



Coffs Coast Tourism Strategic Plan 2020

3 May 2016

Prepared for Coffs Harbour City Council

contents

3	Disclaimer	26	Destination development
4	Acknowledgements		4.0 Visitor Transport Services
5	Acronyms		5.0 Tourism Infrastructure
6	Executive Summary		6.0 Tourism Product and Experience Development
8	Key Directions	37	Destination marketing
9	Why does the Coffs Coast need a tourism strategy?		7.0 Events and Festivals
11	Coffs Coast Destination Experiences		8.0 Brand and Positioning
13	Strategic Planning Approach		9.0 Visitor Markets
15	Tourism Vision and Values		10.0 Strategic and Tactical Marketing
18	Destination management		11.0 Visitor Information Services
	1.0 Tourism Governance and Leadership	58	Strategic Priorities
	2.0 Tourism Funding	59	Implementation and Evaluation Processes
	3.0 Risk Management	61	Reference List
		62	Appendices
			Appendix 1: Analysis and Engagement Processes
			Appendix 2: List of CHCC Councillors that attended the Council consultation meeting
			Appendix 3: List of interviews with stakeholder organisations
			Appendix 4: List of stakeholder organisations represented at destination workshops

disclaimer

The information contained in this report is intended only to inform and should not be relied upon for future investment or other decisions. It is expected that any specific recommendations should be analysed, and appropriate due diligence undertaken prior to making any investment decisions.

In the course of our preparation of the Coffs Coast Tourism Strategic Plan 2020, recommendations have been made on the basis of assumptions, methodology and information provided by many sources. The authors accept no responsibility or liability for any errors, omissions or resultant consequences including any loss or damage arising from reliance on the information contained in this report.

© COPYRIGHT, COFFS HARBOUR CITY COUNCIL

acknowledgements

This Plan has been prepared by:

Dr Meredith Wray, Wray Sustainable Tourism Research & Planning and Sarah Lebski, Sarah Lebski & Associates in collaboration with Bill Fox, Bill Fox and Associates.

The consultants wish to thank the Coffs Harbour City Council and staff, and members of the Destination Coffs Coast Committee for their assistance in the development of the Strategic Tourism Plan.

The consultants would also like to acknowledge all those who participated in the consultation process. Thank you for your interest and your invaluable contributions to this project. (See Appendices for lists of contributors).



Destination Coffs Coast Committee and consultants (September 2015 meeting)

Destination Coffs Coast Tourism Committee members

Coffs Harbour LGA

Dene Zahner – General Manager, Novotel Coffs Harbour Pacific Bay Resort
Paige Sinclair – Chief Executive Officer, Dolphin Marine Magic
Michael Hall – Principal Sunburst Real Estate, Korora
Bob Palmer – Councillor, Coffs Harbour City Council
David Laarhoven – A1 Coffs Coast Tours

Coffs Harbour City Council staff (ex-officio)

Chris Chapman – Director, Sustainable Communities
Nikki Greenwood – Group Leader, City Prosperity
Stephen Saunders – Section Leader, Industry Destination and Development

Bellingen LGA

Yvonne Wynen – Accommodation Manager, Lilypad Luxury Cabins
Brad Shiels – Executive Manager, Operations, NSW Crowns Coast Holiday Parks Trust/Jenny Sewell, North Coast Holiday Parks
Steve Klipin – Councillor, Bellingen Shire Council

Bellingen Shire Council (ex-officio)

Michael Grieve – Manager, Economic and Business Development

acronyms

ARTN	Australian Regional Tourism Network	IDD	Industry and Destination Development
BRWG	Brand Review Working Group	INSW	Infrastructure NSW
BSC	Bellingen Shire Council	IPART	Independent Pricing and Regulatory Tribunal
CHCC	Coffs Harbour City Council	NCDN	North Coast Destination Network
CHCoC	Coffs Harbour Chamber of Commerce	NPWS	National Parks and Wildlife Service
CHRA	Coffs Harbour Regional Airport	NSC	Nambucca Shire Council
CHIM	Coffs Harbour International Marina	NSRF	National Stronger Regions Fund
CHVIC	Coffs Harbour Visitor Information Centre	RDA	Regional Development Australia
CoC	Chamber of Commerce	RMS	Roads and Marine Services
DCCC	Destination Coffs Coast Committee	ROI	Return on Investment
DLPI	Department of Lands and Primary Industries (NSW Government)	RVEF	Regional Visitor Economy Fund
DNSW	Destination New South Wales	SIMPA	Solitary Islands Marine Park Authority
DPE	Department of Planning and Environment (NSW Government)	SME	Stadium and Major Events
DPC	Department of Premier and Cabinet (NSW Government)	TCC	Tourism Coffs Coast
DT	Department of Transport (NSW Government)	VFR	Visiting Friends and Relatives
FCNSW	Forestry Corporation of NSW	VIC	Visitor Information Centre
GMI	Grampians Marketing Inc		

executive summary

Tourism is one of the most important contributors to the growth and character of the Coffs Coast region comprising Coffs Harbour and Bellingen LGAs. The annual economic contribution of tourism to the region is valued at approximately \$490 million. It is estimated that the Coffs Harbour LGA receives 1.6 million visitors annually and the Bellingen LGA receives 223,000. Most are domestic overnight visitors and daytrip visitors, with international visitors accounting for around 5%.

Given the significance of tourism to the Coffs Coast economy and the competitiveness of tourism in regional Australia, it is important that tourism is not only maintained and strengthened as an economic driver, but also planned and managed in a sustainable way to enhance and conserve the natural environment, protect the wellbeing of residents and attract visitors with shared values.

AIM

The aim of this Plan is to strengthen the Coffs Coast visitor economy by increasing overnight visitor stays, length of stay, expenditure, and dispersal across the region. This will be achieved by positioning the Coffs Coast as a leading regional destination for leisure and nature-based tourism, events and cultural experiences.

From a destination management perspective, Coffs Harbour City Council (CHCC) provides an important leadership and coordination role for tourism through its City Prosperity Group, including Industry and Development that is responsible for the coordination of destination marketing activities for the Coffs Coast and visitor information services for Coffs Harbour. For 2015, CHCC allocated over \$1M for the delivery of these services. In addition, the Stadium and Major Events Section plays an important role in positioning Coffs Harbour as a major regional event tourism destination. A Memorandum of Understanding was established with Bellingen Shire Council (BSC) and CHCC in 2008, with BSC contributing \$30,000 annually for marketing activities.

The need to develop the Coffs Coast Tourism Strategic Plan 2020 was identified as an important priority by CHCC and BSC following the establishment of a new tourism CHCC \$355 committee – Destination Coffs Coast Committee (DCCC) in July 2015. The Committee was formed as a new cooperative and strategic approach to the management of tourism for towns and villages across the Coffs Coast following the folding of the Tourism Coffs Coast industry association. DCCC comprises CHCC, BSC and industry representatives from both LGAs. Its role is to provide strategic advice to CHCC and BSC in the implementation of the strategies and actions of this Plan.

This Coffs Coast Strategic Tourism Plan 2020 has been developed in cooperation with the DCCC and is underpinned by a comprehensive situational analysis and stakeholder engagement process. One vision was created through consultation with stakeholders to guide the strategic direction of tourism across the Coffs Coast over the next five years:

VISION

To support the sustainable growth of tourism through the inclusive partnership of government and local businesses, that positions the Coffs Coast as a regional destination for events and quality tourism experiences, which are connected to our natural and coastal environments, our vibrant and culturally distinctive hinterland communities and our relaxed way of life.

From this vision, eleven key directions have been identified to guide the management, development and marketing of tourism for the Coffs Coast and its towns and villages over the next five years (see page 8).

The Plan then identifies strategies and associated actions for each key direction. Important strategies include:

- The establishment of working groups as part of the DCC to assist with: industry development and engagement, accommodation development and refurbishment strategies, a Coffs Coast brand review process, and development of a new nature-based tourism strategy
- Commencement of a stakeholder engagement process to introduce a tourism and business levy
- Development of strategic plans related to: risk management, the proposed Coffs Harbour Bypass, visitor road signage, a Coffs Harbour Events Strategy, Coffs Coast Visitor Information Services Strategy and annual marketing plans
- Continuing to work with CHCC to determine the feasibility of new infrastructure (e.g. a Performing Arts Centre) and enhancement of existing infrastructure (e.g. the Coffs Harbour Regional Gallery)
- Supporting operators to develop new products that focus on distinctive experiences related to leisure, nature-based, regional food, and arts and culture
- Establishing a Coffs Coast Destination Research Program to regularly monitor visitor markets, profiles and satisfaction.

It is also important that Coffs Coast tourism stakeholders are mindful that although the Coffs Coast has many attractions and significant natural attributes, they are not particular to the region and many other destinations can make similar claims. There is also fierce competition for tourism market share across regional Australia.

In addition, the Coffs Coast also faces a number of substantial challenges including relatively flat visitation performance since 2011, negative perceptions regarding ageing infrastructure, the impact of the Pacific Highway upgrade, and the need to achieve stronger visitor dispersal across the Coffs Coast. There is also an immediate need to engage industry operators, and to review the Coffs Coast brand to articulate and promote the region's real point of difference.

In this environment, it is particularly important that Coffs Coast adopts a highly strategic approach to marketing and promotion, which focuses on its key domestic visitor markets – i.e. Sydney, regional NSW, Brisbane and SE Queensland, and potential visitor markets from Melbourne and surrounding areas. It is also vital that key industry stakeholders encourage and support the development of some exciting, market-led signature experiences that reflect the Coffs Coast's distinctive cultural identity and 'sense of place', and which will differentiate the region from other competing destinations. The CHCC's proposed Cultural Plan 2017 to 2022 should assist this process.

The Coffs Coast Tourism Strategic Plan 2020 is a living document, which provides an integrated framework and clear strategic directions to build a resilient visitor economy for the Coffs Coast over the next five years. The successful implementation of this Plan will require participation and cooperation of tourism and business operators as part of a 'whole of destination' approach.

Although a Coffs Coast Destination Management Plan was developed in 2014 to apply for NSW Government funding, it was not adopted by CHCC. The Coffs Coast Tourism Strategic Plan 2020 will provide a strategic policy document to guide the management, development and marketing of tourism over the next five years and can be used as a resource to apply for relevant funding opportunities.

key directions

destination management

1.0 Tourism Governance and Leadership

Continue to establish an effective and collaborative strategic governance structure to lead and guide the strategic and sustainable management, development and marketing of tourism on the Coffs Coast to 2020

2.0 Tourism Funding

Identify new sources of funding and attract investment to support the effective management, development and marketing of tourism on the Coffs Coast to 2020

3.0 Risk Management

Identify and plan for potential risks to visitors and the visitor economy to 2020

destination development

4.0 Visitor Transport Services

Strategically plan for Pacific Highway upgrades, increased air services from key visitor markets, and the improvement of local transport services for visitors to the Coffs Coast to 2020

5.0 Tourism Infrastructure

Support the development of key infrastructure and facilities to position the Coffs Coast as an attractive place to visit, to live and to do business to 2020

6.0 Tourism Product and Experience Development

Encourage and support the development of new and refreshed tourism products and experiences to meet the needs of leisure, nature-based, events and cultural visitor markets to the Coffs Coast to 2020

destination marketing

7.0 Events and Festivals

Position the Coffs Coast as the leading regional destination for sports tourism and innovative events and festivals that support the Coffs Coast brand to 2020

8.0 Brand and Positioning

Ensure the effectiveness of the Coffs Coast brand in its promise to consumers, ability to differentiate the region, improve industry uptake and consistent application across all marketing and promotional activities to 2020

9.0 Visitor Markets

Focus marketing activities on viable, brand-aligned visitor markets to attract returning and new visitors to the Coffs Coast to 2020

10.0 Strategic and Tactical Marketing

Adopt strategic and innovative destination marketing strategies to promote leisure, nature-based, events and cultural experiences to key visitor markets, and to build a strong visitor economy for the Coffs Coast to 2020

11.0 Visitor Information Services

Deliver a contemporary, efficient and cost effective visitor information services system to engage industry and connect visitors with the Coffs Coast experiences to 2020

why does the coffs coast need a tourism strategy?

Tourism is recognised as an important driver of the Coffs Coast economy. It is estimated that 1.8 million tourists visit the Coffs Coast annually with an average annual expenditure of \$490 million¹. A report by Tourism Research Australia (TRA) in 2011 ranked the broader Mid North Coast 11th of the top 20 Australian tourism regions, with an 8.7% rating in terms of the economic importance of tourism to the region².

From a management perspective, CHCC provides an important leadership and coordination role for tourism through its City Prosperity Group, including Industry and Destination Development (IDD, including the former Coffs Coast Marketing) that is responsible for the coordination of destination marketing activities for the Coffs Coast and visitor information services for Coffs Harbour. For 2015, CHCC allocated over \$1M for the delivery of these services. In addition, the Stadium and Major Events (SME) Section plays an important role in positioning Coffs Harbour as a major regional event tourism destination by attracting and coordinating events and managing significant event infrastructure.

For Bellingen Shire, tourism is identified as a top priority as part of the BSC Economic Development and Tourism Plan 2015 to 2020. The Manager, Economic and Business Development works with local stakeholder organisations to foster sustainable tourism and economic development. A Memorandum of Understanding (MOU) was established between BSC and CHCC in 2008, with BSC currently contributing \$30,000 annually to CCM for marketing activities.

The establishment of a new Coffs Harbour City Council \$355 Committee in July 2015 comprising Coffs Harbour City Council, Bellingen Shire Council and industry representatives has heralded a new cooperative and strategic approach to the management of tourism for towns and villages on the Coffs Coast. The role of the Committee, through its current terms of reference, is to provide strategic advice to CHCC and BSC in the implementation of the strategies and actions of this Plan.

The next two years have been identified as a critical phase to establish best practice strategies and processes to guide the sustainable management, development and marketing of tourism on the Coffs Coast. Importantly, this new strategic approach will require increased collaboration and co-operation between Councils and industry to implement this Plan's directions and strategies and build a resilient visitor economy for the benefit of residents and visitors of the Coffs Coast to 2020.

There are also a number of important challenges for the Coffs Coast to surmount over the next five-years to achieve this goal, including a need to:

- Address relatively flat visitation performance since 2011
- Overcome negative visitor perceptions of Coffs Harbour due to ageing infrastructure
- Plan for the Pacific Highway upgrade construction
- Develop innovative tourism products and experiences to create a 'total destination experience' to generate more overnight stays, increase yield, and differentiate the Coffs Coast from its competitors
- Encourage visitor dispersal across the Coffs Coast
- Foster greater participation and cooperation of tourism and business operators as part of a whole of destination approach
- Engage industry stakeholders in a review of the Coffs Coast brand positioning
- Articulate and promote the Coffs Coast's real point of difference.

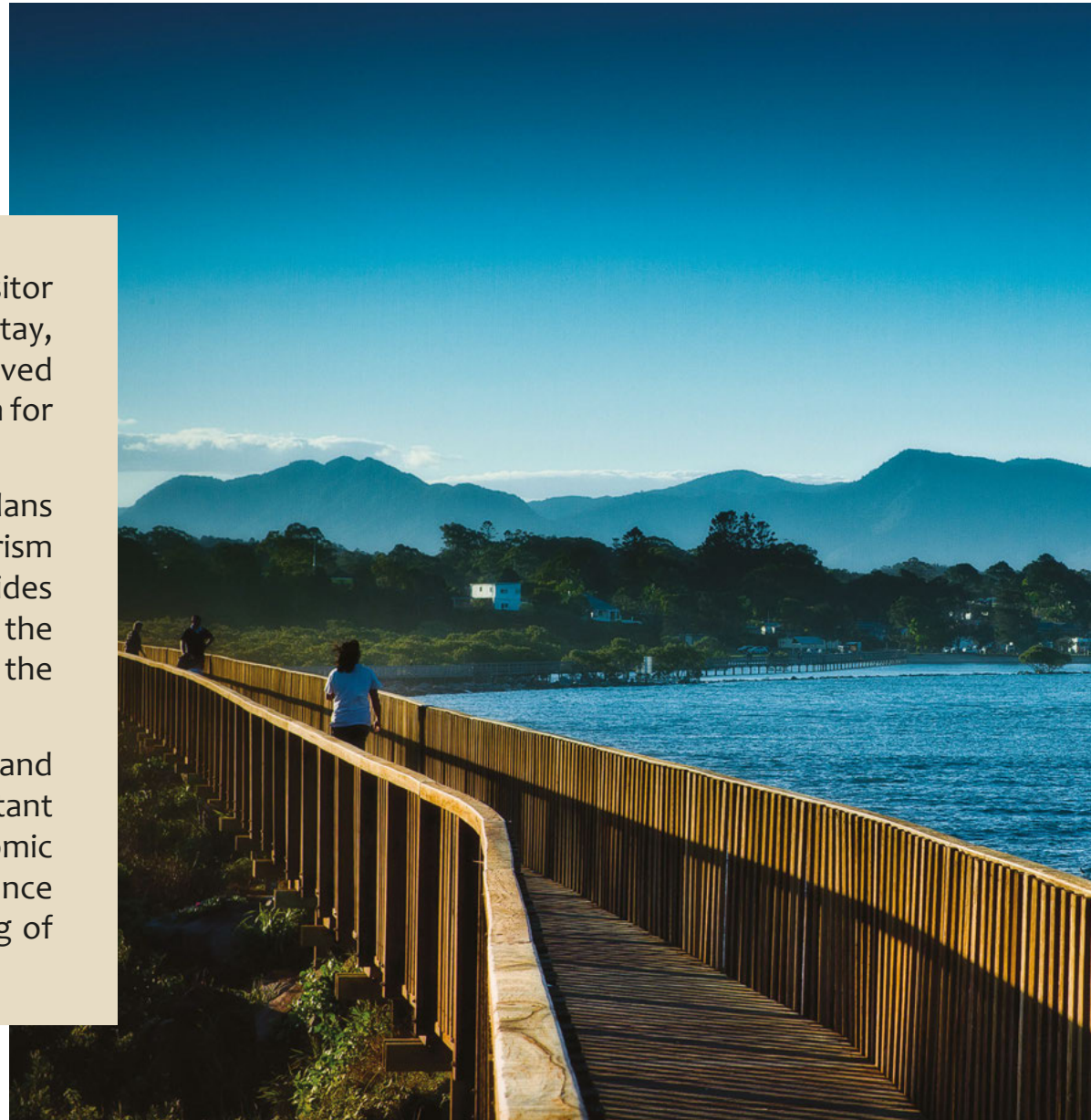
There are, however, significant opportunities to position the Coffs Coast as a leading regional destination for sports tourism, events and innovative festivals and to further develop and promote leisure, nature-based, arts and cultural attractions and experiences to East Coast domestic, self-drive international and VFR visitor markets.

Although a Coffs Coast Destination Management Plan was developed in 2014 to apply for NSW Government funding, it was not adopted by CHCC. The Coffs Coast Tourism Strategic Plan 2020 will provide a strategic policy document to guide the management, development and marketing of tourism over the next five years and can be used as a resource to apply for relevant funding opportunities.

The aim of this Plan is to strengthen the Coffs Coast visitor economy by increasing overnight visitor stays, length of stay, expenditure and dispersal across the region. This will be achieved by positioning the Coffs Coast as a leading regional destination for leisure, nature-based, events and cultural experiences.

Although Coffs Harbour City Council has developed strategic plans and policies in many areas, there is not a comprehensive tourism strategy. This Coffs Coast Strategic Tourism Plan 2020 provides an integrated framework to attract investment and guide the management, development and marketing of tourism for the Coffs Coast over the next five years.

Given the significance of tourism to the Coffs Coast economy and the competitiveness of tourism in regional Australia, it is important that tourism is maintained and strengthened as an economic driver, but planned and managed in a sustainable way to enhance and conserve the natural environment, protect the wellbeing of residents and attract visitors with shared values.



Urunga Boardwalk (image by Gethin Coles)

coffs coast destination experiences

Located almost mid-way between Sydney and Brisbane, the Coffs Coast comprises the Coffs Harbour and Bellingen local government areas (LGAs).

Coffs Harbour LGA

The City of Coffs Harbour is well known as a popular coastal holiday destination, particularly for families, with a range of beaches located near its city centre including Diggers Beach, Jetty Beach, and Park Beach and variety of mid-range accommodation options. Its city location, that is close to the Harbour and Jetty foreshore, provides a different coastal setting compared with other destinations along the East Coast of Australia.

The City of Coffs Harbour is surrounded by coastal village communities including Sawtell, Sapphire, Emerald and Woolgoolga, each with its own distinctive character. There are also a number of smaller settlements throughout the Shire, including the hinterland areas. Many towns and villages of Coffs Harbour are located on the shores of the Solitary Island Marine Park, which provides attractive island vistas, recreational water-based activities and a diversity of marine life that is an attraction for divers. The 60-kilometre Solitary Islands Coastal Walk that extends from the coastal village of Red Rock in the north to the Bonville Headland in the south provides a significant nature-based tourism experience that is easily accessible to visitors to Coffs Harbour. In addition, Coffs Harbour is in close proximity to 21 National Parks and extensive State Forests stretch along the Coffs Coast and west to the ranges. The centrepiece is the Forest Sky Pier, a 22 metre viewing platform at Sealy Lookout, which offers expansive views of Coffs Harbour and its surrounding mountains and coastlines.

While Coffs Harbour has become a regional service centre and hub for major retail shopping outlets, it is also known for its tourist attractions, the Big Banana and Dolphin Marine Magic. Originally built in 1964, the Big Banana had a \$30M redevelopment in 1989. In 2015, it introduced an impressive Water Park, which will further enhance its long held reputation as a very popular family day out. Dolphin Marine Magic is also an enduring family favorite, with its genesis beginning more than 45 years ago. While the seal and dolphin routines provide great enjoyment for its guests, Dolphin Marine Magic has a strong focus on education and the conservation of the marine environment. In addition, the Bonville Golf Resort located on the outskirts of Coffs Harbour is home to an internationally renowned golf course, which is considered one of the most beautiful courses in the world. The Resort is also a leading function and events venue, with a range of conference options and thirty accommodation rooms.

Importantly, Coffs Harbour has developed a very strong reputation in recent years as a regional events tourism destination. It has acquired some flagship sporting events including the FIA World Rally Championship, FFA National Youth Championships and three major Oztag events. Several smaller village festivals like the Chilli Festival (Sawtell) and the Woolgoolga Curry Fest also attract visitors and reflect and celebrate their communities.

Tourism is an important driver for the Coffs Harbour economy receiving approximately 1.6 million visitors and generating \$433m average annual expenditure¹.

Bellingen LGA

Bellingen Shire is located approximately 33kms south off Coffs Harbour and comprises three main communities: Bellingen, Dorrigo and Urunga.

Bellingen is the Shire's regional centre. It is also a haven for artists, craftspeople, writers and musicians who have been attracted to the area for alternative lifestyle opportunities. The community's creativity has been channeled into a series of festivals and events that have become well known across Australia including the Bellingen Readers and Writers Festival and the Bello Winter Music Festival. Bellingen is also home to one of Australia's largest regional markets which attract visitors from all around NSW. Its heritage buildings in the main street provide an attractive backdrop to the interesting shops and cafes that help to create a casual, lively ambiance.

Significantly, over half of the Bellingen Shire is designated as State Forests or National Parks, offering substantial opportunities for nature-based tourism. The inland township of Dorrigo is the gateway to the Dorrigo National Park, which is part of the Gondwana Rainforests of Australia World Heritage Area. The Dorrigo Rainforest Centre and Skywalk is a popular attraction that provides nature-based interpretation, guided walks and a range of visitor facilities. Dorrigo is also home to the largest collection of steam engines and railway stock in the southern hemisphere (privately owned), which has inspired the town's very successful Steam Punk Festival. Dorrigo hosts a popular Folk and Bluegrass Festival, which attracts performers from all over the world.

The Waterfall Way is recognised as one of NSW's best road trip experiences, and is the second most popular motorbike route in Australia. It offers visitors a 191 kilometre scenic drive from the Pacific Highway near Urunga through Bellingen, up to Dorrigo and further on to Armidale. The spectacular landscape changes from National Parks to verdant countryside, rainforest and wide, open plains.

Urunga is a peaceful coastal town between Coffs Harbour and Nambucca Heads. It is much loved for watersports, particularly fishing, and its temperate climate encourages an active outdoor lifestyle. The Urunga Boardwalk provides a wonderful wetlands experience through the mangroves of the river estuary. The town also has several licensed clubs offering a range of dining and sporting facilities and until 2015 hosted the Toast Urunga Festival. The town currently suffers from lack of product and awareness and ageing accommodation. There is however, potential for Urunga to transform given the bypass of the Pacific Highway.

In contrast to the relatively large visitation experienced by Coffs Harbour, it is estimated that Bellingen Shire receives around 223,000 visitors annually with an average annual visitor expenditure of \$57 million¹. Daytrip visitation accounts for over half of all visitation to the area with overnight stays in Bellingen restricted due to limited accommodation capacity. It is also important to recognise that some members of the local community hold differing views with regard to the future of tourism in their Shire. For example, business owners who have invested in cafes and specialty retail are keen to expand their revenue from visitors, while others are concerned about 'quality of life' and environmental impacts, particularly with regard to any further increase in 'day-trippers'. As such, a sustainable approach to tourism development in the area is essential. The 'Shire of Bellingen 2030' Community Strategic Plan identified that the community don't want to be 'another Byron Bay'.

Riverfest (image by Gethin Coles)



strategic planning approach

Coffs Harbour City Council (CHCC) and Bellingen Shire Council (BSC) have identified the need for a strategic tourism plan to guide the sustainable development, management and marketing of tourism in the Coffs Coast area over the next five-years to 2020.

The Coffs Coast Strategic Tourism Plan 2020 has been developed by a consultant team comprising Dr Meredith Wray, Sarah Lebski and Bill Fox in consultation with a CHCC Steering Committee that was established to guide the strategic direction of tourism for the Coffs Coast.

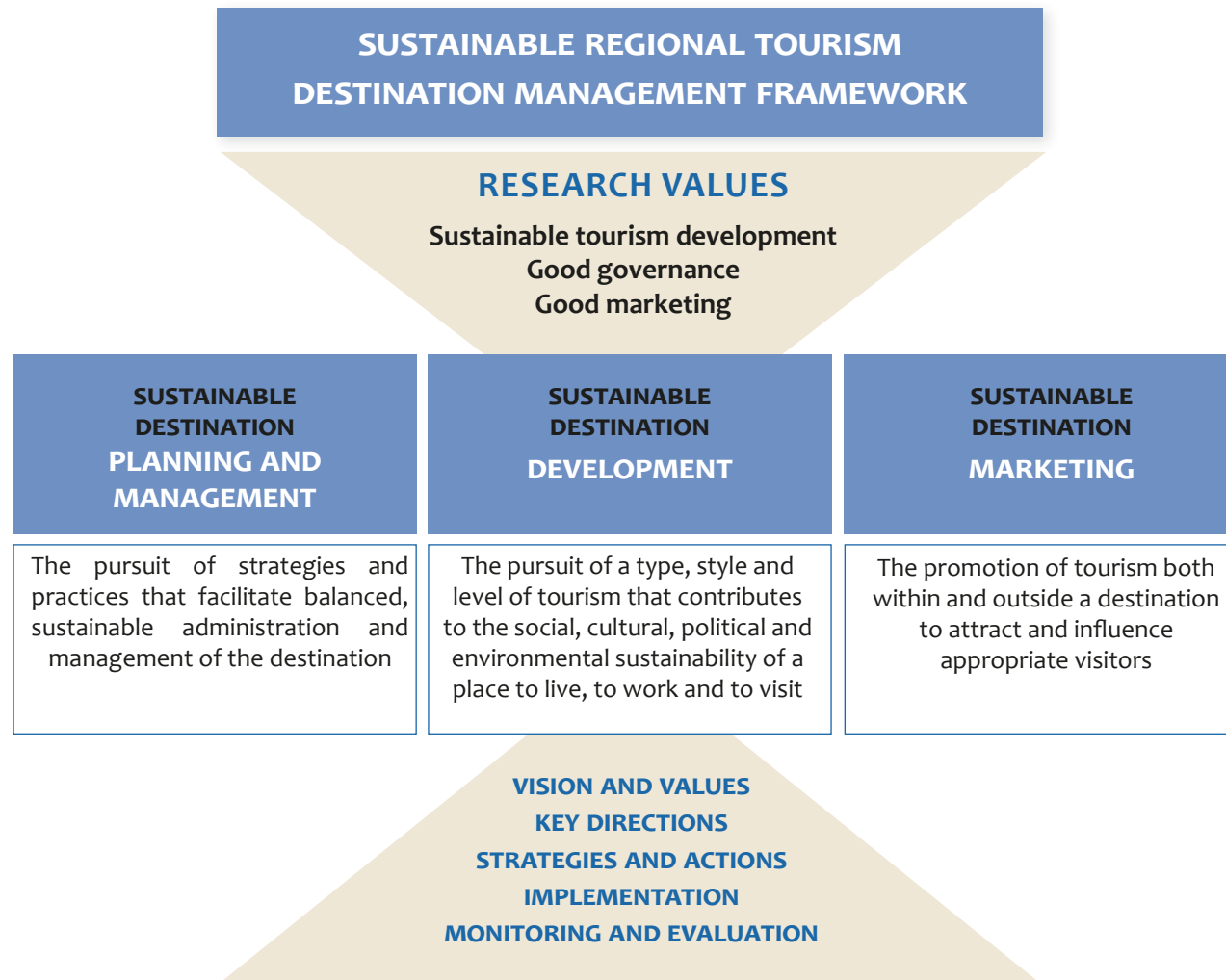
The Plan is a living strategic document that has been developed to:

- Position the Coffs Coast as a leading regional destination for sports tourism, leisure, nature-based tourism, innovative events and festivals, and cultural experiences
- Identify new sources of funding and attract investment
- Recognise that in addition to the main destination of Coffs Harbour, the Coffs Coast comprises distinctive coastal and hinterland towns and villages
- Respond to important issues and opportunities that were identified in the situational analysis and stakeholder engagement processes that were undertaken to inform the development of this Plan
- Recognise the leadership role of CHCC for tourism on the Coffs Coast and as manager of key supporting infrastructure
- Establish a shared vision for the future of tourism on the Coffs Coast with government, business and community stakeholders
- Integrate recognised best practice strategies for the management, development and marketing of regional tourism destinations
- Identify the roles and responsibilities of tourism stakeholders in the implementation of the Plan to 2020

- Determine important implementation priorities over the next year
- Integrate with the 'Coffs Harbour 2030' and 'Shire of Bellingen 2030' Community Strategic Plans and other relevant, strategic Council documents
- Encourage a productive, and integrated working relationship between industry and government stakeholders, guided by appropriate structures and governance
- Provide the tools to produce sustainable tourism that differentiates the Coffs Coast from its competitors and meets community and visitor expectations
- Ensure that tourism is recognised as a major source of economic and regional development by government and the private sector
- Enhance and grow the range and quality of leisure and nature-based tourism products and experiences
- Increase the focus on arts and cultural experience development
- Nurture innovation to create distinctive and quality products and services
- Attract investment to support Coffs Coast positioning and ensure the region is funding ready
- Establish an industry and community engagement process to regularly communicate the importance and future of tourism for the Coffs Coast
- Adapt to changing conditions, issues and opportunities as they arise
- Incorporate an annual monitoring and evaluation process.

A comprehensive situational analysis and stakeholder engagement process was undertaken during September and October 2015 to inform the development of the Coffs Coast Strategic Tourism Plan 2020 (see Appendix 1).

The strategic approach used to develop this Plan is depicted below.



¹Adapted from Dredge, D. 2008. Managing Local Tourism Master Class: Eastern Metropolitan Regional Council Workshop Materials, Southern Cross University, Tweed Heads, Australia.

tourism vision and values

The Community 2030 vision statements that were developed through consultation with local communities were used as a foundation to guide discussion with Destination Workshop participants for the development of important values to underpin a vision for tourism for Coffs Coast to 2020.

Overall, participants supported the visions provided in the 'Coffs Harbour 2030' and 'Shire of Bellingen 2030' community strategic plans. They also agreed that there was a need to establish a specific vision to guide the strategic direction for tourism over the next five years.

To encourage further cooperation between the two Shires, and a 'whole of Coffs Coast' approach, one vision has been created, which recognises their respective differences and underpins the management, development and marketing of tourism in the Coffs Coast region to 2020.

Tourism Values

While there were some differences in the responses from the respective Shires, the vision echoes significant shared values both from the workshop participants and the community visions. The following core values will guide the tourism development, management and marketing across the Coffs Coast region to 2020.

- **Sustainability**
Ensure a sustainable approach to tourism that achieves an appropriate balance between a healthy visitor economy and the protection of natural, social and cultural environments
- **Cooperation**
Foster a cooperative approach to tourism across government, business and community stakeholders at local, regional and state levels
- **Cultural Diversity**
Share and preserve the region's creativity, cultural diversity, authenticity, community values and lifestyles
- **Celebration**
Adopt a consistent and cooperative approach to celebrate and promote the Coffs Coast's significant natural and coastal surroundings through the delivery of quality and innovative tourism experiences.

Coffs Coast Tourism Vision

To support the sustainable growth of tourism through the inclusive partnership of government and local businesses, that positions the Coffs Coast as a regional destination for events and quality tourism experiences, which are connected to our natural and coastal environments, our vibrant and culturally distinctive hinterland communities, our values and relaxed way of life.

destination management

1.0 Tourism Governance and Leadership

Continue to establish an effective and collaborative strategic governance structure to lead and guide the strategic and sustainable management, development and marketing of tourism on the Coffs Coast to 2020

Effective and ongoing strategic planning and decision-making for tourism requires an effective destination management framework and supporting processes to lead and coordinate tourism across government, business and community interests. Ideally, this framework provides a collaborative forum in which the expertise and strategic capacity of individuals and stakeholder organisations can be harnessed to improve tourism outcomes. Important stakeholder organisations involved in tourism should be represented to provide significant leadership to guide and inform planning and decision-making for the destination region (e.g. local governments, local tourism and business groups, regional tourism organisations, state tourism organisations, National Parks agencies)³.

The establishment of the Destination Coffs Coast (DCCC) – a new tourism S355 committee comprising CHCC, BSC and industry representatives from Coffs Harbour and Bellingen LGAs has been an effective transitional governance arrangement following the shelving of TCC and review of the role and functions of CCHC Industry and Destination Development (IDD) and Stadium and Major Events (SME) sections. This has been important to ensure a new strategic direction for Council's involvement in tourism that aligns with the establishment of the new Committee. The appointment of two new Section Leaders, to lead IDD and SME teams, and review of staff roles has been a further positive initiative within Council.

Importantly, this new collaborative destination management arrangement has been well-supported by Coffs Harbour and Bellingen industry stakeholders, who acknowledge the need for a new and strategic approach to drive, unite and coordinate tourism across the Coffs Coast. There is, however, a need to continue to build trust, transparency and communication between Council and industry, given the DCCC has only been recently established. Moreover, proposed new members of the DCCC (as specified in the Terms of Reference from September 2016) must have considerable strategic expertise and vision to support and guide Councils' involvement in tourism to 2020. In addition, BSC currently contributes \$30,000 annually for tourism coordination and marketing services undertaken by CHCC through a Memorandum of Understanding (MOU) that needs to be renegotiated to ensure ongoing cooperation between both LGAs.

Given TCC no longer exists, there is also an immediate need to consider ways to unite and engage tourism and hospitality operators and provide industry development and networking opportunities. It is proposed that a Destination Coffs Coast: Industry Development and Engagement Working Group be established as part of the DCCC to lead and drive these initiatives. It is further recommended that the TCC funds (\$75,000) be used for industry development and engagement activities identified in this Plan.

1.0 Tourism Governance and Leadership cont.

The situational analysis and the stakeholder engagement process undertaken to develop this Plan further identified:

- That the current DCCC Chair provides strong leadership and corporate governance expertise that is necessary to lead and guide the functions of the Committee
- A genuine interest of key nature-based tourism stakeholder organisations to be involved at a strategic level in destination planning and management for the Coffs Coast (e.g. National Parks and Wildlife Service, Solitary Islands Marine Park Authority, Forestry Corporation NSW)
- That the role and responsibilities of CHCC, BSC and the DCCC be clearly communicated to tourism, business and community stakeholders
- Chambers of Commerce in towns and villages on the Coffs Coast currently provide broader industry development and business networking functions and may be able to assist in providing industry development and networking functions for the tourism sector
- A need to engage with important tourism stakeholder organisations across local, regional and state levels to ensure this Plan's initiatives align with other strategic planning and decision-making for the Coffs Coast (e.g. NCDN, NPWS-Northern Zone, SIMPA, DNSW, RDA-Mid North Coast, NSW Department of Primary Industry and Lands)
- A need to continue to improve service quality across the Coffs Coast, including addressing business opening hours
- An opportunity to engage young tourism professionals on the Coffs Coast in capacity building activities for tourism leadership succession planning
- A need to communicate the significance of tourism to the Coffs Coast to the broader business and community stakeholders
- A need to embed the Coffs Coast Strategic Tourism Plan 2020 in Council policy to ensure its strategies and actions are implemented over the next five years.

Best Practice Example

Noosa provides a best practice example of an effective and inclusive destination management structure comprising local government and industry. Tourism Noosa was established thirteen years ago as a not-for-profit destination marketing company responsible for the strategic marketing and delivery of visitor information services for the Noosa region. Tourism Noosa reports to a Board of Directors that comprises skills-based members from industry and community and collects funds from over 500 members. Noosa Council has regard for the advice of Tourism Noosa Board and currently collects funding for the promotion of tourism through a special rate on all rateable land that receives a benefit from tourism, either directly or indirectly, which is then administered by the Tourism Noosa Board. The Tourism Board works collaboratively with local government, regional and state government departments and stakeholder organisations with an interest in tourism for Noosa and surrounds, and has the responsibility to deal with tourism-related issues as they arise.

1.0 Tourism Governance and Leadership cont.

strategy 1.1 Review and refine the role and membership of the Destination Coffs Coast Committee to ensure effective and strategic leadership to guide the sustainable management, development and marketing of tourism on the Coffs Coast to 2020

Strategic Actions	Leadership	Support	Timing
<p>s1.1.1 Revise the Terms of Reference of the Coffs Coast Tourism s355 for the two-year period October 2016 to September 2018 as follows:</p> <p>Scope/Role – add an additional role:</p> <ul style="list-style-type: none"> To lead and coordinate an industry development and engagement program on behalf of the tourism industry by: <ul style="list-style-type: none"> Providing regular industry development, capacity building, service excellence training and other educational opportunities Coordinating regular networking opportunities for tourism and hospitality operators <p>Delegations – revise to read:</p> <p>The Committee has delegation to provide advice on the strategic direction of tourism to Council, advocate on behalf of the tourism industry, and provide industry development initiatives for the tourism industry.</p> <p>Composition of the Committee – revise to read:</p> <ul style="list-style-type: none"> 9 voting members: CHCC Councillor, BSC Councillor, 3 x tourism industry representatives, 1 x Coffs Harbour Chamber of Commerce Board representative (Coffs Harbour LGA), 1 x tourism industry representative and 1 x Bellingen Shire Chamber of Commerce representative (Bellingen LGA), 1 x nature-based stakeholder organisation representative 5 ex-officio members: CHCC Director Sustainable Communities, CHCC Group Leader City Prosperity, CHCC Section Leader, Industry and Destination Development, BSC Manager Economic and Business Development, and a DNSW representative <p>Members with advanced leadership qualities, strategic planning expertise and knowledge of tourism in the areas of: financial management, tourism investment, industry development and capacity building, tourism marketing, regional tourism product and experience development, tourism visitor markets, nature-based tourism, events and festival organisation, and quality tourism and hospitality operations.</p> <p>Potential members will be required to submit an application that addresses a set of criteria (see s1.1.2).</p> <p>continued next page</p>	CHCC	DCCC, BSC	2016

1.0 Tourism Governance and Leadership cont.

Strategic Actions	Leadership	Support	Timing
<p>Office Bearers – revise to read:</p> <ul style="list-style-type: none"> Chair – CHCC Director Sustainable Communities (transition/1 year) Vice Chair – to be elected at the first meeting of the new Committee <p>Term of Office – revise to read:</p> <p>The Committee will serve a term of two (2) years from October 2016.</p> <p>A structural review of the Committee will take place in June 2018. To maintain continuity in strategic direction 50% (2 Coffs Harbour and 1 Bellingen) tourism industry representatives will be returned to the following term. The other 50% (2 Coffs Harbour and 1 Bellingen) of tourism industry representatives will be open to the wider tourism/community for nominations.</p> <p>Council reserves the right to dissolve the Committee at any time by a resolution of Council.</p> <p>Committee membership</p> <p>Committee members hold membership until they:</p> <ul style="list-style-type: none"> fail to attend three consecutive meetings without leave of absence; move their permanent place of residence outside the Council or surrounding local government areas; deliver their written resignation to Council; or receive written notification from Council that their membership of the Committee has been terminated. <p>Sub-Committee (s) – revise to read:</p> <p>The establishment of any sub-committees or working groups will be delegated by the Committee to provide advice and/or direction, based on their investigations, on the specific matters they are tasked with, only within the limitations of the terms of reference for the Committee. Formation of sub-committees or working groups may include external experts and their specific delegations are to be minuted</p>	CHCC	DCCC, BSC	2016
S1.1.2 Establish a set of criteria to be addressed by new DCCC member applicants related to their strategic expertise and skills relevant to tourism	CHCC	Consultant	2016
S1.1.3 Review the role and composition of the Destination Coffs Coast Committee to ensure its ongoing strategic and leadership role	CHCC	Consultant	2018

1.0 Tourism Governance and Leadership cont.

strategy 1.2 Re-negotiate the MOU with BSC to determine the financial contribution of BSC tourism coordination and marketing services, and establish a regular communication process to foster collaboration between both Councils to 2020

Strategic Actions		Leadership	Support	Timing
s1.2.1	Re-negotiate the MOU with BSC to determine the financial contribution of BSC for the period 2016 to 2018 for tourism coordination and marketing services	CHCC, BSC		2016
s1.2.2	Establish a program of quarterly meetings involving the Section Leader IDD and BSC Manager, Economic and Business Development to foster collaboration between both Councils for destination marketing and development initiatives to 2020	CHCC, BSC		2016

strategy 1.3 Integrate the Coffs Coast Strategic Tourism Plan 2020 into Council policy to ensure its strategies are implemented to 2020

Strategic Actions		Leadership	Support	Timing
s1.3.1	Integrate the Coffs Coast Strategic Tourism Plan 2020 and accompanying Situational Analysis and Stakeholder Engagement Report (Report 1) into CHCC 2016 to 2019 Delivery Program and CHCC annual Operational Plans	CHCC		2016
s1.3.2	Ensure objectives, strategies and actions of the Coffs Coast Strategic Tourism Plan 2020 are integrated with CHCC and BSC strategic plans and policies relevant to tourism where appropriate (e.g. cultural plans, economic development)	CHCC, BSC		2016

1.0 Tourism Governance and Leadership cont.

strategy 1.4 Develop industry development and engagement programs to effectively involve and support tourism industry stakeholders across local, regional and state levels to 2020

Strategic Actions		Leadership	Support	Timing
s1.4.1	Establish a Destination Coffs Coast: Industry Development and Engagement Working Group as part of the DCCC to lead and drive industry development and engagement initiatives identified in this Plan to be chaired by a DCCC industry representative (see also s2.1.1)	DCCC	CHCC, BSC	2016
s1.4.2	Develop a Destination Coffs Coast: Tourism Industry Engagement Program to regularly communicate initiatives of CHCC City Prosperity, BSC and DCCC to tourism and business stakeholders, and the broader community	CHCC	DCCC, BSC	2016
s1.4.3	Develop and implement a Destination Coffs Coast: Tourism Industry Development and Engagement Program to provide regular industry development, capacity building, training and education opportunities for tourism and hospitality operators (including service excellence) (see also s2.1.1)	DCCC	CHCoC, other CoCs, CHCC, BSC	2016
s1.4.4	Establish strategic partnerships with important tourism stakeholder organisations at regional, state and national levels to support the new and strategic approach to tourism for the Coffs Coast to 2020 (e.g. NCDN, NPWS-Northern Zone, SIMPA, FCNSW, DNSW, RDA, DLPI)	CHCC	BSC	2016
s1.4.5	Establish a Destination Coffs Coast: Tourism database comprising all tourism and hospitality operators on the Coffs Coast that is regularly updated	CHCC	BSC	2016
s1.4.6	Establish a Destination Coffs Coast: Tourism Young Professionals Mentoring Program to develop the capacity of young tourism and hospitality professionals in the area as future leaders (e.g. participation in the ARTN Young Tourism Professional of the Year program)	DCCC	ARTN	2016
s1.4.7	Establish an annual Destination Coffs Coast: Tourism Awards Program that aligns with the NCDN and DNSW awards programs to benchmark, reward, celebrate and promote successful and innovative tourism and hospitality operations on the Coffs Coast and encourage best practice	DCCC	NCDN, DNSW, CHCC, BSC, CoCs	2016
s1.4.8	Adopt a service quality accreditation program for tourism and hospitality operators	DCCC	CHCC, BSC	2017

2.0 Tourism Funding

Identify new sources of funding and attract investment to support the effective management, development and marketing of tourism on the Coffs Coast to 2020

Methods used to raise revenue to support tourism initiatives at a local/destination level include: membership fees for a local tourism association, establishment of a commercial booking service as part of the delivery of visitor information services and accessing state and national government grant opportunities. In addition, best practice in other leading regional tourism destinations has shown the effectiveness of developing a tourism and business levy that is collected from all businesses. The funds raised from the levy can be used to directly support tourism management systems, development of infrastructure and facilities, destination marketing initiatives, conservation of natural and heritage environments, and to contribute to relevant community initiatives. The funds can also be used to undertake research and education programs. Development and implementation of levy schemes in other destinations has, however, shown that such schemes require careful consideration and consultation with business and the community to ensure acceptance of their introduction over time³.

To date, funding for tourism marketing for the Coffs Coast has mainly been provided by CHCC. In addition, CHCC provides funding for the delivery of visitor information services in Coffs Harbour and has determined this level of support is not viable into the future (see more about visitor information services on page 52).

Annual revenue raised by TCC through industry membership was estimated at approximately \$125,000. However, given that TCC no longer exists, industry operators do not currently contribute financially to tourism marketing and visitor information services. Funds carried over from the TCC (\$75,000) have also yet to be transferred to CCHC as part of the agreement to establish the DCCC. As a consequence, there is an immediate need to consider viable and ongoing revenue sources to support CCHC and DCCC for the implementation of the strategic objectives of this Plan.

Best Practice Example

Deniliquin Council successfully applied to the NSW Government's Independent Pricing and Regulatory Tribunal's (IPART) for a \$195 levy on local business premises to help raise a promotion fund. It is proposed that a committee comprising primarily business representatives, along with Council representation, will recommend the best ways to invest money from the promotion fund across the three-year trial period. Although, there wasn't unanimous support for the proposal from the business community, Deniliquin Council were able to demonstrate extensive consultation and a high level of acceptance in their IPART submission⁴.

The situational analysis and the stakeholder engagement process undertaken to develop this Plan further identified:

- An historical degree of apathy amongst industry operators to contribute financially to membership of local and regional tourism organisations and VICs
- Decline in revenue derived through VIC booking services in Coffs Harbour
- Previous research and support for a tourism and business levy from the Coffs Harbour Chamber of Commerce
- The need for a strategic approach to effectively bid for state and national grants to assist with infrastructure and tourism product and experience development, events and cooperative marketing initiatives.

2.0 Tourism Funding cont.

strategy 2.1 Identify new sources of funding and attract investment to support the effective management, development and marketing of tourism on the Coffs Coast to 2020

Strategic Actions		Leadership	Support	Timing
S2.1.1	Determine if funds carried over from the TCC are able to be transferred to CCHC for use by the CCTC for industry development initiatives identified in this Plan (est. \$75,000)	DCCC	CHCC	2016
S2.1.2	Commence stakeholder engagement around the potential introduction of a tourism and business levy for the Coffs Coast based on investigation of other recent successful levy schemes and processes in NSW local government areas	CHCC	DCCC	2016
S2.1.3	Subject to S2.1.2 prepare an IPART application for a tourism and business levy for the Coffs Coast	CHCC	BSC	2017
S2.1.4	Adopt a strategic approach to identify and prepare successful grant submissions for suitable projects that align with the objectives of this Plan for annual DNSW, Regional Visitor Economy Fund and Australian Government grant opportunities (e.g. National Stronger Regions Fund)	CHCC	DCCC	2016 to 2020

3.0 Risk Management

Identify and plan for potential risks to visitors and the visitor economy to 2020

A logical and strategic approach to risk and crisis management can reduce the impacts and losses associated with any adverse event and can provide a framework from which both businesses and destinations can apply risk management strategies for prevention, preparedness, response and recovery. Best practice destinations work with relevant agencies and stakeholders to prepare a risk management strategy for any unexpected crises or risk that may affect business viability, community and visitor wellbeing, and the environment. This includes developing emergency management plans for infrastructure sites in town centres and key visitor sites, incorporating crises and risk management plans for tourism into relevant local government plans, encouraging tourism businesses to develop risk management strategies for their own operations, and developing and implementing tactical marketing campaigns to respond immediately to crisis situations³. The aim is to build community resilience to maintain a normal level of service in the face of periodic or unpredictable external shocks or system failures⁵.

Examples of environmental issues relevant to the Coffs Coast visitor economy include risks of drought, bushfire and flood. Variations in economic conditions may also impact visitation to the region, including fluctuating fuel prices and currency values that can cause changes in domestic and/or international travel. In addition, a recent risk to the NSW North Coast visitor economy has been shark attacks along the North Coast that have caused concern for coastal communities. To address this issue, the NSW Government initiated a Parliamentary Inquiry in August 2015, 'Management of Sharks in New South Wales Waters'. In addition, a shark-tagging program began in late August 2015 that is trialling mapping the movements of great white sharks in the area, and an increase of aerial surveillance is occurring on beaches, to restore the immediate confidence of beachgoers on the North Coast.

Best Practice Example

Grampians Marketing Inc. (GMI) demonstrated exemplary skills in crisis management during the devastating bushfires in the summer of 2006 that swept through the central Grampians National Park. Within four days of the fires starting, key tourism stakeholders formed a cooperative response to address tourist perceptions that the Grampians was burnt out and inaccessible, and deliver a positive message of recovery to attract visitors back to the Grampians as soon as possible. Cooperation between local councils and tourism was critical in successfully identifying the best short, medium and long-term strategies to ensure the recovery and future growth of tourism in regional Victoria.

During the bushfires, GMI drove the crisis plan and response by developing a structure to manage delivery of tourism messages. Perceptions that the whole area was devastated were countered by regular media updates, as well as web and instant email updates. GMI maintained constant contact with land managers, Parks Victoria and Tourism Victoria for the most up-to-date information. As a result, a clear and consistent message was conveyed, that environmental regeneration and the recovery of park facilities was well underway. Despite an immediate decline in domestic overnight visitation, compounded by ongoing drought and increases in fuel prices, the region still managed to attract 2 million domestic visitor nights, an increase of 15.2 percent. Success in the implementation of crisis management strategies immediately following the bushfires required leadership and cooperation that was driven by tourism managers through the Grampians Regional Tourism Recovery Group. Ongoing cooperation between Parks Victoria and tourism area managers was strengthened by the campaign, and Parks Victoria subsequently integrated tourism fully into its planning process³.

3.0 Risk Management cont.

strategy 3.1 Identify and plan for potential risks to the Coffs Coast visitor economy to 2020

Strategic Actions		Leadership	Support	Timing
s3.1.1	Develop a five-year Destination Coffs Coast: Tourism Risk Management Plan that identifies, assesses and plans for potential risks related to the Coffs Coast visitor economy to 2020, including natural disasters, threats to natural environments, shark concerns, currency fluctuations, and terrorist attacks	CHCC	BSC, DCCC, NPWS, SIMPA, FCNSW	2017
s3.1.2	Communicate the Destination Coffs Coast: Tourism Risk Management Plan to tourism stakeholders to ensure strategies are clearly understood	DCCC	CHCC, BSC	2017/2018
s3.1.3	Support tourism operators to develop risk management plans for their own businesses as part of the Destination Coffs Coast: Tourism Industry Development and Engagement Program (see s1.4.3)	DCCC	CHCC, BSC	2016 to 2020
s3.1.4	Consider risk to the Coffs Coast visitor economy from unregulated tourism operations (e.g. freedom campers, airbnb)	DCCC	CHCC, BSC	2016 to 2020

strategy 3.2 Identify and plan for potential risks to the safety and wellbeing of visitors to the Coffs Coast to 2020

Strategic Actions		Leadership	Support	Timing
s3.2.1	Endeavour to ensure visitor safety and security is integrated into current and future CHCC and BSC plans and policies (e.g. Local Environment Plans, CHCC Drought Management Plan, CHCC Floodplain Risk Management Study, BSC Risk Management Plan 2015, BSC Floodplain Risk Management Plan 2002)	CHCC, BSC		2016
s3.2.2	Identify strategies to overcome the reliance on the Waterfall Way and its exposure to risk from accidents and floods	BSC	RMS	2016 to 2020

destination development

4.0 Visitor Transport Services

Strategically plan for Pacific Highway upgrades, increased air services from key visitor markets, and the improvement of local transport services for visitors to the Coffs Coast to 2020

Successful regional tourism destinations are easily accessible to visitors and are influenced by a place's proximity to key populations centres, the location and capacity of airports, frequency and capacity of other forms of transport, road infrastructure and transport systems³. In addition to these gateway services, the ability for visitors to move easily within the destination is also important.

Northern NSW is one of the fastest growing areas in country NSW and experiences large increases in traffic volume particularly during summer. Significantly, around 90% of visitors to Coffs Coast arrive by private or hire car. Moreover, the Pacific Highway is the main thoroughfare from Sydney to Brisbane for commercial and private vehicles currently passing through the Coffs Harbour central business district. The current upgrade of the Pacific Highway generates major challenges and opportunities for towns and villages on the Coffs Coast.

The NSW and Australian governments commenced upgrades of the Pacific Highway in 1996 to provide a four lane divided road from Hexham (NSW) to Queensland will substantially reduce the travel time to the Coffs Coast and is due for completion in 2020. Currently 397 kilometres of the Pacific Highway between Hexham and the Queensland border is now a four lane divided road (60%) and about 123 kilometres (19%) are being built or being prepared for major work. Although, the reduction in travel time from Sydney and South East Queensland presents a significant opportunity for improved visitor access to the Coffs Coast, ongoing road construction will continue to create frustration and delays for drivers, in terms of reduced speed limits and bottlenecks during peak travel times. More importantly, the visual appeal of the Coffs Coast as a desirable holiday destination is greatly diminished during this construction phase.

The Coffs Harbour bypass proposal is also a significant infrastructure project that will change visitor travel patterns around Coffs Harbour. The proposal involves the development of a 12-kilometre dual carriageway upgrade of the Pacific Highway from south of Englands Road to Korora Hill, north of Coffs Harbour and includes a western bypass of Coffs Harbour approximately one kilometre from the CBD. Currently, the RMS and CHCC are continuing to manage the existing highway through Coffs Harbour until a new bypass is built. Timing for construction will depend on funding negotiations between the NSW and Australian governments' ongoing environmental assessment. The construction of a bypass is acknowledged as having the potential to create significant and adverse effects on Coffs Harbour's tourism industry, which is already facing considerable challenges⁶. As a consequence, there is a need for an immediate action to strategically plan for the proposed development of the Coffs Harbour bypass, to ensure drive visitors continue to use 'Coffs' as a stopover and holiday destination during the proposed construction phase and following its completion.

From an air services perspective, Coffs Harbour Regional Airport (CHRA), that is owned and managed by CHCC, is one of the largest and busiest regional airports in NSW and has for some years accommodated the greatest number of passengers flying to and from Sydney, compared to other destinations within NSW⁷. It is estimated that 8% of visitors to the Coffs Coast in 2015 arrived by air⁸. Increasing services to and from Melbourne provide an important opportunity to attract new visitor markets from Victoria. It is also important that low cost carrier air services from Brisbane are re-established. Significantly, CHRA management works with key tourism and aviation stakeholders to negotiate air services, analyse investment and market research, and undertake cooperative marketing programs.

4.0 Visitor Transport Services cont.

From a maritime perspective, the Coffs Harbour International Marina (CHIM) has become a significant attraction for nautical travellers serving as a halfway point between Sydney and Brisbane. Visiting small cruise vessels and 'Blue Nomads' (sailing/boating retirees) have emerged as reliable and growing visitor markets that CHIM management are presently researching. However, the current marina facilities are small and struggle to keep up with the needs of modern-day boating. Plans to upgrade the Marina are also in the balance due to the expiry of the lease with Crown Lands in 2021. It should also be recognised that the attraction of large cruise tourism vessels to Coffs Harbour is not a viable opportunity given restrictive harbour access that cannot be overcome, and ocean conditions that are not suitable for tender arrangements.

Best Practice Example

A new hop-on hop-off shuttle service, 'Green Frog Shuttle', was launched by a local commercial tourism transport operator in October 2015 that connects the main towns, villages and attractions within Byron Shire (Byron Bay, Brunswick Heads, Mullumbimby, Crystal Castle, Bangalow and Suffolk Park). The service is positioned as a friendly, efficient and affordable transport option, that runs four times daily through the Shire and takes about two hours each cycle. The cost is \$40 per trip with family discounts and two-day passes.

The situational analysis and the stakeholder engagement process undertaken to develop this Plan further identified:

- Industry concern about negative visitor perceptions of the Coffs Harbour CBD and ongoing Pacific Highway upgrades
- The upgrade of the Pacific Highway presents a opportunity for passing visitors to see the scenic coastline and the Solitary Islands from the Highway
- A need to retain Coffs Harbour's position as a quality stop-over destination
- An immediate need to start working cooperatively with RMS to ensure Highway gateway and directional signage is strategically planned
- Concern from industry stakeholders regarding the impact of bad weather on the road infrastructure to Dorrigo, which creates negative visitor perceptions about the town being 'cut off'
- Urunga Chamber of Commerce has undertaken considerable strategic planning to consider the implications of the Urunga bypass for its local businesses and residents
- A need to improve connectivity between tourism and villages on the Coffs Coast through improved road infrastructure and transport services
- An opportunity to continue to develop infrastructure to position the Coffs Coast as a cycle tourism destination
- A need to consider ways to improve bus/coach and rail infrastructure and services to the Coffs Coast
- Plans to install new state-of-art signage at the Coffs Harbour Regional Airport to make it an attractive gateway.

4.0 Visitor Transport Services cont.

strategy 4.1 Strategically plan to reduce negative visitor perceptions and access issues regarding the upgrade of the Pacific Highway and its impact on the Coffs Coast, and the proposed bypass of Coffs Harbour to 2020

Strategic Actions		Leadership	Support	Timing
s4.1.1	Develop a five-year Destination Coffs Coast: Visitor Road Signage Plan in partnership with RMS to strategically plan for gateway and wayfinding signage, tourism attraction and business signage, and visitor information during construction and completion phases of the Pacific Highway upgrades across the Coffs Coast	CHCC	BSC, DCCC, NSC, RMS, DT, CoCs	2016
s4.1.2	Develop a Coffs Harbour Bypass Plan to strategically plan for the creation of gateway and wayfinding signage, visitor information, and marketing strategies to overcome impacts during the construction phase and completion phases of the bypass for residents and visitors	CHCC	DCCC, RMS, DT, CHCoC	2016/2017

strategy 4.2 Work with Coffs Harbour Regional Airport to attract and promote new and existing air services to the Coffs Coast to 2020

Strategic Actions		Leadership	Support	Timing
s4.2.1	Work collaboratively with CHRA management to create attractive gateway signage at the Airport to welcome visitors and generate awareness of the diversity of experiences on the Coffs Coast	CHCC	BSC, NPWS, SIMPA, FCNSW	2016
s4.2.2	Work collaboratively with CHRA management to increase air services from key visitor markets to the Coffs Coast	CHCC	DCCC	2016 to 2020
s4.2.3	Work collaboratively with CHRA management to support marketing initiatives for current and emerging air services as part of the Coffs Coast Marketing Plan 2020 (see s10.1.1)	CHCC	DCCC	2016 to 2020

4.0 Visitor Transport Services cont.

strategy 4.3 Support the Coffs Harbour International Marina to position the Marina as an attractive destination for visiting small vessels

Strategic Actions	Leadership	Support	Timing
s4.3.1 Support CHIM to undertake research to better understand the 'Blue Nomads' visitor market and their infrastructure requirements	CHCC		2016/2017
s4.3.2 Support CHIM to develop submissions to Crown Lands for lease renewal	CHCC		2016/2017
s4.3.3 Support CHIM to develop submissions for relevant grants and funding to upgrade marina facilities to encourage small vessel visitation	CHCC		2016 to 2020

strategy 4.4 Investigate ways to improve local road and visitor transport services to encourage visitors around the Coffs Coast

Strategic Actions	Leadership	Support	Timing
s4.4.1 Investigate and promote opportunities to establish viable commercial local transport services to connect coastal and hinterland towns and villages and enhance visitor dispersal around the Coffs Coast	CHCC, BSC	DCCC, CoCs	2016/2017
s4.4.2 Investigate opportunities to improve and promote local bus services for visitors around the Coffs Coast	CHCC, BSC		2016/2017
s4.4.3 Continue to develop infrastructure to support cycle tourism for the Coffs Coast	CHCC, BSC	DCCC	2016 to 2020
s4.4.4 Work with nature-based and adventure tourism stakeholders to promote cycling tourism and mountain bike trails and tracks as part of the Coffs Coast Marketing Plan 2020	CHCC	BSC, NPWS, SIMPA, FCNSW	2016
s4.4.5 Support improvements to road infrastructure and develop alternate routes to Waterfall Way (e.g. Eastern Dorrigo Way – Coramba, Megan, Dorrigo)	BSC	RMS	2016 to 2020

strategy 4.5 Work with Railcorp NSW and commercial coach services to promote rail transport services to the Coffs Coast

Strategic Actions	Leadership	Support	Timing
s4.5.1 Establish a strategic partnership with Railcorp NSW to improve and promote rail transport services to the Coffs Coast including innovative packages and events that use rail services	CHCC	BSC	2016 to 2020
s4.5.2 Establish strategic partnerships with key coach operators to improve and promote coach services to the Coffs Coast	CHCC	BSC	2016 to 2020

5.0 Tourism Infrastructure

Support the development of key infrastructure and facilities to position the Coffs Coast as an attractive place to visit, to live and to do business to 2020

The development of infrastructure and facilities helps a destination develop as a good place to live, to do business and to visit. A lack of adequate infrastructure and supporting facilities can limit the realisation of tourism potential. Careful planning and management is therefore required to ensure a balance between tourism growth and development of supporting infrastructure and facilities³.

Infrastructure in the Coffs Harbour area is perceived as being aged due to a large volume of development in the 70s and 80s, and limited new development in the period since. Findings of a Tourism Research Australia Visitor Profile Survey undertaken in 2011 confirmed that although the range of infrastructure and product was well received, the quality of infrastructure in the region falls below consumer expectations. This was also identified as a key concern by industry stakeholders consulted in the development of this Plan.

To address this concern, CHCC has undertaken significant strategic planning work to improve infrastructure and facilities that will help to reinvigorate Coffs Harbour. The City Centre Masterplan 2031 is an important infrastructure project that will assist in rejuvenating the City Centre as the key retail precinct in Coffs Harbour. In addition, the Jetty4shores Project and Surrounds Area Concept Plan will enhance key entrances and high use lands of the jetty foreshore area for recreational use by residents and visitors. The first stage, a new walkway has already been completed. CHCC was recently successful in securing over \$5 million in Commonwealth funding to match its \$5million investment to commence work on the next stages of this project: a kiosk area, market/picnic area and Boardwalk.

CHCC has also recently allocated funds for the development of the Cultural Strategic Plan 2017-2022 and Performing Arts Centre Feasibility and Cost Benefit Assessment to determine the potential strategic impacts and benefits of a new Performing Arts Centre for the region. Detailed research and concept planning are also underway for the proposed expansion of the Harry Bailey Memorial Library and the Coffs Harbour Regional Gallery. Both feasibility projects are due for completion in mid 2016 which will greatly enhance arts and cultural experiences in Coffs Harbour.

The BSC Economic and Tourism Development Plan (2015) identifies a number of infrastructure priorities and strategies that will enhance the visitor experience. These include finalisation of a Main Street plan to improve the visual appearance and pedestrian safety in the main business area of Bellingen and implementation of the Gleniffer Master Plan to enhance the precinct and reduce impacts from excess visitation.

The situational analysis and the stakeholder engagement process undertaken to develop this Plan further identified a need to:

- Consider ways to attract public and private sector investment for new infrastructure
- Ensure adequate provision of facilities for visitors across the Coffs Coast (e.g. beautification of public areas, clean toilets, parking, parking for larger vehicles, RV dump points)
- Encourage public and private sector organisations to redevelop/ refurbish tired and ageing facilities
- Develop new sporting facilities and better maintain key attractions in Bellingen Shire (e.g. Urunga Boardwalk, Dangar Falls)
- Ensure adequate infrastructure to handle growing visitation in Bellingen Shire
- Address concerns from community stakeholders that although they have been consulted in the past about infrastructure needs, there has been limited action.

5.0 Tourism Infrastructure cont.

strategy 5.1 Ensure implementation of Council strategic plans for key infrastructure and facility development projects to enhance the Coffs Coast as an attractive place to visit, to live and to do business to 2020

Strategic Actions		Leadership	Support	Timing
s5.1.1	Work with relevant CHCC departments to determine the feasibility of the development of new infrastructure, and enhancement of existing Council-owned attractions and tourism-related infrastructure (e.g. CH Performing Arts Centre, Harry Bailey Memorial Library and the CH Regional Gallery)	CHCC		2016 to 2020
s5.1.2	Work with relevant CHCC departments to develop Business and Marketing Plans for Council-owned attractions and tourism-related infrastructure to ensure their economic viability and appeal to residents and visitors as part of annual Destination Coffs Coast: Tourism Marketing Plans (See s.10.1.1)	CHCC		2016 to 2020
s5.1.3	Develop strategies to promote the completion of new infrastructure development projects in Coffs Harbour and Bellingen LGAs to visitors and potential tourism business investors as part of annual Coffs Coast: Tourism Marketing Plans (see s.10.1.1)	CHCC, BSC	DCCC	2016 to 2020
s5.1.4	Work with relevant Council departments to ensure there are adequate and well-designed public facilities, amenities and parking to support the sustainable growth of tourism to towns and villages on the Coffs Coast to 2020	CHCC, BSC		2016 to 2020
s5.1.5	Work with relevant Council departments to improve the visual appeal of towns and villages through ongoing beautification works (e.g. streetscapes, gateway entrances)	CHCC, BSC		2016 to 2020

strategy 5.2 Develop strategic partnerships with relevant NSW and Australian government departments to position the Coffs Coast as an attractive place to visit, to live and to do business to 2020

Strategic Actions		Leadership	Support	Timing
s5.2.1	Develop strategic partnerships and lobby relevant NSW and Australian government departments to support the development of appropriate public infrastructure and facilities to enhance the visitor experience, community amenity and economy of the Coffs Coast (e.g. NPWS, Crown Lands, FCNSW, DNSW, DLPI, DPC, INSW, RDA)	CHCC, BSC	DCCC, CoCs	2016 to 2020
s5.2.2	Work cooperatively with relevant NSW and Australian government departments to support private sector stakeholders to develop new and appropriate infrastructure to enhance the visitor experience, community amenity and economy of the Coffs Coast	CHCC, BSC	CoCs, DNSW, RDA	2016 to 2020

6.0 Tourism Product and Experience Development

Encourage and support the development of new and refreshed tourism products and experiences to meet the needs of leisure, nature-based, events and cultural visitor markets to the Coffs Coast to 2020

A destination that offers a diverse range of visitor and brand-aligned experiences is in a better competitive position than one that has a limited mix of visitor activities. Best practice destinations recognise that there is a need to provide a diversity of appropriate tourism products and activities to complement their core visitor attractions including: a range of accommodation types to suit different visitor markets, vibrant events and festivals, nature-based experiences, recreational and leisure activities, quality food and beverage experiences, and cultural and heritage experiences. They also support and encourage entrepreneurs to establish quality and innovative experiences³.

In addition, the availability of quality, value-for-money accommodation is a key component in a visitor's destination choice and a top three consideration in short-break travel. Ongoing investment is, however, required to refresh and refurbish accommodation facilities to meet changing visitor expectations and to ensure visitor satisfaction. Accommodation development should also fit with the overall brand and image of a destination to ensure that it reflects both consumer and host community values⁹.

Although Coffs Harbour offers a range of mid-level accommodation that is suitable for various visitor markets (e.g. transit, leisure, family, sporting groups), it is generally regarded as being tired and in need of an upgrade. While Bellingen Shire is characterised by guesthouse, B&Bs and cabin-style facilities that align well with village qualities, current overnight capacity is limited. There is also a range of privately owned holiday houses and apartments promoted through accommodation and real estate agent websites across the Coffs Coast. This style of accommodation is an important part of the accommodation offering on the Coffs Coast, providing opportunities for typical coastal holidays and some 'high-end' luxury products currently not available through traditional accommodation options. Consideration should, however, be given to potential impacts of this type of accommodation in residential areas if capacity continues to increase, and how VICs can tap into accommodation booking commissions for these properties.

In terms of tourism products and experiences, visitors to the Coffs Coast can currently enjoy a diversity of leisure and nature-based experiences related to its beaches and waterways, coastal and hinterland villages and distinctive natural environments, as well as iconic and well-known attractions.

While Coffs Harbour and Bellingen LGAs can be considered to offer differing community, environmental and lifestyle experiences, they are also highly complementary from the visitor perspective. Tourism product and experience development should therefore adopt a destination-wide approach that integrates Coffs Harbour and Bellingen Shire attractions and experiences to present and promote a total visitor experience across the Coffs Coast. A Visitor Profile Survey undertaken in 2011 by TRA found that visitors to outlying villages of the Coffs Coast (e.g. Bellingen and Sawtell) reported higher levels of satisfaction. This will help to improve visitor experiences and satisfaction, increase length of stay and encourage visitor dispersal. Interestingly, visitation analysis undertaken to inform the development of this Plan estimated that only 13% of domestic overnight visitors in 2015 went on a day-trip to another place.

Clearly there is an opportunity to encourage and support the development of tourism products and experiences that reflect the Coffs Coast brand positioning to generate more overnight stays, including signature experiences that differentiate the Coffs Coast from other key competitor destinations such as Byron Bay, Port Macquarie, the Tweed Coast, South Coast NSW and Gold and Sunshine Coasts (QLD). It should be further noted that engaging and exciting signature experiences are not simply about attracting major new tourism investments; existing industry operators can also be actively mentored to further develop their products based on pre-determined criteria for a 'signature experience'.

continued next page

6.0 Tourism Product and Experience Development cont.

There is also a significant opportunity to further develop and promote nature-based and adventure tourism experiences on the Coffs Coast given the abundance of National Parks, State Forests and the Solitary Island Marine Park that are in close proximity to where visitors stay. This will, however, require a cooperative and strategic approach that engages government, business, and community stakeholders. A Nature-Based Tourism Strategy developed by consultants in 2012, provides some foundational work in this area that could be used as a basis to progress further strategic work. Current strategic tourism planning being undertaken by NPWS for the Northern Zone is also timely and will provide a good foundation to initiate a strategic approach for nature-based tourism development across the Coffs Coast. Other important stakeholders such as the Solitary Islands Marine Park Authority and the Forestry Corporation (Coffs Harbour) have considerable strategic experience and are also keen to be engaged in any future nature-based tourism planning initiatives. It will also be important to engage with nature-based and adventure tourism operators to encourage the development of appropriate niche operations and to ensure business viability.

There is also an immediate need to further develop distinctive cultural experiences for visitors, particularly in Coffs Harbour. This includes the need to clearly identify what distinguishes Coffs Harbour and the broader Coffs Coast from other coastal destinations – i.e. what are the soci-cultural features of Coffs Harbour and Bellingen Shires that are appealing to visitors and how can these be enhanced and promoted? A Visitor Profile Survey undertaken in 2011 by TRA showed that Coffs Harbour rated poorly in relation to cultural activities. To address this issue, the CHCC Cultural Plan 2013 to 2016 highlighted the need to build on assets which are in some way distinctive to this region or which provide a particular advantage, including Aboriginal culture and heritage, the Regional Gallery, and the region's natural beauty. Specifically, the Plan proposed that CHCC investigates the local potential for arts and heritage-based cultural tourism initiatives, with a particular emphasis on arts education initiatives, and identifies two strategies related to the development of cultural tourism: to investigate further potential for cultural tourism, and to develop opportunities for increased sales by local artists⁶. As previously explained in Section 5, a new CHCC Cultural Plan 2017 to 2022 is to be developed in 2016 that will consider and identify strategies to improve cultural tourism experiences for visitors. It should also be acknowledged that Arts Mid North Coast are an important stakeholder in cultural tourism planning for the Coffs Coast and have designated Bellingen as one of the 6 Creative Communities of the Mid North Coast.

Importantly, Bellingen Shire is well known for its cultural diversity and provides visitors to the Coffs Coast with opportunities to explore diverse arts and cultural experiences. The Bellingen Shire Public Art Plan (2014) identifies and recommends a range of public art projects throughout these areas, with a focus on projects which are practical, achievable and affordable over the next five years. The Plan aims to provide the first step towards a high quality public art program for the Bellingen Shire, one which is distinct from other places in Australia and which celebrates the diversity and uniqueness of the locality. In addition, the BSC Arts & Culture Plan (2012) identifies various objectives and strategies to provide support and facilities for a range of artistic and cultural services, programs and activities and to support and develop the artistic and cultural talent in the Shire. In addition, BSC has introduced a place-making program in 2016 that encourages the community to develop creative spaces through an on-going small grants program. There is, however, a need to promote these distinctive cultural experiences to visitors to Coffs Harbour whilst also ensuring that day-trip visitation to Bellingen Shire does not impact resident lifestyles.

Another distinctive opportunity is to better showcase and develop Coffs Coast regional food and produce. The Coffs Coast Local Food Framework 2010 to 2020 (an initiative of the Local Food Futures Project 2009 to 2012) and BSC Local Food Guide aims to support the development of a sustainable local food tourism economy for the region. This type of initiative should be continued to support local producers and to enhance the visitor experience.

Woolgoolga Headland – Solitary Island Coastal Walk



6.0 Tourism Product and Experience Development cont.

The situational analysis and the stakeholder engagement process undertaken to develop this Plan further identified:

- Tourism product development in the Coffs Harbour LGA should be contemporary and innovative and based on the visitor markets' evolving needs and expectations, and linked to coastal lifestyle attributes of the area
- Tourism product development in the Bellingen LGA should be aligned with the area's natural and cultural advantages, retain the authenticity of its towns and villages, and reflect community values
- That consideration be given to aligning funding/grant submissions for tourism product and experience development to state government and national government strategic plans and priorities (e.g. key experience sectors identified by DNSW)
- The NPA have proposed the development of a Great Koala National Park, which if advanced by the State Government, should be considered within the framework of future nature-based tourism plans
- Some nature-based and adventure tourism operators have expressed concern about the costs of permits and access to National Parks and waterways adjacent to North Coast Holiday Parks, which is limiting the development and delivery of nature-based activities and their business viability
- There is a need to ensure that nature-based tourism development conserves natural and marine environments
- There are opportunities to further enhance and promote the Coffs Harbour Regional Museum, Coffs Harbour Regional Gallery, Jetty Memorial Theatre and Botanical Gardens as interesting visitor attractions
- The Arts Mid North Coast Strategic Plan 2016 to 2018 recognises the value of cultural tourism to the regional visitor economy and supports all initiatives to identify, showcase and develop cultural experiences
- An opportunity to promote the range of produce on the Coffs Coast as 'bananas, blueberries and spice'.

Best Practice Example

Kangaroo Island has a proven track record in developing secondary attractions, many of which are linked to the island's natural and cultural heritage and complement its natural assets. This is particularly evident in the growth of small-scale food and wine tourism businesses, where producers have diversified from general farming in response to the gradual decline in traditional areas of agricultural production. This has enhanced the sophistication of the island's tourism product and encourages visitors to extend their stay.

There are approximately 30 wine producers on the island and a number of boutique wineries have emerged, offering visitors a truly local wine and food experience. In addition, a number of well-established commercial food producers provide opportunities for visitors to learn about the production process and sample and purchase local produce. The most notable examples are honey farms, which produce pure honey from the Ligurian bee; a sheep dairy which produces quality yoghurts and cheeses; and a marron farm where visitors can taste freshwater crayfish. Other specialty food products include olive oil, native jams, local seafood and free range chicken and eggs. Kangaroo Island's growing reputation as a culinary destination was recognised in early 2007 when it was named as Australia's Best Regional Food Destination at the Vogue Entertaining and Travel Produce Awards. Other secondary experiences include lighthouse tours and sheep shearing demonstrations, heritage accommodation and art and craft galleries³.

6.0 Tourism Product and Experience Development cont.

strategy 6.1 Support the development of new accommodation properties, and encourage the refurbishment of existing properties to provide a diverse range of quality and affordable accommodation options for visitors to the Coffs Coast to 2020

Strategic Actions		Leadership	Support	Timing
s6.1.1	The Destination Coffs Coast: Industry Development and Engagement Working Group to advise Council on accommodation opportunities and issues, investigate ways to support existing accommodation operators to invest in refurbishment of their properties, and monitor the scale of holiday letting of private properties in residential areas to ensure potential visitor impacts are minimised	DCCC	CHCC, BSC	2016 to 2020
s6.1.2	Undertake a comprehensive and regular audit of secondary data sources of all visitor accommodation to determine the scale and characteristics of current offerings and to identify gaps/opportunities to help plan for appropriate levels of visitor accommodation	CHCC	DCCC, BSC	2016 to 2020
s6.1.3	Review CHCC and BSC development control and land use policies to ensure there is sufficient detail to guide the location and design of tourism accommodation facilities	CHCC, BSC		2016
s6.1.4	Develop CHCC and BSC dedicated website pages that clearly articulate Council guidelines; these sites should provide potential developers and property owners with information to encourage quality and sustainable development that complies with Council and environmental policies for each Shire. They should also include information about planning processes, development controls, local economic and community profiles and links to relevant Council information	CHCC, BSC		2016
s6.1.5	Support potential developers and property owners to ensure they understand relevant Council and state policies and processes for development applications	CHCC, BSC	DPE	2016 to 2020
s6.1.6	Ensure future plans for rural tourism development are undertaken in consultation with rural communities and assess the infrastructure needs to support such development	CHCC, BSC		2016 to 2020

6.0 Tourism Product and Experience Development cont.

strategy 6.2 Support tourism operations and attractions to develop new products that focus on quality and distinctive experiences on the Coffs Coast to 2020

Strategic Actions	Leadership	Support	Timing
s6.2.1 Undertake a comprehensive tourism product and experience audit to determine the scale and characteristics of current offerings and to identify opportunities that is updated annually	CHCC	BSC, DCC, CoCs	2016
s6.2.2 Actively promote tourism infrastructure and investment opportunities on the Coffs Coast (e.g. accommodation, hospitality, retail, arts and cultural, regional food)	CHCC, BSC	RDA, DNSW, INSW, RDA	2016 to 2020
s6.2.3 Support tourism operators to develop quality submissions in applying for relevant grant funding (e.g. DNSW RVEF)	CHCC, BSC	DCCC, DNSW	2016 to 2020
s6.2.4 Support CHCC to investigate opportunities to develop and promote cultural tourism opportunities (including indigenous) in cooperation with Arts Mid North Coast as part of the development of the CHCC Cultural Plan 2017 to 2020	CHCC	DCCC	2016
s6.2.5 Support BSC to implement strategies relevant to tourism as part of the Bellingen Shire Public Art Plan (2014)	BSC	DCCC	2016 to 2020
s6.2.6 Review the Coffs Coast Local Food Framework 2010 to 2020 to identify opportunities to promote regional food and produce across the Coffs Coast to visitors	CHCC	DCCC	2016
s6.2.7 Initiate a Coffs Coast Signature Experiences Development Program for selected industry operators whose products have the potential to fulfill the key criteria of a 'signature experience' – i.e. an exciting product that can drive conversion, underpin the Coffs Coast brand, build sustainability, enhance yield and importantly, improve the region's competitive advantage	CHCC, BSC	DCCC	2016

strategy 6.3 Work with nature-based tourism organisations to develop a Destination Coffs Coast: Nature Based Tourism Strategy to 2020

Strategic Actions	Leadership	Support	Timing
s6.3.1 Establish a Destination Coffs Coast: Nature-Based Working Group as part of the DCCC to lead the development of a Coffs Coast Nature-Based Tourism Strategy to 2020 in cooperation with key nature-based tourism stakeholder organisations (NPWS, SIMPA, FCNSW) and local nature-based operators (to be chaired by the DCCC nature-based tourism representative)	CCHC	BSC, DCCC, NPWS, SIMPA, FCNSW	2016
s6.3.2 Promote the recommendations of the Coffs Coast Nature-Based Tourism Strategy to 2020 to industry and community	CHCC	BSC, DCCC, NPWS, SIMPA, FCNSW	2016/2017
s6.3.3 Support existing and new nature-based tourism operators to develop viable operations and provide distinctive nature-based experiences in National Parks, Reserves, Crown Land and State Forests on the Coffs Coast	CCHC	BSC, DCCC, NPWS, SIMPA, FCNSW, DLPI, DPE	2016 to 2020
s6.3.4 Encourage and support operators to achieve relevant environmental/eco-tourism accreditation to promote their operations as best practice	DCCC	CHCC, BSC, NPWS, SIMPA, FCNSW	2016 to 2020

destination marketing

7.0 Events and Festivals

Position the Coffs Coast as the leading regional destination for sports tourism, innovative events and festivals that support the Coffs Coast brand to 2020

Events and festivals are recognised as a major catalyst for regional visitation. They provide numerous opportunities and benefits for individual businesses, communities and the destination region, including increased visitation and expenditure, reduced seasonality, repeat visitation and stronger regional awareness. They can also provide the stimulus for additional infrastructure development and build community pride¹⁰. In addition, sports tourism is internationally recognised as a substantial and highly desirable niche market segment for regional areas given that there are a number of opportunities for visitors to participate in tourism activities not connected with sport¹¹.

Coffs Harbour is renowned for its events, which play a very significant role in attracting visitors to the Coffs Coast and boosting the local and regional economy particularly in traditionally low visitation periods. In October 2015, the city won a globally acclaimed International Festivals and Events Association (IFEA) World Festival and Event City Award, gaining recognition alongside major cities around the world. The FIA World Rally Championship (run in conjunction with the Bellingen and Nambucca Councils) attracts the greatest number of spectators (50,000+) and also provides the Coffs Coast with valuable international media coverage. Coffs Harbour is also host to a range of high profile annual sporting contests including the National Touch League, the FFA National Youth Championships, three major Oztag events (Nationals, Junior Nationals, Junior State Cup) and the Australian Surf Festival (to 2017), Adventurethon and the Coffs Coast Festival of Cycling. Destination NSW (DNSW) supports several Coffs Harbour events, including the Coffs Harbour Running Festival, through its Regional Flagship Events Program. As such, sports tourism is a very attractive market segment for Coffs Harbour, however other regional destinations are keen to take their share.

CHCC's Stadium and Major Events team play a significant leadership role in bidding for sports tourism events and the management of key event infrastructure and facilities. In order for Coffs Harbour to retain its competitive

position and build on its existing sports tourism events portfolio, it will be important that Council adopts a strategic approach to identify opportunities to: attract and bid for key sports tourism events, public and private investment for new regional sporting infrastructure and facilities, and increase visitor dispersal across the Coffs Coast.

In addition to sports tourism events, the Coffs Harbour LGA delivers a diversity of cultural festivals that are attractive to residents and visitors. These include the highly successful Coffs Harbour International Buskers and Comedy Festival (supported by CHCC), Multicultural Harmony Day and the Saltwater Freshwater Festival. Coffs Harbour also attracts quality theatrical performances, art exhibitions, concerts, cinema and dance, which can add value to the visitor experience. Community based events like Woolgoolga's Curryfest, the Chilli Festival (Sawtell) and until recently, the Coast Out Festival and Toast Urunga, play an important role in showcasing local villages and supporting the Coffs Coast brand. To ensure their ongoing viability, local events' organisers need additional support and advice to navigate the increasing complexities of events management, particularly given the reliance on volunteers and limited resources. Issues include negotiating compliance issues; funding applications; effective allocation of human and financial resources; building industry, business and community support for events and festivals; conducting consumer research, maximising the visitor economy and measuring return on investment (ROI).

For business events see page 45.

continued next page

7.0 Events and Festivals cont.

The creative communities in and around Bellingen are also reflected through a range of cultural festivals and local events. The Bello Winter Music Festival, the Bellingen Jazz Festival ('resting in 2015'), the Dorrigo Folk and Bluegrass Festival, Dorrigo Creative Mountain Arts Exhibition and Made in Dorrigo Festival, and the Bellingen Readers and Writers Festival (held in various venues along the Waterfall Way), attract visitors from well beyond the Shire's boundaries and the broader Coffs Coast region. Camp Creative, a summer school featuring courses including music, dance, voice and the visual arts has been running for 30 years, bringing families and individuals to Bellingen for five days in January. The highly innovative Steam Punk Festival in Dorrigo which references the huge collection of historic steam engines nearby, is typical of the kind of event which can become a significant draw card for a small township over time. The Shire also hosts some community sporting events including the Urunga Dragon Boat Regatta and the Coffs Coast/Mylestom Dragon Boat Regatta, and regular produce/community markets. Both Bellingen and Urunga residents would like more sports tourism, and there is a proposal for a basketball/multi-purpose stadium in Urunga. To support local event organisers, Bellingen Shire Council has recently introduced an Events Hub in the Waterfall Way Visitor Information Centre to provide practical support for organisations and volunteers. Apart from offering a centralised, dedicated meeting space, the Hub also provides computer and printing facilities, file storage, publicity and event ticket sales through the Visitor Information Centre.

Best Practice Example: The Port Fairy Folk Festival, Victoria

The Port Fairy Folk Festival is a popular annual four-day music festival based in the historic fishing village of Port Fairy in Victoria. From its humble beginnings in 1977, the Festival will celebrate its 40th anniversary in 2016 with an impressive line-up of national and international performers. The Festival receives no Government funding and is entirely reliant on the enormous support from the small Port Fairy community; schools, service clubs, sporting clubs and other community organisations and volunteers to ensure that every aspect of the Festival runs smoothly – and all benefit from it financially. Funds have built a number of community assets including a swimming pool. Local businesses also embrace the opportunity with bumper results!

This collaborative approach to event management and knowledge-sharing would be beneficial across both shires. Furthermore, for Coffs Coast to effectively leverage greater benefits from its events and festivals, all tourism stakeholders should work cooperatively to highlight the range of attractions and experiences in and around the host community, and the region. This should be underpinned by an annual events marketing plan.

The situational analysis and the stakeholder engagement process undertaken to develop this Plan further identified:

- There is no single source of information for the region's events and festivals which detracts from marketing efforts and confuses both organisers and consumers
- The need for local businesses to make a stronger effort in providing events' visitors with a total destination experience – (e.g. through visitor-friendly opening hours and facilities)
- The potential for neighbouring towns like Urunga to receive a 'spill-over' benefit from larger, Coffs Harbour based events
- Recurring costs for events' organisers, particularly in relation to supporting infrastructure needed to deliver events and festivals (e.g. power, sound, lighting and electronic billboards)
- Events and festivals require ways to measure their effectiveness, and secure funding and other external support
- While DNSW provides events funding to the region, CHCC is not permitted to use the Coffs Coast brand for these events
- Overpriced accommodation during events is creating negativity amongst visitors
- The potential to refresh and innovate existing events so they continue to deliver memorable experiences.

7.0 Events and Festivals cont.

strategy 7.1 Develop a strategic and coordinated approach to position the Coffs Coast as the leading regional destination for sport tourism to 2020

Strategic Actions	Leadership	Support	Timing
s7.1.1 Develop a Coffs Harbour Events Strategy that identifies opportunities to attract and bid for key sports tourism events, public and private sector investment for new regional sporting infrastructure and facilities, and establishes marketing strategies to promote events to increase visitor dispersal across the Coffs Coast to 2020	CHCC	BSC, DNSW, INSW, RDA	2016/2017
s7.1.2 Investigate opportunities to fund and develop sports tourism infrastructure and facilities in Bellingen Shire	BSC	DNSW, INSW, RDA	2016 to 2020

strategy 7.2 Establish a coordinated approach to deliver innovative and viable events and festivals across the Coffs Coast

Strategic Actions	Leadership	Support	Timing
s7.2.1 Establish a single, authoritative and comprehensive annual events and festivals calendar for the Coffs Coast region, which addresses the needs of both organisers and consumers	CHCC	BSC, CoCs	2016 to 2020
s7.2.2 Develop and promote a 'How to plan and deliver successful community events' guide for the Coffs Coast, which includes measuring economic, social and environmental impacts and other practical solutions and advice, to assist community-based events' organisers	CHCC, BSC	CoCs, DNSW	2016
s7.2.3 Establish a regular mentoring program to provide ongoing support and advice for community-based organisers in the Coffs Harbour LGA	CHCC	CoCs	2016
s7.2.4 Support event organisers to create new, innovative and brand-aligned events and festivals, as well as opportunities to refresh and enhance successful, existing events and festivals	CHCC, BSC	CoCs, DNSW	2016 to 2020
s7.2.5 Introduce a 'one stop shop' to assist organisers with regulatory requirements for events and festivals within the Coffs Harbour LGA	CHCC		2016
s7.2.6 Continue to deliver the events hub to support local event organisers in Bellingen LGA	BSC		2016 to 2020
s7.2.7 Develop a BSC Events Policy to provide support and guidelines for event organisers in Bellingen LGA	BSC		2016

7.0 Events and Festivals cont.

strategy 7.3 Encourage event and festival visitors to stay longer, spend more and enjoy the diversity of experiences across the Coffs Coast region

Strategic Actions		Leadership	Support	Timing
s7.3.1	Encourage broader industry stakeholders (e.g. accommodation, tour operators) to support Coffs Coast events and festivals through their own marketing initiatives	CHCC, BSC	DCCC, CoCs	2016 to 2020
s7.3.2	Encourage ‘whole of community’ support for Coffs Coast events and festivals through visitor-friendly initiatives (e.g. appropriate opening hours and availability of amenities and services)	CHCC, BSC	DCCC, CoCs	2016 to 2020
s7.3.3	Investigate spreading the benefit from larger Coffs Harbour events to surrounding towns, to encourage dispersal and spend (e.g. use of some sporting facilities at Urunga)	CHCC	BSC, DCCC, CoCs	2016 to 2020

8.0 Brand and Positioning

Ensure the effectiveness of the Coffs Coast brand in its promise to consumers, ability to differentiate the region, improve industry uptake and consistent application across all marketing and promotional activities to 2020

A brand is the set of expectations, memories, stories and relationships that, taken together, account for a consumer's decision to choose one product or service over another¹². An effective brand is at the heart of a successful visitor destination. It should drive the marketing strategies at every consumer touch point and inform both current and future product and experience development. Tourism brands require periodic monitoring to ensure that they are aligned to core markets and contemporary consumer trends; provide a genuinely competitive edge based on the region's unique qualities; deliver a strong and consistent message across all platforms, and engage those who must champion the brand promise as part of their regular business and community activities.

Put simply, the best tourism brands are built on a genuine sense of place and a focus on those qualities that make that place special and different. Many visitor destinations fail to reach their desired potential because their brand positioning is too generic, particularly in such a dynamic and competitive environment. The Coffs Coast for example, has superb beaches, parks, forests and reserves and a range of family activities but these attributes are not particular to the region, and many other destinations could make similar claims. The challenge is in clearly articulating the region's real point of difference.

Coffs Coast Tourism and the Coffs Harbour City Council jointly funded a 'Brand Refinement' project in 2011, which was completed in 2012. The project objectives were to develop a unique appearance for the region; convey the diversity of tourism offerings; and create a personality that was both authentic and distinctive. The project arose from several key factors including:

- The existing brand did not resonate with the Coffs Coast tourism industry, particularly those stakeholders beyond Coffs Harbour where smaller towns and villages struggled to assert their distinctive characteristics
- The lack of industry support resulted in fractured and inconsistent marketing messages
- A decline in visitation and strong competition from other destinations, suggested that the region needed to reposition its relationship with potential markets.

continued next page

Bushwalking, Orara State Forest



8.0 Brand and Positioning cont.

In response, consultants focused on creating a new Coffs Coast brand that included an intricate logo design to reflect coastal and hinterland experiences. Although this brand exercise was originally driven by some very valid concerns, the issues that prompted it some four years ago are largely still echoed in engagement activities undertaken to inform this Plan.

Best Practice Example: Tasmania – Go Behind the Scenery

Tasmania's tourism industry is achieving unparalleled success, which is being driven by a new, unconventional and quirky brand, Tasmania – Go Behind the Scenery. In an increasingly noisy market place, this small place on the edge of the world is 'standing out from the crowd' with its unique invitation to consumers. While the brand reflects well-known Tasmanian attributes, it also encourages consumers to engage with those experiences that are 'behind the scenery' – 'the nooks and crannies, the offbeat and the original, and Tasmania's natural beauty set against the brutality of our convict past'¹³. The brand story is highly authentic and unflinching in its recognition of the island's heritage and culture. Consumers are responding in droves, however Tourism Tasmania's formal tracking research is consistently used to refine content, messaging and other key facets of the brand.

The situational analysis and the stakeholder engagement process undertaken to develop this Plan further identified:

- The brand needs to reflect the key visitor experiences on the Coffs Coast related to leisure, nature-based, sports tourism, and events and festivals
- Some sub-branding has been developed independently of the agreed brand process for the Bellingen Shire
- An effective sub-brand has been created for sports tourism events in Coffs Harbour – 'where champions play'
- That the current Coffs Coast brand was initially well supported by industry stakeholders across Coffs Harbour and Bellingen LGAs as an effective umbrella brand, but industry stakeholders indicated that they didn't understand its key elements and have not incorporated the Coffs Coast brand into their business practices
- Industry stakeholders do not understand what constitutes a destination brand, with many thinking that a destination brand is simply a logo or an advertising tag line
- Industry stakeholders in the hinterland still feel particularly disconnected from the current brand, which they view as being predominantly coastal
- A need to communicate the Coffs Coast brand positioning to other important tourism stakeholders (e.g. NCDN, DNSW)
- Overall, improved industry engagement with the Coffs Coast brand and positioning is imperative going forward to 2020
- Negative visitor perceptions of Coffs Harbour due to its reputation as a regional services hub and the CBD's lack of appeal as travellers drive through – i.e. visitors don't know about the more attractive areas that lie beyond the Highway and CBD area
- An opportunity to position the Coffs Coast hinterland as a distinctive visitor experience.

8.0 Brand and Positioning cont.

strategy 8.1 Undertake a brand review process to ensure an authentic, consistent and competitive brand and positioning for the Coffs Coast that reflects coastal and hinterland visitor experiences to 2020

Strategic Actions		Leadership	Support	Timing
s8.1.1	Establish a Destination Coffs Coast: Brand Review Working Group as part of the DCCC comprising a CHCC and BSC representative, 2 x DCCC members and an external expert with considerable brand development experience during 2016 (to be chaired by CHCC)	CHCC	BSC, DCCC	2016 to 2017
s8.1.2	Undertake a Coffs Coast Brand Review Process to evaluate stakeholder perceptions, brand identity, key messages and brand communication and management, and identify relevant sub-brands	CHCC	BSC, BRWG, Consultant	2016
s8.1.3	Review and update existing marketing collateral and visitor information, based on the review findings, to ensure brand consistency	CHCC	BSC	2017 to 2020
s8.1.4	Undertake regular consumer research to evaluate Coffs Coast brand effectiveness and visitor perceptions (see also s9.2.2)	CHCC	BSC, BRWG	2017 to 2020

strategy 8.2 Facilitate engagement with tourism stakeholders to effectively promote and apply the Coffs Coast brand to 2020

Strategic Actions		Leadership	Support	Timing
s8.2.1	Develop an 'industry-friendly' Coffs Coast Style and Brand Guide to inform the development of industry marketing collateral	CHCC	BSC, BRWG, Consultant	2016
s8.2.2	Develop a Coffs Coast Brand Engagement Program to communicate how the brand works in the market place, the value of brand loyalty, the importance of all industry stakeholders adopting and promoting the brand; and the application of brand elements to Coffs Coast tourism and local businesses; and ensures its consistent use	CHCC	BSC, BRWG	2016
s8.2.3	Work collaboratively with NCDN and DNSW to ensure consistent delivery of the Coffs Coast brand and alignment to key visitor markets	CHCC	BSC, NCDN, DNSW	2016 to 2020

9.0 Key Visitor Markets

Focus marketing activities on viable, brand-aligned visitor markets to attract returning and new visitors to the Coffs Coast to 2020

Destinations must consider and establish the visitor segments that they are willing and able to target through their marketing efforts. Visitor markets should therefore be considered in terms of their relative ‘fit’ with the attractions and experiences available at the destination and with the local community’s objectives for tourism³. The drive for sustainability also needs to feature in marketing decisions as many visitors now prefer peace and quiet, access to natural and real tourism experiences rather than ones that have been artificially or detrimentally impacted by over promotion¹⁴. As such, a strong synergy between appropriate, well-researched target markets and a destination’s positioning in the marketplace encourages new and repeat visitation, higher levels of customer satisfaction, brand ambassadors, and a more competitive and resilient visitor economy.

A comprehensive analysis of TRA visitation data from 2011 to 2015 (year ending June) was undertaken to inform the development of this Plan³. During 2015, Coffs Coast received approximately 1.6 million visitors comprising approximately 45% domestic overnight visitors, 5% international overnight visitors, and 50% day-trip visitors. For 2015, it is estimated that there were 726,00 overnight domestic visitors representing a decline since peak levels experienced in 2013 and 2014 (830,000 and 823,000), international visitation peaked in 2015 (81,600), and day-trip visitation.

³See full visitation analysis in Coffs Coast Strategic Tourism Plan 2020 Report 1: Situational Analysis and Stakeholder Engagement



Cycling, Bruxner Flora Reserve

Key Visitor Markets

Findings of the visitation analysis confirm that the focus for Coffs Coast Tourism marketing should be concentrated on the following key visitor markets:

1. Primary markets: Sydney and regional NSW, Brisbane and South East Queensland
2. Secondary markets: Melbourne and surrounds
3. VFR and Stopover visitor markets.

9.0 Key Visitor Markets cont.

Further Recommendations

Although, the region is well positioned for the international self-drive market, given its strategic location between Sydney and Brisbane, the international visitor market forms a small proportion of overall visitation to the Coffs Coast and is best pursued through appropriate Legendary Pacific Coast marketing initiatives which positions the Coffs Coast as part of the broader North Coast of NSW.

Coffs Harbour also attracts business events, mostly through its resort-style properties, however it remains a small percentage of the potential visitor market, which is currently best pursued by those industry operators who directly benefit from this sector.

It is, however recommended that CHCC marketing funds are not currently allocated to target the Business Events market, until further rigorous, updated assessment and considerations of the highly competitive business events marketplace is undertaken as part of the feasibility assessment process for a new Performing Arts Centre in Coffs Harbour for the Cultural Strategic Plan 2017 to 2022 project work (See s5.1.1).

Sapphire Beach



The situational analysis and the stakeholder engagement process undertaken to develop this Plan further identified:

- A new air service between Melbourne and Coffs Harbour commencing in December 2015 is likely to increase the importance of some Victorian domestic markets for the Coffs Coast
- The NSW North Coast offers other similar destination experiences for visitors (e.g. Ballina, Byron Bay, Port Macquarie, Port Stephens, the Tweed Coast) as does the NSW South Coast
- Broader competitor destinations include the Gold Coast and Sunshine Coasts with important regional airports and self-drive opportunities
- Although day-trip visitation is a significant part of the Coffs Coast visitor economy, impacts on smaller villages should be monitored
- The region is well positioned for the international self-drive market, due to its strategic location between Sydney and Brisbane, however given that the international visitor market forms a small proportion of overall visitation to the Coffs Coast, it is best pursued through leveraging the Legendary Pacific Coast brand, which positions the Coffs Coast as part of the broader North Coast of NSW
- International visitation to the Coffs Coast has, however, continued to grow since 2011
- There was an increase in international arrivals from Melbourne to the Coffs Coast in 2015 (12.4%) in comparison with 2014 (7.6%)
- Recent growth in Chinese visitation to Australia suggests that the Coffs Coast should monitor this visitor market to determine its alignment with the region's brand and experiences (regional dispersal of Chinese travellers is currently predominantly out of Sydney)¹⁶
- Overall, marketing should aim to attract visitor markets that align with community values.

9.0 Key Visitor Markets cont.

Visitation Snapshot

The key characteristics of overnight visitors to the Coffs Coast for year ending June 2015 were as follows:



Domestic Overnight Visitors

- The main purpose of trip was for a holiday (50%), followed by VFR market (30%)
- The majority drive (88%), followed by air services (8%)
- Most stay up to 7 nights (90%) and short stays of one to three nights remain significant (61%)
- The 55+ year age group is the most important demographic segment (44%), followed by those aged 30 to 54 years (38%)
- The main travel party types are adult couples (32%), followed by family groups (23%) and those travelling alone (22%)
- Intrastate visitors remain important (60%) – i.e. Sydney and regional NSW
- Interstate visitors account for 40% of domestic overnight visitation
- There was a decline of 12% in the number of domestic overnight visitors from 2014 to 2015
- Main activities include: eating out (68%), outdoor/nature (63%), visiting friends and relatives (57%), sightseeing/looking around (38%), active outdoor sports (33%), visiting local attractions/tourist activities (34%), and shopping for pleasure (26%) – day-trips to other places remains quite low (13%)
- The main accommodation used is hotels and similar accommodation (38%), camping and caravan parks (17%), rented houses and apartments (6%) and 'other private accommodation' (37%) presumably of friends and relatives.

International Overnight Visitors

- The main purpose of travel is for holidays (67%), but also includes some VFR (19%)
- The majority drive (66%), followed by bus or coach (16%) and air (11%)
- The main place of arrival is Sydney (56%), followed by Melbourne (15%) and Brisbane (15%)
- The majority stay between 1 and 7 nights (70%) and 17% stay between 8 and 14 nights
- Most travel alone (52%) or are adult couples (24%)
- Key age groups are those aged between 20 and 24 years (23%) and 25 and 29 years (20%)
- Their main activities include outdoor/nature activities (95%), eating out (94%), visiting local attractions/tourist activities (85%), shopping (83%) – they currently do not participate in day-trip visits to other places⁸.

9.0 Key Visitor Markets cont.

strategy 9.1 Focus marketing efforts on key existing and new visitor markets for the Coffs Coast to 2020

Strategic Actions		Leadership	Support	Timing
s9.1.1	Target key domestic leisure, nature-based, events and cultural visitor markets to the Coffs Coast: Sydney, regional NSW, Brisbane, and South East Queensland	CHCC	NCDN, DNSW	2016 to 2020
s9.1.2	Build consumer awareness of the Coffs Coast to potential leisure, nature-based, events and cultural visitor markets from Melbourne and surrounds	CHCC	CHRA, NCDN, DNSW	2016 to 2020
s9.1.3	Maintain the strong VFR and Stop-over markets to the Coffs Coast through appropriate marketing initiatives	CHCC	BSC	2016 to 2020
s9.1.4	Target the international self-drive market through appropriate marketing initiatives only (e.g. Legendary Pacific Coast)	CHCC	NCDN, DNSW	2016 to 2020

strategy 9.2 Establish a Coffs Coast Tourism Destination Research Program to regularly monitor and evaluate visitor markets, profiles, and satisfaction for the Coffs Coast to 2020

Strategic Actions		Leadership	Support	Timing
s9.2.1	Analyse and monitor TRA visitation half-yearly to monitor and evaluate domestic, day-trip and international visitor market, profiles, patterns and key competitor visitation	CHCC	NCDN	2016 to 2020
s9.2.2	Establish regular destination-based consumer research to monitor and evaluate visitor expectations, satisfaction and profiles for Coffs Coast destinations	CHCC	BSC, Consultant	2017 to 2020
s9.2.3	Establish a data collection methodology system 'in-destination' to regularly gather and analyse visitation data collected by VICs, major attractions, CHRA, NPWS, SIMPA and CHIM	CHCC, BSC	DCCC	2017 to 2020

10.0 Strategic and Tactical Marketing

Adopt strategic and innovative destination marketing strategies to promote leisure, nature-based, events and cultural experiences to key visitor markets, and to build a strong visitor economy for the Coffs Coast to 2020

Effective marketing is consumer-focused, agile and content-driven through traditional and social channels. Potential visitors are seeking more tailored and experiential information that relates to their specific interests and lifestyle, rather than a generic marketing approach. Destinations must therefore develop deeper, interactive relationships with consumers to understand their evolving needs and expectations. Moreover, there is a strong trend towards brands that ‘earn’ customer loyalty, through social media for example, rather than those that ‘push’ products through paid advertising and promotion. Marketing influence should also extend throughout the travel planning cycle from the ‘dreaming’ stage to after the visitor has returned home. Best practice principles for the sustainable marketing of regional tourism destinations include a research-driven, collaborative approach and the development and implementation of annual marketing plans, that identify innovative advertising sales and promotion strategies to support the destination brand and image³.

CHCC, through its Industry and Destination Development Section has assumed overall leadership and responsibility for the promotion of tourism on behalf of the Coffs Coast. Marketing activities span traditional and digital marketing, including specific buy-in campaigns with industry partners, media promotions, trade events, product packaging and the development and continued update of the Coffs Coast consumer website. In the year ending June 2015, CHCC spent more than \$200,000 on a full suite of operational marketing activities. In addition, industry development and assistance is provided through a free image library, e-newsletters, ‘famils’, advertising and brochure templates, an annual prospectus for partnership opportunities and brand style guidelines.

BSC works with CHCC to develop collaborative marketing initiatives, however

it has also introduced some of its own activities including the recent launch of three Discovery Apps for Bellingen, Urunga and Dorrigo, which include information regarding accommodation, attractions, festivals and events, eateries and other tourism-related products as well as local services. In addition, local operators undertake their own marketing activities.

Although both CHCC and BSC have undertaken marketing initiatives there has been to date, no strategic or coordinated planning approach to marketing the Coffs Coast.



10.0 Strategic and Tactical Marketing cont.

The situational analysis and the stakeholder engagement process undertaken to develop this Plan further identified:

- Coffs Harbour is well positioned as the gateway destination to the Coffs Coast region, but there is a need to encourage visitor dispersal to other coastal and hinterland villages
- Ensure that Coffs Harbour does not lose stop-over/transit visitors as this is an important visitor market
- A need for a coordinated approach to digital marketing and social media across the Coffs Coast that integrates Bellingen and Coffs Harbour products and experiences, to establish consistent visitor information for the whole of the Coffs Coast
- Industry needs to collaborate ('buy-in') more effectively to cooperative marketing initiatives; this is important in such a competitive coastal destination marketplace – there are, however, widespread reports of industry apathy and lack of confidence in the former Coffs Coast Marketing efforts
- Broad agreement that while stakeholders wanted growth for the Coffs Coast visitor economy, it needed to be sustainable and not to the detriment of either community and social values or the region's natural attributes
- Coffs Coast would benefit from like-minded operators packaging/ bundling a range of experiences to showcase the best of the region
- Packaging of airline services and 'on the ground' product is a major opportunity for the region that should be driven by local operators
- Marketing activities should focus on yield rather than volume, which is largely achieved through overnight stays. Longer term, this approach assists a more sustainable balance of business, community and environment
- BSC has undertaken some of its own marketing initiatives that need to be better aligned to the Coffs Coast marketing strategies
- The Waterfall Way is under-promoted
- Visitor markets need a stronger message that the hinterland areas are more than a day trip
- '101 Things to Do...' should be reviewed as a key approach to marketing the Coffs Coast to focus on key experiences and attractions
- Promote niche sector experiences relevant to the Coffs Coast (e.g. there is an opportunity to tap into visitor markets with a heightened awareness of sustainability/regional produce, diving and marine-based activities).

10.0 Strategic and Tactical Marketing cont.

strategy 10.1 Establish a strategic approach to align and coordinate all marketing activities with key visitor markets, experiences and the Coffs Coast brand to 2020

Strategic Actions		Leadership	Support	Timing
s10.1.1	Develop an annual Destination Coffs Coast: Tourism Marketing Plan, including a digital and social media strategy, that is inclusive of the whole destination region and supported by industry stakeholders across both LGAs	CHCC	DCCC, BSC	2016
s10.1.2	Develop tactical campaigns that promote the Coffs Coast as an appealing and attractive visitor destination by promoting sports tourism, leisure, marine and nature-based experiences, an exciting events calendar and its connection to coastal and hinterland villages (e.g. promote the scenic beauty of the Coffs coastline and Solitary Islands and natural environments – the other side of the Highway)	CHCC	BSC, NPWS, SIMPA FCNSW	2016 to 2020
s10.1.3	Ensure Coffs Coast marketing initiatives align with DNSW and other stakeholder marketing plans (e.g. CHRA, NPWS, SIMPA, FCNSW, NCDN)	CHCC	DNSW, NPWS	2016 to 2020

strategy 10.2 Develop strategies to promote coastal village and hinterland experiences as part of annual Coffs Coast: Tourism Strategic Marketing Plans to encourage visitor dispersal, enhance the visitor experience and foster a sustainable visitor economy across the Coffs Coast to 2020

Strategic Actions		Leadership	Support	Timing
s10.2.1	Work with local operators to develop and promote a series of themed, self-drive coastal, village, water-based, nature-based, cultural and regional food itineraries to encourage visitor dispersal and increased overnight visitation, particularly in the hinterland areas	CHCC	BSC, DCCC	2016/2017
s10.2.2	Capitalise on the Waterfall Way as one of NSW's most attractive, scenic drives to encourage visitors to explore beyond Coffs Harbour	CHCC, BSC	NPWS, RMS	2016 to 2020
s10.2.3	Develop pre/post touring packages and special deals to increase overnight visitation, length of stay and spend of event and festival patrons	CHCC	BSC, DCCC	2016 to 2020
s10.2.4	Promote Coffs Coast-wide activities and experiences for 'down-time' during larger events and for partners/friends/family who are not directly involved in the events (e.g. World Rally Championships)	CHCC	BSC	2016 to 2020
s10.2.5	Promote that the main beaches in Coffs Harbour are patrolled by life-guard continuously throughout the year	CHCC	BSC	2016 to 2020

10.0 Strategic and Tactical Marketing cont.

strategy 10.3 Build digital marketing capacity with Coffs Coast industry operators to strengthen their competitive position and meet consumer expectations to 2020

Strategic Actions	Leadership	Support	Timing
s10.3.1 Encourage all tourism and hospitality operators to list their products and regularly update their listing with the Australian Tourism Data Warehouse (ATDW) to ensure that they are represented on visitnsw.com.au	BSC, CHCC	DCCC, NCDN	2016 to 2020
s10.3.2 Support all tourism and hospitality operators to better understand digital media technologies through training opportunities as part of the Destination Coffs Coast: Industry Development and Engagement Program (see s1.1.4)	DCCC	CHCC	2016 to 2020

strategy 10.4 Develop strong stakeholder partnerships to support regional marketing opportunities and expand promotional opportunities for the Coffs Coast to 2020

Strategic Actions	Leadership	Support	Timing
s10.4.1 Conduct quarterly meetings to coordinate destination marketing strategies and initiatives between representatives from the CHCC and BSC	CHCC	BSC	2016 to 2020
s10.4.2 Actively encourage and support industry 'buy-in' to build consumer-led, cooperative marketing initiatives – i.e. bundling and packaging of experiences which showcase the best of the region	CHCC	BSC, DCCC	2016 to 2020
s10.4.3 Work collaboratively with key local industry stakeholders (e.g. Coffs Harbour Airport, C.ex, CoCs) on cooperative marketing initiatives	CHCC	DCCC	2016 to 2020
s10.4.4 Work cooperatively with neighbouring destination regions on cooperative marketing initiatives (e.g. Nambucca, Clarence and Armidale)	CHCC	BSC	2016 to 2020
s10.4.5 Develop strategic relationships with key tourism stakeholder organisations to create awareness of Coffs Coast marketing initiatives and leverage collaborative promotional opportunities	CHCC	BSC, NCDN, DNSW, NPWS, SIMPA, FCNSW	2016 to 2020

11.0 Visitor Information Services

Deliver a contemporary, efficient and cost effective visitor information services system to engage industry and connect visitors with the Coffs Coast experiences to 2020

Significant research undertaken by the City of Melbourne in 2013 confirmed that visitors' information needs differed according to the stage of their journey¹⁷. Typically, Visitor Information Centres (VIC) have been responsible for providing much-valued local knowledge during the 'in-destination' stage. However, the future of Visitor Information Centres (VICs) has fuelled considerable debate in recent years. In the absence of a strategic approach, VICs in regional Australia have largely developed in a haphazard way and local governments have mainly assumed responsibility for their management and operation. Further research indicates that limited attention has been given to their location within a broader geographical context, their place within the industry structure, their evolutionary role and purpose, or their longer-term funding and viability. Most recently, there has been a review of NSW visitor information centres conducted by Orima Research on behalf of Destination New South Wales and Tourism Research Australia. CHCC staff provided some input. The findings have not yet been released.

The Coast has a number of VICs, which together represent a significant commitment to visitor services for the region. They have a range of different operational arrangements.

Coffs Harbour LGA

- Coffs Harbour Visitor Information Centre, which is funded and operated by CHCC with a combination of paid staff and volunteers
- Woolgoolga Information Centre and Sawtell Visitor Information Desk, funded by their Chambers of Commerce and CHCC, and staffed by volunteers

Bellingen LGA

- Waterfall Way Information Centre, which is funded and operated by BSC and includes one part-time employee and volunteers
- Bellingen Shire (Urunga) Visitor Information Centre, which is managed by the BSC S355 Committee and staffed by volunteers
- Dorrigo Information Centre, which is operated independently by the Dorrigo Tourism Association and staffed by volunteers
- The Rainforest Centre located in the Dorrigo National Park and funded and managed by the NPWS, is an important visitor attraction in its own

right, the key source of visitor information for all the National Parks in the Coffs Coast region, and provides some more general tourist information including brochures for accommodation and attractions in the area.

The Coffs Harbour VIC (CHVIC) is the main centre for the city of Coffs Harbour and the broader region. The CHVIC moved to the Big Banana site in October 2014 to increase its visibility and exposure to more than 900,000 visitors who visit the attraction annually. Currently The Centre is, operating at a considerable cost to CHCC. The CHVIC is managed by the Council's IDD Section that has recently completed a review of alternate visitor information service delivery methods to provide quality service to visitors and to determine the most cost effective options, as the Council's current investment is no longer viable and its approach to the delivery of visitor information does not meet changing visitor information search behaviors.

The review recommends the adoption of a blended distributed model for Visitor Services. This would consist of:

1. A centralised Group Bookings facility accessible over the phone 5 days a week, email and the web
2. Redirection of visitors to the Coffs Coast App and website for 24/7 information
3. Closure of the Coffs Harbour Visitor Information Centre, subject to property negotiations
4. Decentralised availability of collateral and free, limited visitor advice through partners in high traffic areas, e.g. Coffs Central, Toormina, Park Beach Plaza, Big Banana, Dolphin Marine Magic
5. Pop-up presence at selected large events in the city
6. Consider limited location digital mini-kiosks or signposts, supported by free wi-fi, e.g. at the Jetty shops area, city square
7. Widespread ambassador-type program enrolling and training staff from cafes, service stations, restaurants, taxi drivers and others, to be certified, to provide free, helpful advice for visitors
8. Promotion of the new service delivery and its benefits.

11.0 Visitor Information Services cont.

Additionally, findings of a review of Coffs Coast marketing services undertaken by consultants in 2014, involving industry, recommended that visitor information services should be reassessed to consider innovative, digitally based solutions for exciting and cost effective service delivery. The consultants further suggested there was an opportunity over the short to medium term to reallocate funding from visitor information centres to visitor information services¹⁹.

It should also be acknowledged that IDD provides a range of partnership opportunities for industry to market and promote their businesses through the CHVIC including consumer shows, packaging opportunities, brochure displays and mail outs, advertising via an in-house TV monitor, product familiarisations, operator evenings and cooperative, 'special offer' mail outs¹⁸. While these opportunities are only available through the CHVIC, they are also offered to tourism operators in the Bellingen Shire. There has, however, been concern about industry engagement with the CHVIC. A 2014 survey, undertaken by R & S Muller Enterprise, asked Coffs Coast tourism operators to describe their relationship with industry service providers including, 'Visitor Information Centre'. Survey distribution details are not known, however 75 responses were received. Of those responses, 25.3% described themselves as 'active participant' and 42.6% 'support' the VIC, however, 32% 'have no contact' with the VIC. While 56% believed that the VIC generated income for their business, 94% were not prepared to use their own funds to maintain the VIC¹⁹.

The Bellingen Shire Council contributes an estimated \$50,000 per annum towards the operation of its three VICs, excluding salaries and marketing spend. Income is derived from merchandise and ticket sales. Services to industry are provided through the Waterfall Way VIC and include professional development via workshops including use of social media, communication to operators regarding industry initiatives at a local, state and national level, collaborative marketing through the CHCC Industry and Destination Development and product 'famils', and the event knowledge hub. A significant and current issue for Bellingen Shire is the impact of the Pacific Highway bypass of the Bellingen Shire (Urunga) Visitor Information Centre. BSC is currently investigating alternative sites to relocate the Bellingen Shire (Urunga) Visitor Information Centre, once the Highway is bypassed. In addition, the new Nambucca Service Centre (2017) will provide an important platform to promote the Coffs Coast for north bound Pacific Highway traffic.

Further Recommendations

Overall, there has been an ongoing industry discussion related to the purpose and operation of the Coffs Coast VICs. There is no single pathway in the search for visitor information. The decisions regarding the most appropriate visitor information service delivery strategies for the Coffs Coast should be based on a thorough understanding of consumer behaviour throughout the travel planning cycle, and the range of information sources that are used during that process.

A high quality destination website is necessary, but there is strong evidence that visitors still have a preference for printed maps on arrival and visitor information apps can be useful. These are important considerations as the CHCC moves towards a sustainable model that combines the needs of consumers and those of the Council, as the funding organisation.

A future model requires rigorous and substantial research given the range of information delivery options. 'On-ground', these options may include built infrastructure, mobile information services, digital kiosks, 'pop-up' spaces, and strategically placed, 'visitor lounges' that provide comfortable seating, toilets and water, as well as free wi-fi and charging stations, so that visitors can always access their preferred digital information sources en route, and share their experiences with family and friends.

A more holistic and integrated visitor information services system is also needed, to ensure visitors enjoy an enriched destination experience and benefits are shared across the Coffs Coast visitor economy. A broader approach to visitor information services extends beyond the delivery of VICs to include:

- A visitor services network that meets the needs and expectations of consumers, as well as being cost effective for the funding organisation
- Wayfinding signage, which enables visitors to easily and safely access attractive local precincts, activities and experiences, buildings, transport options, public toilets, park and playgrounds, major retail and other places of interest, both on foot and in a motor vehicle (NB: the Coffs Harbour City Centre Masterplan 2031 has noted that a holistic wayfinding strategy is critical to the function of a City Centre)
- Interpretation, which encourages visitors to slow down and spend more time in a particular area
- A cohesive local signage policy which integrates Council's tourism-related signage and encourages industry operators to adopt appropriate signage for their own businesses.

11.0 Visitor Information Services cont.

Key considerations for the future delivery of CHCC visitor information services

1. The new delivery model requires a fully integrated approach, which includes both digital and physical assets, and extends to interpretation, signage and other wayfinding devices
2. Physical structures and services must be positioned in high profile areas that are easily accessible to visitors
3. The functionality and design of the physical spaces must align with the visitor needs and expectations
4. Visitors place a very high value on quality, local knowledge and human interaction is still considered desirable; in the digital space, 'content is king'
5. The source of visitor information varies according to the stage of travel – there is no 'one size fits all'
6. Although the local industry are aware of the need for change in the visitor information service delivery methods, communication of future plans to improve the visitor information services system is essential to ensure their on-going support
7. Visitor Information services are a key component of destination marketing; they provide an opportunity to influence decision-making – the choice of destination, the length of stay, what to experience during a visit and whether to return or recommend the destination to others.

The situational analysis and the stakeholder engagement process undertaken to develop this Plan further identified:

- The need for visitor information in Coffs Harbour's key precincts like the CBD and the Jetty area
- Support for VICs, but a move towards a combination of digital and human interface
- Support for 'pop-up' visitor information during peak seasons and key events
- A need for all tourism businesses to be represented across all visitor information delivery modes
- An opportunity to improve reservation and booking system to generate additional revenue
- The importance of ongoing cooperation across Coffs Coast to share visitor information
- Lack of communication between some VICs
- A significant lack of industry participation in marketing and promotional opportunities through the CHVIC
- The role of Chambers of Commerce in providing VIC services for towns and villages other than the main centres in Coffs Harbour and Bellingen centres
- Service excellence and training support for volunteers in smaller VIC operations
- A dependence on ageing volunteers and their ongoing ability to 'staff' VICs
- Opportunities to involve community organisations to act as ambassadors for the Coffs Coast (e.g. life-guards are important ambassadors for the Coffs Coast, and are often a first point of contact for visitors)
- Multiple issues related to tourism signage, including old and outdated signs, an overall lack of signage, lack of action from Councils regarding community requests for signage and the need for attractive, well designed and welcoming town entry signage that doesn't detract from the surrounding landscape
- Potential for combined directional signage and QR codes for attractions.

11.0 Visitor Information Services cont.

Best Practice Example: City of Hobart Wayfinding Strategy

The City of Hobart has introduced new wayfinding markers in high volume pedestrian precincts. The aim of the trial is to help evaluate the design and messaging used on the wayfinding elements.

The design of the markers includes a distinctive coloured band containing the name of the location, directional information, a map including distance markers and graphics of primary and secondary destinations for identification purposes plus a directory listing of such things as places of interest, transport options, public toilets, major retail, emergency services, parks and playgrounds.

There is also an opportunity to display a QR code to link to digital information and this can be tailored for people with impaired vision and to accommodate multiple languages.

During a trial period, the Council called on interested members of the public and visitors to provide feedback on several prototype markers with community comments to be used to inform any necessary amendments to the design and messages. Ultimately, the Council plans to install a total of 61 markers in researched locations across three distinct ones – the waterfront, inner city and outer city areas.

11.0 Visitor Information Services cont.

strategy 11.1 Deliver a contemporary, efficient and cost effective visitor information services system to engage industry and connect visitors with the Coffs Coast experiences to 2020

Strategic Actions		Leadership	Support	Timing
S11.1.1	Implement the recommendations of the Coffs Harbour City Council Review of Visitor Information Services.	CHCC	DCCC, DNSW	2016
S11.1.2	Develop an integrated Coffs Coast Visitor Information Services Plan that is based on the review findings (S11.1.1), the DNSW VIC strategy, best practice research, engagement with industry stakeholders, and considers the feasibility of integrating VICs with other Council Services	CHCC	BSC, DNSW	2016/2017
S11.1.3	Communicate key recommendations of the Coffs Coast Visitor Information Services Strategy to tourism stakeholders	CHCC	BSC, DCCC, CoCs	2016
S11.1.4	Encourage all tourism and hospitality operators to provide their latest product information via both digital and traditional collateral, to IDD, the CHVIC and all visitor information services outlets across the region	CHCC, BSC	DCCC, CoCs, other regional VICs	2016 to 2020
S11.1.5	Establish a regular training and development program for Coffs Coast visitor servicing staff	CHCC, BSC	DCCC, CoCs	2016 to 2020
S11.1.6	Develop a Destination Coffs Coast: Tourism Volunteer Program to increase the pool of available VIC volunteers, assist with succession planning and build a culture of mutual benefit for both volunteers and their areas of operation (this may also be applicable to event volunteer staff)	DCCC	CHCC, BTC, CoCs	2016 to 2020
S11.1.7	Regularly monitor and evaluate visitor information services across the Coffs Coast including ROI, visitor demand and patterns of use, industry participation, staff training programs, information sharing between VICs and uptake of volunteers	CHCC, BSC	CoCs	2016 to 2020

11.0 Visitor Information Services cont.

strategy 11.3 Strategy 11.2 Establish appropriate and fully integrated signage, interpretation, gateway and general wayfinding policies and practices across the Coffs Coast to 2020

Strategic Actions		Leadership	Support	Timing
s11.2.1	Conduct audits across all levels of local signage in the Coffs Harbour and Bellingen LGAs	CHCC, BSC	DCCC, CoCs	2016 /2017
s11.2.2	Develop a cohesive local wayfinding signage plan that aligns with the Coffs Coast brand, respects community values, landscapes and the broader environment	CHCC, BSC	DCCC, CoCs	2017/2018
s11.2.3	Develop an Interpretation Plan for Coffs Harbour and key villages in the region to tell their stories and acknowledge their cultural heritage	CHCC	BSC, DCCC, CoCs	2016 to 2020
s11.2.4	Develop a comprehensive wayfinding system for Coffs Harbour which showcases the best of the city and its amenities, and enables visitors to navigate unfamiliar areas safely and with ease	CHCC	DCCC, CoCs	2016 to 2020
s11.2.5	Ensure that the signage policy, Interpretation Plan and wayfinding elements are incorporated into the Coffs Coast Visitor Services Plan to provide a systematic approach to visitor information services	CHCC	BSC	2016 to 2020

strategy 11.3 Continue to deliver quality visitor information services within the Bellingen LGA, including future VIC services in Urunga

Strategic Actions		Leadership	Support	Timing
s11.3.1	Consider optimum, new location for the Bellingen Shire (Urunga) Visitor Information Centre that enables retention of driver-reviver station	BSC	RMS, Urunga CoC	2016
s11.3.2	Continue discussions with the Nambucca Shire Council regarding the development of visitor information services at the new Nambucca Service Centre and potential collaboration with the Bellingen Shire	BSC	CHCC Urunga CoC	2016

strategic priorities

The Coffs Coast Tourism Strategic Plan 2020 identifies eleven key directions and associated strategies and actions. Implementation will require ongoing cooperation amongst Coffs Harbour City Council, Bellingen Shire Council and the Destination Coffs Coast Committee to lead and drive the delivery of key strategic priorities to position the Coffs Coast as a leading regional destination for sports tourism, leisure, nature-based tourism and innovative events and festivals, and ensure the viability of its visitor economy to 2020.

Important priorities that should be initiated by Coffs Harbour City Council, Bellingen Shire Council and the Destination Coffs Coast Committee within the next 6 to 12 months include:

1. Revise the Terms of Reference of the Coffs Coast Tourism s355 for the two-year period October 2016 to September 2018 (s1.1.1)
2. Establish a set of criteria to be addressed by new DCCC member applicants related to their strategic expertise and skills relevant to tourism (s1.1.2)
3. Integrate the Coffs Coast Tourism Strategic Plan 2020 and accompanying Situational Analysis and Stakeholder Engagement Report (Report 1) into CHCC 2016 to 2019 Delivery Program and CHCC annual Operational Plans (s1.3.1)
4. Re-negotiate the MOU with BSC to determine the financial contribution of BSC for the period 2016 to 2018 for tourism coordination and marketing services (s1.2.1) or
5. Determine if funds carried over from the TCC are able to be transferred to CCHC for use by the DCC for industry development and engagement initiatives identified in this Plan (est. \$75,000) (s2.1.1)
6. Establish a Destination Coffs Coast: Industry Development and Engagement Working Group as part of the DCC to lead and drive industry development and engagement initiatives identified in the Plan (s1.1.4)
7. Establish a Destination Coffs Coast: Nature-Based Working Group as part of the DCCC to lead the development of a Coffs Coast Nature-Based Tourism Strategy to 2020 in cooperation with key nature-based tourism stakeholder organisations (NPWS, SIMPA, FCNSW) and local nature-based operators (to be chaired by the DCCC nature-based tourism representative) (s1.1.4)
8. Establish a Destination Coffs Coast: Brand Review Working Group (BRWG) comprising a CHCC and BSC representative, 2 x DCCC members and an external expert with considerable brand development experience during 2016 (s8.1.1)
9. Undertake a Coffs Coast Brand Review Process to evaluate stakeholder perceptions, brand identity, key messages and brand communication and management, and identify relevant sub-brands (s8.1.2)
10. Develop an annual Destination Coffs Coast: Tourism Marketing Plan, including a digital and social media strategy, that is inclusive of the whole destination region and supported by industry stakeholders across both LGAs (s10.1.1)
11. Implement the recommendations of the Coffs Harbour City Council Review of Visitor Information Services (s11.1.1).

implementation and evaluation processes

Monitoring of the implementation of the Plan's strategies is important to ensure the aim and vision is achieved and to provide valuable information that can be used to inform decision-making over the next five years.

An annual reporting framework is proposed which will help to regularly communicate to stakeholders the outcomes of the Plan, and may also assist with funding submissions.

The following implementation and evaluation process is recommended to ensure the strategies and actions contained in this Plan are implemented.

Stakeholder Roles and Responsibilities

To ensure the effective implementation of this Plan, it is important that the roles and responsibilities of CHCC, BSC, DCC and other key stakeholder organisations are clearly understood and communicated to all tourism stakeholders. It is recommended that:

- **CHCC** be positioned as the umbrella authority to oversee the implementation of strategies and actions associated with this Plan over the next five years
- **BSC** provides a key supporting role to CHCC in the implementation of strategies and actions associated with this Plan over the next five years
- **DCCC** provides regular strategic advice to assist CHCC and BSC to implement the strategies and actions in this Plan over the next five years
- **DCCC** assumes a lead role in the implementation of strategic actions contained in this Plan related to industry development and engagement
- **Other key stakeholder organisations and agencies** identified as having a primary or supporting role are encouraged to provide on-going support over the next five years to implement strategies and actions associated with this Plan.

Evaluation and Reporting

The following evaluation and reporting process is recommended to monitor the implementation of the Plan:

- **CHCC** monitor the implementation of strategies and actions contained in this Plan on an annual basis

- **CHCC prepare an annual report in cooperation with the DCCC** to communicate the progress undertaken in achieving strategies and actions contained in this Plan and key outcomes achieved to government, industry and community stakeholders (see more below)
- **Consultants** undertake a review of implementation of the Plan annually for the next five years (a commitment of one working day per year) in collaboration with CHCC and the DCCC and makes recommendations for any adjustments to the Plan.

Annual Review Process

An annual review process should evaluate:

- **Policy** – has Council adopted the Plan? Are there new Council policies that need to be considered as part of the Plan?
- **Governance** – are the governance arrangements still appropriate? Have there been any changes in the Council organisational structure that may impact the implementation of the Plan? Are CHCC, BSC and the DCCC working cooperatively to implement the Plan?
- **Stakeholder Engagement** – are government, industry and community stakeholders supportive of the Plan? Are they engaged in its implementation? Have key directions and strategies been communicated?
- **Issues and Opportunities** – have new issues or opportunities emerged that need to be considered and addressed in the Plan?
- **Implementation** – have strategic priorities and actions been implemented effectively? Are there any issues or concerns with the implementation process and its timing? How can they be overcome? Are resources adequate to ensure the on-going implementation of the Plan?
- **Monitoring** – a table showing the key directions, strategies and strategic actions contained in this Plan should be included in the annual report to show the actions that have been implemented and the actions to be undertaken in the next 12-month period.

continued on next page

The following areas should also be investigated and evaluated specifically using quantitative and qualitative methods as part of the annual reporting process. (It is acknowledged that these indicators will evolve over time depending upon access to datasets):

- **Grant funding** – identification of successful grant applications for Council and private sector submissions (see s2.1.3)
- **Visitor economy risks** – review of any issues related to risk management (see s3.1)
- **Visitor signage** – results of signage audit processes, and new signage development (see s4.1 and s4.2)
- **Transport services** – identification of any new or improved transport services to or within the Coffs Coast (see s4.2, 4.3, 4.4 and 4.5)
- **Infrastructure and facilities development** – review of new and proposed infrastructure and facilities development (see s5.1 and s5.2)
- **Accommodation refurbishment and development** – findings of annual audit processes; review of any new or proposed development; and identification of any accommodation refurbishment activities (see s6.1)
- **Tourism product and experience development** – findings of annual tourism and product experience audit processes to identify new product development related to leisure, nature-based, regional food, and arts and cultural experiences (see s6.2 and s6.3)
- **Awards and achievements** – review of any awards and tourism industry achievements for Councils and Coffs Coast operators (see s1.4.6 and s6.3.4)
- **Events and festivals** – review of any new events and festivals; new event infrastructure; findings of research undertaken at events and festivals to evaluate visitation, satisfaction, and economic, social and environmental impacts; and an evaluation of the main reasons why events and festivals are no longer offered (see s7.1 and s7.2)
- **Brand positioning** – review of industry uptake of the Coffs Coast brand (see s8.1 and s8.2)
- **Key visitor markets** – findings of a comprehensive review of annual TRA visitation data to evaluate domestic, daytrip and international visitations including: overall visitor numbers, key visitor markets, number of overnight stays, length of stays, expenditure, visitor demographic profiles, purpose of trip, and visitor activities (see s9.2.1)
- **Competitive situation** – findings of research that tracks key competitor destinations in NSW, QLD and VIC (see s9.2.1)
- **Consumer research** – findings of research that evaluates visitor expectations and satisfaction (see s9.2.2)
- **Strategic and tactical marketing** – findings of visitation research to evaluate marketing campaign effectiveness (if possible); review of industry buy-in on Coffs Coast marketing initiatives; and measure of the number of operators listed on ATDW (see s10.3.1)
- **Visitor information services** – review of the number of operators engaged in visitor information service delivery methods (see s11.1.4); evaluation of volunteer participation and satisfaction as part of the Coffs Coast Tourism Volunteer Program (see s11.1.6).

reference list

1. Destination NSW (2015) Local Government Area Profiles, Coffs Harbour and Bellingen, Four Year Average to year ending September 2014.
2. Tourism Research Australia (2011) Economic Importance of Tourism in Australia's Regions, Australian Government, Department of Resources, Energy and Tourism, April.
3. Wray, M., Dredge, D., Cox, C., Buultjens, J., Hollick, M., Lee, D., Pearlman, M., & Lacroix, C. (2010) Sustainable regional tourism destinations: Best practice for management, development and marketing, Sustainable Tourism Cooperative Research Centre, Gold Coast
4. Dennilquin Pastoral Times (2015) Levy to inject \$37m, May 26. Retrieved from <http://www.mmng.com.au/local-news/denilquin/levy-to-inject-37m-1.93505>(accessed November 26)
5. Lew, A. (2012) Creative Resilience: The Next Sustainability for Tourism? October 21. Retrieved from <http://tourismplace.blogspot.com.au/2012/10/creative-resilience-next-sustainability.html> (accessed December 2, 2015)
6. Coffs Harbour City Council (2013) Cultural Plan 2013 to 2016
7. Coffs Harbour City Council (2014) Coffs Harbour Regional Airport 2014 Master Plan Update
8. Tourism Research Australia, NVS & IVS, Time Series Data 2011 to 2015 YE June
9. Sustainable Tourism Online (2015) Accommodation, retrieved from <http://www.sustainabletourisonline.com/business-operations/product-development/product-and-experiences-development/accommodation> (accessed 10 December, 2015)
10. Sustainable Tourism Online (2015) Events and Festivals, retrieved from <http://www.sustainabletourisonline.com/business-operations/product-development/product-and-experiences-development/events-and-festivals> (accessed 10 December, 2015)
11. Deery, M., Jago, L. & Fredline, L. (2004) Sport tourism or event tourism; are they one and the same, *Journal of Sport Tourism*, Vol. 9, No. 3, pp. 235-245.
12. Godin, S. (2015) Define Brand. Retrieved from http://sethgodin.typepad.com/seths_blog/2009/12/define-brand.html (accessed December 20, 2015)
13. Tourism Tasmania Corporate (2015) Tasmania's Tourism Brand. Retrieved from <http://www.tourismtasmania.com.au/marketing/our-brand> (accessed 13 December 2015)
14. Pike, S. (2004) *Destination Marketing Organisations*. Elsevier, Amsterdam
15. Middleton, V.T.C. & Hawkins, R. (1998) *Sustainable Tourism: A Marketing Perspective*, Butterworth Heinemann, Oxford.
16. Tourism Research Australia (2015) Chinese Visitor Dispersal in Australia. Retrieved from [http://www.tourism.australia.com/documents/Markets/Chinese_Visitor_Dispersal_in_Australia_\(Final_for_release_18_March\)](http://www.tourism.australia.com/documents/Markets/Chinese_Visitor_Dispersal_in_Australia_(Final_for_release_18_March)) (accessed 12 December, 2015)
17. City of Melbourne (2013) *The Visitor Journey*. Retrieved from
18. Coffs Coast Marketing (2014) *Coffs Coast 2014 Partnership Opportunities*
19. R & S Muller Enterprise Pty Ltd (2014) *Findings Report: An Action Plan for Marketing the Coffs Coast as a Tourist Destination*, prepared for CHCC, June.

appendices

Appendix 1: ANALYSIS AND ENGAGEMENT PROCESSES

Situational Analysis

Information for this stage involved undertaking a review of strategies, plans and policies relevant to the Coffs Coast across state, regional and local levels and an analysis of visitation statistics relating to current tourism market dynamics.

From this, a Situational Analysis was undertaken that encompassed:

- The geographic, economic and social profile of main towns and villages that comprise the Coffs Coast that are particularly attractive to visitors
- Tourism product and experiences across the Coffs Coast related to leisure-based, nature-based and events offerings
- The role of Coffs Harbour City Council and Bellingen Shire Council, and other important state and regional stakeholder organisations involved in the management, development and marketing of tourism for the Coffs Coast
- Tourism visitation to the Coffs Coast and its key competitor destinations
- Infrastructure development plans relevant to the Coffs Coast over the next five to ten years
- Visitor information services currently provided on the Coffs Coast
- The current brand positioning processes for the Coffs Coast.

Stakeholder Engagement Process

A stakeholder engagement process was undertaken during October 2015 to determine stakeholder values and visions, and important issues, challenges and opportunities for tourism on the Coffs Coast to 2020. The following methods were used to engage various government, business, and community stakeholder individuals, groups and organisations and to ensure a transparent process:

Committee Meetings were undertaken in September, October and November 2015 with the Tourism S355 Committee to understand their views of important issues, opportunities and solutions for tourism over the short, medium and long-term.

Council Consultation Meeting that was facilitated with CHCC Councillors in October 2015 to understand their views as to important issues, opportunities and solutions for tourism over the short, medium and long-term. This meeting was considered as an important initial phase to engage with Council, to communicate the strategic planning process from the outset of the project and to continue to foster a collaborative approach. It should be noted Bellingen Shire Councillors decided to have the option to attend destination workshops rather than have a separate meeting.

Stakeholder Interviews that were undertaken during September and October 2015 with 25 representatives of stakeholder organisations across state, regional and local levels with considerable knowledge and expertise related to tourism for Coffs Coast.

Destination Workshops (7) that were facilitated during October 2015 with representatives of local stakeholder organisations and groups with an interest in tourism for Coffs Coast and its towns and villages (Bellingen, Coffs Harbour, Dorrigo, Northern Beaches, Sawtell and Urunga).

Appendix 1: ANALYSIS AND ENGAGEMENT PROCESSES continued

A list of relevant individuals, groups and organisations was prepared in consultation with CHCC and BSC staff. Over 500 representatives of business organisations and community associations were invited to attend the workshops that were facilitated in Bellingen, Coffs Harbour (2), Dorrigo, Northern Beaches, Sawtell, and Urunga.

Workshop participants were given an overview of the background and the approach to the development of the Coffs Coast Strategic Tourism Plan 2020 and were asked to:

- Consider the important values to assist with the development of a vision statement to guide the development, management and marketing of Coffs Coast to 2020
- Undertake a 'destination health diagnostic' to rate their current view of destination management success factors for the Coffs Coast region
- Identify important issues and opportunities related to tourism for Coffs Coast that should be considered in the development of the Strategic Plan.

The workshop sessions were audio-recorded and the main themes of the recording and participant feedback sheets collated, to produce an overview of the findings of each workshop. This information was distributed back to participants in attendance to ensure the main themes had been captured.

A **Have Your Say Online Survey** was developed as a means for interested individuals and stakeholder groups to source information about the strategic planning process and to provide input into the consultation process. The public was informed about this opportunity through media articles that appeared in local press in October and reminder emails sent to CHCC and BSC databases. The survey aligned with stakeholder workshop activities, with respondents asked to identify values to inform the development of a vision for tourism, and document three main issues and three opportunities related to tourism for Coffs Coast to 2020. Nineteen contributions were made to the website.

Analysis of Findings

Analysis involved collating the values, and the issues, challenges and opportunities identified through the stakeholder engagement activities, to determine common themes. Findings have been integrated into this Plan.

Coffs Harbour Destination Workshop, October 2015



Appendix 2: LIST OF CHCC COUNCILLORS AND STAFF THAT ATTENDED THE COFFS HARBOUR CITY COUNCIL CONSULTATION MEETING

Cr. Denise Knight (Mayor)

Cr. Garry Innes (Deputy Mayor)

Cr. Rod Degens

Cr. Sally Townley

Cr. Bob Palmer

Steve McGrath (GM)

Chris Chapman (Director Sustainable Communities & Chair Tourism S355 Committee)

Stephen Saunders (Section Leader Industry Destination and Development)

Appendix 3: LIST OF INTERVIEWS WITH STAKEHOLDER ORGANISATIONS

Bellingen Shire Council

- Michael Grieve, Manager, Economic and Business Development
- Catherine Tait, Volunteer & VIC Coordinator

Big Banana

- Michael Lockman, General Manager

C.ex Group

- John Rafferty, CEO

Coffs Harbour Regional Airport

- Dennis Martin, Manager

Coffs Harbour City Council

- Chris Chapman, Director Sustainable Communities
- Nikki Greenwood, Group Leader City Prosperity
- Sian Nivison, Group Leader Community & Cultural Services
- Christabel Wright, Cultural Research
- Nicole Moore, Coffs Coast Marketing Manager
- Stephen Saunders, Section Leader Industry & Destination Development

Coffs Harbour Visitor Information Centre

- Sheryl Attwood, Mandy Nicol, Bernie Witjes

Destination New South Wales

- Matt Stoeckel, Group Zone Manager
- Tom Urban, Zone Manager, North Coast
- Phil Ventham, Manager, Regional Event Development
- Paula Sanchez, Event Delivery Manager, Sport & Strategic Events

Dolphin Marine Magic

- Paige Sinclair, CEO

North Coast Destination Network

- Belinda Novicky, Executive Officer
- Paige Sinclair, Board member

National Parks & Wildlife Service

- Kathryn Wood, Manager, Dorrigo Rainforest Centre
- Linda Hall, Team Leader – Northern Zone, Visitor and Tourism Services Unit, Customer Experience Division
- Glen Storee, Area Manager – Coffs Coast Area

NSW Government

- Andrew Fraser, MP – Member for Coffs Harbour

NSW State Forestry

- Justin Black, Partnerships Coordinator Forestry Corporation of NSW, Forest Stewardship

Solitary Islands Marine Park

- Nicola Johnstone, Manager

Appendix 4: LIST OF STAKEHOLDER ORGANISATIONS REPRESENTED AT DESTINATION WORKSHOPS

A1 Coffs Coast Tours	Forestry Corporation	Skee Kayak & SUP Centre
BDM Bunker Cartoon Gallery	Forestry Corporation of NSW	Solitary Islands Lodge Bed & Breakfast
Beachpark Apartments	Halcyon Retreat	Surf Club Restaurant & Bar
Beautiful Bellingen Farmstay	Harbourside Markets + The Happy Frog	Swimplex Facilities
Bellingen Chamber of Commerce	Hillbilly Hijinks	Tabatinga Family Fun Centre
Bellingen River Tourist Park	HWH Stables	That Shop at Woopi
Bellingen Shire Council	IGA	The Bunker Cartoon Gallery
Bellingen Shire Events Hub	Jetty Dive Centre	The Clog Barn Caravan Park
Bellinger River Tourist Park	Lily Pily Country House	Urunga Chamber of Commerce
Big Banana	Lilypad Luxury Cabin	Village Sports/Coastal Media
Bim Morton Furniture	Maggie Porter – interests in art and culture, tourism and events	Waterfall Way VIC
Bonville Golf Resort	Mountain Metal Art	Woodseys Wheels
C-Change Adventures	National Parks and Wildlife Service – Dorriggo Rainforest Centre	Woolgoolga Art Gallery
Carabona	National Parks and Wildlife Service Northern Zone, Grafton Office	Woolgoolga Chamber of Commerce
Centenary of Rail – Smoke on the Water Festival	North Coast Hotel Group	Woolgoolga CurryFest
Chamber of Commerce	NPWS – Office of Environment and Heritage	
CoastOut Festival	NSW Government – Department of Premier and Cabinet	
Coffs City Sky Divers	Opal Cove Resort	
Coffs Coast Advocate	Pacific Bay Resort	
Coffs Coast Cycle Challenge	Park Beach Plaza and Park Beach Home Base	
Coffs Coast Holiday Parks	Precision Helicopters	
Coffs Harbour Chamber of Commerce	Promised Land Retreat	
Coffs Harbour City Council	Quality inn City Centre	
Coffs Harbour Marina	Rally Australia	
Coffs Harbour Show Society	Red Dirt Distillery	
Destination Dorriggo	Regional Architects	
Dorriggo Chamber of Commerce	Rosebourne Gardens Motel	
Dorriggo IGA supermarket	Sawtell Chamber of Commerce	
Dorriggo Tourist Association	Sawtell Chilli Festival	
Dorriggo Visitor Information Centre		
Employment Services – Mid North Coast Region 1		
Enterprise and Training Co		