

# 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 2021 .....2

# 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

**3.7 million  
Visitors\***

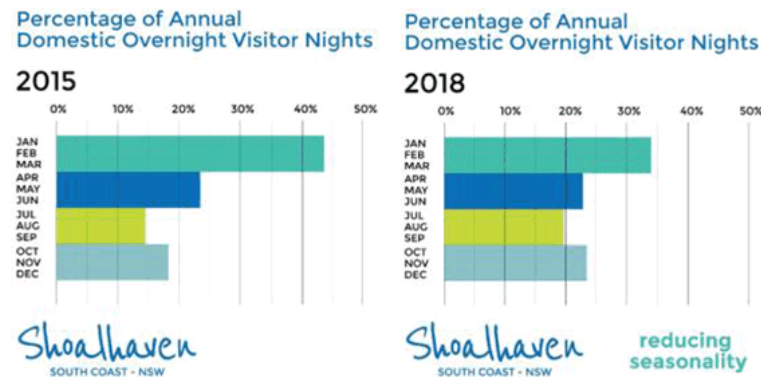
**\$1billion annual  
expenditure\***

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

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# 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

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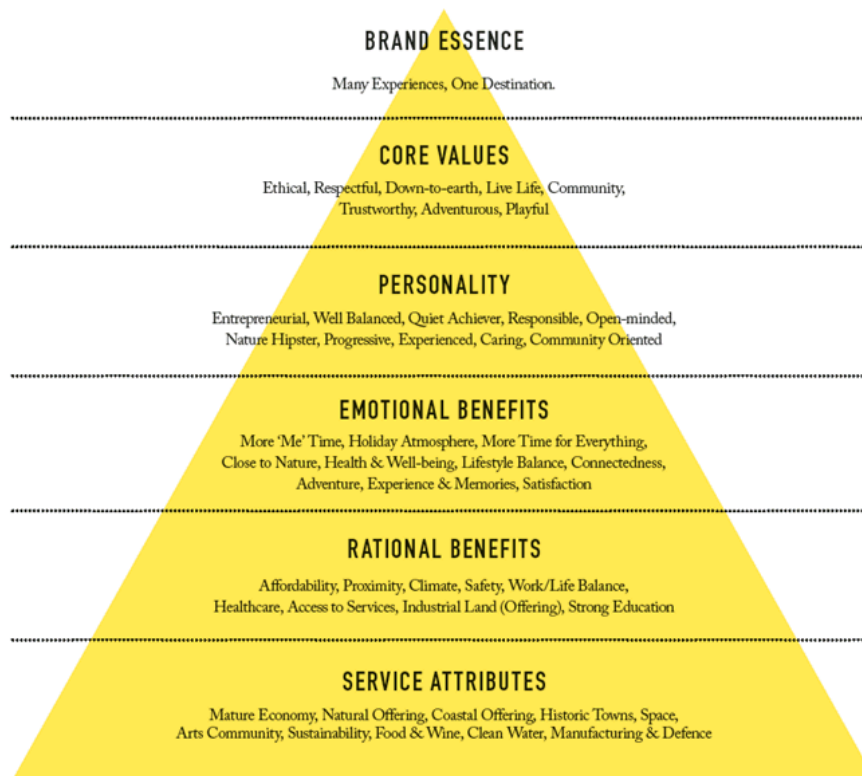
# Promotional Pillars

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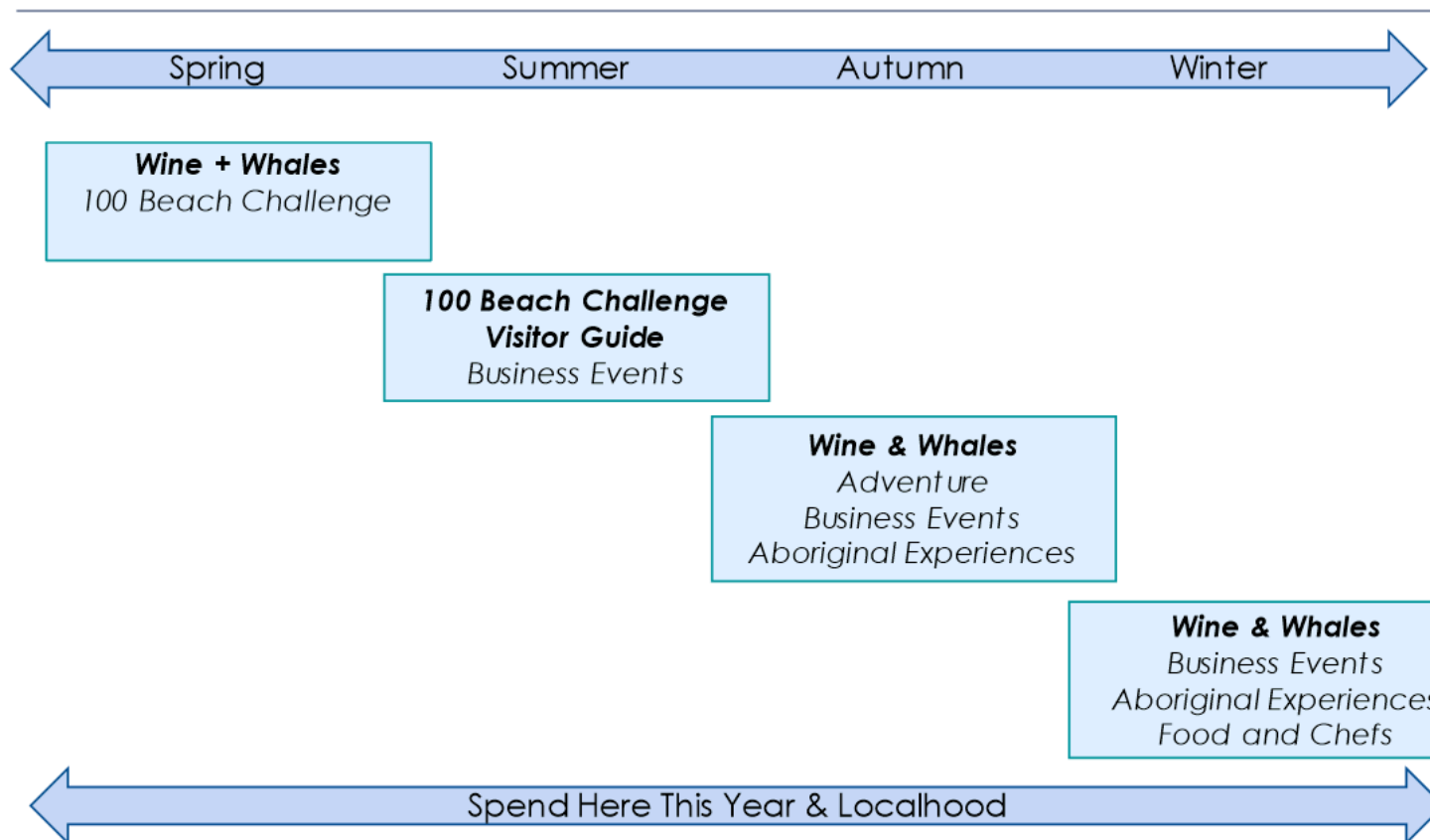
# Our Brand Identity



Many experiences.  
One Destination.

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# 2020/21 Campaigns



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# Campaign Background

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- 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

## Strengths

- Bookable product
- Award-winning wineries
- Operator engagement
- Link ins with DNSW, TA
- High yielding products
- Luxury accommodation avails

## Weakness

- Lacking brand awareness in specific experience pillars
- Operator cohesion
- Cold/wet weather
- Staffing and rental shortages

## Opportunities

- Off-peak availability
- heightened domestic travel
- Growing VFR market
- New markets intrastate
- Desire to escape cities

## Threats

- COVID resurgence
- Operator fatigue
- Warm competitors – QLD
- Locals with tourism fatigue
- Operator closures
- Lack of International travellers

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# Campaign Rationale

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- 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.

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# Campaign Pillars

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Nature & Outdoors  
WHALES

Food & Wine  
WINE

Cosy  
Nature Stays

Restaurants &  
Local Produce

Breweries &  
Distilleries

Aboriginal Cultural Experiences

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# Look & Feel



Visual identity



Google display ads

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# Look & Feel



Full page ad look



Gourmet Traveller solus EDM

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# Assets



Promo video



2 x brochures (20,000)

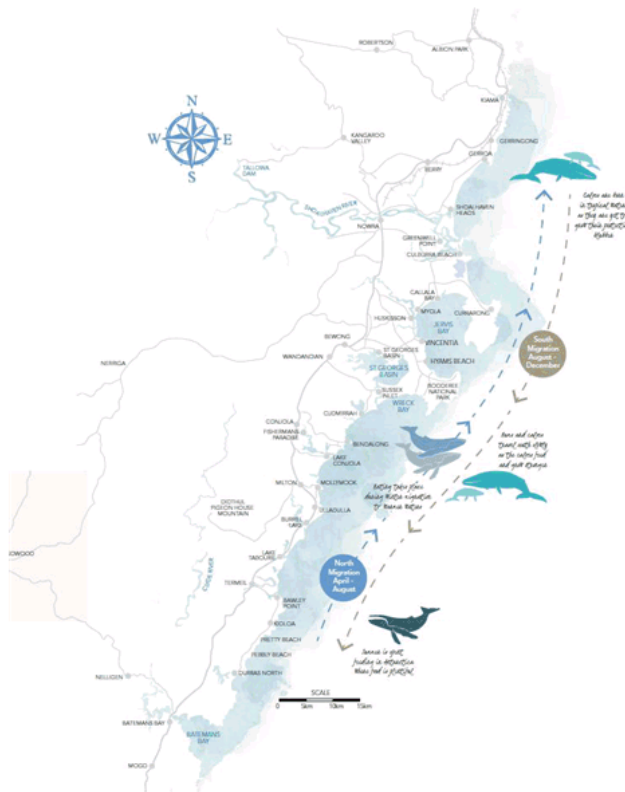


Landing page  
[Shoalhaven.com/wine-whales](https://Shoalhaven.com/wine-whales)

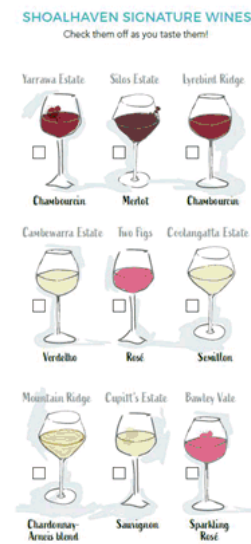
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# Assets



Map from Whale DL brochure



Covers from Wine DL brochure

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# Broad Objectives

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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

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# 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!

Target market weighting:			
Gen Z	Gen Y	VFR	Families

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# 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

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- 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

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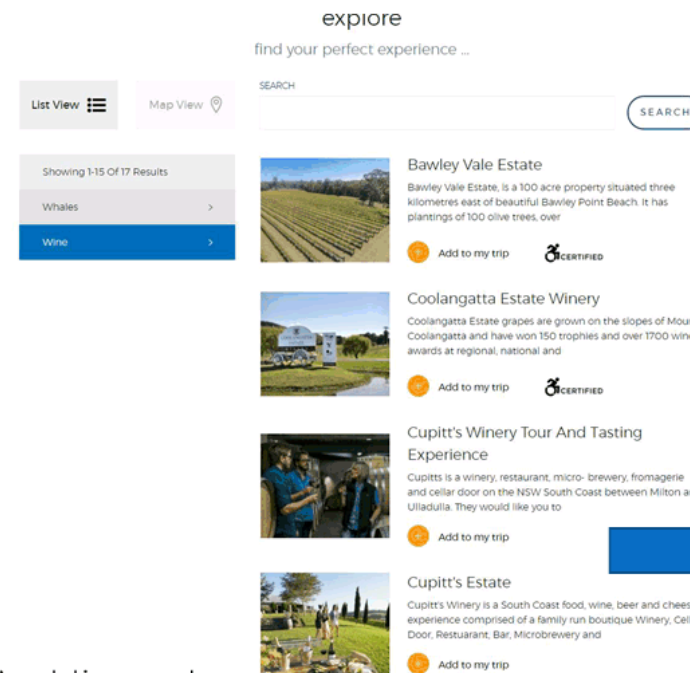
# Conversion goals

Download or  
request a brochure



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

Leads to industry  
Via ATDW listings



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# 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
<b>Total</b>	<b>16 million 1.48 million</b>	<b>reach engagement</b>	



# 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

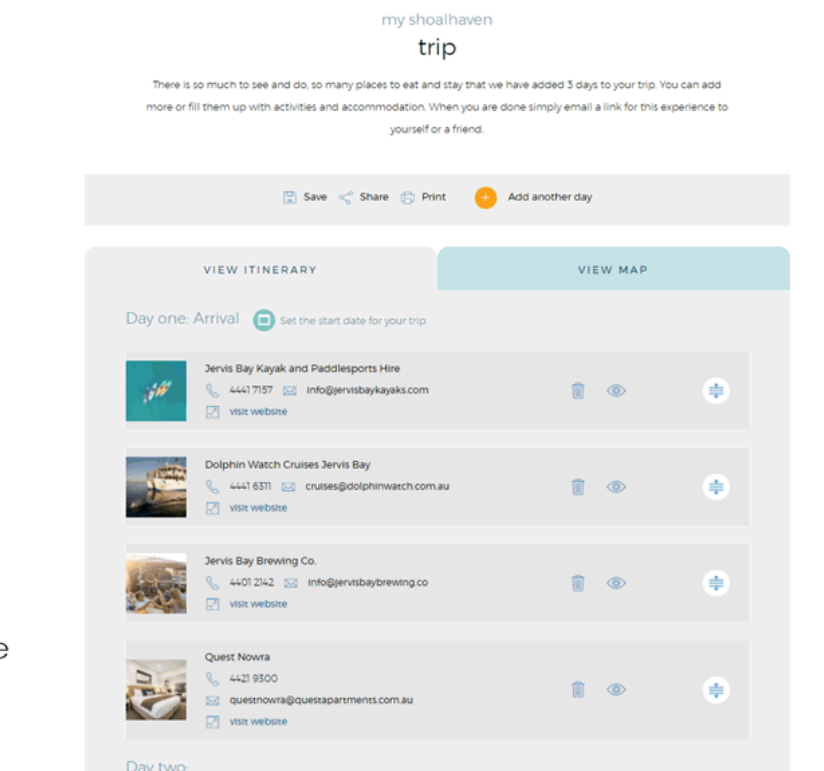
- Bookable:  
12 wineries + tours  
6 whale experiences
- Destination:  
4 lookouts

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



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# 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  
Sitchu  
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

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# Ad & Paid Editorial Targets

## 2020 Advertisers & Editorial Partnerships:

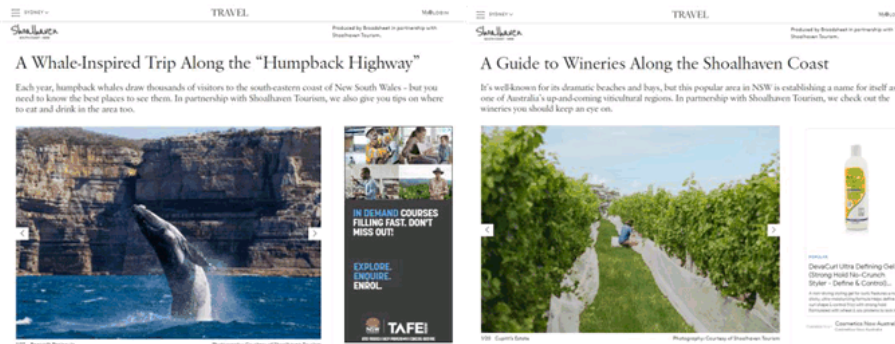
- Gourmet Traveller – Solus EDM  
FPC & editorial mention Sept issue
- Broadsheet partnership - (September)

[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](http://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](http://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.

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# 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



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# Key Stakeholders

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- 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
<b>TOTAL</b>	<b>\$125K</b>





## Previous Food and Wine Promotion

Audience: 578,000

<http://www.delicious.com.au/eat-out/gallery/top-10-foodie-hot-spots-berry/56Ts2oUa>

## THE TOP 10 FOODIE HOT SPOTS IN BERRY



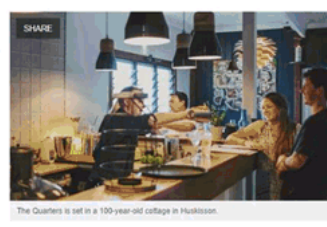
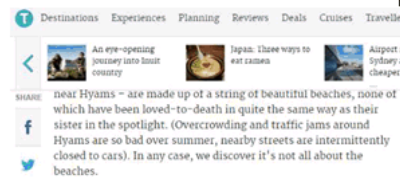
## WHERE TO FIND THE BEST KITCHEN GARDENS ON THE NSW SOUTH COAST



d. delicious. team  
delicious. team



# South Coast of NSW



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# 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 motorising 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: Launceston, AU  
Circulation: 16095  
Type: Regional  
Size: 913.00 sq.cms.



## Deeply personal Jervis Bay jaunt

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 compete 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 connections to Canberra means more



## A Whale-Inspired Trip Along the "Humpback Highway"

Each year, humpback whales draw thousands of visitors to the south-eastern coast of New South Wales - but you need to know the best places to see them. In partnership with Shoalhaven Tourism, we also give you tips on where to eat and drink in the area too.

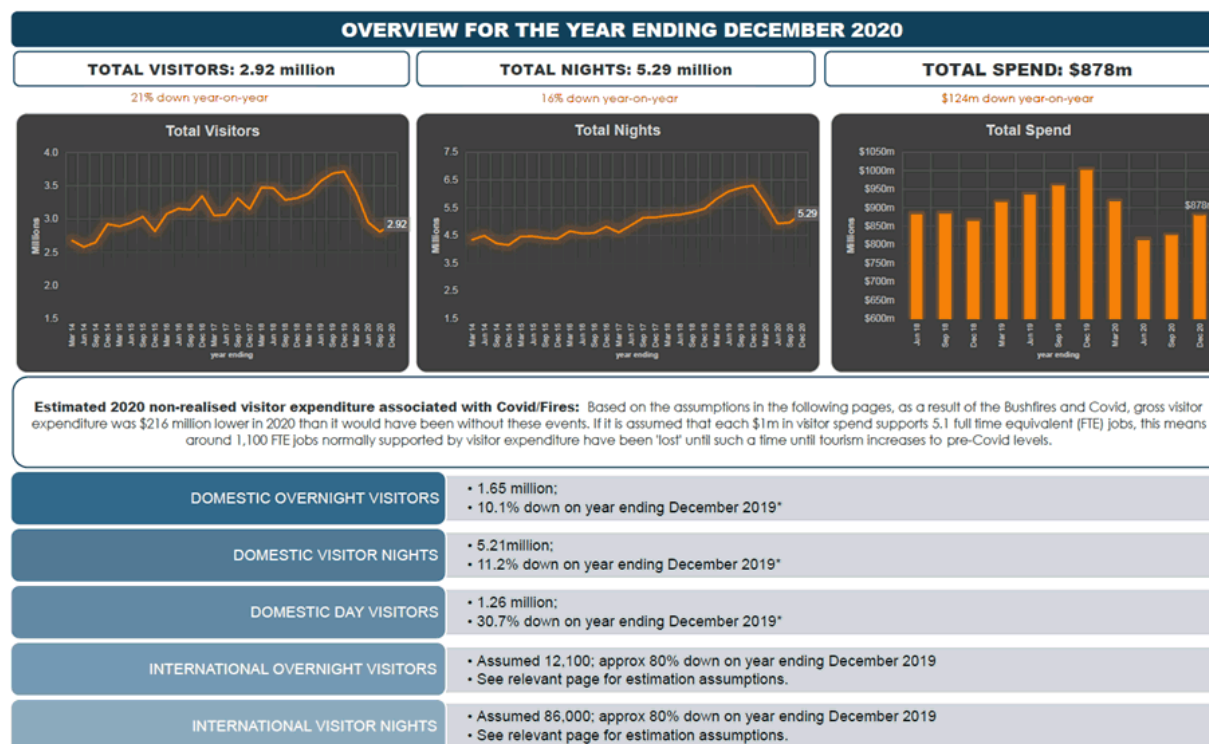


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# Research – further detail

## Shoalhaven & JBT Tourism Monitor



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

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# 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.

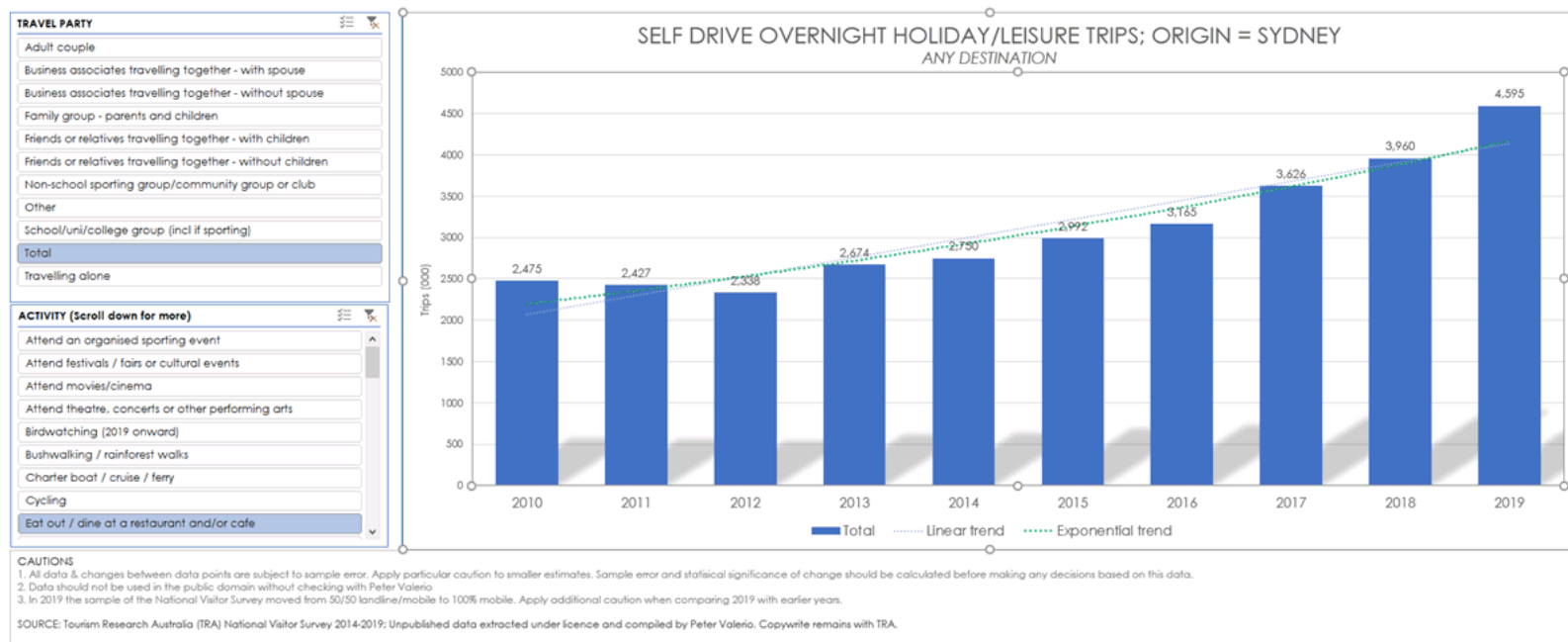
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# Tourism Research Australia

## Eat / Out Dine at a restaurant

- Activity popularity almost doubled in 10 years

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

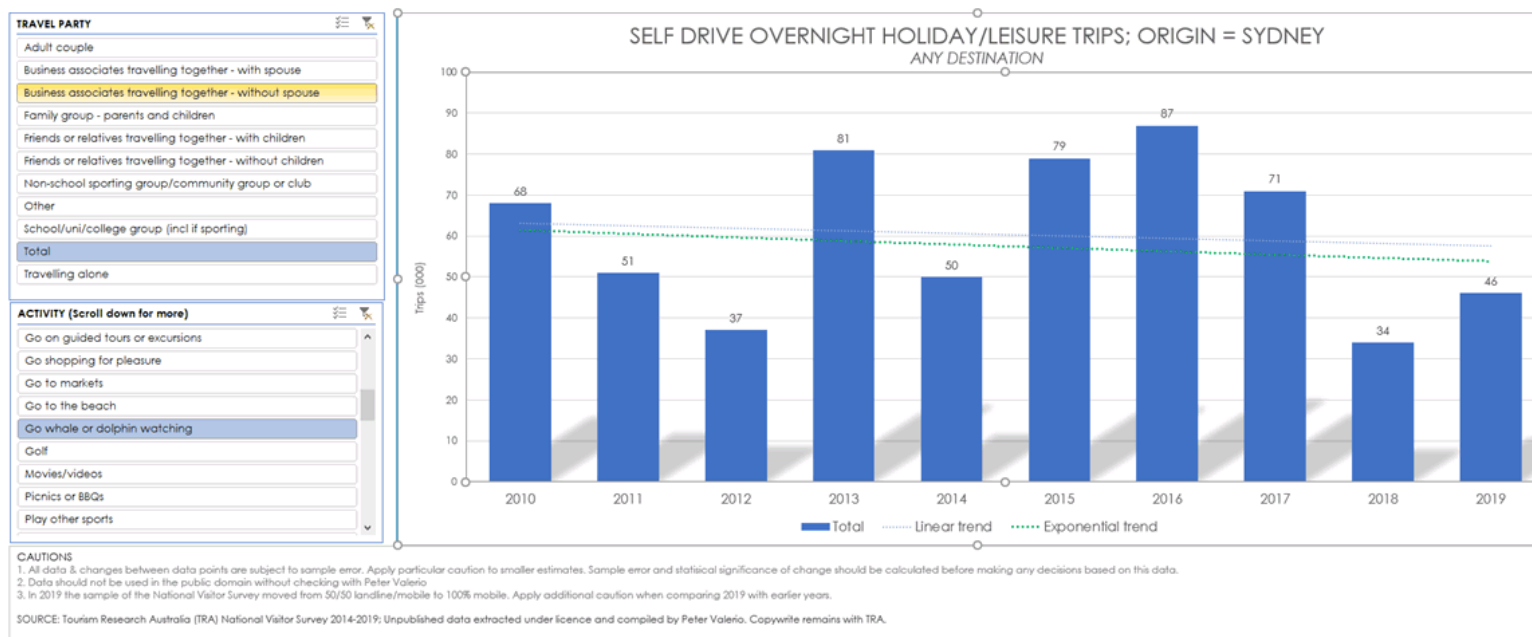


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# Tourism Research Australia

## Go dolphin or whale watching - Erratic in popularity

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



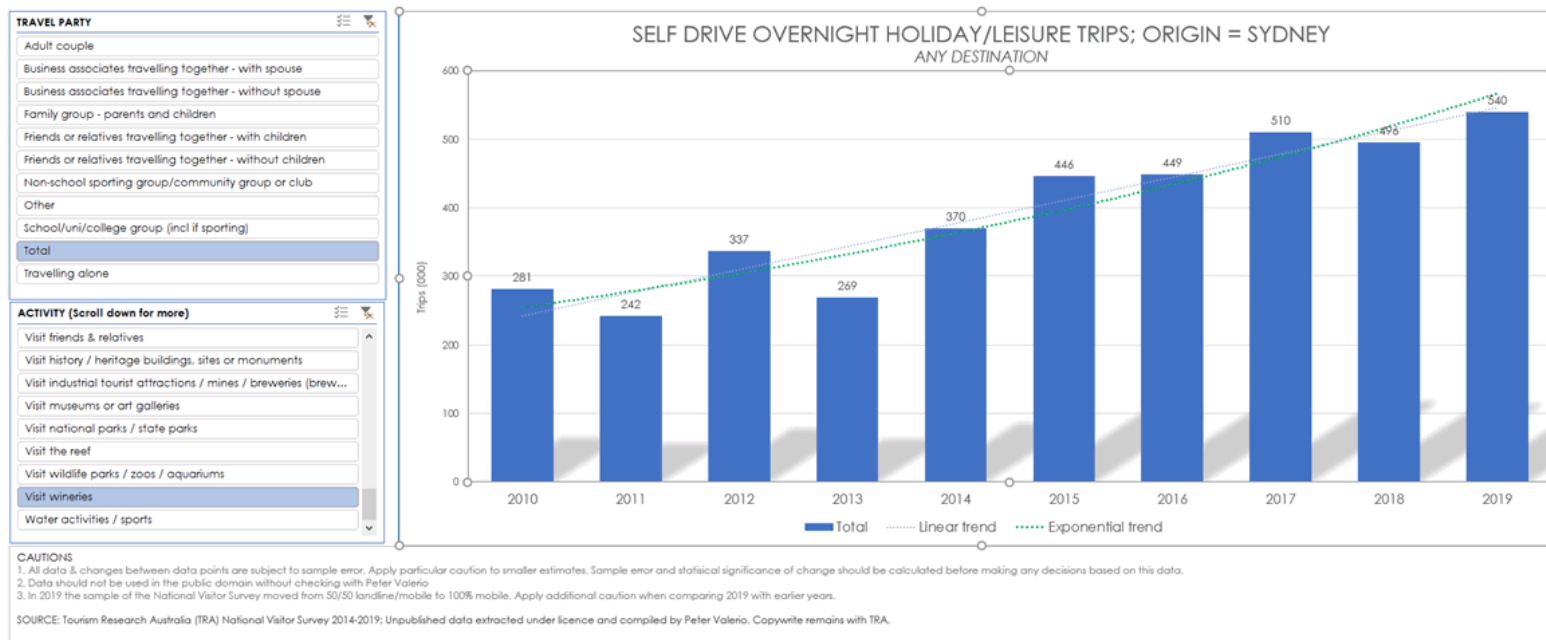
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# Tourism Research Australia

## Visit Winery

- Activity popularity almost doubled in 10 years

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

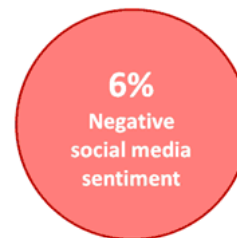


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# Wine Research – Gap Analysis

## Fast Facts: Shoalhaven Coast Wine Region

**Social media sentiment**  
*Based on analysis of the  
wine region*



**Online media sentiment**  
*Based on analysis of the  
wine region*



Most Positive online  
media sentiment at  
87.9% (0% negative)



Most Negative online  
media sentiment at  
41.1% (18.5%  
positive)

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# Wine Research – Gap Analysis

## Summary of development priorities for Shoalhaven Coast Wine Region

Shoalhaven Coast	<ul style="list-style-type: none"><li>• Enrich the experience offering of the region to profile the wine tourism experience, especially to appeal to low and shoulder season travellers</li><li>• 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</li><li>• 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</li></ul>
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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

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## 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.

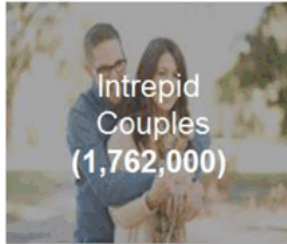

Source: Ecotourism Australia Manifesto

## 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

