key priority
Travel Activities	What matters most when deciding on a destination? Activities, deals and special offers, life time experience and price	What matters most when deciding on a destination? Price, deals and special offers, activities and culture
Digital Media Behaviours	77.9% identify the internet as the most useful channel for travel	85.2% identify the internet as the most useful media for travel bookings

Top Helix Personas



Key Actions

- Develop in time for the Autumn
- Promote experiences with guides (80% of content to be guided)
- New website landing page, compile, refine content
- Video + content creation and organisation
- Limited publicity famils with media / Influencers
- Advertising in magazine or nature-based blogs
- Wellbeing, Being group
- Australian Geographic +Aus Geographic Adventure
- Digital campaign – social and search
- Inclusion in 2020 Visitor Guide
- Celebrate and help develop local operators

Success Measures

Measure / Results	Channel / Who / When
Strong brand recognition of Adventuring Shoalhaven	Publicity / Media / June 2020
5 media articles. 2 blog mentions. 3 ads	Publicity, partnerships / TMS / June 2020
Refine Webpage content and create Adventure landing page out of various landing pages and blogs	Website / DMA / Jan 2020
500K reach social engagement and pageviews	Website / DMA / May 2020
20K Unique visits to landing page / year	Website / DMA / Dec 2020
5 bespoke itineraries / trails online	Website, social / DMA / June 2020
1 x instameet or 5 x influencer posts	Website, social / DMA / June 2020
Double Click advertising own site	Website, social / DMA / Feb 2020

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Key Stakeholders

- Shoalhaven Tourism Advisory Group
- Aboriginal Advisory Group
- Local Aboriginal Businesses
- NPWS
- State Forests
- Local Operators
- Destination NSW
- Destination Sydney Surrounds South
- Tourism Australia

Budget

Action	Cost
Australian Geographic	\$10K
Wellbeing Group	\$10K
Influencers	\$7K
Search and Social	\$5K
Video production and assets	\$5K
Online blogs	\$10
Radio + Traditional	\$5K
TOTAL	\$52K

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