

North Coast NSW Destination Management Plan

2022-2030



This Destination Management Plan was prepared by EarthCheck

ACKNOWLEDGEMENTS

The North Coast NSW destination management planning process was undertaken Earthcheck Pty Ltd. Meredith Wray (Wray Sustainable Tourism Research & Planning) was engaged to finalise the DMP.

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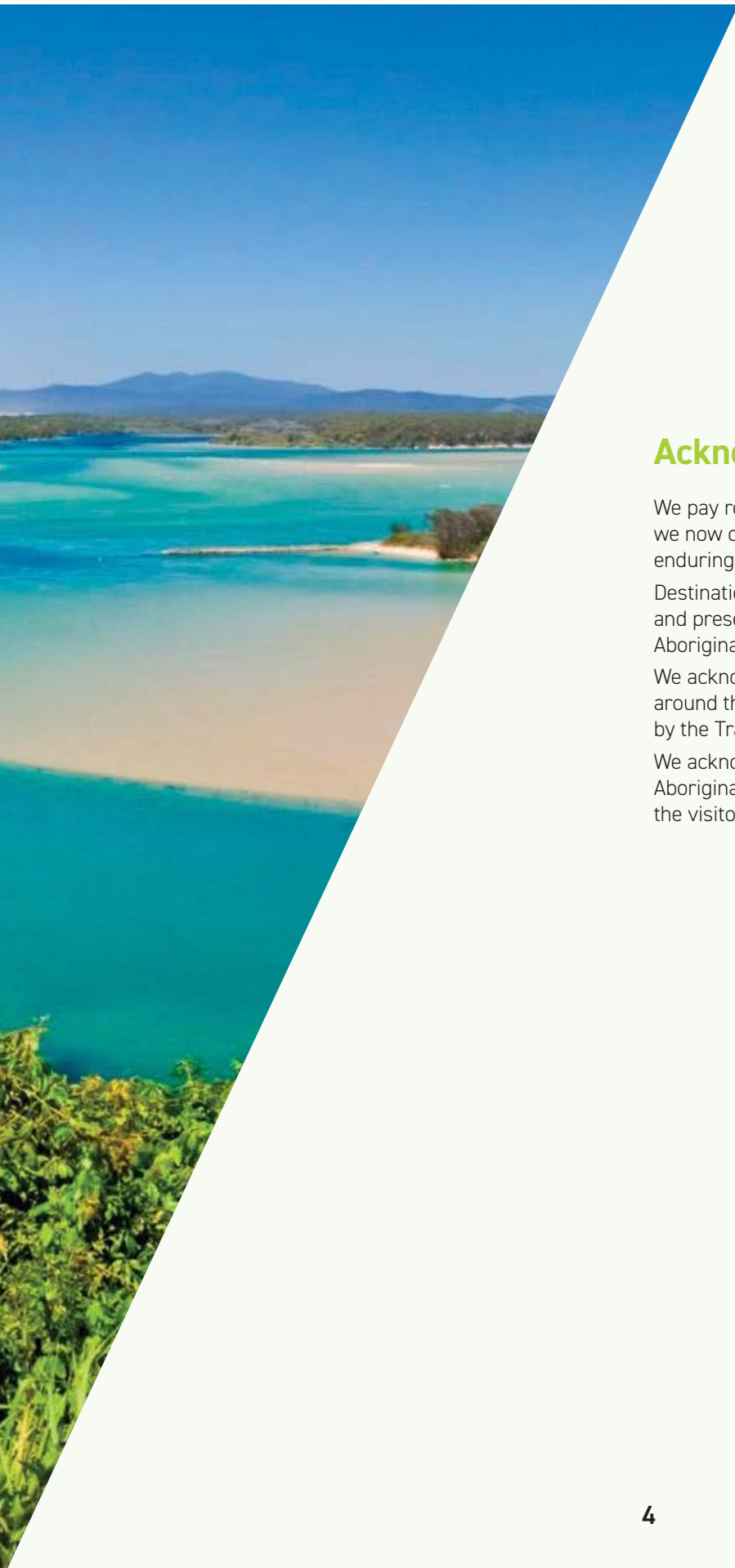
LIST OF ACRONYMS

ATDW	Australian Tourism Data Warehouse	NATOC	NSW Aboriginal Tourism Operators Council
CCIA	Caravan and Camping Industry Association	NC	North Coast NSW
CMCA	CMCA Campervan and Motorhome Club of Australia	NPWS	NSW National Parks and Wildlife Service
DMP	Destination Management Plan	NRJO TMG	Northern Rivers Joint Organisation Tourism Managers Group
DNC	Destination North Coast NSW	NSW	New South Wales
DNPMG	Destination Network Project Management Group	REDS	Regional Economic Development Strategies
DNs	Destination Networks	RV	Recreational Vehicle
DNSW	Destination NSW	STRA	Short Term Rental Accommodation
DRNSW	Department of Regional NSW	UNESCO	United Nations Educational Scientific and Cultural Organization
EA	Ecotourism Australia	VES	NSW Visitor Economy Strategy 2030
FCNSW	Forestry Corporation of NSW	VFR	Visiting Friends and Relatives
Govt	Government	Y/End (YE)	Year End
GSP	Gross State Product		
GVA	Gross Value Add		
JO	Joint Organisation		
LALCs	Local Aboriginal Land Councils		
LGA	Local Government Area		
LTO	Local Tourism Organisation		

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Acknowledgement of Country

We pay respect to the Traditional Custodians of the land we now call New South Wales and acknowledge their enduring culture and continued connection to Country.

Destination North Coast pays our respect to Elders, past and present, and acknowledge future generations of Aboriginal people.

We acknowledge visitors from across Australia and around the world are made welcome on Aboriginal lands by the Traditional Custodians of North Coast NSW.

We acknowledge the significant contribution made by Aboriginal people to the development and promotion of the visitor economy.

Message from the North Coast NSW Board

The Destination Network structure for the Visitor Economy across Regional NSW commenced in 2018 and saw the delivery of the first Destination Management Plan. Our inaugural board oversaw the successes of delivering 47 of the 51 action items within this plan. This included the development of a Nature-based Tourism Activation Investment Plan for the region, creation of a multi award-winning Business Events program and the advocating for significant new infrastructure development including the Northern Rivers Rail Trail.

The extreme challenges that the industry has faced through bushfires, drought, pandemic, and floods has accelerated the critical role that the Destination Networks play as the lead agency within region for the industry, and how it is a key conduit between the levels of government. Destination North Coast NSW has established a level of confidence, leadership and strong representation for the industry that it represents. The region is a mature visitor economy destination and as such the board and organisation demonstrates this maturity, knowledge, and expertise.

As we move toward the recovery from the challenges faced and into the future, against an ambitious NSW Visitor Economy Strategy 2030 (VES) as our guide, North Coast NSW has the potential to support regional tourism's goal of reaching \$25 billion in expenditure by 2030. The focus for the North Coast will be to capitalise on its unique character and authentic charms for its tourism experience. Facilitating this with critical transport infrastructure for ease of access by land or air and building high yielding visitation that is sustainable, bringing economic, social, and environmental benefits.

The current board of Destination North Coast NSW is proud to launch this latest Destination Management Plan to cover 2022 – 2030, that sets the pathway to achieve these ambitious goals. The future for the North Coast NSW is very bright (green) and this strategy will unlock the success of the region and continue to restore confidence in the importance of the visitor economy towards a vibrant and sustainable 2030.

Cameron Arnold
Chair

Our opportunity

This plan takes a borderless view to identify and quantify regional strategies and actions for Destination North Coast NSW and exists to:

- Align regional visitor economy growth and development activities with the NSW Visitor Economy Strategy 2030 (VES)
- Provide a framework for sub-regional and local DMPs to be developed or updated within our region
- Capture stakeholder consultation to ensure the regions stakeholders are invested in the plan
- Provide a roadmap for the growth of the visitor economy to 2030
- Provide an action plan with a focus on cross-regional projects for visitor economy growth and development to guide the work of Destination North Coast NSW (DNC)
- Ensure the visitor economy is planned through a coordinated and sustainable approach.

Overview

Destination North Coast NSW (DNC) is one of seven Destination Networks (DNs) in regional NSW. Its principle role is to represent and coordinate the growth and development of the North Coast visitor economy.

The North Coast region spans the length of approximately 600km of coast and hinterland and comprises 13 Local Government Areas as well as the Lord Howe Island's Board of Management. Each area has their respective vision for the future, and projects and priorities, which are relevant to the sustainable growth of the region.

The North Coast NSW visitor economy delivered 9.5% of the region's jobs, supports 7,394 businesses and directly delivers 6.8% (\$1.7 billion) of the region's Gross Value Add (GVA) which has grown every year since 2010-11 at an average 4.5% pa. The region attracted over 15.3 million visitors and 28.5 million visitor nights in 2019 (Year End December)¹.

The North Coast NSW Destination Management Plan has been prepared to create a collaborative framework to guide the work of local, regional and state visitor economy stakeholders to grow, develop and promote the region's visitor economy to 2030 and contribute to the NSW Government's target to achieve \$25 billion in visitor expenditure by 2030.

This Plan sets out five strategic objectives and an associated plan of action for the region from 2022 to 2030, reflecting current market trends and local priorities, and aligning with State Government's NSW Visitor Economy Strategy 2030:

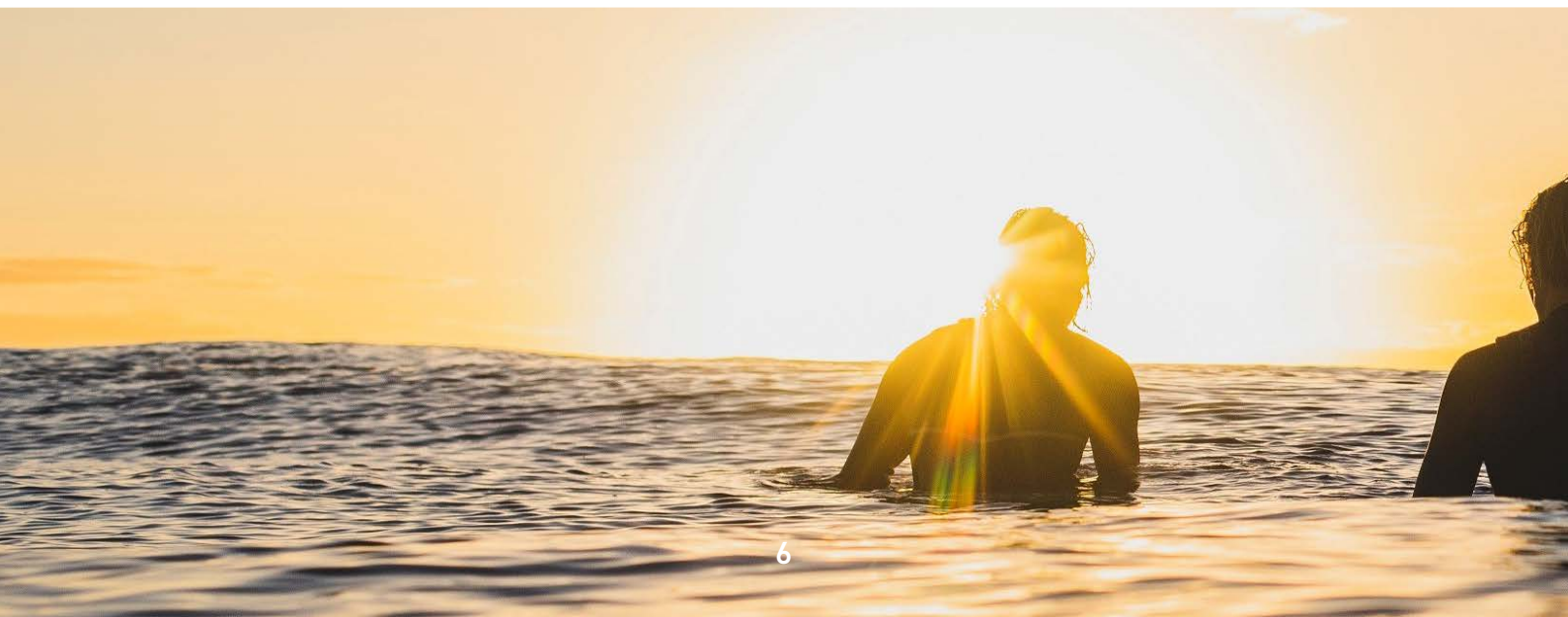
1. Road to Recovery

- » Support visitor economy businesses to welcome visitors back to 2019 levels by 2024 through targeted support programs.
- » Provide leadership and advocacy to coordinate & represent the needs of the North Coast NSW economy.

2. Build the Brand

- » Build community pride and awareness of the visitor economy's benefits across the region.
- » Strengthen partnerships between LGAs.
- » Improve quality of commercial accommodation.
- » Increase the quantity of North Coast NSW product promoted.

¹ YE December 2019 (pre-COVID-19 health pandemic) Tourism Research Australia visitation data is used as a base measure to recover and grow the visitor economy



3. Showcase Our Strengths

- » Build authentic experiences around the region's product strengths.
- » Support growth of wellness, food & beverage, aboriginal product.
- » Facilitate growth of paid nature-based experiences.
- » Focus on increasing average length of stay & yield.

4. Focus on World Class Events

- » Use events to encourage greater visitor dispersal.
- » Position North Coast NSW as the premier participative sporting event host in regional NSW.
- » Encourage events that increase visitation across low and shoulder season.

5. Facilitate Growth

- » Support the facilitation and attraction of key infrastructure projects.
- » Advocate for a streamlined planning process.
- » Support the industry to increase sustainable operations.
- » Support the development of accessible tourism product and experiences.

Vision

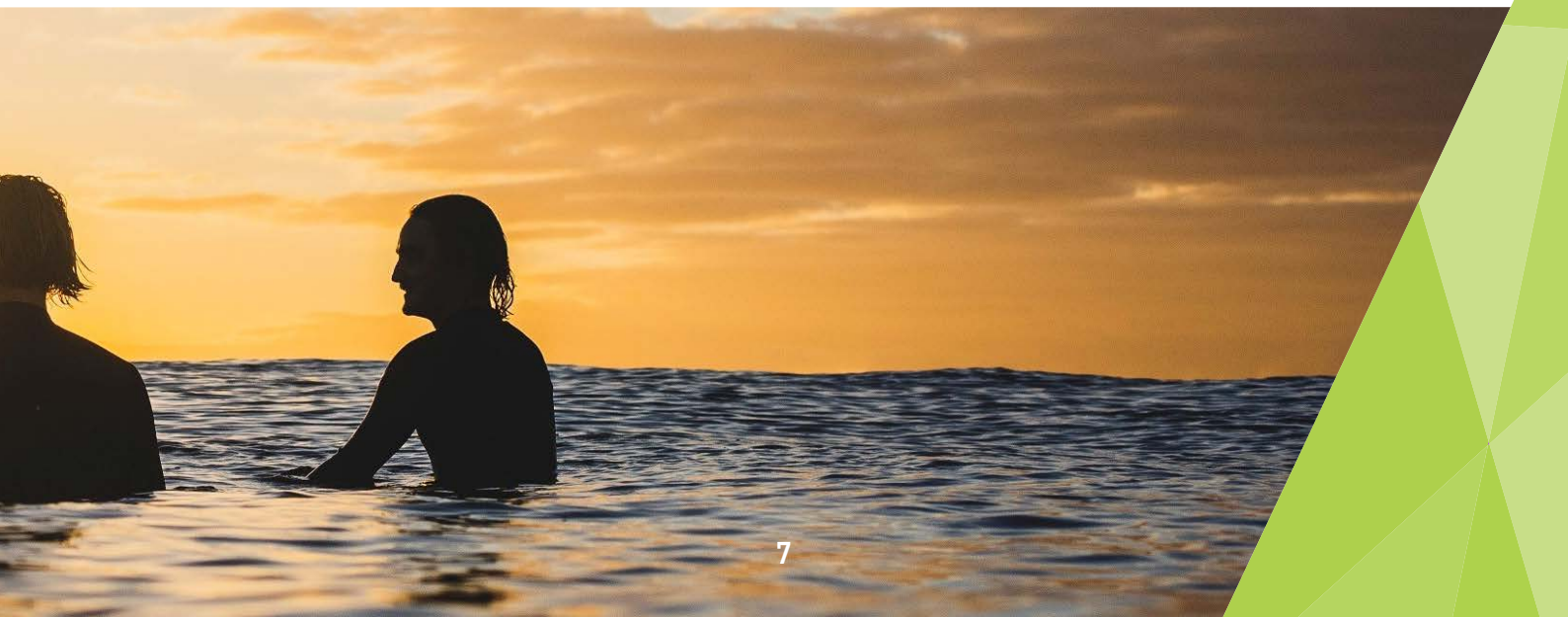
To sustainably grow yield of visitors to North Coast NSW supporting the regional NSW goal of generating \$25 billion by 2030, without compromising the distinct natural beauty and communities that makes the region so unique.

Positioning

North Coast NSW is positioned as a natural escape with a food bowl and plentiful local produce across its vibrant communities. To ensure the region lives up to expectations, it must deliver on health and wellness opportunities, food and local produce, camping and caravanning, arts and heritage and events that promote its naturally spectacular and colourful image.

Mission

To maximise the benefits of the visitor economy and ensure the sustainable future of North Coast NSW's visitor economy.



Introduction

Destination North Coast NSW commissioned the preparation of the North Coast NSW Destination Management Plan to create a collaborative framework to guide the work of local, regional and state visitor economy stakeholders to grow, develop and promote the region's visitor economy to 2030.

The North Coast NSW DMP 2022 to 2030 has been developed to align with the directions of NSW Visitor Economy Strategy 2030 (VES).

The VES 2030 acknowledges regional NSW as a key to the future of the NSW visitor economy. The NSW statewide target for 2030 is \$65 billion in total visitor expenditure. Regional NSW will contribute \$25 billion in overnight visitor expenditure to this target.

The visitor economy is identified as one of seven 'engine industries' expected to drive regional NSW economies over the next 18 years and is identified as one of 50 new priorities to drive long-term stimulus impact.

Following a review of the regional visitor economy in 2017 the NSW Government, through Destination NSW (DNSW), established six administrative zones, referred to as Destination Networks (DNs). In July 2022, one additional DN was added, Destination Central West NSW, and several other changes were made to DN boundaries to assist the growth of the NSW regional visitor economy.

The seven DNs are:

- Destination Central West NSW
- Destination Country and Outback NSW
- Destination North Coast NSW
- Destination Riverina Murray
- Destination Southern NSW
- Destination Sydney Surrounds North
- Destination Sydney Surrounds South

A Destination Network Project Management Group (DNPMG) was established in September 2021 that comprises the General Managers of each Destination Network as well as the General Manager, Product, Policy and Engagement, Destination NSW.

Importantly, the DNPMG committed to working collaboratively to deliver a suite of seven new Destination Management Plans (DMPs) (2022 to 2030) that are aligned to the NSW Visitor Economy Strategy 2030.

A Destination Network DMP planning framework was established to create a consistent and collaborative approach to guide the work of the Destination Networks, consultants, and local, regional, and state visitor economy stakeholders to consider how to grow, develop and promote the NSW regional visitor economy to 2030.

Consultants, Earthcheck Pty Ltd, were engaged from January to July 2022 to prepare the North Coast NSW DMP 2022 to 2030.

This DMP is intended to be a living, practical document. In developing this plan, engagement was held across the North Coast NSW to gain support of the broad range of stakeholders. As we respond to changing market conditions, expectations may shift and evolve to emerge through the recovery phase, building momentum back to pre-COVID-19 levels, and accelerating to reach visitor expenditure goals, contributing North Coast NSW's part of the NSW goal of achieving \$25 billion for regional NSW by 2030 and sustainably building towards a leading visitor economy.

The aim of the NSW Visitor Economy Strategy 2030 and the Destination Network DMPs is to stimulate economic prosperity, create new jobs and enhance the lifestyles of the people of NSW.



North Coast NSW DMP 2022 to 2030

The North Coast NSW region consists of 13 Local Government Areas and Lord Howe Island's Board of Management and spans the length of approximately 600km of coast and hinterland (Figure 1).

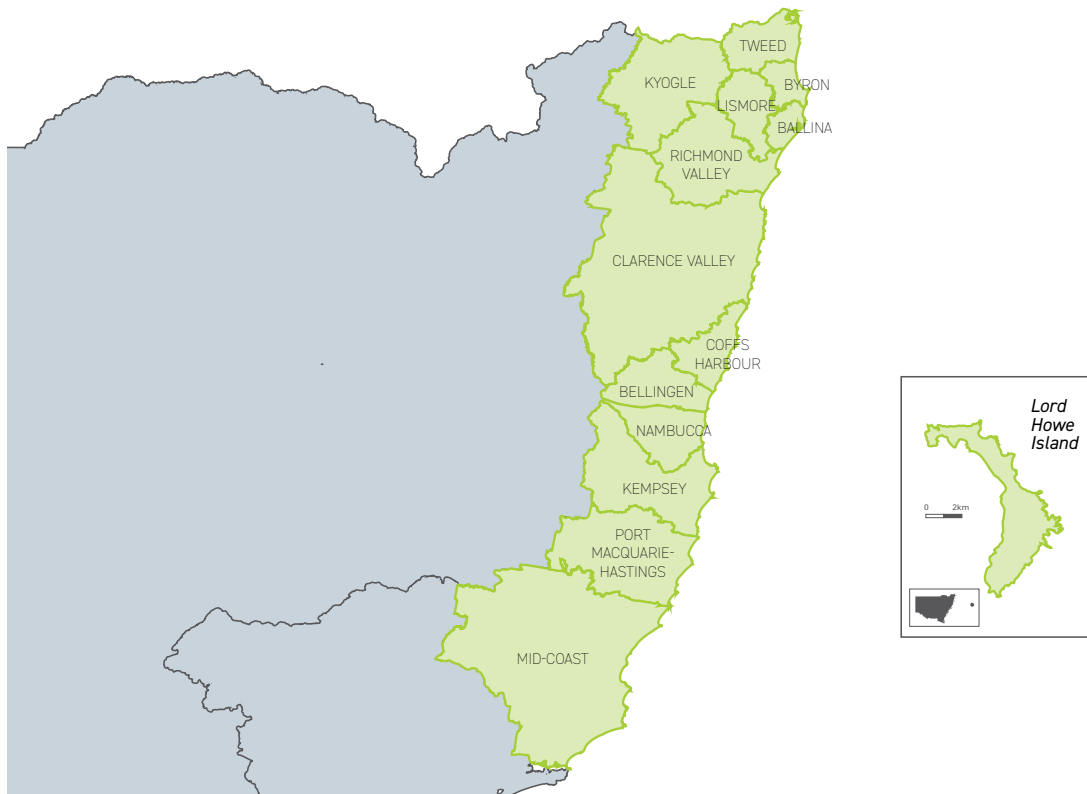


Figure 1. Map of the Destination North Coast NSW region



North Coast NSW DMP 2022 to 2030 (continued)

The North Coast NSW visitor economy delivered 9.5% of the region's jobs, supports 7,394 businesses and directly delivers 6.8% (\$1.7 billion) of the region's Gross Value Add (GVA) which has grown every year since 2010-11 at an average 4.5% pa. The region attracted over 15.3 million visitors and 28.5 million visitor nights in 2019 (Year End December)². The DMP process was undertaken in mid-2022, based on a range of industry consultation, market research and engagement with key stakeholders identified by DNC. Steps within the process are outlined in Figure 2 below.



Figure 2. Destination Management Planning process

In region industry consultation sessions (shown in Figure 2) were held in the Tweed, Ballina, Clarence Valley, Coffs Harbour, Port Macquarie and Barrington Coast.

² YE December 2019 (pre-COVID-19 health pandemic) Tourism Research Australia visitation data is used as a base measure to recover and grow the visitor economy



Strategic Context



Strategic Context

The North Coast NSW DMP 2022 to 2030 has been developed to align with the directions of *NSW Visitor Economy Strategy 2030*. The strategy comprises three phases:



Figure 3. NSW Visitor Economy Strategy 2030 phases

Ambitions, Outcomes and Targets

Figure four shows the ambitions, outcomes and visitor expenditure targets presented in the *NSW Visitor Economy Strategy 2030*. Under Destination NSW's coordinated approach and the guidance of Destination North Coast NSW, the Plan will bring economic prosperity, create jobs, and enhance lifestyle across North Coast NSW.

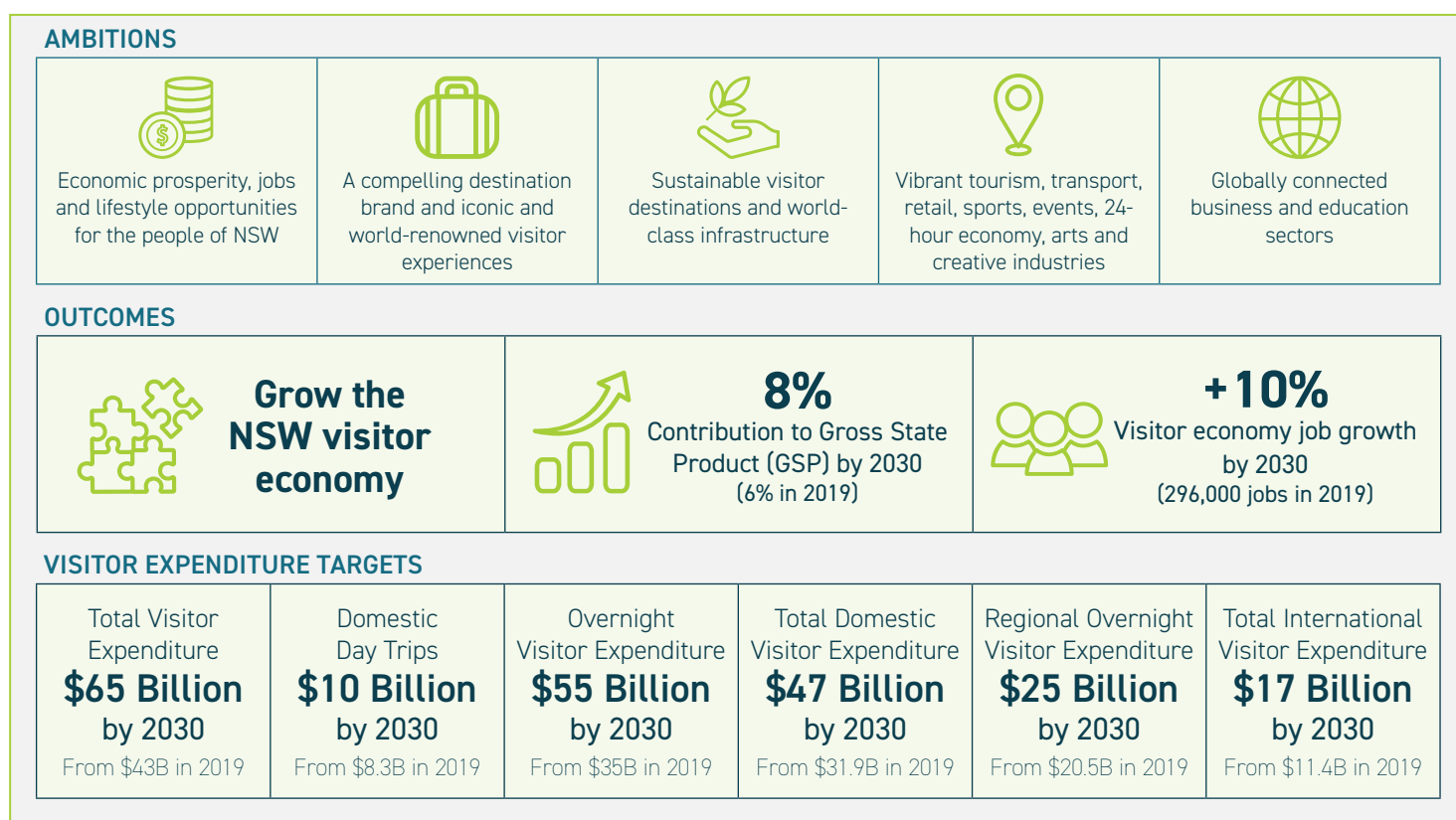


Figure 4. NSW Visitor Economy Strategy 2030 – ambitions, outcomes, and visitor expenditure targets

North Coast NSW Destination Management Plan

Guiding Principles

Five Guiding Principles inform the NSW Government's policy and investment in the visitor economy.

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.

Table 1. NSW Government Five Guiding Principles for visitor economy policy and investment

Strategic Pillars

The Destination Network Destination Management Plans have been developed to align with the Strategic Pillars and key result areas where relevant.

1. Road to Recovery
2. Build the Brand
3. Showcase our Strengths
4. Focus on World Class Events
5. Facilitate Growth

These pillars and associated key result areas are explained further on pages 30-31.



Other Considerations relevant to the North Coast NSW

This plan recognises that local government policy and direction forms a critical element of the framework for visitor economy development and management. A wide range of policies support the visitor economy including community, economic development, planning, arts and culture, recreation, and asset management, as well as the Council's direct roles in destination management, information, and marketing (Appendix 1).

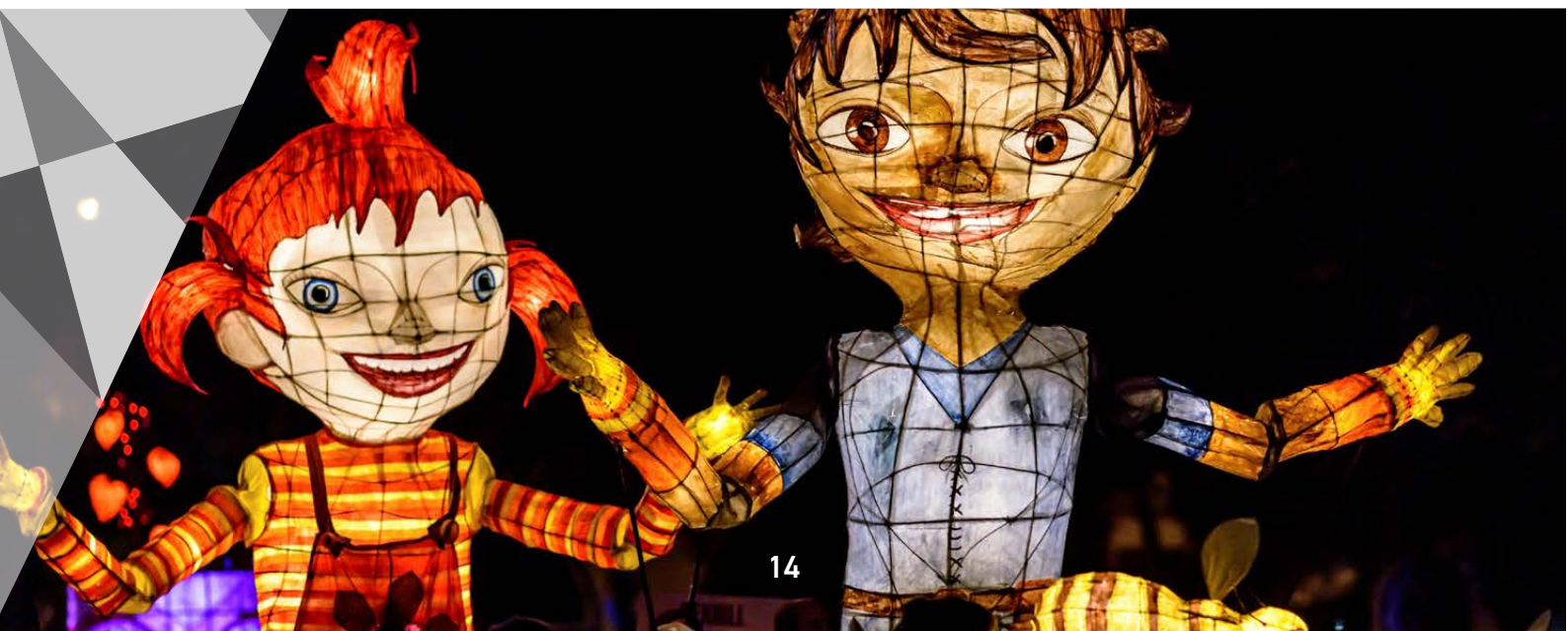
There are two Joint Organisations (JO) that collectively represent the majority of Councils of North Coast NSW. As the hub for local intergovernmental collaboration, the JO's statutory mandate includes identifying key regional strategic priorities, advocating for these priorities, and building collaborations around these priorities with other levels of government, industry, and community. The visitor economy is identified in the JO's strategic plan as a regional economic strength.

The Northern Rivers JO is a collaborative body that brings together Ballina, Byron, Kyogle, Lismore, Richmond Valley and the Tweed councils to provide a united and local voice. Clarence Valley Council is also an Associate Member of this joint organisation. Whilst its boundaries do not align across the full region, they offer a northern perspective to the region, aligning destinations with strong connections to the rivers, coast, and hinterland under a common goal.

The Northern Rivers JO has several long-term, high-level priorities including biodiverse natural environments, improved community wellbeing, a connected region, sustainable energy, water and waste, a diverse regional economy and a collective Northern Rivers brand. The visitor economy is recognised as an engine of growth for the Northern Rivers and has a strong role to play in delivering action and outcomes as well as a supporting role to other community-based actions.

Mid North Coast JO includes Port Macquarie-Hastings Council, Bellingen Shire Council and Kempsey Shire Council with the purpose of strengthening regional collaboration to work more closely with the NSW Government to deliver important projects on a regional scale.

Destination North Coast NSW, as an Associate Member will collaborate with the JO's and local government partners to further the strategic visitor economy objectives outlined in this plan, to ensure that the visitor economy contributes fully to regional economic objectives.



Trends Influencing Visitor Demand

The COVID-19 health pandemic has resulted in a range of new consumer trends related to travel decision planning.

The following provides an overview of the main trends influencing recovery from the pandemic as sourced from travel research commissioned in 2022 that is also relevant to regional NSW visitor economy growth and development. It is recommended that continual monitoring of consumer trends be undertaken to 2030³.

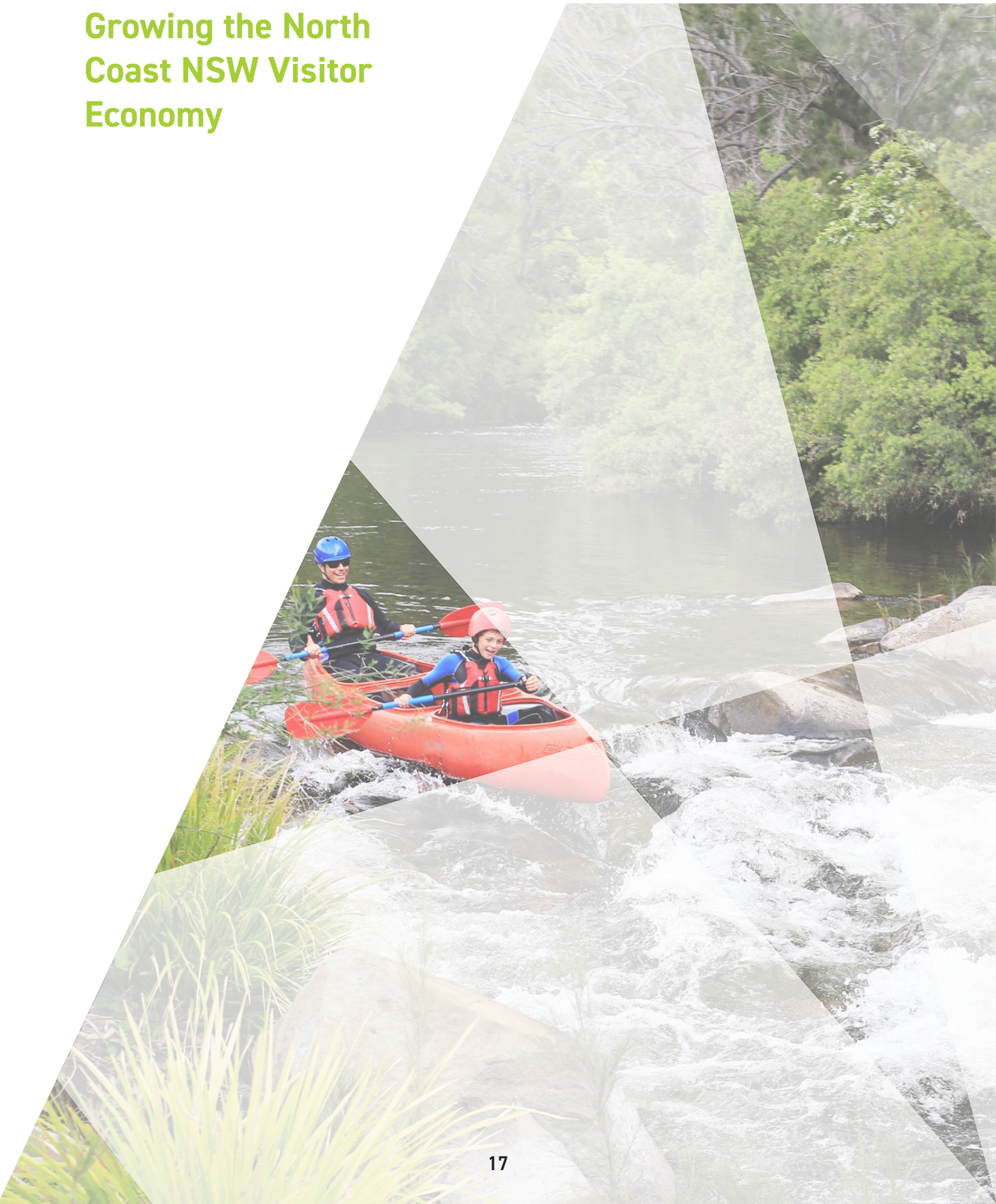
TREND	DESCRIPTION
Edventures / Mixing Work & Play	Is about combining education and holidays for the youngest members of the family. While adults may need to telework or attend meetings, their children can be doing workshops and learning in a playful way – workcations.
Transformative Travel Experiences	These are experiences that are less about just looking at things and more about experiencing something new that engages and connects visitors, in a meaningful way, to the place, its history and heritage and its people.
Conscious Travel	Travel to more distant destinations, but with prolonged durations of stay, as consumers look to enjoy as much of each place they visit as possible.
Green Travel	Climate change is a problem that is present and growing. Consumers now are much more responsible and aware of the reality they live in on a daily basis.
Rural Experiences	Rural and regional destinations in Australia will continue to benefit from the desire of source markets for city escapes that continue to boost domestic tourism.
New faces and places	2022 will finally be the time to branch out and make new connections with 55% wanting to meet new people while away. A resurgence of vacation romances is also likely, with 41% hoping for one on their next trip.
Travel as Self Care	Travel will become an essential form of self-care. Travellers agree that travel helps their mental and emotional wellbeing more than other forms of self-care.
Community First	Authentic connection with the local community will be a priority. Travellers agree it's important that their trip is beneficial to the local community at their destination.
Just Say Yes	People will be saying YES to travel, making up for lost vacation time with travellers now more open to different types of vacations.
Embracing the Unpredictable	People will use technology to embrace travels continued unpredictability with travellers agreeing that technology will be more important than ever while on vacation.

Table 2. Trends influencing visitor demand

³ See more at <https://www.unwto-tourismacademy.ie.edu/2021/08/tourism-trends-2022>, <https://skift.com/megatrends-2022/>, <https://skift.com/megatrends-2022/>



Growing the North Coast NSW Visitor Economy



Growing the North Coast NSW Visitor Economy

Growing the North Coast NSW Visitor Economy will require strategies to continue to recover from impacts of floods, bushfires and the COVID-19 health pandemic to 2024 followed by growth strategies to stimulate and capitalize on investment made in the visitor economy to 2030.

COVID-19 Impacts

In March 2020 the Commonwealth Government closed its international borders due to the rapid spread of COVID-19 virus. Domestic travel to NSW was constrained by Public Health Orders resulting in numerous lockdowns and restrictions on intrastate and interstate movement.

The disruption to the visitor economy in 2020 was unprecedented. The immediate halt to people movement to prevent the spread of COVID-19 was significant to the industry in Australia and worldwide that experienced: a sudden halt in international visitation; restrictions on domestic mobility; and increased health and safety concerns. Australia's proactive management approach to the pandemic played a key role in protecting domestic demand for tourism despite ongoing disruptions to the visitor economy⁴.

At Y/End Dec 2021 the number of total visitors to the North Coast NSW Destination Network was 9.8 million or 37 per cent below the pre-COVID period (year 2019).

⁴ Tourism Research Australia, Tourism Investment Monitor 2019-20. Australian tourism investment and COVID-19 impacts



Recovery Goals

The focus of the Recovery Phase to 2024 is to assist businesses and the industry to rebuild and return total visitor expenditure to pre-COVID levels.

The following table highlights the Y/E 2019 (pre-COVID) visitor economy achievements versus the Y/End 2021 impacts for North Coast NSW.



Figure 5. 2019 (pre-COVID) visitor economy indicators versus 2021 outcomes⁵

⁵ International visitation data is not statistically reliable for YE December 2021

Main Opportunities & Challenges

The following strengths, weaknesses, opportunities, and threats were identified during the destination management planning process to inform the development of the North Coast NSW DMP.

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Abundant nature-based attractions and experiences, world-class surf beaches, rivers and waterways, and National Parks and State Forests • Large established visiting friends and relatives market • Well known and popular destinations among domestic and international markets • Vibrant and colourful communities with unique personalities and identities • The most popular region for caravan and camping in NSW (23.3% of NSW nights YE Dec 2021) • World-class food and produce experiences • Large markets neighbouring northern boundary of our region and southern tip of region • Diverse fauna and flora • Safe, clean and green • Well-established and successful events and festivals • Lord Howe Island is a significant island visitor experience 	<ul style="list-style-type: none"> • Communication connectivity within the region (mobile blackspots) • Limited trading hours and lack of evening activities hampers overnight visitor market growth for some destinations • Limited family and wet weather experiences and attractions • Destinations/products/experiences not well linked/ packaged • Inadequate gateway and wayfinding signage • Lack of high-quality accommodation options in parts of the region • Overall quality of accommodation • Lack of understanding among businesses involved in the visitor economy • Quality and quantity of workforce • A lack of hinterland products and experiences • Limited rail infrastructure with restricted services

Main Opportunities & Challenges (continued)

OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Strong air access and connections into three major North Coast airports and 2 major (international) airports on the region's north and southern borders • Facilitating growth and investment in nature-based tourism product and experiences to showcase the world-class natural attractions, National and World Heritage Parks and coastlines and waterways • Facilitating growth in luxury and wellness sectors to meet growing customer expectations • Ensuring destinations (LGAS and LTOs) and visitor economy operators are prepared to deliver sustainable experiences as climate change and sustainability are moving up the agenda • Improving infrastructure and facilities of camping and caravanning to service this growing market including establishing RV friendly towns • Capitalising off business events by increasing length of stay through pre and post visits to destination • Facilitating cooperation across destinations to build strong itineraries that engage visitors to come for a short stay or to stay longer and spend more • Increasing yield of prevalent day trip market or turning day trippers into overnight visitation through product and experience development • Supporting private sector investors to activate their product development concepts • Increasing the quantity of product for keep with accessibility issues to capitalise on this growing market sector 	<ul style="list-style-type: none"> • Difficulties in recruiting staff across the visitor economy • Major disruption to some sectors due to the COVID-19 health pandemic – e.g., business events and international students - speed of recovery will vary • Slow approval time for Development Applications • Challenging NSW planning framework that does not favour the visitor economy • Climate change and disaster events impacting businesses and natural assets

Table 3. Strengths, weaknesses, opportunities, and threats of the North Coast NSW region



Vision & Positioning



Vision & Positioning

The following vision was created from findings of the destination management planning process:

Vision

To sustainably grow yield of visitors to North Coast NSW supporting the regional NSW goal of generating \$25 billion by 2030, without compromising the distinct natural beauty and communities that makes the region so unique.

Positioning

North Coast NSW is positioned as a natural escape with a food bowl and plentiful local produce across its vibrant communities. To ensure the region lives up to expectations, it must deliver on health and wellness opportunities, food and local produce, camping and caravanning, arts and heritage and events that promote its naturally spectacular and colourful image.

North Coast NSW is considered to have reasonably mature visitor economies with some destinations carrying strong identities and sub-brands creating visitor economies within their own rights. Across each of these destinations, there are a suite of attractions that combine to create a strong visitor demand, unique identity and proposition.



Figure 6. Presents the positioning of key themes for the North Coast NSW region

Sub-region positioning

A table detailing the positioning of each Local Government Area within our region is included in Appendix 3 (Table 8).

Target Markets & Visitor Profiles



Target Markets & Visitor Profiles

The North Coast NSW destination management planning process identified nature-based and adventure travel and local food as strong experience themes for the region. These experience clusters offer significant opportunities to grow market share of day trip, domestic overnight and international visitors within the State, and attract new visitors to regional NSW. They are supported by a strong camping, caravanning and RV sector, sporting and events travel, and life-style health and well-being travellers.

Based off current visitation and aspirations for the future, the following experience themes have been identified as the most appropriate to target:

- Nature-based (land and water)
- Caravan and camping
- Food, drink and agri-tourism
- Business and leisure event
- Lifestyle, health and well-being
- Cultural tourism
- Heritage and arts

The aim is to attract high value travellers that are focused on immersive and experiential visitors and that respect the local culture and customs.

The following table shows the main North Coast target markets and their associated growth opportunities and key experiences.

TARGET MARKET	GROWTH OPPORTUNITIES	KEY EXPERIENCES
Day Visitors	<ul style="list-style-type: none"> • South East Queensland • Newcastle and Hunter Region • Within the North Coast • Visiting Friends and Relatives 	<ul style="list-style-type: none"> • Nature-based • Food, drink and agritourism • Heritage and arts • Aboriginal culture • Authentic Leisure and business events • Wellness
Domestic Overnight (short breaks)	<ul style="list-style-type: none"> • Greater Sydney • Interstate (Queensland, Victoria) • Intra-region / regional NSW 	
International	<ul style="list-style-type: none"> • Extended stays and touring • Visiting Friends and Relatives 	
Meetings, Incentives, Conference and Exhibitions	<ul style="list-style-type: none"> • Intra-region • Greater Sydney, Newcastle, Melbourne and South East Queensland • Mid-week trade, with links to leisure trips/ extensions 	<ul style="list-style-type: none"> • Incentive offerings related to food and wine, coast, arts, and culture

Table 4. North Coast NSW main target markets





Strategic Objectives



Strategic Objectives

Our strategic objectives are designed to coordinate the region's visitor economy industry to grow the North Coast NSW visitor economy to be fit for the future and align to the State Government's NSW VES 2030 strategic pillars.

VES 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.	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.	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.	Invest in World Class Events An accelerated investment in signature sporting and cultural events 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.	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.
North Coast DMP Strategic Objectives	<ul style="list-style-type: none"> • Support visitor economy businesses to welcome visitors back to 2019 levels by 2024 through targeted support programs. • Provide leadership and advocacy to coordinate & represent the needs of the North Coast NSW economy. 	<ul style="list-style-type: none"> • Build community pride and awareness of the visitor economy's benefits across the region. • Strengthen partnerships between LGAs. • Increase the quantity of North Coast NSW product promoted digitally. 	<ul style="list-style-type: none"> • Build authentic experiences around the region's product strengths. • Support growth of wellness, food & beverage, aboriginal product • Facilitate of growth paid nature-based experiences • Improve quality of commercial accommodation. • Focus on increasing average length of stay and yield. 	<ul style="list-style-type: none"> • Use events to encourage greater visitor dispersal. • Position North Coast NSW as the premier participative sporting event host in regional NSW. • Encourage events that increase visitation across low and shoulder season. 	<ul style="list-style-type: none"> • Support the facilitation and attraction of key infrastructure projects. • Advocate for a streamlined planning process. • Support the industry to increase sustainable operations. • Support the development of accessible tourism product and experiences.

Strategic Objectives (continued)

VES Key Result Areas	<ul style="list-style-type: none"> • Return visitation and expenditure to pre-COVID levels by 2024 • Sustainable and resilient visitor economy businesses • Increased number of registered tourism businesses for the North Coast 	<ul style="list-style-type: none"> • Increased demand to visit North Coast NSW • Greater brand awareness in target markets • Improved response to campaign activity • Increased quantity of NC product that can be transacted digitally 	<ul style="list-style-type: none"> • Increased average length of stay and yield • Growth in visitation and expenditure for regional destinations • Higher levels of repeat visitation • Increased average review scores for North Coast NSW commercial accommodation • Increased proportion of accessible product on offer across NC NSW 	<ul style="list-style-type: none"> • Increased economic impact and visitor attendance at events • Greater promotion of North Coast NSW as an events destination • Increased community and visitor satisfaction 	<ul style="list-style-type: none"> • Increased private and public sector investment in visitor infrastructure • Improved access to visitor destinations and visitor attractions • Increased quantity of operators and destinations using sustainable principle • Increased visitor satisfaction with accommodation and experiences
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Table 5. Strategic objectives for North Coast NSW visitor economy





Action Plan



Action Plan

The following sections identify actions related to the five North Coast NSW DMP strategic objectives.

Actions align with the three phases of the VES 2030:

- Recovery Phase to 2024
- Growth Momentum to 2026
- Growth Accelerate to 2030

1.0 Road to Recovery

Strategic Objectives:

- **Build community pride and awareness of the visitor economy's benefits across the region.**
- **Support visitor economy businesses to welcome visitors back to 2019 levels by 2024 through targeted support programs.**
- **Provide leadership and advocacy to coordinate & represent the needs of the North Coast NSW economy.**
- **Advocate and support workforce growth, capability and resilience to assist the recovery of North Coast NSW visitor economy.**

The Recovery phase to 2024 is short-term and focuses on regaining lost markets. The recovery from COVID-19 will happen at different speeds across market segments, with a focus on domestic markets in the short-term. Economic uncertainty with rising inflation and interest rates also adds another degree of volatility to the market outlook.

An immediate and critical issue across all North Coast LGAs is workforce shortages and lack of skilled staff. Hiring staff with the skills, knowledge and the ability to work effectively in the industry is foundational to meeting ambitious growth targets. In addition, advocating and coordinating action that supports the industry to address this challenge is essential for Recovery. Investment in skills training and capacity building includes advocating for changes to visas and growing new pathways through partnerships with education providers to workforce issues front and centre. Destination North Coast NSW will advocate for change and support the NSW Government and other agencies, such as education partners, to deliver innovative pilots, trials, and platforms to address workforce shortages.

The following actions focus on building industry sustainability, capability and resilience to best support recovery to return visitation and expenditure to pre-COVID levels by 2024.

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
1.1	Work with DNSW to deliver NSW First initiatives to strengthen industry sustainability, capability, and resilience	DNSW	DNC LGAs, LTOs	2022 to 2024
1.2	Work with the Destination Network Project Management Group to create an 'Understanding the Regional Visitor Economy Program' to improve understanding of local government, industry and community about the North Coast NSW visitor economy	DNPMG	DNSW DRNSW LGAs	2022 to 2024
1.3	Work with the Destination Network Project Management Group to advocate and maximise the opportunities and resources available from external grant funding opportunities to support regional visitor economy resilience and growth	DNPMG	DNC DRNSW	2022 to 2030
1.4	Work with the Destination Network Project Management Group and regional stakeholders to advocate for work force solutions around visitor economy staff and skills and housing shortages	DRNSW	DNPMG DNC	2022 to 2030

North Coast NSW Destination Management Plan

1.0 Road to Recovery (continued)

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
1.5	Identify innovative support programs and facilitate collaboration of operators to better engage the night-time economy through tourism activities and attractions, precinct activation, arts, culture, food, beverage and retail	DNC	DNSW DRNSW LGAs, LTOs	2022 to 2024

2.0 Build the Brand**Strategic Objectives:**

- Strengthen partnerships between LGAs.
- Increase the quantity of North Coast NSW product promoted.

Day visitors make up a large part of the North Coast NSW market. Understanding how to engage visitors to spend more whilst visiting will support North Coast NSW's ability to reach its goals. Cross regional and boundary opportunities for itinerary development, packaging and bundling present reasons to stay longer and spend more.

The following actions focus on identifying and communicating marketing cooperation opportunities and initiatives across the North Coast NSW region.

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
2.1	Coordinate LGAs and LTOs to create distinctive experience trails and itineraries related to positioning strengths of the region and link to key source markets	DNC	DNSW LGAs, LTOs NRJO TMG	2022 to 2026
2.2	Work with DNSW to coordinate and communicate opportunities for Feel New NSW content development for North Coast NSW stakeholders	DNC	DNSW LGAs, LTOs NRJO TMG	2022 to 2030

3.0 Showcase our Strengths

Strategic Objectives:

- Build authentic experiences around the region's product strengths.
- Support growth of wellness, food & beverage, aboriginal product.
- Improve quality of commercial accommodation.
- Facilitate of growth paid nature-based experiences.
- Focus on increasing average length of stay and yield.

The region is renowned for its spectacular natural attractions, coastal and hinterland offerings, and unique waterways. By putting nature first and offering innovative and contemporary visitor economy experiences that champion what makes North Coast NSW and its communities unique and creates reasons to visit. These experiences are key drivers of visitation that will increase yield and build a strong visitor economy.

Set apart from other destinations by the connection between coast and hinterland, North Coast NSW can further enhance and develop innovative nature-based products and attractions – especially on water. Strategically coordinated development of experiences that aim to grow visitor economies and attract higher yielding, appropriate, and respectful visitor markets is a priority.

The following actions focus on supporting and developing authentic experiences focused on the sub regional and destination identities and strengths.

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
3.1	Work with DNSW to deliver NSW First programs that encourage and support development and packaging of new and improved existing products and services	DNSW	DNC	2022 to 2030
3.2	Work with the Destination Network Project Management Group, NPWS and FCNSW and private landowners to identify opportunities for hero nature-based product and experience development	DNPMG	DNSW NPWS, FCNSW LGAs, LTOs	2022 to 2030
3.3	Work with the Destination Network Project Management Group to support operators to further develop agritourism and produce product development opportunities to enhance the region's food bowl reputation	DNPMG	DNSW DRNSW LGAs, LTOs	2022 to 2030
3.4	Work with the Destination Network Project Management Group to advocate and support the development of new heritage and First Nations products and experiences including tailored industry development and support to help bring forward new cultural tourism product development opportunities to champion the North Coast's strengths in this space	DNPMG	DNSW NATOC Museums & Galleries NSW LGAs, LTOs LALCs	2022 to 2030
3.5	Work with DNSW to coordinate the delivery of DNSW First programs and resources to support operators to be international ready	DNSW	DNC LGAs, LTOs	2022 to 2030
3.6	Advocate and support development of experiences and infrastructure that will drive visitation by improving access to and activation of the region's waterways as critical visitor assets	DNC	LGAs, LTOs Visitor economy operators	2022 to 2030

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3.0 Showcase our Strengths (continued)

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
3.7	Support new and existing operators to invest and develop products aligned to the region's experiences strengths	DNC	DNSW LGAs, LTOs Visitor economy operators	2022 to 2030
3.8	Build on catalytic infrastructure developments and key attractions to create clusters of well-packaged products and experiences	DNC	DNSW DRNSW LGAs, LTOs Visitor economy operators	2022 to 2024
3.9	Collaborate with LGAs and LTOs and operators to enhance the caravan, camping and RV sector maintaining North Coast NSW market leading position	DNC LGAs, LTOs	DNSW CCIA, CMCA Visitor economy operators	2022 to 2024
3.10	Work with LGAs and LTOs and operators to support family friendly destinations to address the shortage of contemporary and creative family focused product within the region.	DNC LGAs, LTOs	DNSW CCIA, CMCA Visitor economy operators	2022 to 2024
3.11	Continue to support operators to develop accessible and inclusive tourism product and experiences	DNC LGAs, LTOs	DNSW Visitor economy operators Disability agencies	2022 to 2024

4.0 Invest in World Class Events

Strategic Objectives:

- Use events to encourage greater visitor dispersal.
- Position North Coast NSW as the premier participative sporting event host in regional NSW.
- Encourage events that increase visitation across low and shoulder season.

Events that align to the key strengths of the region play a pivotal role in driving visitation year-round, creating reasons to visit, excite, engage new visitors market and drive visitation in shoulder seasons. As a leading performance and sporting destination, North Coast NSW has the opportunity to build on major infrastructure facilities to further leverage its position as the leading regional performance and participative sporting destination.

The following actions focus on supporting event organisers and the region's LGAs to improve event coordination and capacity.

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
4.1	Support LGAs and LTOs attract and deliver events either independently or collaboratively that have the capacity to grow visitation to the region	DNC LGAs, LTOs	DNSW	2022 to 2026
4.2	Identify and assist in securing key new events that have the potential to be amplified to attract increased or new audience segments that align with the experience strengths of the region	DNC LGAs, LTOs	DNSW	2022 to 2030
4.3	Identify existing events with unrealised potential and support event organisers with sustainable growth strategies including effective grant writing resources	DNC LGAs, LTOs	DNSW DRNSW	2022 to 2030
4.4	Support the attraction and continued development of participatory sporting events and advocate for regional hosting of training camps and sporting events including for the 2032 Olympic and Paralympic Games	DNC	DNSW DRNSW LGAs, LTOs	2022 to 2030
4.5	Continue to build momentum in strategically attracting business events to the region	DNC	LGAs, LTOs Visitor economy operators	2022 to 2030
4.6	Continue to promote a 12-month forward calendar of regional and local events to be available on the DNC website to assist event organisers to identify gaps in low seasons and opportunities to encourage regional visitor dispersal and longer stays	DNC	LGAs	2022 to 2030

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5.0 Facilitate Growth

Strategic Objectives:

- Support the facilitation and attraction of key infrastructure projects.
- Advocate for a streamlined planning process.
- Support the industry to increase sustainable operations.
- Support the development of accessible tourism product and experiences

Currently, across the North Coast NSW region only 30% of experiences are paid, the remaining are free. This creates a relatively low yielding baseline for the destination. By working with visitor economy operators, new businesses and other key stakeholders to identify how to monetise key assets, value can be added to the visitor economy. To balance the needs of our host communities, the environment and visitors, sustainable development is paramount.

The following actions focuses on positioning the North Coast NSW as an attractive region for investment and supporting private sector to enhance or develop new products and experiences.

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
5.1	Continue to advocate and support investment in projects that have the potential to grow the region's visitor economy related to the regions' positioning strengths	DNC	DNSW LGAs, LTOs	2022 to 2026
5.2	Champion private investors, LGAs and LTOs to grow the quantity, diversity, and quality of accommodation across the region	DNC	DNSW LGAs, LTOs	2022 to 2030
5.3	Work with DNSW and the Destination Network Project Management to disseminate and communicate relevant visitor economy research to regional stakeholders	DNSW DNPMG	LGAs, LTOs	2022 to 2030
5.4	Work with the Destination Network Project Management Group to advocate to the NSW Government and LGAs to streamline planning requirements to better support the growth of the visitor economy	DNPMG	NSW Govt DNSW DRNSW LGAs, LTOs	2022 to 2030
5.5	Work with the Destination Network Project Management Group to advocate to the Australian and NSW Government to improve digital and transport connectivity	DNPMG	NSW Govt DNSW	2022 to 2030
5.6	Work with the Destination Network Project Management Group to leverage opportunities for international and domestic airway route development and to improve the visitor experience	DNPMG	DNSW	2024 to 2030
5.7	Seek pilot projects (leading to new ways of working) to work with NPWS, Crown Lands, Forestry and the visitor economy to streamline the approach to multi-tenure development applications	DNC NPWS, FCNSW Crown Lands	NSW Govt LGAs, LTOs	2022 to 2030
5.8	Facilitate capacity building programs to enhance operator knowledge and engagement with sustainability principles and advocate for grant programs to embed sustainability measures as part of funding applications	DNC LGAs	DNSW NSW Govt	2024 to 2030



Key Infrastructure Projects



Key Infrastructure Projects

A number of important development projects were identified during the destination management planning process that will help to grow the visitor economy across North Coast NSW.

There is a pipeline of just under \$3.2 billion in visitor economy infrastructure development across the region. Capitalising on these developments will support achievement of the regional NSW target of \$25 billion in expenditure by 2030.

The following table presents a summary of key infrastructure development projects that are underway or have funds committed.

THEME	LOCATION	EXPLANATION	INVESTMENT
Major infrastructure	Coffs Harbour	The Coffs Harbour Pacific Highway Bypass will improve travel times through the North Coast whilst assisting in the revitalization of the Coffs Harbour CBD which will be a catalyst for both public and private investment	\$2.2 billion
	Coffs Harbour	Pacific Bay Resort Studios & Village will comprise of a film production studios, a film school, hotel, museum and gallery and supporting infrastructure and facilities	\$438 million
	Coffs Harbour	Beautification and development of Coffs Harbour's Jetty Foreshores precinct	\$76 million
	Bellingen	Dorrigo, Arc Rainforest Centre development including boardwalk and lookout to offer accessible and exceptional experiences for visitors. In addition, a multi-day walk will be developed and will include walkers' hut precincts, new camping areas, three suspension bridges, and 46 kilometres of walking trails.	\$56 million
	Coffs Harbour	The Big Banana has embarked on a 20-year redevelopment plan that will see the introduction of up to 50 family friendly, nature-based accommodation cabins, an expansion of the Water Park, a new Plantation Coaster, a contemporary and stylish brewery and restaurant and new amusement ride.	\$50 million
	Northern Rivers	Opening in 2023 the Northern Rivers Rail Trail will transform the scenic rail corridor into the region's newest must-do experience for visitors and locals. Delivered in four stages, the trail will total 132km.	\$24 million
	Kempsey	Macleay Valley Recreation Adventure Park - The facility, to be located at Kempsey Regional Airport, will be the only one of its kind in the country and will feature facilities designed for a variety of sports, including a world-class canopy swoop pond, BMX pump track and an indoor rock-climbing gym.	\$11.3 million
	Northern Rivers	Tweed Byron Trail - a new multi-day walk from Mount Jerusalem National Park to Nightcap National Park. 4-day, 36 km, immersive rainforest experience	\$7.3 million

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THEME	LOCATION	EXPLANATION	INVESTMENT
Nature	Lord Howe Island	Protection of plant and animal species to maintain the World Heritage listing of Lord Howe Island.	\$32.9 million
	Ballina	The Lennox Park village revitalization project will see staged development works in the village that will include beautification works, improved accessibility, new playground and cycling facilities, increased levels of tree coverage and other improvements aimed at retaining its low-key, social and coastal village feel.	\$9.8 million
	Clarence Valley	Grafton Waterfront redevelopment - the Grafton Waterfront is being developed into a riverside precinct complete with footpaths along the water's edge, beach entries, a new jetty, and better access down the levee.	\$6.4 million
	Port Macquarie-Hastings	Upgrade Port Macquarie-Hastings Koala Hospital and expansion of the existing site to include additional tourist attracting, educational and conservation infrastructure.	\$5 million
	Nambucca	Nambucca Valley Council will be replacing the existing, failing seawall on Nambucca Main Beach with an upgraded seawall. The works will provide a new 180m long seawall, resealing and reconfiguration of the carpark and construction of a pedestrian footpath adjoining the top of the seawall, a viewing platform and a new beach shower facility.	\$3.6 million
	Port Macquarie-Hastings	Guulabaa – meaning Place of Koala is a partner-project in Cowarra State Forest that incorporates the Koala Conservation Australia (Wild Breeding Centre), Birpai Aboriginal Land Council (operator of a not for profit café and art gallery) and WildNets treetop Adventure Park.	\$3 million
	Port Macquarie-Hastings	The Beach to Beach Shared Pathway is an 11km continuous path from the North Haven breakwall to Pilot Beach in Camden Head. The shared pathway will be accessible for all abilities and links the communities of North Haven, Laurieton and Dunbogan.	\$2.9 million
	Kyogle	Mallanganee Observatory will showcase the astronomical, geological and natural attributes of the Richmond Ranges to Wollumbin (Mount Warning), the caldera and the east coast. A platform for real and augmented reality experiences will be showcased 24/7 in the open-air Observatory 365 days a year.	\$2.1 million
	Port Macquarie - Hastings	Upgrade Coastal Walk in Port Macquarie, the sections between the CBD to Tacking Point Lighthouse including widening of walkways, installation of wayfinding and interpretive signage and other public amenities.	\$765,000
	Bellingen	Dangar Falls Infrastructure Development including the installation of two new accessible viewing platforms, signage, and an interpretive shelter.	\$655,000
	Bellingen	Upgrade of Urunga Boardwalk including a renewal of the boardwalk itself, pedestrian pathways between board walk, beach, parklands, and entrance to reserve. Installation of new accessible amenities and play equipment.	\$4.5 million

Key Infrastructure Projects (continued)

THEME	LOCATION	EXPLANATION	INVESTMENT
Arts & Culture	Coffs Harbour	'Yarilla Place' The Coffs Harbour Cultural and Civic Space named 'Yarilla Place' will combine arts, people, technology and culture to create a vibrant community hub and tourist destination.	\$76.5 million
	MidCoast	Foster Civic Precinct Development – includes new public library, visitor information centre, indoor and outdoor community space (200 people capacity), MidCoast Council Customer Service Centre, 180 carparks, seniors living apartments, retail shops etc.	\$18 million
	Clarence Valley	Clarence Valley Cultural and Community Precinct - with a tiered 270-seat auditorium will replace the Maclean Civic Hall in a proposed project to enhance the Maclean CBD and connection to the Clarence River.	\$13.5 million
	MidCoast	Manning Entertainment Centre Redevelopment – adding a multi-purpose space with state-of-the-art facilities featuring retractable seating for up to 150 patrons.	\$2.5 million
	Lismore	The refurbished Lismore City Hall will be re-branded as the Northern Rivers Performing Arts Centre.	\$1.1 million
	Northern Rivers	The Northern Rivers Conservatorium will undergo enhanced accessibility access and complete refurbishment.	\$636,000
Accommodation	Byron Bay	The Barbotine will offer forty-one 2-, 3- and 4-bedroom Hotel Apartments, in addition to a level of dining, retail and wellness venues in the heart of Byron Bay.	\$130 million
	Clarence Valley	Redevelopment of the Calypso Yamba Holiday Park including demolition, relocation and reconstruction, to facilitate better road networks and water/sewage infrastructure.	\$6.7 million
	Coffs Harbour	Bularri Muurlay Nyannggan Aboriginal Corporation will create an eco-resort at Sealy lookout in Coffs Harbour. In addition, the project will see the expansion of then existing café and the development of an amphitheater for performances.	\$5.4 million
	Byron Bay	Byron Bay Council will develop a state of the art skate park and recreation precinct converting an underutilized area into a vibrant public space that recognizes the important cultural values of the site.	\$2.1 million
	Kempsey	Revitalisation Stuarts Point Foreshore including construction of new community centre, library, carparks, Indigenous cultural centre as well as new accessible pedestrian access between town centre and foreshore. Construction and upgrade of boat ramp, new wharf, playgrounds, public amenities, and café.	\$1.7 million
	Coffs Harbour	Coffs Harbour Yacht Club Accessibility Upgrade to enable access to all areas of the facility as well as promotion for the Jetty Foreshore Precinct as an inclusive tourism destination.	\$450,000

Table 6. Priority projects by Local Government Area





Stakeholder Roles in Growing the Regional NSW Visitor Economy



Stakeholder Roles in Growing the Regional NSW Visitor Economy

The North Coast NSW Destination Management Plan will guide the region's priorities to 2030 and will require cooperative support from other visitor economy stakeholders across local, regional and state/territory levels to successfully implement the Plans' initiatives.

Stakeholder engagement confirmed a commitment from local governments, tourism businesses, Destination North Coast NSW and Destination NSW to develop a solid working relationship to achieve the outcomes prioritised in this Plan.

The following outlines the roles of these stakeholders in implementing this plan to 2030.

Destination North Coast NSW

Destination North Coast NSW is one of seven Destination Networks in regional NSW and is an important conduit between the NSW Government, the local governments and tourism businesses across the North Coast region. It continues to play an important role in delivering regional funding and industry development programs, and in identifying infrastructure needs and investment opportunities to grow the regional visitor economy.

The NSW Destination Networks are considered 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 programs⁶.

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

The Destination Networks are predominantly destination managers and are considered the 'shopfront' for Destination NSW in regional NSW and work closely with local government, tourism organisations and operators.

Their objective is to facilitate visitor economy growth at the local level, through representing and coordinating the region's visitor economy industry.

Their core responsibilities include:

- Industry Engagement and Industry Development
- Product Development
- Training and Education
- Preliminary Review of Local DNSW Grant Applications to ensure quality/compliance with guidelines
- Collaboration with DNSW on cooperative marketing and industry activities that are aligned to Brand NSW

Specifically, Destination Networks:

- **Develop and implement the region's Destination Management Plan and Business Plan**, in alignment with the NSW Visitor Economy Strategy 2030, and ensure alignment with local visitor economy and related plans
- **Work with Local Government and industry** on product development, including investment attraction
- **Work in collaboration with DNSW** led marketing and communications activity for their 'hero' destinations, experiences, events and festivals and regional campaigns
- **Explore Industry Development initiatives** (i.e. identify opportunities for growth) e.g. Conferencing, Field Study Tours, local industry education and training needs especially for small to medium sized visitor economy operators
- **Assist local industry to prepare DNSW grant applications**⁷.

The Destination Networks are funded by Destination NSW with an independent skills-based Board providing strategic leadership and direction.

⁶ NSW Visitor Economy Strategy 2030

⁷ Destination Networks: Driving Growth of the Visitor Economy in Regional NSW <https://www.destinationnsw.com.au/wp-content/uploads/2016/07/Destination-Networks-29-June-2017.pdf>

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Destination NSW

As the lead NSW Government agency for the visitor economy, Destination NSW will coordinate and amplify delivery of the programs and initiatives of the NSW Visitor Economy Strategy 2030 across all levels of Government.

A whole-of-government approach has been 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 are also proposed to inform the development of new NSW Government initiatives and programs for the visitor economy. 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.

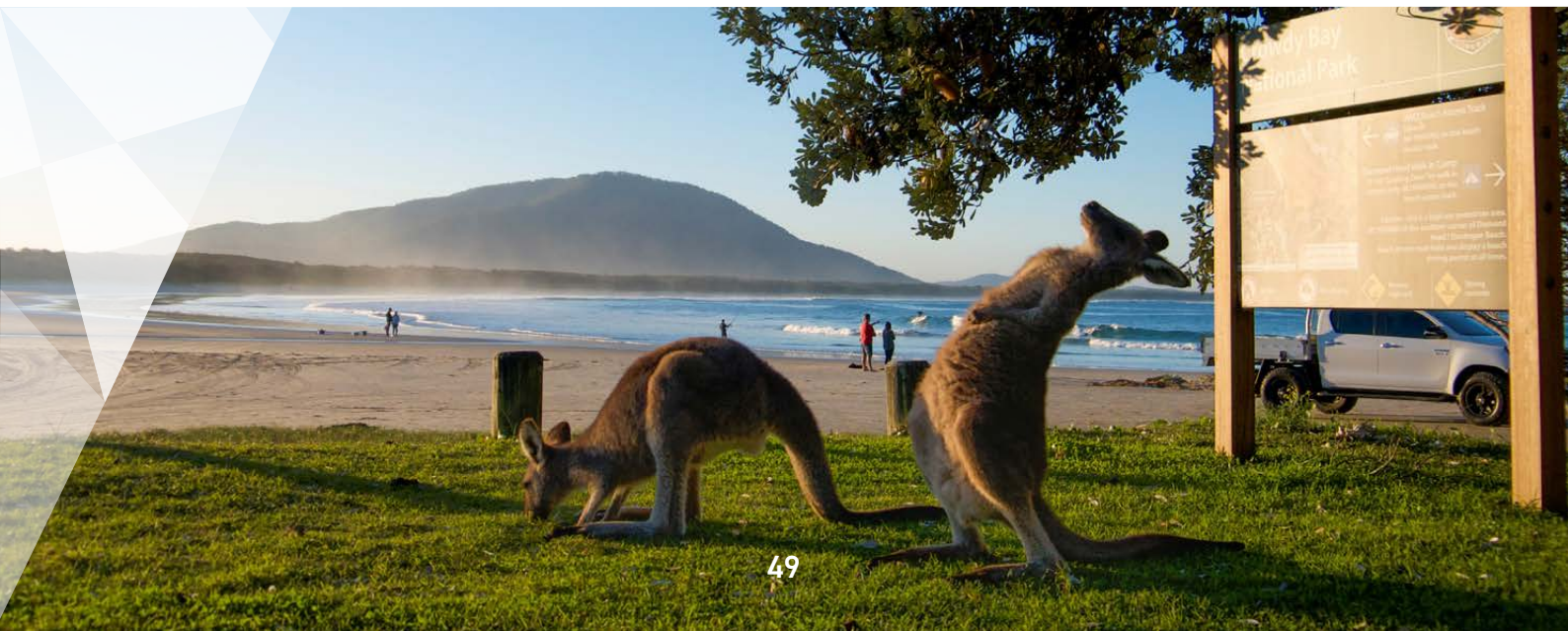
Destination NSW has also recently been restructured. DNSW support the Destination Networks to deliver the strategic directions of the DMPs and grow the visitor economy.

Department of Regional NSW

The Department of Regional NSW is the NSW Government's central agency for regional issues, building resilient regional economies and communities, strengthening primary industries, managing the use of our valuable regional land, overseeing the state's mineral and mining resources and ensuring that government investment into regional NSW is fair and delivers positive outcomes for local communities and businesses⁸.

The NSW Government's 'Regional Development Framework' and '20-Year Economic Vision for Regional NSW – Refresh' set out the Government's priorities and plans to achieve long-term social and economic success for regional communities across the state. In addition, Regional Economic Development Strategies provide a clear economic development strategy for the regions and guide government investment in economic development initiatives in regional NSW.

⁸ www.regional.nsw.gov.au



Local Government

Local Government plays a pivotal role in visitor economy activity, with councils actively involved in promoting tourism, providing infrastructure and services to support tourism, and managing the impacts of tourism. The Australian Regional Tourism and Economic Development Australia benchmarking survey of local governments (2020) shows that each council spends on average \$761,000 on the visitor economy annually. Whether it's through the provision of infrastructure, cultural facilities, events, visitor services or public spaces, councils support the economic development of their local communities via either direct financial or in-kind support to tourism. The role of local government in tourism is also recognised in the State Government's NSW Visitor Economy Strategy 2030, which contains a commitment for Destination NSW to work closely with councils and a principle of collaboration between the industry and government, including councils⁹.

Other Key Support Partners

Other important local, regional and NSW government and industry stakeholders that have an important role in supporting the DNs to implement strategies and actions of their associated with this Plan to 2030 include:

- Local tourism organisations and Chambers of Commerce
- Region Joint Organisations
- NSW Government Departments and Agencies (represented by the DNSW Visitor Economy Seniors Officers Group)
- NSW Tourism Industry Associations

Visitor Economy Businesses

As a sector of the economy, visitor expenditure and other economic benefits are primarily delivered by businesses doing business; they are the lifeblood of the visitor economy. Continued investment in developing and delivering high quality visitor experiences will underpin successful implementation of this Destination Management Plan.

Review

Monitoring of the implementation of this Plan's strategies and actions is important to ensure its vision and objectives are achieved and to provide new information that can be used to inform planning and decision-making for the North Coast NSW visitor economy to 2030. A review of this plan will be undertaken in 2024 and 2026.

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 for regional NSW visitor economies and have been designed to help guide prioritisation and decision-making. See Appendix 3 for the criteria used by the NSW Government to analyse the cost benefit of infrastructure development proposals. See Appendix 2.

⁹ <https://lgnsw.org.au/Public/Public/Policy/Tourism.aspx>







Appendices

Appendix 1: NSW Government strategies relevant to the regional visitor economy

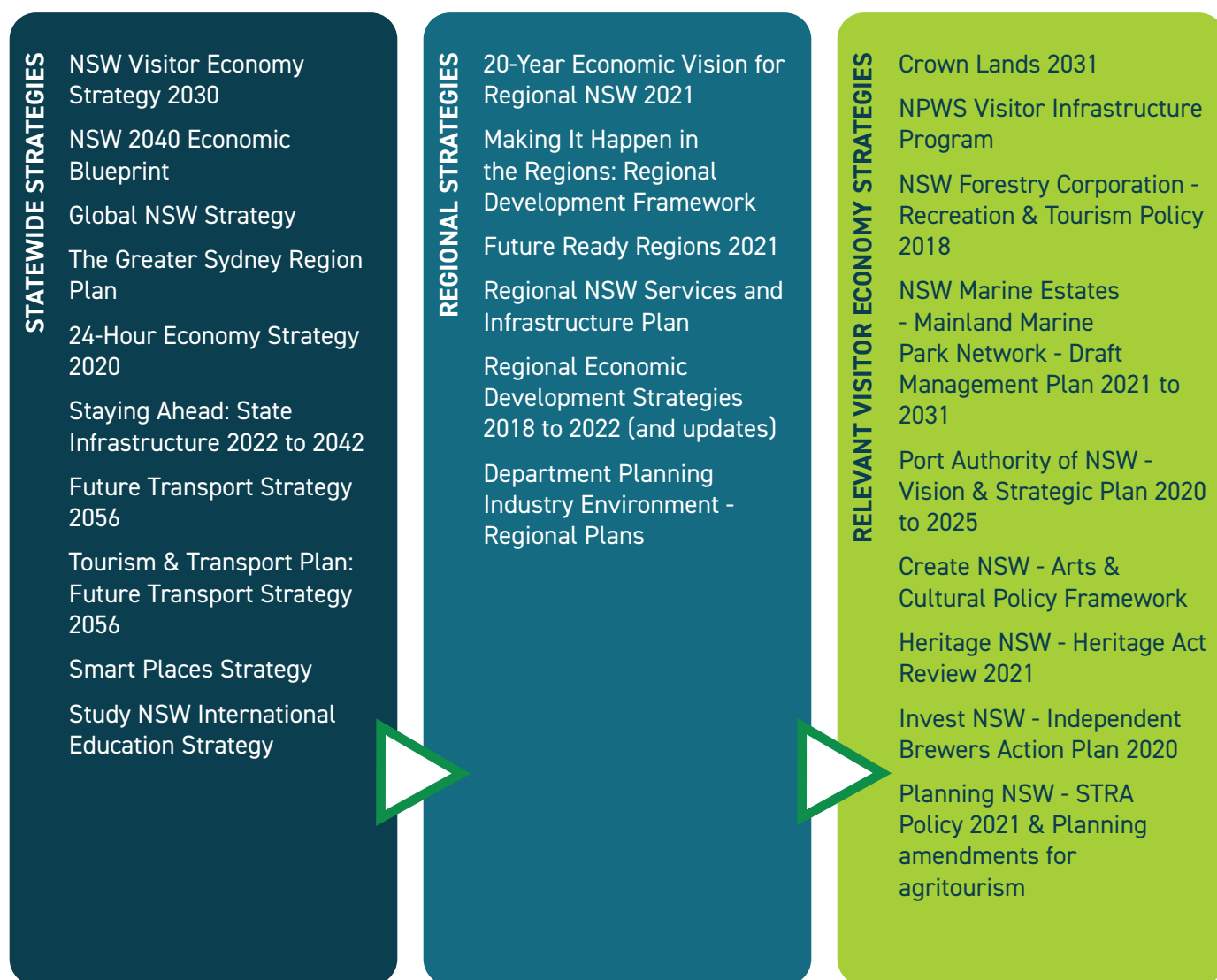


Figure 7. Strategies relevant to the regional visitor economy

Appendix 2: NSW Government Cost Benefit Analysis

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.

ASSESSMENT CRITERIA (continued)

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.

Table 7. Assessment criteria for NSW Government Cost Benefit Analysis

North Coast NSW Destination Management Plan

Appendix 3: Local Government Area Positioning

The following table describes the North Coast NSW sub-regions and destinations, their related vision, positioning and experience development themes as identified in current destination management plans and brand positioning strategies.

LGA	Description	Positioning statement	Key experiences
Mid Coast - Destination Barrington Coast	As crystal clear water trickles from the rugged peaks, it breathes life into our land; for this is the Barrington Coast – A place where the leaves touch the waters, from the mountains to the sea. We invite you to pursue a path less trodden, to wander wild highlands into ancient Gondwana rainforest and World Heritage-listed Barrington Ranges - where nature abounds at every turn. Watch peaceful creeks pour over towering waterfalls, forming fertile valleys rich in agriculture and abundant with fresh produce, rural charm and welcoming smiles. Follow meandering rivers that ebb through bustling towns and delightful retreats, and bathe in the beauty of our untouched lakes and estuaries. Complete your journey at the place where the path ends, swept away by the ocean waves that shape our breath-taking beaches. For this is the Barrington Coast – The place where the leaves touch the waters, from the mountains to the sea.	Blaze your own trail and revel in new possibilities as energising as our nature is breath-taking. If you seek the road less travelled, you'll find us. We stand on mountain peaks, wander through subtropical rainforests, roam remote beaches and take delight in the wonder of our region. This is your place, for the Barrington Coast belongs to the curious.	<ul style="list-style-type: none"> » Gondwana rainforests & world-heritage listed Barrington Ranges » Aussie Ark – native wildlife conservation sanctuary (eg. Tassie Devils) » Myall Lakes National Park - one of most visited in NSW » Copeland Tops State Conservation Area – historic Gold Mine tours » Ellenborough Falls - longest single drop waterfall in Southern Hemisphere » Mountain Biking - Kiwarra State Forest Mountain Bike Park, The Steps Barrington & Barrington Bike Park » Unique triple lake system found nowhere else in Australia
Port Macquarie - Hastings	Located mid-way between Sydney and Byron Bay, the area is surrounded by waterways, beaches and stunning hinterland. The main centre of Port Macquarie and on the Hastings River is known for its beaches, wildlife, heritage and its flourishing food and wine scene.	More than just a place to holiday, Port Macquarie is a lifestyle, a place that you can live your best life: your time; your way.	<ul style="list-style-type: none"> » Nature attractions including the Koala Hospital, Billabong Zoo and Sea Acres Rainforest Centre » Major events » Waterways » Hatted restaurants and beautiful eateries » 17 beaches and lush hinterland » City meets beach » A unique winery trail and farm tour trail » Popular attractions such as Bago Maze & Vineyard, and Ricardoes Tomatoes & Strawberries

Appendix 3: Local Government Area Positioning (continued)

LGA	Description	Positioning statement	Key experiences
Kempsey – Macleay Valley Coast	The Macleay Valley is nestled between the coastal towns of Port Macquarie and Coffs Harbour and is known for world-famous waves, the beautiful Macleay River and Bushwalks and pristine nature-based experiences, world class surfing and diving.	<p>The vision for a vibrant visitor economy in the Macleay Valley Coast is to establish itself as a premier regional visitor destination through the development of iconic natural visitor attractions, driving growth in high-yield and environmentally sustainable tourism</p> <p>Macleay Valley Coast is to establish itself as a premier regional visitor destination through the development of iconic natural visitor attractions, driving growth in high-yield and environmentally sustainable tourism</p>	<ul style="list-style-type: none"> » Slim Dusty Centre. » Dunghutti-Ngaku Aboriginal Art Gallery » Kalateenee Mountain Bike Trails » Grassy Head, South-West Rocks, Hat Head and Crescent Head – some of the best surfing beaches on the east coast. » Crescent Head National Surfing Reserve » Historic Trial Bay Gaol » Fish Rock Dive and underwater cave » Smoky Cape Lighthouse » Festivals and events including Slim Dusty Festival and Sculptures in the Goal
Nambucca Valley	Located between Port Macquarie and Coffs harbour, the Nambucca Valley is a popular holiday destination, particularly for those escaping the hustle and bustle of larger destinations. Haven for beach goers, river users and nature lovers.	<p>The undiscovered coast. Perfectly positioned between Sydney and Brisbane, the Nambucca Valley boasts unspoilt natural beauty and a warm, subtropical climate. A visit to the Nambucca Valley will take you to miles of unspoilt beaches, seaside towns, heritage and rural villages, through productive farmland and rainforests to the foothills of the Great Dividing Range.</p>	<ul style="list-style-type: none"> » Over 20 kilometres of expansive coastline » Nambucca Heads – iconic V Wall, outdoor breakwall art gallery » Historic Bowraville – ‘The Verandah Post Town’, 2 quality museums » Macksville – historic Macksville Bridge » Scotts Head – surf beaches and Unkya Aboriginal Cultural Tours » Gaagal Wanggaan (South Beach) National Park » Yarriabini National Park » Dunggir National Park » Taylors Arm – The Pub with No Beer » Farm life around Eungai, Missabotti and historic Bowraville, including the Eungai Buffalo Farm » High quality museums

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LGA	Description	Positioning statement	Key experiences
Bellingen Shire	Located between Coffs Harbour and Nambucca Shires, the region is renowned for its ecological diversity from beautiful beaches to world heritage-listed national parks.	The Bellingen Shire, with its three distinct areas, is rich in natural beauty, architectural heritage, rural charm, bohemian vibe and a thriving cafe society that is proud of its Gumbaynggirr culture and connections and strong sustainability values.	<ul style="list-style-type: none"> » Dangar Falls – get up close to the waterfalls on the viewing platform that overhangs the cliff or take a dip in the chilly waters and swim under the waterfalls » The Urunga Boardwalk stretching 1.2kms from the lagoon to the beach » The Urunga Wetlands – a 600mtr fully accessible walkway that boasts a myriad of strange and interesting birdlife » Arts and cultural experiences that includes world and cultural music events, fine music, Readers and Writers festivals, arts and sculpture events, film festivals and more » Cafes and restaurants that rival that of Sydney and Melbourne with local produce the hero of every meal. » An eclectic array of shops, artisans stores and galleries. » Heritage and cultural experiences including Indigenous culture Urunga – where the rivers meet, art, music and culture and Dorriggo » Dorriggo World Heritage National Park including Dorriggo Rainforest Centre and the ancient Gondwana Rainforests » Linked by Waterfall way – the most scenic drive in Australia
Coffs Harbour	A key regional city along the Pacific Highway between Newcastle and the Gold Coast, known for its beaches, being home to NSW's oldest marine park, the Solitary Islands Marine Park, and many family attractions including the Big Banana. Coffs Harbour attracts family holiday makers and adventure travellers alike and is the only place in NSW where the Great Dividing Range meets the Pacific Ocean.	Place of Plenty. Surrounded by National Parks, state forests and the solitary islands marine park, the Coffs Coast offers uncrowded beaches, natural hinterlands, fascinating history, and connection to the ancient Gumbaynggirr culture. A nature lovers' paradise complemented by abundant activities and attractions, excellent shopping, fantastic accommodation and award winning food and drink.	<ul style="list-style-type: none"> » Adventure hub – kayaking, surfing, mountain biking and bushwalking » Ancient rainforest » Local Gumbaynggirr culture and stories » Solitary Island Marine Park » Family activities including the Big Banana Fun Park » World class sporting facilities » Conferencing and events facilities » NSW's First ECO Certified Tourism Destination

Appendix 3: Local Government Area Positioning (continued)

LGA	Description	Positioning statement	Key experiences
Clarence Valley	The Clarence Valley is located on the Clarence River, the largest river on the east coast of Australia with an exciting hinterland and stunning beaches to explore. Major towns include Grafton, Maclean and Yamba, surrounded by 60 quaint villages. The Clarence Valley is the largest local government area in the North Coast of NSW. It has a population of approximately 53,000.	From the Bundjalung, Gumbaynggirr and Yaegl Traditional Owners, to the generations of families on the land and by the ocean. The Clarence Valley can be a chapter in the story of your life, or it can be the whole book. Nature at its most humbling and inspiring.	<ul style="list-style-type: none"> » Historic town of Grafton » Festivals and events (Jacaranda festival) » Heritage trail » River access – longest white-water trail, kayaking, houseboats, sailing » UNESCO-listed Gondwana Rainforest in Iluka » 100km of coastline including world renowned surfing break Angourie » 5,000km of National and State Park » Some of the best fishing in NSW
Richmond Valley	Casino, the main town in the region, is located on the banks of the beautiful Richmond River and is fast becoming beef capital of Australia. The Richmond Valley has pristine nature, national parks, walking and cycling trails, rivers and waterways that wind through villages to the pretty coastal town of Evans Head.	Explore next door - a sanctuary waiting for you to discover. Explore the Valley and unearth our natural gems, from lush World Heritage rainforests, waterways, rivers and rugged mountain landscapes to crystal blue ocean waters and pristine, white sands.	<ul style="list-style-type: none"> » Beef week festival » Unspoilt beaches and coastal walks » Rail Trail access » Rural landscapes, national parks and agri-tourism » Whale watching » Fishing Classic and deep sea fishing » Kayaking and paddling » Mountain bike and cycling trails » WW2 history, military and Heritage Aviation museums » New Italy » Vibrant artistic, dining and entertainment experiences » Historic pubs in small villages
Kyogle	Gateway to the rainforest, Kyogle makes a great base for exploring World Heritage-listed wilderness. Located just two-hours from Brisbane and the Gold Coast, Kyogle is surrounded by rich farmlands and ancient Gondwana Rainforest.	The Gateway to the Rainforest. This charming hinterland town began life as a timber camp in the 1830s and is a great base for exploring nearby UNESCO World Heritage rainforest and the tiny villages built around them.	<ul style="list-style-type: none"> » Border lookout walk » Camping and fishing » Art deco town » Toonumbar World Heritage Listed National Park

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LGA	Description	Positioning statement	Key experiences
Lismore	Nestled between the rainforest and the sea, Lismore is the regional city and heart of the Northern Rivers region, home to several magnificent World Heritage National Parks with walking trails, waterfalls and breathtaking views.	Advancing Lismore City as the heart of a vibrant sustainable region.	<ul style="list-style-type: none"> » UNESCO World Heritage rainforest » Back Alley Gallery » Koala Care Centre » Northern Rivers Performing Arts » Cultural, creative and community events and festivals
Ballina Coast and Hinterland	A diverse holiday destination with water-based activities on the river, surf beaches and accessible coastal paths. The fertile valleys that make up the surrounding hinterland provides the opportunity to experience local produce and unique townships.	The Ballina Coast and Hinterland is home to 32km of pristine coastline, lush subtropical rainforests, diverse wildlife, quaint hinterland towns, stunning waterfalls and world class surf breaks. With a laid back coastal lifestyle, unique cultural heritage and plenty of opportunities to experience fresh local produce the region is the perfect place to play, stay, eat and explore.	<ul style="list-style-type: none"> » 32km of pristine coastline » 25km of shared paths and cycleways; including the Aboriginal Cultural Ways which follows the stunning coastline between Angels Beach in East Ballina to Sharpes Beach » Opportunities to spot coastal marine life including whales, dolphins and turtles » River cruises » Unique Hinterland villages » Fresh local produce and farmgate stalls » Lake Ainsworth – Fresh water tea tree lake » Northern Rivers Community Gallery » Arts and Cultural experiences » Killen Falls » World class surf breaks » Naval and Maritime Museum » Crawford House Museum » Festivals and Events » Access to National Parks
Byron Shire	Its stunning natural attractions and laid-back beach lifestyle, attracts both domestic and international visitors alike. The Cape Byron headland and iconic lighthouse marks Australia's most easterly mainland point. Byron Bay has many beautiful surf beaches and a bustling shopping strip and café culture. Bangalow, Mullumbimby and Brunswick Heads are also popular village destinations.		<ul style="list-style-type: none"> » World famous beaches » Cape Byron National Park and Lighthouse » International standard accommodation » Music events and festivals » Health, wellness and alternative lifestyles » Indigenous culture

Appendix 3: Local Government Area Positioning (continued)

LGA	Description	Positioning statement	Key experiences
The Tweed	With beaches, estuaries, the beautiful Tweed River, rainforest and majestic Mount Wollumbin/ Mount Warning, the Tweed region forms part of an ancient caldera. Given its proximity to southeast Queensland, the Tweed is both a popular holiday and day-trip destination. Kingscliff is an important destination on the Tweed Coast that stretches through to Pottsville.	Sparkling seaside villages, riverside towns and hinterland hamlets create endless holiday experiences.	<ul style="list-style-type: none"> » River activities » Galleries, makers and music - Tweed Regional Gallery and Margaret Olley Art Centre, M Arts Precinct » National Parks - Wollumbin Mount Warning and Gondwana Rainforests » Hinterland villages » Food and wine experiences » Hatted restaurants » Wellness » Cook Island Aquatic Reserve
Lord Howe Island	Located 600km east of Port Macquarie, UNESCO World Heritage-listed Lord Howe Island is characterised by sandy beaches, subtropical forests, crystal clear waters revealing pristine coral reefs and the towering Mt Gower.	Just paradise. Immerse in Lord Howe's spectacular World Heritage-listed natural surroundings. A pristine, stress-free natural environment, which is safe, unpolluted, unrushed and like no other destinations. Experience some of the world's best day hikes, snorkel the world's southernmost coral reef, hand-feed the fish at Ned's Beach and wander along white-sanded beaches.	<ul style="list-style-type: none"> » Nature – land and sea » Bird watching » Hiking » Snorkelling/diving » Wellbeing » UNESCO World Heritage Status for island's beauty and biodiversity

Table 8. Positioning of each Local Government Area within the North Coast NSW region





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