

North Coast NSW

Regional Tourism Plan 2004-2007



Background

The *Towards 2020-New South Wales Tourism Masterplan* seeks to develop a sustainable tourism industry for the state. Tourism New South Wales working on behalf of the state government and in conjunction with each Regional Tourism Organisation (RTO), is progressively developing a set of three year tourism plans for each of the 16 tourism regions of New South Wales.

The North Coast NSW RTO was established in July 2001 with the amalgamation of the Holiday Coast RTO (that was later renamed Coffs Coast), the Mid North Coast RTO and the Port Stephens area (which was previously part of the Hunter RTO).

The new North Coast NSW RTO region comprises the eight local government areas of Port Stephens, Great Lakes, Greater Taree, Hastings, Kempsey, Nambucca, Bellingen and Coffs Harbour and extends along the New South Wales coastline for approximately 420 kilometres and west to the Great Dividing Range.

The region possesses a diverse array of natural, cultural and economic environments across a variety of terrestrial and marine tenures.



Situation Analysis

Tourism is one of the principal industry sectors of the North Coast NSW region. For the year ended December 2002, the region attracted approximately 5,111,730 visitors (6% of state visitation) comprising 2,908,000 domestic tourists, 126,730 international tourists and 2,077,000 day trips emanating from outside the region.

The region's tourism market can be summarised by two broad segments that reflect different travel motivations. These categories are:

1. The Destination Specific Tourist - This broad segment comprises the dominant market segment for the region and includes the traditional domestic family and 'empty nester' markets who frequently return year after year to engage in a coastal holiday ritual. These markets rarely stray from their destination of choice and participate in traditional coastal activities that centre around their accommodation base.

The emphasis of industry marketing and development activities in the region has been directed towards this market segment due to its size and resilient history. As a result of this market segment's destination focus, tourism initiatives developed for this sector have predominantly been driven at the local as opposed to regional level.

2. The Regional Traveller - Unlike the destination specific tourist, the regional traveller requires a regional, as opposed to a local marketing and development response. This broad segment includes:

A. The In-Transit Traveller - This segment comprises those markets who are travelling through the region to an alternate destination or are part of a wider regional travel experience.

B. The Experiential Traveller - This emerging and rapidly growing segment comprises those markets seeking a diversity of experiences within the region and includes the self-drive traveller and the high yield niche markets such as backpacker, nature-based, ecotourism, food and wine and cultural heritage travellers.

The Region's Issues

Despite the popularity of the region as a traditional coastal holiday destination, the region as a whole has experienced a long-term decline in visitor numbers. This decline is attributed to a decline in the destination specific market segment that represented the traditional 'bread and butter' of the region's tourism industry.

A number of factors may have been responsible including:

- That recent development activity at popular coastal 'hot spots' have changed the character and appeal of these locations. As a result, the altered character of these settings may have resulted in turning the traditional coastal holiday-makers away from their favourite holiday 'havens';
- That the coastal features that made the region popular for the destination specific traveller is now mirrored in a large number of coastal areas along the entire Eastern Seaboard. Improved access, targeted marketing activities and strong competitive regional marketing campaigns may have resulted in traditional markets going elsewhere for their holidays.
- That the entire tourism market is evolving towards experiential travel. Market research supports the notion that traditional market sectors are evolving towards the motivations of the experiential traveller. As a result, the traditional destination specific tourist market is shrinking as the experiential market is growing.

As the emphasis of industry activities to-date have been targeted towards the destination specific market, this shrinking traditional market has seen increased industry competition arising within the region for the tourism dollar. The issue has been exacerbated in the 'low season' by virtue of the fact that significant seasonality exists with this destination specific market sector that seek a coastal summer holiday experience.

Increased competition within the region at the local level has hindered the ability to develop regional partnerships, which is a necessary pre-requisite to develop a coordinated regional response and target emerging market segments such as the rapidly growing experiential traveller segment.

The Regional Solution

Solutions to the Region's issues are found through a regional integrated marketing and development planning response that:

- Protects the natural and cultural drawcards of the region

that underpins the future of the tourism industry by embracing the principles of ecologically sustainable development,

- Creates a stronger more cohesive region through strong government, industry and community partnerships that share a common vision; and
- Encourages a shift in marketing emphasis from a local to regional response that proactively addresses emerging high yield growth segments such as the experiential traveller segment.

The Regional Tourism Plan seeks to empower the North Coast NSW Regional Tourism Organisation to become an intermediary or agent to coordinate and manage the region's broad array of stakeholders into addressing the Region's issues through the implementation of actions contained within the Regional Tourism Plan.

The Vision

In ten years time the North Coast NSW region will have a sustainable tourism industry working cohesively throughout the region, delivering a diverse array of consistently high quality experiences throughout the year that encourage traditional and new tourism markets to stay longer, visit more often and spend more in the region.

Tourism will be seen to integrate with (as opposed to inundate) the natural, social and economic values of the region, and will play a pivotal role in retaining the unique character of the region.

The natural and cultural assets that underpin the success of the industry will be protected and showcased through best practice approaches to ensure that the needs of the region's residents and the tourism industry share a common vision.'

The two major devices used by the Regional Tourism Plan that support the sustainable intent of the Plan include:

- 1. The hub and spoke approach to regional development.**
This development approach seeks to connect the region's existing townships (hubs) by an experiential network (spokes); and
- 2. The thematic district approach to developing district competencies.** This approach uses a cooperative marketing and product development solution to create impetus to explore the entire region. This approach seeks to create regional diversity and capitalise on what each District within the region does particularly well. In this way, the distinctive settings within the region do not compete with each other but add value to the regional experience.

Objectives

The 29 strategies and 93 actions contained within this three-year *Regional Tourism Plan* are classified under 6 broad objectives:

Developing the Regional Network

This objective relates to the creation of a hub and spokes regional tourism network. Some of the feature projects proposed under this objective include:

- Existing successful cooperative marketing drive trail programs such as the "Handmade in Hastings" project will be adopted throughout the region through a staged roll-out;

- Drive trail experiences will be prominently featured through regional marketing and an array of different 'pilot' drive trail programs will be trialed throughout the region;
- Assistance will be provided to a number of important built attractions and events that add value to the regional network. Examples include the Dorrigo and Sea Acres built attractions, the Great Lakes Ironman Triathlon, the proposed Slim Dusty Heritage Centre and the Wadima Keeping Place project; and
- The region's townships will be evaluated for their potential to become important 'hubs' of the regional network.



An Integrated Transport Solution

Most visitors to the region arrive by car via the Pacific Highway. Measures, such as an efficient hierarchical signage system throughout the region are proposed that encourage visitors to move off the highway and explore the region.

For visitors travelling by public or commercial transport, various strategies are proposed that seek to concentrate critical mass at the region's hubs thereby providing a sustainable market for transport operators and encouraging regional transport solutions between the hubs.

Some feature projects contained within this objective include:

- Gateway signage will be developed along the Pacific Motorway and at major transit terminals that directs visitors to the visitor information centres (VICs) of the region;
- New tourist drives will be developed in the region to create an alternative travel path to the Pacific Motorway through the region;
- The VICs will become a one stop shop for information needs on the region's tourism network; and
- The NSW Tourist Sign Posting Manual will be used as a planning template to develop consistent and effective tourist signage throughout the region.

Effective and Efficient Marketing

This objective addresses the need to consolidate and rationalise marketing activities that are currently performed at the industry or local government level into district or regional solutions. The approach seeks to achieve a greater marketing impact for a reduced marketing dollar. Feature projects include:

- Developing a comprehensive regional website referred to as the Total Tourism Web Portal that links to the State Tourism Data Warehouse (STDW);
- District marketing activities that encourage local government to combine their marketing resources and cooperatively market the region's districts to create regional diversity; and
- The development of comprehensive district brochures referred to as 'Definitive District Guides' and the production of a comprehensive regional brochure.

Monitoring and Market Research

Tourism decision making and planning relies on research and monitoring tourism activity. Some of the feature projects contained within this objective include:

- The region will participate in the Statewide Regional Data Package Project and the State Visitor Information Centre Barometer;
- Targeted research will be developed for industry cluster activities; and
- The Hastings Industry Benchmarking System for the Tourism Industry (HIBS-T) will be enhanced and applied throughout the region as the region's principle industry benchmarking device.

Industry Assistance, Training and Incentives

The regional network seeks to provide a diverse array of high quality experiences that satisfy a range of market segments. Training assistance programs that enhance the level of service delivery and industry incentives are proposed to encourage this aim.

Industry cluster planning models are proposed to develop the capabilities of emerging sectors such as arts/crafts, food and wine, ecotourism, backpacker, agritourism, and aboriginal tourism.

The Regional Plan also proposes the use of business incubation programs that trial new commercial tourism opportunities and assist emerging industries into the marketplace.

Resourcing the Regional Plan

The plan adopts a number of measures that will achieve significant cost savings through rationalising marketing and development activities conducted predominantly at the local government level into district and regional solutions. In addition, user pay principles have been adopted to partly or fully fund a number of important regional initiatives.

The plan also proposes to increase the capabilities of the RTO by appointing a Product Development Coordinator (PDC) on an 18 month performance based contract to develop business cases for product development initiatives proposed in the Plan and present these proposals to prospective partners (beneficiaries) for consideration.

While the implementation of the actions contained within the Regional Tourism Plan occur between the July 2004 to June 2007 planning period, the six month period prior to the Plan's commencement will be used to mobilise commitment and resources towards the Plan's implementation.

Expected Outcomes

The initiatives contained in the plan are ambitious and challenge stakeholders to deliver a vision of worth, but with an effective RTO, cooperative partnerships at all levels and strong commitment to the Regional Plan, the vision is attainable.

The plan establishes a framework to:

- Protect and enhance the drawcard features of North Coast NSW;
- Develop a sustainable tourism industry; and
- Enhance the quality of life and well being of the region's community.

The regional plan seeks to develop a solid foundation in three years time that establishes momentum towards the delivery of a powerful regional network and a sustainable 10 year solution for the North Coast NSW region.



For More Information

To obtain more information about the North Coast NSW Regional Tourism Plan, please contact:

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