

Shoalhaven Tourism Advisory Group

Meeting Date: Monday, 19 July, 2021

Location: Council Chambers, City Administrative Centre, Bridge Road, Nowra

Attachments (Under Separate Cover)

Index

3. Reports

TA21.23 Destination Marketing

Attachment 1 Wine and Whales Marketing Strategy 20212



Wine and Whales

Winter/Spring 2021
Campaign Plan

**MANY
EXPERIENCES**

One destination

#unspoilt

Shoalhaven
SOUTH COAST - NSW

Shoalhaven

- 2 hours from Sydney and Canberra
- 49 towns and villages including Jervis Bay, Mollymook, Berry and Kangaroo Valley
- Building offseason visitation May – November is a key priority for marketing campaigns
- Product development for off-season experiences
- Post Bushfire and COVID recovery focus
- Award-winning 100 Beach Challenge campaign in summer for dispersal

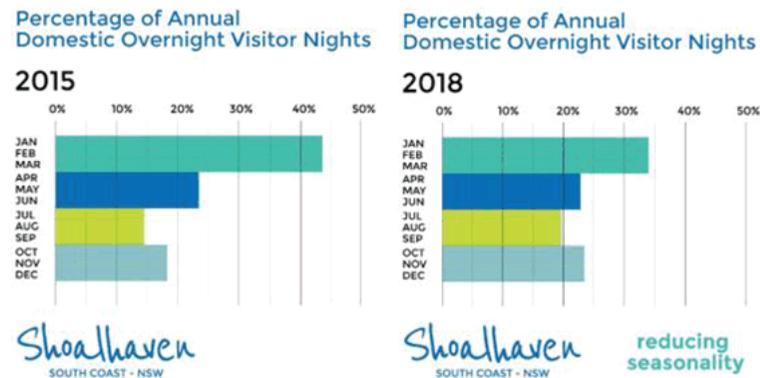


*Shoalhaven and Jervis Bay Monitor
Tourism Research Australia YTD December 2019

Shoalhaven

Building off-season

- Past cooperative campaigns have grown off-season considerably – 43% growth on three years
- Unspoilt South Coast campaign was one of the most successful Destination NSW RVEF campaign partnerships 2014 – 2019
- Shoalhaven campaigns in winter focus around food, wine and adventure.



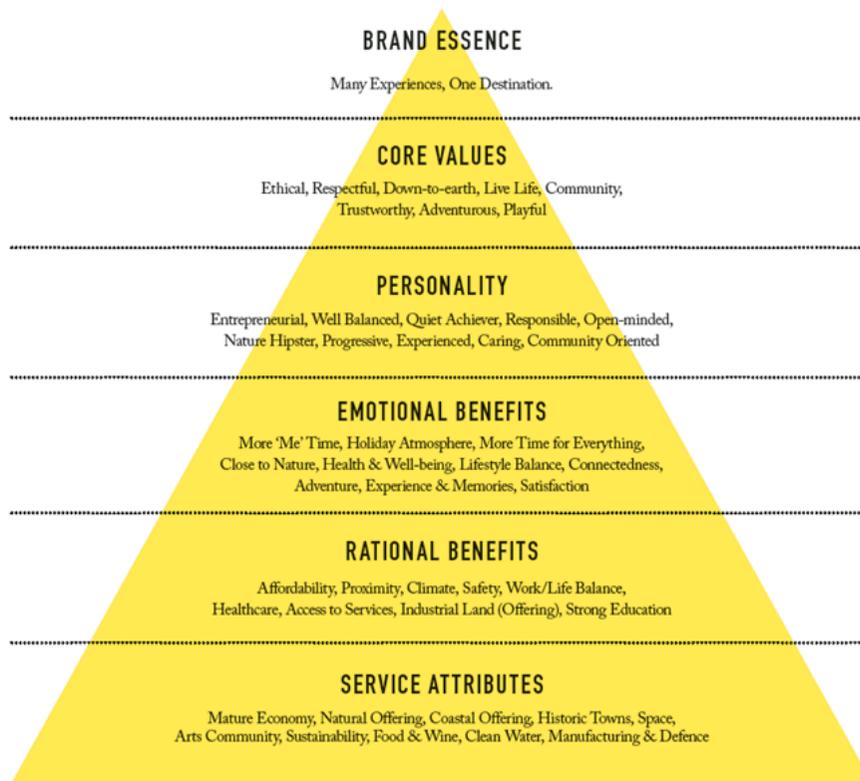
Tourism Research Australia, National and International Visitor Survey 2015-2018

Shoalhaven

Promotional Pillars



Our Brand Identity



Many experiences.
One Destination.

Shoalhaven

2020/21 Campaigns

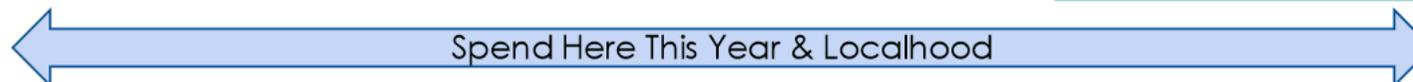


Wine + Whales
100 Beach Challenge

100 Beach Challenge
Visitor Guide
Business Events

Wine & Whales
Adventure
Business Events
Aboriginal Experiences

Wine & Whales
Business Events
Aboriginal Experiences
Food and Chefs



Campaign Background

- Wine and Whales campaign was developed as a 2020 campaign and was recovered well but cut short by COVID
- Food & Wine and Coastal & Aquatic and Nature & Adventure are key pillars aligning with DNSW and Tourism Australia campaigns
- Connects with DNSW Food and Wine Tourism Strategy and Action Plan and will assist the recovery toward the 2030 Visitor Economy Strategy goals for New South Wales by targeting both overnight and day trip visitors, and bringing more jobs to the region.
- Food and wine campaigns have run over winter as successful family programs – fine dining and paddock to plate focus as well as partnership with Slow Food in creation of the Local Producer Guide
- As individual pillars wine, whales and food have been successful but together they offer a very strong off-season offering for the Shoalhaven

SWOT

<p>Strengths</p> <ul style="list-style-type: none"> • Bookable product • Award-winning wineries • Operator engagement • Link ins with DNSW, TA • High yielding products • Luxury accommodation avails 	<p>Weakness</p> <ul style="list-style-type: none"> • Lacking brand awareness in specific experience pillars • Operator cohesion • Cold/wet weather • Staffing and rental shortages
<p>Opportunities</p> <ul style="list-style-type: none"> • Off-peak availability • heightened domestic travel • Growing VFR market • New markets intrastate • Desire to escape cities 	<p>Threats</p> <ul style="list-style-type: none"> • COVID resurgence • Operator fatigue • Warm competitors – QLD • Locals with tourism fatigue • Operator closures • Lack of International travellers

Campaign Rationale

- Whale watching is a key feature of the South Coast's Winter offering with Whale experiences from May – November offered, many high yielding and bookable.
- The Shoalhaven wine region has more than just wine, being identified as 'new' and interesting wine region for consumers, with a depth of product across wine, dining and interesting on estate experiences like High Tea and winery tours
- Wine and Whales were included in Unspoilt 2019 promotion as a product sector, therefore DNSW pages are updated and there is some awareness of the product and experiences.
- Whales package well with wine, food and wellness other key winter pillars, fitting in with our high level objectives of increasing off-season visitation.
- Collateral and campaign awareness created in 2020 so ready to go with great assets and content such as brochures, video and campaign identity.
- Wine and Whales is an attractive destination driver for visitors to the Shoalhaven, supporting over 2,000 other products across supporting experiences and accommodation.

Campaign Pillars

Nature & Outdoors
WHALES

Food & Wine
WINE

Cosy
Nature Stays

Restaurants &
Local Produce

Breweries &
Distilleries

Aboriginal Cultural Experiences

Shoalhaven

Look & Feel



Visual identity



Google display ads



Look & Feel



Full page ad look



Gourmet Traveller solus EDM

Shoalhaven

Assets



Promo video



2 x brochures (20,000)



With 100 beautiful beaches, the Shoalhaven is one of Australia's leading coastal destinations. But there's a special kind of magic in a South Coast winter - wine, whales, wonderful food and welcoming hospitality just two hours from Sydney and Canberra. From May to November, the whale migration kisses the coastline, the wine is flowing, and the people are cracking.

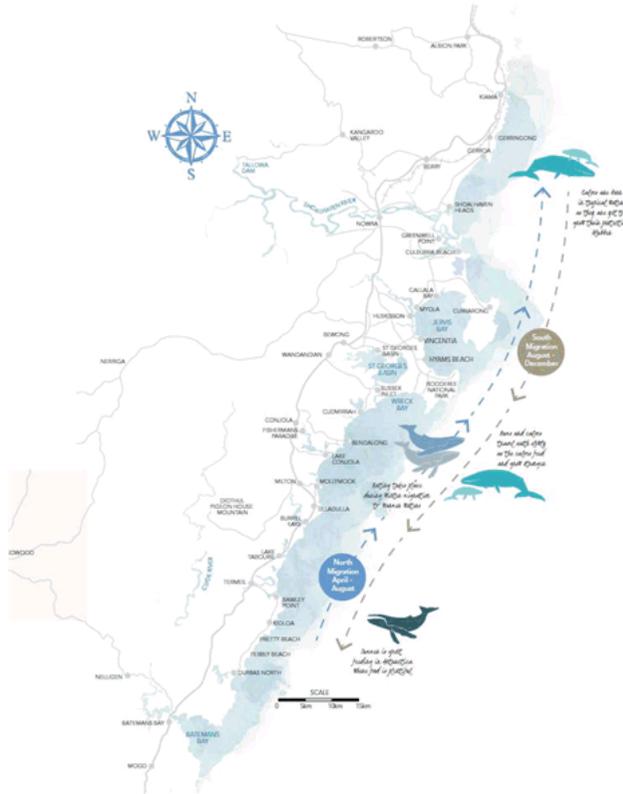
To round out your wine and whales day, visit one of our many paddock-to-plate or fine dining restaurants, or bring your army and visit our farmstead, groves and farmsteads. Unique accommodation is also here - boutique homes, B&B's with staying trees or unique stays, you'll feel like you're in a home away from home with our friendly locals in our coastal and hinterland hamlets. Enjoy the sea-bach luxury and nature in the Shoalhaven with a wine and whales day this winter and spring.



Landing page
Shoalhaven.com/wine-whales

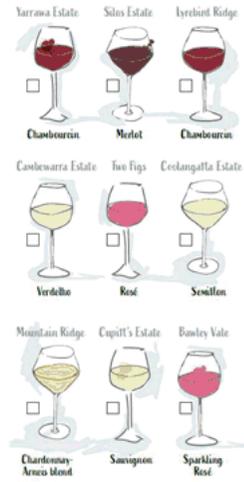
Shoalhaven

Assets



Map from Whale DL brochure

SHOALHAVEN SIGNATURE WINES
Check them off as you taste them!



Covers from Wine DL brochure



Broad Objectives

Industry / Brand	Visitation
Drive brand awareness of Shoalhaven winery and whale watching product / industries	Drive off-season visitation
Inspire collaboration of products and experiences	Spend more, stay longer in region
Promotion of bookable product	Attract a sustainable, environmental visitor
Upsell experiences in region	Encourage itineraries and trails
Lift profile and cohesion within local industry	Inspire repeat visitation

Target Markets

Profile/Demographic	Key Channel	Messaging
Gen Z Under 30	Social media Insta + Tik tok Website PR – blogs + Youth Mags Outdoor	Wine and whales is the perfect holiday combination in the Shoalhaven. Meet the maker at cellar doors year-round, and whale spot along the 'humpback highway' from May to November.
Gen Y Under 45	Social Media – Insta + FB Website PR – Blogs Outdoor TV	Explore the magic of wine and whales in the Shoalhaven in winter and spring. Enjoy an escape with nine cellar doors and a front seat to the humpback highway. Download our wine and whales guides and make your wish list today!
VFR All ages including Gen X + Baby Boomers	Local Radio Brochures PR – Local TV	Explore your own backyard with the magic of wine and whales this winter. Invite the whole family to stay and play with wine and whales today.
Families Syd/Canberra/regional NSW	Facebook Website PR – traditional TV, papers Outdoor TV	Escape to wide open spaces with family-friendly wineries and whale watching cruises. Join our 'sealy' friends and 'whaley' big humpbacks with the friendliest locals at sea!



Timeline

Channel	May	June	July	Aug	Sep	Oct
digital / social ads	x	x	x	x	x	x
publicity pitching	x	x	x			
publicity famils		x	x			
Influencers				x	x	x
print/ blog advertising			x	x	x	x
regional TV			x	x	x	x
high impact outdoor		x	x	x		
EDM – industry + visitor	x	x	x	x	x	x

DNSW Amplification

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Key Actions

- Update web/landing pages on shoalhaven.com
- Publicity famils with media
- Publicity pitching for stories outside of famils
- Operator and Industry Engagement
- Influencer instameet and famils
- Distribute 5,000 wine and whales brochures / new print run
- Advertising and paid editorial bookings x 2
- Update /deploy existing ads for social and search
- High impact outdoor advertising – Sydney, Canberra
- Regional TV – South Coast, Canberra, regional NSW
- Owned channel promotion – organic social, visitor and operator EDMs
- Industry briefing at networking night

Conversion Funnel

	Goals	Channels
Awareness	Achieve reach and engagement targets	Publicity partners Outdoor TV
Consideration	Drive visits to site Increase time on site	Social Display and retargeting Email Advertising / paid editorial
Conversion	Drive leads to industry Drive downloads of brochure	Social Search website

Conversion goals

Download or request a brochure



NB: Tracked via shoalhaven.com CMS and Google Analytics goals

Leads to industry
Via ATDW listings

explore
find your perfect experience ...

SEARCH

List View Map View

Showing 1-15 Of 17 Results

Whales >

Wine >

Bawley Vale Estate
Bawley Vale Estate, is a 100 acre property situated three kilometres east of beautiful Bawley Point Beach. It has plantings of 100 olive trees, over

Add to my trip CERTIFIED

Coolangatta Estate Winery
Coolangatta Estate grapes are grown on the slopes of Mount Coolangatta and have won 150 trophies and over 1700 wine awards at regional, national and

Add to my trip CERTIFIED

Cupitt's Winery Tour And Tasting Experience
Cupitts is a winery, restaurant, micro- brewery, fromagerie and cellar door on the NSW South Coast between Milton and Ulladulla. They would like you to

Add to my trip

Cupitt's Estate
Cupitts Winery is a South Coast food, wine, beer and cheese experience comprised of a family run boutique Winery, Cellar Door, Restaurant, Bar, Microbrewery and

Add to my trip



Channel Goals

Measure / Results	Target	Metric	Key Channels
Strong brand recognition of Whale watching and wine industry	6 million	reach	Advertising, TV, Outdoor
10 x high level wine, whale or food-based famils, 3 local media articles	7 million	reach	Publicity, partnerships
Social, search and digital media marketing	2 million 80K	Reach engagement	Google, social, Social media,
Shoalhaven.com pageviews Increased time on site	700K	engagement	Website
Unique visits to wine-whales landing page leads to industry via listings	20K 10K	engagement	Website, advertising
Brochures distributed, downloaded and posted	8K	engagement	Brochures, partnerships
1 x instameet or 10 x influencer posts	400K	engagement	Publicity, Social Media
CPC under \$1	N/A	ROI	Social and Digital Media, website
Owned audience – EDM, organic social, partner channels	1 million	Engagement	Social, websites, listings
Total	16 million 1.48 million	reach engagement	

Considerations

- Aboriginal cultural experiences included in all famils with journalists
- Inclusive Tourism article featuring accessible whale watching cruises and wineries as there is great product available (Have Wheelchair Will Travel)
- Wine and Whales spread to feature in 2021/2 Visitor guide – 80,000 copies and 20,000 downloads



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Product inclusions

[Shoalhaven.com](https://shoalhaven.com) – via ATDW

Products on campaign page

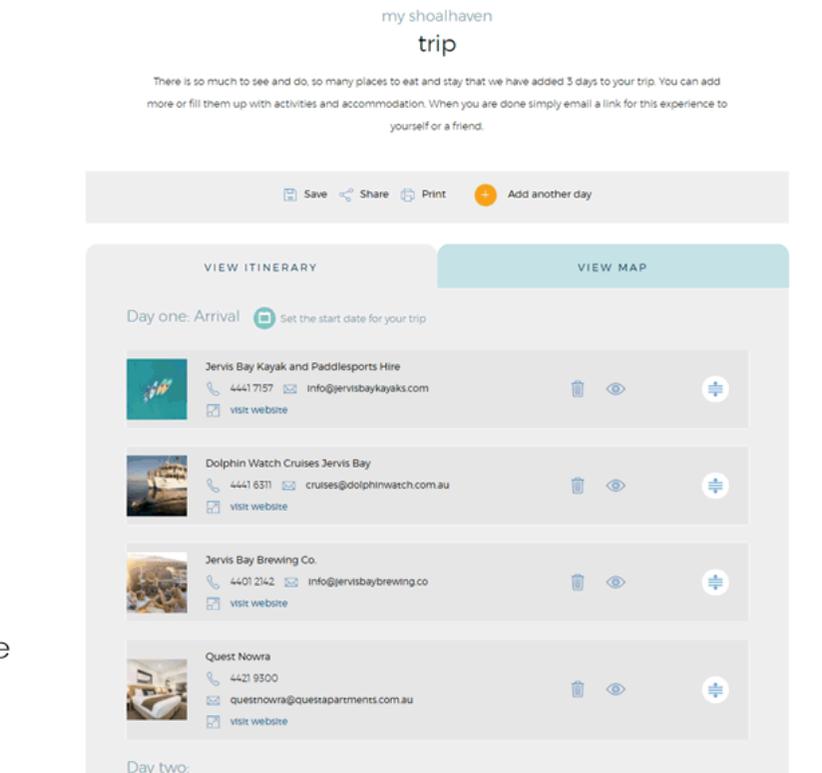
- Bookable:
 - 12 wineries + tours
 - 6 whale experiences
- Destination:
 - 4 lookouts

Supporting product on site

- 1,270 bookable places to stay
- 208 places to eat
- 435 things to do/play
- 70+ events

[Shoalhaven.com/my-trip](https://shoalhaven.com/my-trip) itinerary builder

Will bring these products together in a Share-able, customisable way to promote 3 days stay



Shoalhaven

Publicity & Famil Targets

9Honey
Australian Financial Review - Life and Leisure
Australian Geographic
Australian Traveller
AWOL
Broadsheet
Concrete Playground
Daily Telegraph - Stellar
Delicious
Eat Drink Play
Elle Australia
Escape - Digital
Escape - Print
Good Food
Gourmet Traveller
Gourmet Traveller WINE
GQ
Guardian
John Rosenthal - Freelance
Junkee
LadBible

Lifehacker
Marie Claire
Pedestrian
Punkee
Selector Magazine
Sit chu
SMH - Good Weekend
SMH - Sunday Life
Sue White - Freelance (SMH, The Age, Aus Geo, Vogue,
etc.)
The Australian
The Latch
Urban List
The Weekend Australian
The West Australian
Thrillist
Traveller
Vacations and Travel Magazine
Vogue
Wine Enthusiast Magazine
Australian Women's Weekly Food

Shoalhaven

Ad & Paid Editorial Targets

2020 Advertisers & Editorial Partnerships:

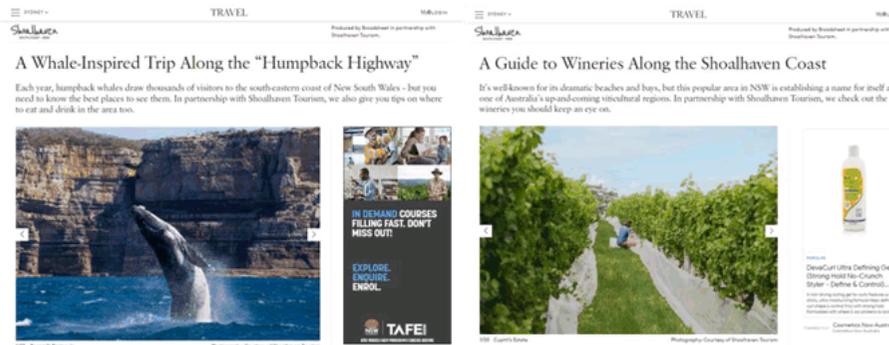
- Gourmet Traveller – Solus EDM
FPC & editorial mention Sept issue
- Broadsheet partnership - (September)

[Whale editorial](#)

[Wine editorial](#)

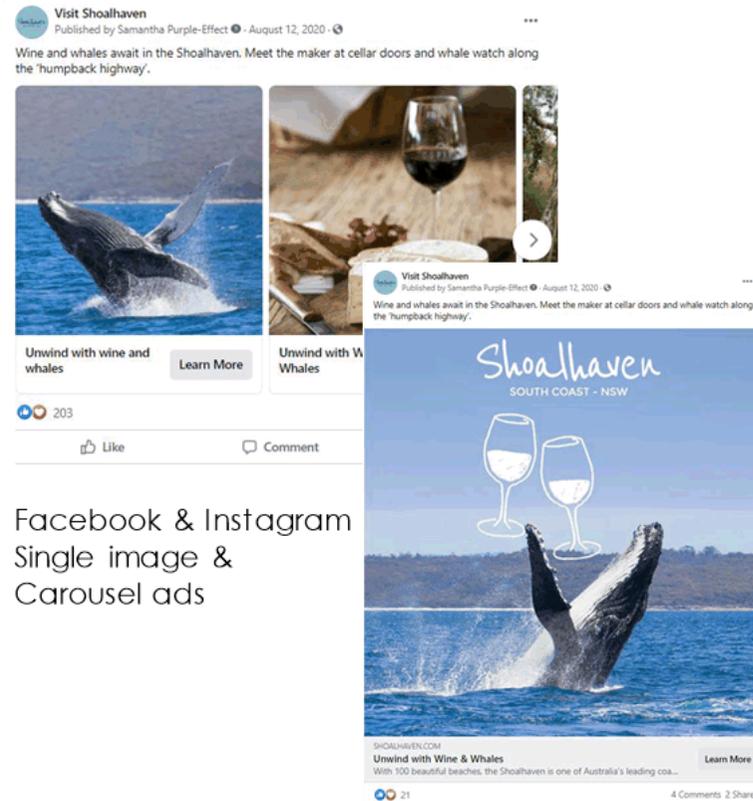
2021 Advertisers & Editorial Partnership Targets:

- Delicious
- Concrete Playground
- Urban List
- SMH Good Weekend
- Daily Tele Escape print
- News Corp digital partnership



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Social & Search



Facebook & Instagram
Single image &
Carousel ads

Wine & Whales Await You | In The Shoalhaven This Spring | Cosy Stays, Great...
www.shoalhaven.com/Wine-And-Whales
Meet The Maker At Cellar Doors & Whale Spot Along The 'Humpback Highway'. 2 Hours From Sydney & Canberra, Where The Whale Migration Kisses The Coastline.

Unwind With Wine & Whales | In The Shoalhaven This Spring | 2 Hours From...
www.shoalhaven.com/Wine-and-whales
Unwind With A Weekend Of Wine & Whales, Just 2 Hours Out Of Sydney & Canberra. Meet The Maker At Cellar Doors And Whale Spot Along The 'Humpback Highway'. Take ...

Google search
NB: Worked with contractor to ensure use of whales and alcohols s within guidelines in 2020 this will be further reviewed.



TV and Outdoor Options

Regional TV options:

- Tokyo Olympics placements on Prime 7
- Packages on WIN and Nine

Placement options:

- South Coast
- Canberra
- Regional NSW

Outdoor High Impact Options:

- Torch Media
- Light Rail – Sydney or Canberra
- Ferries Manly to Sydney
- Trains and Train stations
- Ooh Media!
- Offices
- Street furniture
- Cafe

NB: Quotes have been obtained for discussion – scalable pending DNSW amplification via grant



Sydney Light Rail
A NEW WAY TO TRAVEL IN SYDNEY



72 LIGHT RAIL VEHICLES
RUNNING THROUGH SYDNEY
CBD FROM ALL 3 LINES



12.8 MILLION JOURNEYS
ON INNER WEST & CBD
AND SOUTH EAST LINES



PERSONAL INCOME
50% HIGHER THAN
NATIONAL AVERAGE

Shoalhaven

Key Stakeholders

- Shoalhaven Tourism Advisory Group
- Shoalhaven Wine Coast operators
- Local whale watching operators – Dolphin Watch, Jervis Bay Wild, Dive Jervis Bay
- Destination NSW
- Destination Sydney Surrounds South
- Grand Pacific Drive
- Tourism Australia
- Aboriginal Advisory Group
- Wild About Whales
- NPWS

Budget

Action	Cost
Print collateral and video production	\$5K
Publicity Famils + Agency	\$20K
Digital and Social media advertising	\$15K
Advertising – blog / Magazine	\$20K
Influencer Activity	\$15K
Regional TV advertising – South Coast, Canberra, Regional NSW	\$20K
Outdoor Advertising	\$30K
TOTAL	\$125K

Previous Food and Wine Promotion

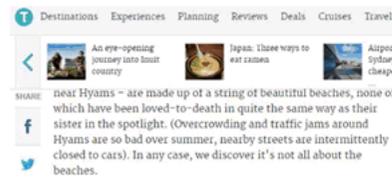
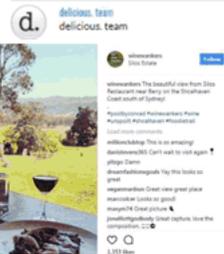
Audience: 578,000

<http://www.delicious.com.au/eat-out/gallery/top-10-foodie-hot-spots-berry/561s2o1q>

THE TOP 10 FOODIE HOT SPOTS IN BERRY



WHERE TO FIND THE BEST KITCHEN GARDENS ON THE NSW SOUTH COAST



TA21.23 - Attachment 1

Previous Whale Promotion

During their annual migration up and down the east coast, majestic humpback whales visit Jervis Bay. You can book a swim with them between June and November.



Whale of a time

I'm being watched. I can feel it. It's 8am on another big sky day in the Shoalhaven region and I've just slid into the drink at the northern reach of Jervis Bay. There's nothing but endless blue all around, and beneath me the deepest hue of navy.

I've come to swim with the humpbacks that cruise into the bay during their annual migration up and down the east coast of Australia.

"You can see them from June on their way north to breeding sites in warmer waters," Peter Ellis from Dive Jervis Bay tells me while we're motorcruising out from Husky and into the bay. "They're also here from August to November. The

Sunday Examiner
Sunday 12/07/2020
Page: 35
Section: General News
Region: Lancelton, AU
Circulation: 16065
Type: Regional
Size: 913.00 sq.cms.



FIRST metres from the back of the boat, I see two enormous bodies rise out of the water and then flip back in. Whales! I've come out looking specifically for them - not such an unusual activity off the New South Wales coast this time of year. But this trip to Jervis Bay is different.

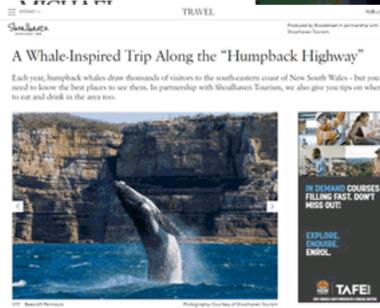
"Get in, get in!" You'll miss "em!" the skipper shouts.

Wearing a wetsuit and flippers, I put on my snorkel and goggles and jump in the water. I can just make out the whales diving down beneath me, the white of their bellies contrasting against the deep blue water, enormous but so graceful in their natural habitat.

For hours I have been out on the boat with Dive Jervis Bay, jumping in the water whenever we spot whales nearby. However, as I discover, this is not some Finding Nemo experience where the sea creatures play and talk. We are seeing a lot of whales from the deck but, when I get in and start swimming, they don't seem to want to be in (I guess I can't compare with the reason for their migration north.) Still, wow, how incredible to be in the same water as these giants of the ocean, to see their tails splash just a short distance away, to hear them gliding through, to catch a flash of their bodies as they pass by.

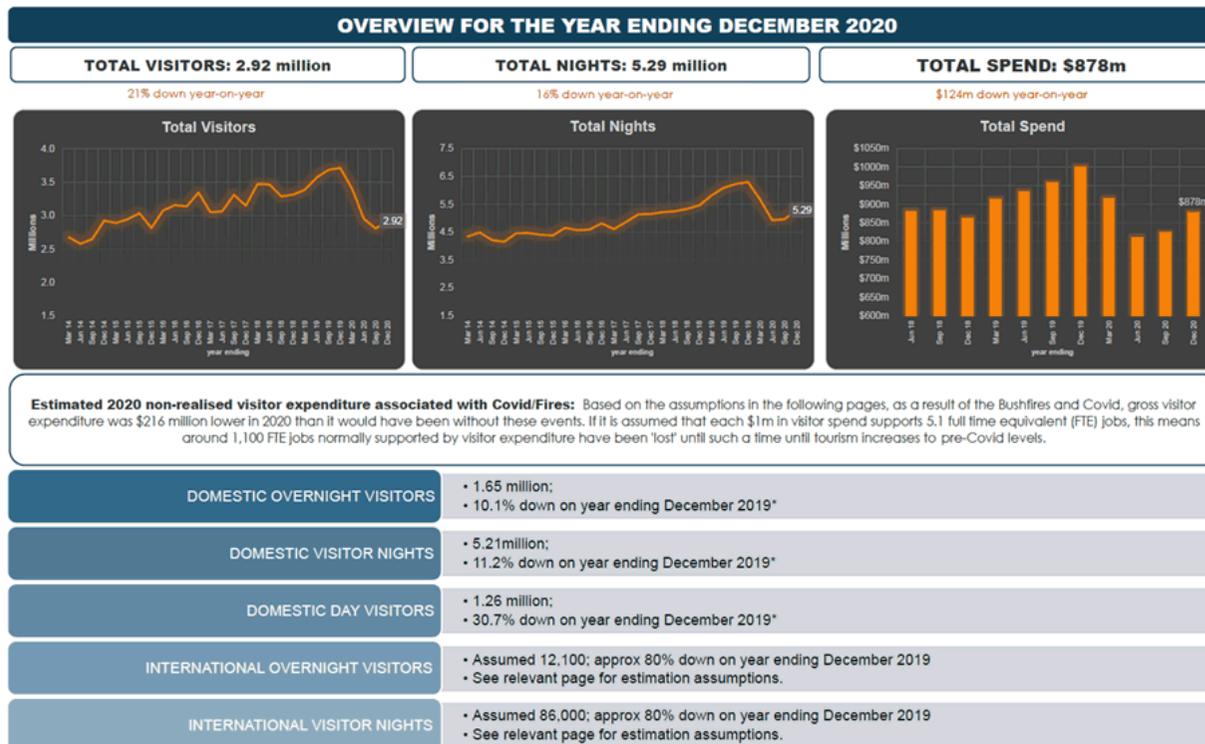
In the afternoon, we arrive back at Huskisson, a bustling town that is the main tourism hub of Jervis Bay. In recent years, it has seen a number of new stylish local businesses open (partly because the better road connection to Canberra means more

Deeply personal Jervis Bay jaunt



Research – further detail

Shoalhaven & JBT Tourism Monitor



*Please refer to the summary points on the relevant page of the monitor regarding the statistical significance of this change



Research – further detail

Shoalhaven & JBT Tourism Monitor

OVERVIEW FOR THE YEAR ENDING DECEMBER 2019

TOTAL VISITORS: 3.71 million

NEW RECORD

12.1% UP year-on-year

TOTAL NIGHTS: 6.30 million

NEW RECORD

15.4% UP year-on-year

TOTAL SPEND: \$1.002b*

NEW RECORD

\$139m UP year-on-year

DOMESTIC OVERNIGHT VISITORS

- 1.84 million - NEW RECORD
- 14.7% up on 2018
- Statistically significant change.

NEW RECORD



DOMESTIC VISITOR NIGHTS

- 5.86 million - EQUAL RECORD
- 14.3% higher than 2018
- Statistically significant change when relaxed test used.

EQUAL RECORD



DOMESTIC DAY VISITORS

- 1.81 million - NEW RECORD
- 9.8% higher than 2018
- Not a statistically significant change.

NEW RECORD



INTERNATIONAL OVERNIGHT VISITORS

- 61,600
- 2.8% up on 2018
- Not a statistically significant change



INTERNATIONAL VISITOR NIGHTS

- 425,000
- 32.6% up on 2018
- Not a statistically significant change.

NEW RECORD



*CAUTION: This estimate is modelled. See last page for more information.

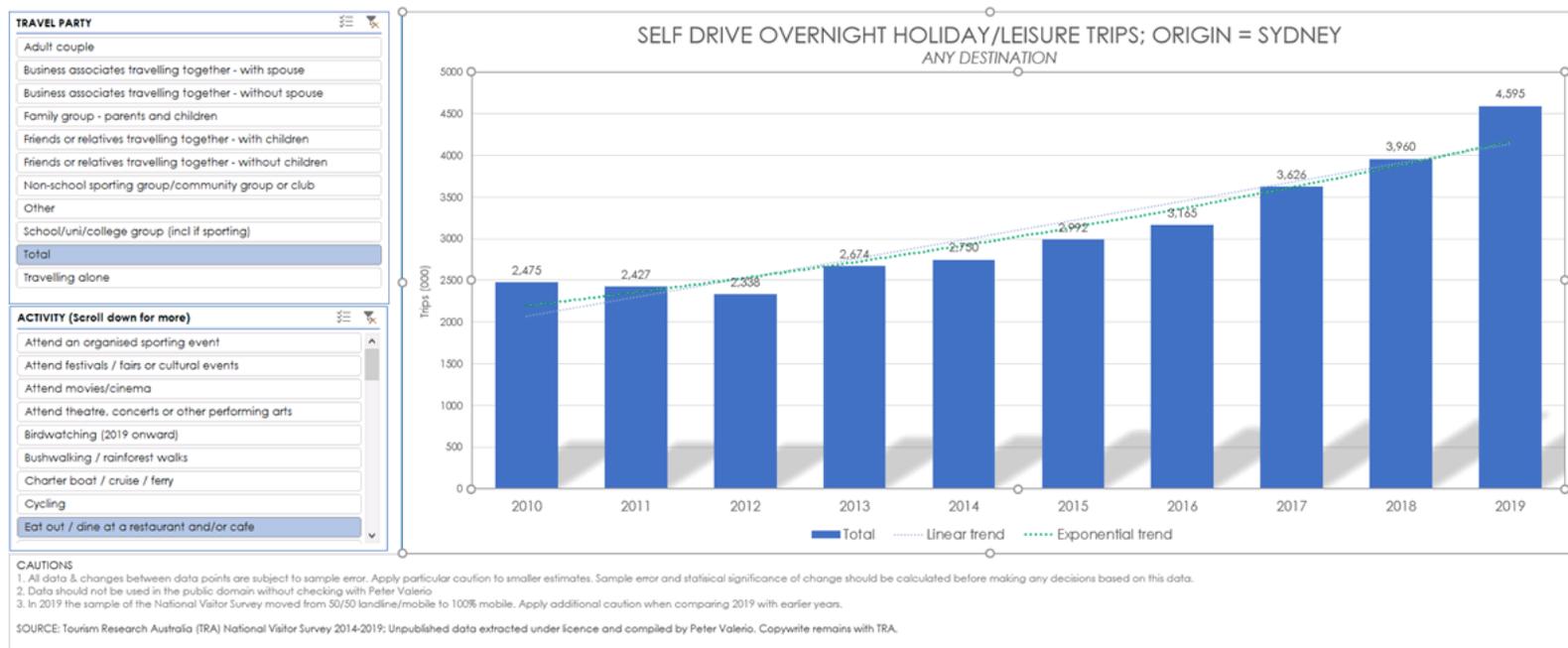
Shoalhaven

Tourism Research Australia

Eat / Out Dine at a restaurant

- Activity popularity almost doubled in 10 years

* Activity x Travel Party Mixer / 10 year analysis – Shoalhaven



Tourism Research Australia

Go dolphin or whale watching - Erratic in popularity

* Activity x Travel Party Mixer / 10 year analysis – Shoalhaven

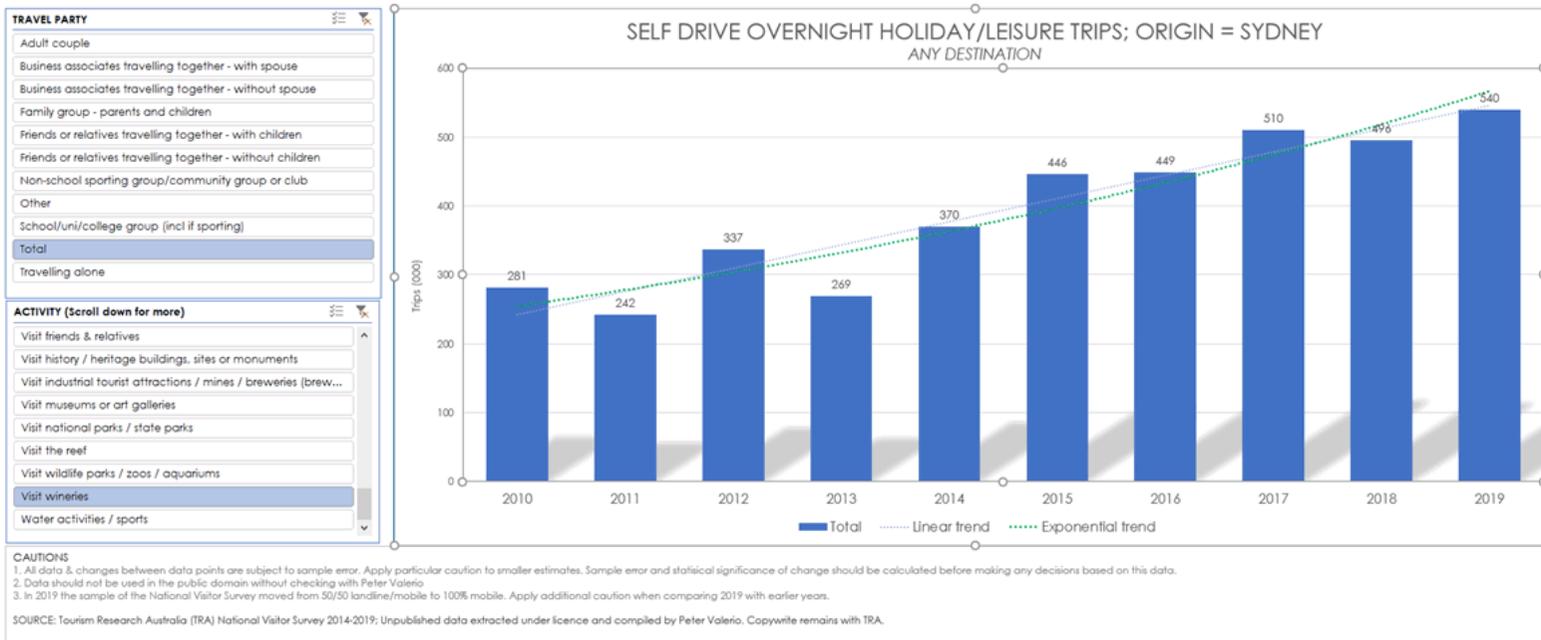


Tourism Research Australia

Visit Winery

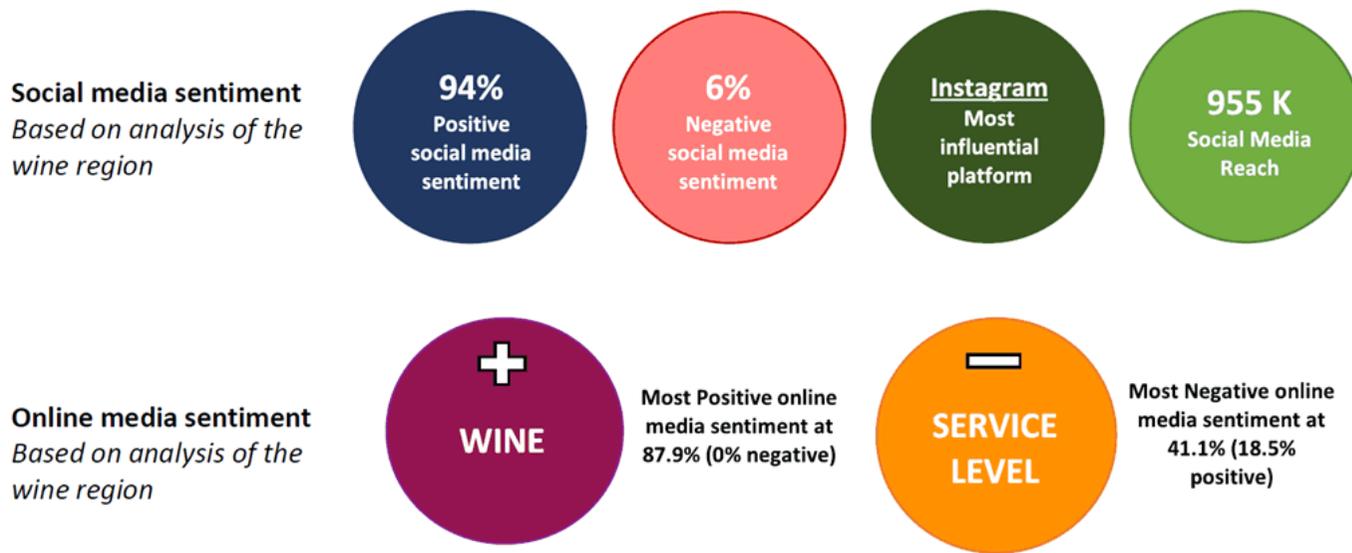
- Activity popularity almost doubled in 10 years

* Activity x Travel Party Mixer / 10 year analysis – Shoalhaven



Wine Research – Gap Analysis

Fast Facts: Shoalhaven Coast Wine Region



Wine Research – Gap Analysis

Summary of development priorities for Shoalhaven Coast Wine Region

Shoalhaven Coast	<ul style="list-style-type: none">• Enrich the experience offering of the region to profile the wine tourism experience, especially to appeal to low and shoulder season travellers• Create signature wine tourism experiences that capture the competitive advantage of the wine region as being located on the coast – link to aquatic and coastal theme promoted to international markets by Tourism Australia• Strengthen marketing campaigns and create content for multichannel distribution to profile the story and build awareness of the region’s wine offering, including wine tourism experiences
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Wine Research – Gap analysis

Priorities for developing wine tourism: Shoalhaven Coast Wine Region

- EXPORT READINESS: Develop more commissionable wine tourism products to showcase the richness of the region's offer beyond just the beaches and nature. This is consistent with global trends relating to the appeal and point of difference food and wine tourism offers to destinations.
- TOURISM PROGRAMS: Encouraging more businesses and wineries to participate in industry programs, such as the NSW First Program delivered by Destination NSW and Wine Australia's Growing Wine Tourism programs is also a priority. This can strengthen the online and export-ready product offering in the region.
- BUSINESS LISTINGS: Businesses and wineries within the region could do more to take advantage of business listings and improve their responsiveness to or use of platforms such as TripAdvisor.
- CONSUMER SENTIMENT: Consumer sentiment and online media analysis indicated that a weakness of the region relates to its service offering. Customer service, including to meet the evolving motivations and behaviours of the market should be addressed as a priority.

Whales 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

Whales Research – Domestic

- The number of nature based domestic overnight visitors to NSW in YE December 2018 was 13.4 million, up 15% when compared to YE December 2017. They stayed 49.3 million nights (up 13.5%) and spent \$10.1 billion (up 18.5%).
- Nature-based tourists accounted for 39% of all domestic overnight visitors to NSW, 46% of nights and 48% of expenditure.
- Over a quarter of nature based domestic overnight visitors to NSW were between 15 and 29 years (26%). Around 21% were aged 60 years+ and 20% were aged 30–39 years.
- Nature based domestic overnight visitors to NSW who identified as having a disability or long term health condition were just as likely as the total domestic overnight market to undertake a nature based activity. Nature based activities have wide appeal and if made accessible should result in increased participation by visitors with disability. (results obtained from supplementary disability questions in March QTR 2017, National Visitor Survey. Nature based domestic overnight visitors to NSW were mostly adult couples (28.5%) and friends or relatives travelling together (27.9%), followed by family group (23%) and solo travellers (18%).
- Staying in the homes of friends/relatives was the most popular type of accommodation utilised by nature based domestic overnight visitors to NSW (37% of nights), followed by commercial caravan parks (13.0%) and rented properties (12.7%).

Source: <https://www.destinationnsw.com.au/wp-content/uploads/2019/07/nature-based-tourism-to-nsw-snapshot-ye-dec-2018.pdf>

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

