

「**THE TWEED**」

# DESTINATION MANAGEMENT PLAN

2018-2030

The Tweed DMP has been prepared by Regionality Pty Ltd on behalf of Destination Tweed Ltd

  
destinationtweed

## ► CHAIR OF DESTINATION TWEED

This Destination Management Plan is the culmination of work undertaken by Destination Tweed Limited as the local tourism organisation and Regionality Pty Ltd as the lead consultant and facilitator. The process was open and engaged over 200 people across five forums and many, many individual conversations about what the future might look like for tourism on the Tweed. The outcome from the DMP process has not only created a shared vision for the future of our naturally beautiful destination, it has transformed the community of individuals and built a network of people who understand and share the vision and are committing to delivering the aspirational targets. This plan is a platform for collaboration ensuring tourism continues to prosper in our region whilst protecting our most valuable assets, our people, our natural environment and our sense of community.

**Kylie Ryan-Milroy**

Chair - Destination Tweed Ltd

## ► MAYOR – TWEED SHIRE COUNCIL

The Tweed stands out as a magnificent nature based tourism destination. Our pristine coastline, estuarine and subtropical environment created in the caldera of an ancient shield volcano, has created a truly unique place. The DMP expresses a very clear aspiration to sustain and care for our community and environment. We are surrounded by nature at its best, with World Heritage National Parks to the west and marine parks to the east. We are merely custodians of this ancient landscape, so we welcome visitors who share the same values as our community.

**Cr. Katie Milne**

Mayor - Tweed Shire Council



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 investment decisions made using these specific recommendations, will be fully analysed and appropriate due diligence undertaken prior to being made.

In the course of our preparation of the Tweed’s Destination Management Plan 2018 to 2030, recommendations have been made using information and assumptions provided by many sources and from the methodology adopted for this Plan. The authors, Regionality Pty Ltd and Destination Tweed 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.

It should also be noted that visitation data presented in this Plan for the region is an approximation of the administrative boundaries of the Tweed Local Government Area. Definitions can vary between data sources and over time, the data should be used with caution. The data has been sourced largely from the National and International Visitor Surveys and compiled and analysed by Tourism Solutions on behalf of Destination Tweed, it should be not relied upon to inform investment without further investigations and review.

**This plan was commissioned by Destination Tweed Ltd and prepared by Regionality Pty Ltd after extensive engagement and consultation with industry, community and stakeholders.**

TABLE OF ACRONYMS			
DMP	Destination Management Plan	NP	National Park
TSC	Tweed Shire Council	DNSW	Destination New South Wales
EDU	Economic Development Unit	TEQ	Tourism Events Queensland
DMG	Destination Management Group	GCT	Gold Coast Tourism
LTO	Local Tourism Organisation	DT	Destination Tweed
M+E	Monitoring and Evaluation	DNC	Destination North Coast
MOU	Memorandum of Understanding	B+B	Bed and Breakfast
KPIs	Key Performance Indicators	CBD	Central Business District
DM	Destination Management	RV	Recreational Vehicle
ROI	Return on Investment	TAFE	Technical and Further Education
NVS	National Visitor Survey	VFR	Visiting Friends and Relatives
IVS	International Visitor Survey	VIC	Visitor Information Centre / Visitor Inspiration Centre
SCU	Southern Cross University	NPWS	National Parks and Wildlife Service
TBG	Tweed Byron Group	NRRT	Northern Rivers Rail Trail
ED	Economic Development	TVRT	Tweed Valley Rail Trail
WMW	Wollumbin Mt Warning	TNBTAP	Tweed Nature Based Tourism Action Plan

## Statement of acknowledgement of the Bundjalung Aboriginal Nation

We wish to recognise the generations of the local Aboriginal people of the Bundjalung Nation who have lived in and derived their physical and spiritual needs from the forests, rivers, lakes and streams of this beautiful valley over many thousands of years as the traditional owners and custodians of these lands.

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The Destination Tweed Ltd Board of Directors acknowledges and thanks the many members, staff, individuals in the community and other organisations, for their valuable and insightful contributions to the extensive process required to prepare the Tweed DMP 2018 - 2030. The value is not only measured in the many hundreds of hours of time, knowledge and commitment to the process, but the level of passion and ownership by so many people who are committed to ensuring we 'get this right'.

The outcome is a document that truly reflects our collective aspiration for the future of tourism in the Tweed.

Images in this report have been captured by local professional and amateur photographers. Trevor Worden, Ryan Fowler and Isabella Wright.

<b>DISCLAIMER</b> .....	<b>3</b>
<b>SECTION 1: EXECUTIVE SUMMARY</b> .....	<b>6</b>
DESTINATION MANAGEMENT - EXECUTIVE SUMMARY .....	7
<b>SECTION 2: RESEARCH - BACKGROUND AND CONTEXT.</b> .....	<b>10</b>
THE TWEED'S VISITOR ECONOMY - DATA SETS AND TRENDS .....	13
DESTINATION PERFORMANCE .....	14
KEY SOURCE MARKETS AND PURPOSE OF VISIT .....	16
STRATEGIC INSIGHTS STAKEHOLDER AND COMMUNITY ENGAGEMENT .....	18
STRATEGIC INSIGHTS AND SITUATION ANALYSIS .....	19
<b>SECTION 3: LONG TERM STRATEGY.</b> .....	<b>22</b>
OUR STRATEGIC INTENT. ....	23
DESTINATION STRETCH GOAL .....	24
THREE STRATEGIC GOALS .....	26
STRATEGIC OPPORTUNITIES SUMMARY .....	29
THREE EXPERIENCE PILLARS .....	31
THE BRAND FRAMEWORK .....	33
<b>SECTION 4: STRATEGIC ACTION PLAN</b> .....	<b>34</b>
DMP IMPLEMENTATION .....	35
DMP STRATEGIC PRIORITIES AND ACTIONS. ....	36

# SECTION 1: EXECUTIVE SUMMARY

*Overview of the development of the DMP, where it sits, how it is implemented and by whom.*

The DMP was developed through an independent and extensive consultation with TSC, industry and community stakeholders. It has been designed after considering Tweed Shire's Community Strategic Plan 2017–2027, the Destination North Coast Network DMP, the NSW Government and Tourism Australia's strategic plans.

One of the key challenges identified in the process was the pressure constantly being exerted on the Tweed community from mass tourism destinations to our north and south. The Gold Coast and Byron Bay have developed in a way that does not appeal to the Tweed community, indeed if the Tweed were to develop in the same way, it is likely that the essence of what makes this area naturally beautiful and uniquely appealing would disappear in a long stretch of development that would render the Tweed indistinguishable from its neighbours north and south. In short it would become rather UNREMARKABLE!

This document along with the engagement and capacity building process undertaken throughout the DMP development process have resulted in a long term strategic Vision for Tourism in the Tweed to 2030. The Strategic Intent is designed to be the brand manifesto, which aims to position the Tweed as a world's best practice sustainably managed destination with nature at the core of the experience.

The Stretch Goal aims to quadruple the visitor economy by 2030 with a focus on high yield experiential based visitation, an approach that aligns with both Tourism Australia and Destination NSW. The Destination Tweed Ltd board of directors and tourism industry members have endorsed the DMP and support the key strategies and goals it seeks to achieve. To implement this long term strategy a focus needs to be on managing the destination through the

1. Leadership & Governance. 2. Supply through industry development and 3. Developing demand through marketing. Planning and managing the destination cannot be outsourced, it is a collaborative approach by TSC, Industry and other stakeholders.



**This table demonstrates the strategic contexts of the DMP and demonstrates how the Destination Management Governance sits at the heart of effective destination development and marketing.**

Strategic priorities are designed to shine a light on where the DMP needs to focus its activity in the four areas outlined in figure 1, including

- Research and Planning
- Destination Development (supply side)
- Destination Marketing (demand side) and
- Stakeholder Holder Engagement and Collaboration

The Strategic Intent, Experience Pillars, Stretch Goal and Destination Brand all guide the DMP Strategic Goals.

Strategic objectives and high level actions are segmented

- a. Destination Management - Leadership & Governance
- b. Supply Development/Industry Development
- c. Demand Development/Marketing

These are summarised in the DMP Framework Figure.

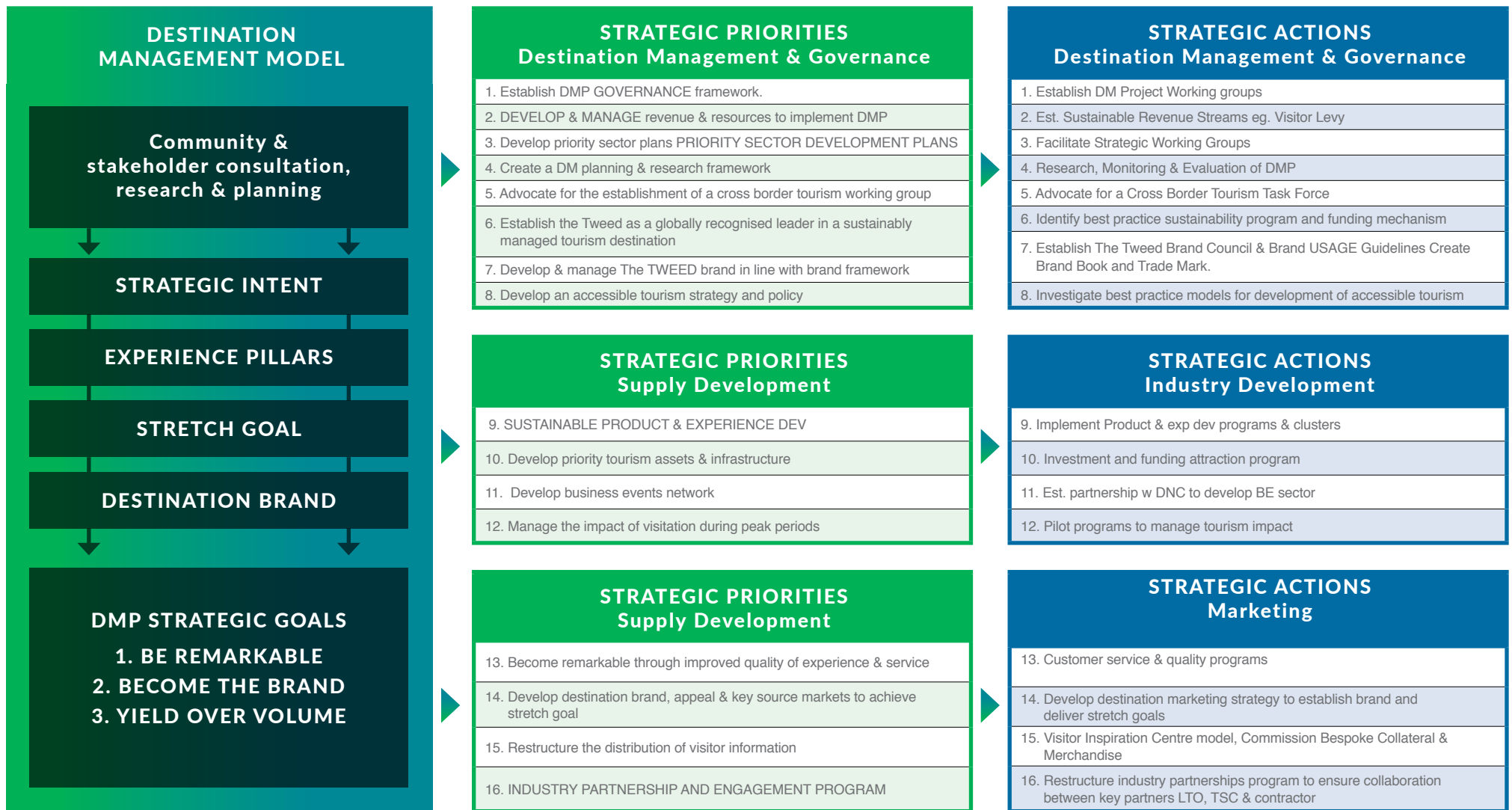
Detailed implementation plans and prioritisation are required for each area with annual delivery plans, and DMP review against long term goals every three years.

## **NEXT STEPS**

The document has been developed and endorsed by industry and community stakeholders, in consultation with TSC. Once adopted by TSC under the Economic Development Strategy, the DMP will require the establishment of a Destination Management Committee co formed by industry and TSC under the EDU.

Once adopted, the DM Committee will steer its implementation. An annual review to track performance and ensure the strategy continues to be in line with the original objectives with a 3-4 year review of the DMP against long term strategies.





# SECTION 2: RESEARCH

The purpose of developing a **Destination Management Plan (DMP)** is not simply to create a document, the primary purpose is to bring key partners in the destination, the community, the industry and government together, to establish a long term strategic vision for the future of The Tweed and to plan how the visitor experience and offering can evolve over time to ensure it supports this strategic vision. In short the DMP is as much about the local community as it is the visitor.

The process of consultation and stakeholder engagement was designed to engage and provide an opportunity for thought provoking discussion about how one would experience The Tweed in 2030. If we understand the types of experiences the locals want to have and be known for, we can work collectively to ensure they are developed and delivered. We can consider strategies to manage the key assets and natural environments that support these experiences and that our story-telling reflects this. This helps to ensure that we attract visitors that value and seek out the same sorts of experiences that locals love and treasure the unique attributes that make the Tweed a simply beautiful place to live.



Our Approach to Destination Management Planning has been to share information and inspire thoughtful discussion throughout the process. Once the DMP process is complete, the stakeholders will once again be asked to become part of its delivery. Tourism is everyone's business. It can enhance our community and way of life by bringing a range of services and experiences into our community. It can enrich our culture, bring diversity and drive economy by inspiring investment in all manner of industries and businesses through positive experiences.

However, without proper management and planning, tourism can overwhelm communities and resources. There is a delicate balance between a vibrant destination and one that loses its appeal through mass tourism. The Destination Management Plan is a blueprint that sets out a long term vision for the future, with strategies to manage growth to ensure the Tweed's visitor economy continues to grow sustainably, whilst remaining a wonderful place to live and visit. Destination Managers need to consider not just demand side development, but actively work on supply side development strategies to ensure the products, experiences, infrastructure and services are in place to cater for the needs of locals and visitors alike. Ongoing stakeholder engagement, research and planning are fundamental functions of Destination Management as summarized in the figure above and explained in more detail in the narrative below.

### ► THE ROLE OF RESEARCH

Research is used to inform and to evaluate the effectiveness of strategies and monitor progress through ongoing monitoring and evaluation processes.

- What the consumer wants (both locals and visitors)
- What our destination is capable of offering
- How we are tracking against our brand values and key strategies over time

Current data used to inform planning and monitor and evaluate performance relies on data collected by Tourism Research Australia via the National Visitor Survey (NVS) and the International Visitor Survey (IVS). This excellent data provides long term comparable data that enables trends and performance to be tracked over time. Interpretation of these data sets has been undertaken for many years by research consultant Tourism Solutions. Local data is collected via the Visitor Information Centres (VIC) in Tweed Heads, Kingscliff and Murwillumbah on visitor numbers using the service. There are opportunities to enhance the current data to improve monitoring and evaluation of the destination against the goals set out in this plan.

Understanding who our visitor is and how we have performed is an important measure of return on investment and effort. The DMP process allows us to assess the data over time and to compare our performance against other coastal regions in NSW and our adjoining shires, who are significant mass tourism destinations. The data is used to inform decision making and benchmark progress moving forward. Three key metrics will be used to monitor and evaluate performance in the future and to assess the value and yield of different forms of visitation.

1. The number of visitors – broken down into domestic and international, day trip and overnight visitors.
2. The duration of stay – how long visitors stay in the Tweed
3. The expenditure – the value of each visitor in terms of how much they spend.

The data sets over the past decade provide insight into the market trends and performance to date and the gaps and opportunities for the future. The following are key points to consider. A full report and analysis will be provided as an annex to the final DMP.



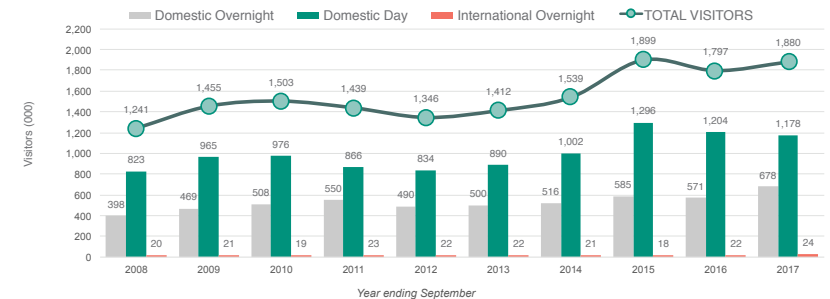
- The total number of visitors to the Tweed in the year to 30 September 2017 equaled 1,880,000
  - Domestic Day-trip Visitors** represent 65% of the total visitors to the Tweed. Numbers have declined in the year to date with 1,178,000 day-trip visitors during that period. Day trippers spend on average \$85 per visit
  - Domestic Overnight Visitors** numbers are at record highs with 107,000 more overnight visitors than the same period last year totaling 678,000 or 34%. They stayed an average of 3.6 nights, with an average spend of \$126 per night, with more than half originating from SEQ
  - International Overnight Visitors** only 24,000 came to the Tweed. Given the volume of international visitors coming to Byron Bay and Gold Coast and the access to market via Gold Coast Airport, the Tweed could improve this figure with focus and investment over time.

The Tweed is performing very well in relation to the numbers of visitors and the consistent growth it has experienced in the domestic market. Domestic growth in overnight visitors has averaged 6.1%pa and day trip at 4.1%pa.

However international overnight visitation has only had modest growth at 2.1%. It would appear that the Tweed has not capitalized on its position and access to market.

Domestic overnight visitors currently spend more time and money in the region per day, albeit the per day spend is low by comparison to other LGA's in coastal NSW, Gold Coast and Byron Bay - we have the ability to improve the yield.

## VISITOR SUMMARY



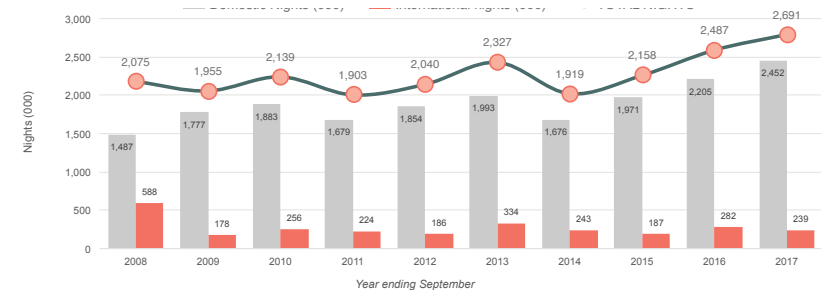
OVERALL AVERAGE ANNUAL GROWTH\*: 4.7%  
 Domestic overnight growth: 6.1% p.a.  
 Domestic day growth: 4.1% p.a.  
 International Overnight growth: 2.1% p.a.

Average Domestic overnight contribution: 34%  
 Average Domestic day contribution: 65%  
 Average International overnight contribution: 1%

Methodology note: The NVS sample was modified in 2014 to include mobile phone respondents. This may affect domestic comparisons before and after that year.

Source: Tourism Research Australia, National and International Visitor Survey; Customised data extraction by Peter Valerio

## VISITOR NIGHTS SUMMARY



OVERALL AVERAGE ANNUAL GROWTH\*: 2.9%  
 Domestic growth: 5.7% p.a.  
 International growth: -9.5% p.a. (caution; affected by high 2008)

Domestic overnight contribution: Average 34%  
 International overnight contribution: Average 1%

Methodology note: The NVS sample was modified in 2014 to include mobile phone respondents. This may affect domestic comparisons before and after that year.

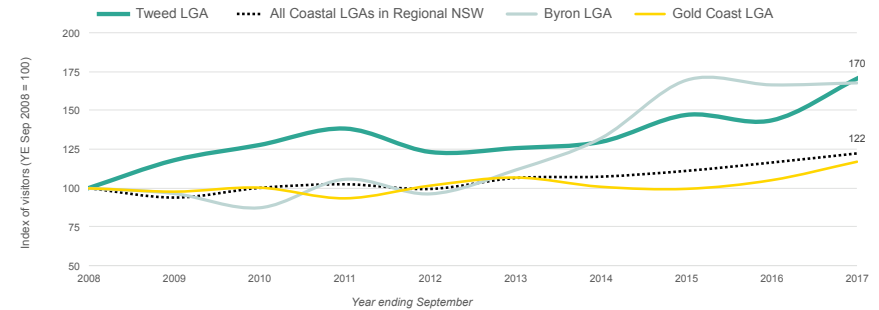
Source: Tourism Research Australia; National & International Visitor Survey; Customised data extraction by Peter Valerio

If the goal is to grow the visitor economy, looking at volume alone does not provide sufficient insight into how the destination is performing in the context of its region and other competitive factors. For these purposes we have chosen two contexts to compare. The first is our rate of growth when compared to other NSW LGAs and the second is to compare to the growth of our neighbouring coastal LGAs, both of which impact upon and contribute to the visitor economy in the Tweed. A series of additional data sets are available to investigate specific categories, however domestic and international overnight are useful indicators to provide an overall picture of performance. Figure 4 provides a 10-year performance index focusing on domestic and international overnight visitors.

Significantly, this figure demonstrates that in terms of growth in domestic overnight stays, the Tweed's overnight visitors have grown by 70% over the past decade by comparison to 22% on average for other coastal NSW LGAs. Indeed the Tweed's growth rate has been slightly better than Byron Bay and more than triple that of the Gold Coast and almost 3 times that of other LGA's during the same decade.

The Tweed's share of international visitation is surprisingly low, given the size of the market in the neighbouring LGAs and the proximity to Gold Coast Airport.

## DOMESTIC OVERNIGHT VISITOR PERFORMANCE INDEX



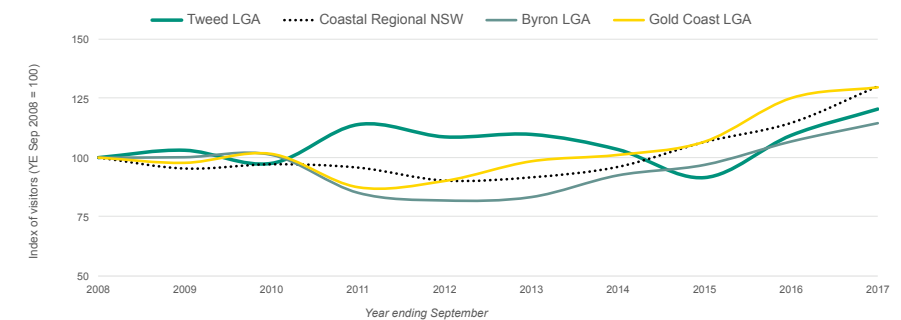
AVERAGE ANNUAL GROWTH RATES:

- Tweed: 6.1%
- All Regional Coastal LGAs: 2.3%
- Byron: 5.9%
- Gold Coast: 1.7%

Source: Tourism Research Australia; National Visitor Survey; Customised data extraction by Peter Valerio

EXAMPLE OF READING THE INDEX: If visitor numbers are 10% higher than they were in 2008 the index will be 110. If the index is below 100 this means less visitors than in 2008.

## INTERNATIONAL OVERNIGHT VISITOR PERFORMANCE INDEX



AVERAGE ANNUAL GROWTH RATES:

- Tweed: 2.1%
- All Regional Coastal LGAs: 3.0%
- Byron: 1.5%
- Gold Coast: 2.9%

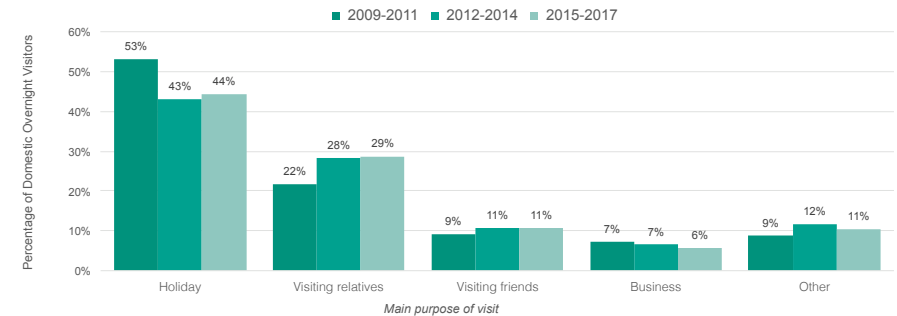
Source: Tourism Research Australia; National Visitor Survey; Customised data extraction by Peter Valerio

Figure 4 Overnight Visitor Performance Index

Tracking yield is also critical to understand the future focus for destination management.

- Who is coming to the Tweed?
- How long visitors stay?
- How much they spend and
- What they do are important considerations in planning for industry development and marketing.
- The investment of resources in attracting and converting visitors needs to be viewed in terms of the returns they generate, the cost of converting the sale and the impact they have on the destination. Each destination will want a mix of visitors to provide stability and diversity.
- Short stay visitors from within a 200 kilometre drive radius will return frequently and are easier and more cost effective to market directly, if the systems are in place to do so.
- These customers are usually self-drive and are motivated primarily by social interactions through connections with their friends and family living in the Tweed.
- Domestic high yielding visitors that stay longer and spend more are highly desirable. They are more likely to fly rather than drive and are predominantly from Sydney, however the cost of attracting these visitors is higher through traditional media.
- The current profile of international visitors stay longer (10 nights YE Sep 2017) but spend less per night. If effort and investment were to occur in the export market, yield and collaborative partnerships would need to be considered to ensure viability of the market.

## DOMESTIC OVERNIGHT VISITORS - PURPOSE OF VISIT



Holiday and Visiting Relatives have always dominated and continue to do so. A number of visit purposes are included in the "Other" category because they lack significance (despite grouping three years of data).

Figure 5 Domestic Overnight by Purpose - Averages Over Time

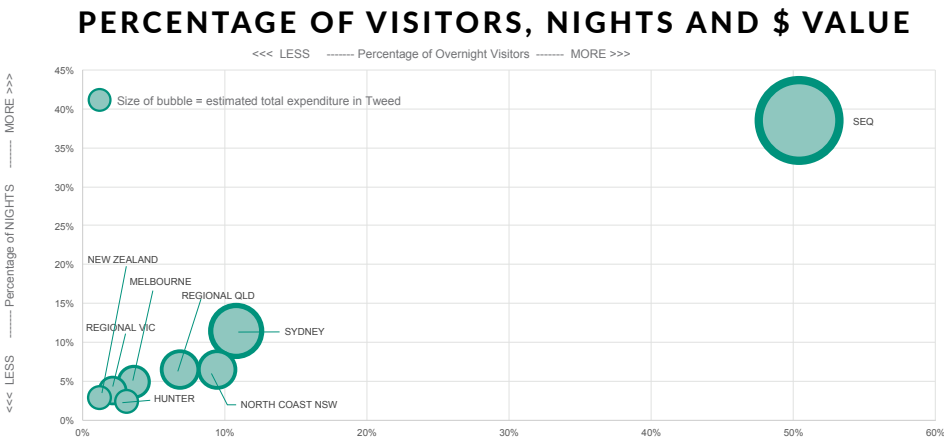
SOURCE	ON VISITORS	NIGHTS	\$ PER NIGHT	APPROX \$M
SEQ	50%	38%	166	147
Sydney	11%	12%	200	54
Regional QLD	7%	7%	186	28
North Coast NSW	9%	6%	160	24
Melbourne	4%	5%	163	19
Regional VIC	2%	4%	166	14
New Zealand	1%	3%	125	8
ACT	1%	3%	163	10
Hunter	3%	3%	183	11
United Kingdom	0%	2%	86	4
Tasmania	1%	2%	180	8
Central Coast	2%	2%	179	7
Other Europe	0%	1%	100	3
New England North West	1%	1%	190	6
Western Australia	0%	1%	185	5
South Coast	1%	1%	176	4
Other	5%	10%	NA	15

Figure 6: Comparison of overnight source markets



The figure outlines the relative size and value of each of our quantifiable source markets. It provides an overview of the origin of domestic and international overnight visitors and their value in terms of how long they stay and how much they spend. It is an informative comparison and helps to focus key strategies in the DMP. Spend per night is based on the NVS and IVS data sets for these source markets. These figures put into context the size, scale and yield of key markets and compares both domestic and international overnight visitors.

The bubble graph demonstrates just how dominant SEQ is in terms of both the size of the market and spend. Sydney is currently our second most important market in terms of value. It is worthy of note that the only export market to make it onto the graph is New Zealand, despite the presence of an international airport partly in our LGA.



Consultation has two functions, firstly as a data collection mechanism to understand

- How and what the community, our partners and stakeholders want tourism in the Tweed to look like in the future
- What strategies we need to put in place to better develop, market and manage the destination and
- With whom and how do we collaborate to realize this aspiration? and
- How are we performing in relation to the above

The second and perhaps most importantly, the role of consultation is to activate the industry, community and business community to engage with and contribute to the planning process, then actively engage in the delivery of the key strategies. The consultations have provided strong strategic input into the strategic direction resulting in the following.

## ► 10 KEY CONSULTATION MESSAGES

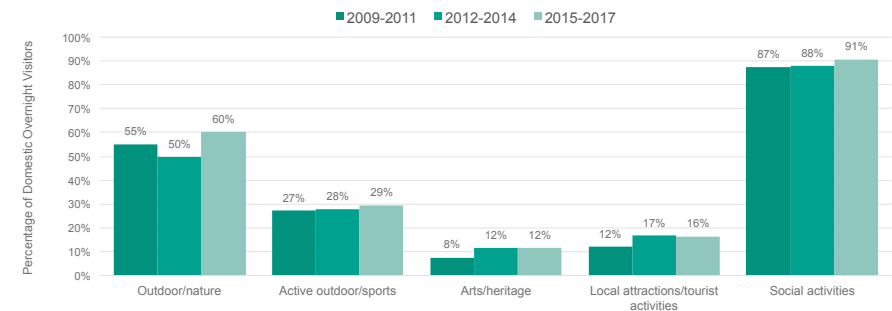
Key themes - The consultation revealed that the stakeholders want the Tweed DMP to be a roadmap that:

1. **Protects our way of life and natural environment** – “We DON’T want mass tourism or to lose our sense of community and identity because of tourism”
2. **Establishes a clear vision** of how we want to evolve into the **future as a destination**
3. **Provides a platform for collaboration** between industry, community and local government to manage The Tweed as a destination
4. **Focuses investment** and effort into key areas of priority by identifying **critical infrastructure** opportunities that support the DMP and community aspirations
5. **Supports sustainable, managed growth in the visitor economy** and continued industry viability through a **focus on yield over volume**
6. **Prioritises the protection** and/or enhancement of key **public and natural assets to support visitation**
7. **Identifies potential gaps in products, services and experiences** with ways to overcome them
8. **Explores ways visitors can contribute** to the cost of sustainability managing the destination
9. **Creates a brand framework** that reflects our core community values; our promise to visitors and provides strategic direction for destination marketing
10. **Enables us to tell our collective story** with authenticity and pride

The following section is informed by datasets and consultation and has been prepared with consideration of best practice destination management approaches. These insights provide greater detail that will inform various plans and actions

- Our visitor numbers and length of stay are good. Whilst we cannot become complacent in our efforts to attract our traditional markets, any new market development needs to focus on high yielding segments that fill off peak and shoulder periods and increase yield.
- Whilst our numbers are healthy overall, our daily expenditure across all categories is comparatively low. On latest annual figures, domestic overnight visitors to the Tweed spend on average **\$46 less than those who travel to Byron Bay**. If we can increase the spend of this one segment to the same as Byron Bay we will generate an **additional \$112,792,000 per annum increasing the Tweed’s visitor economy by 24% without increasing numbers of visitors**.
- Our long standing challenge has been the limited number and quality of saleable products and experiences for visitors to engage in. This challenge has the flow-on effect of limiting dispersal beyond the coast into the Tweed Valley. It’s not good enough to have people just driving around having picnics looking at the scenery, we need them to get out of the car and spend money. To achieve this the destination needs to consider core experience themes that build upon both the destinations’ potential and the inherent traits that appeal to targeted market segments.
- There is a significant opportunity to connect with our visitors through these social activities and encourage them to explore up the river, through the valley and into the mountains, visiting farms and food producers and exploring the other natural and cultural experiences on offer.
- Connecting farm to plate and engaging our visitors in the provenance story of the Tweed, whether it be in a restaurant, at a market or in an event, is an effective way to entice them to disperse and explore and importantly to spend more whilst in our region.

### DOMESTIC OVERNIGHT VISITORS - ACTIVITY CATEGORIES



Social activities are fundamental. Almost all visitors to Tweed participate in activities in this category and could almost be considered 'basic trip needs'. Outdoor/nature activities are the most significant of the more 'active' activity types.

Note: adds to more than 100% as visitors can do more than one type of activity

**"MORE THAN 90% OF OUR VISITORS ENGAGE IN SOCIAL ACTIVITIES WHILST IN OUR REGION, WHICH INCLUDES DINING OUT AS THE MOST SIGNIFICANT ACTIVITY"**

- Focusing effort on clusters that connect to existing offerings and tourism routes and trails that link villages will focus and disperse beyond the coast.
- Currently these are largely free recreational activities. Whilst the vast majority of our natural and recreational assets should remain freely accessible for all to enjoy, there are some that need to be managed to ensure they remain accessible, safe and are preserved for future generations. Improving strategic infrastructure associated with popular or iconic natural attractions will help ensure they are sustainably managed over time. Creating opportunities for sustainable businesses to provide services and experiential based products in and around this public/visitor infrastructure will enhance the range and quality of the activities on offer to visitors and locals alike. These value added offerings will help improve the spend, the dispersal throughout the Tweed Valley and improve the range of experiences on offer.
- Wollumbin Mt Warning (WMW) is our most identifiable and iconic natural landform and arguably our 'Uluru or Opera House'. However, WMW has had limited investment in infrastructure and is being used without the respect and care it deserves. Whilst we want to maintain access to the site, we must also consider alternative offerings such as the creation of a number of nature based experiences to alleviate the pressure from WMW, particularly for uses that do not respect the significant cultural and natural heritage of the site.
- It must be a priority to facilitate collaboration between the Tweed's traditional owners, NPWS, rural land holders and TSC to identify and prioritise areas where public infrastructure can be created allowing for the development of a range of suitable tourism products and experiences that will help sustainably manage visitation to key natural and cultural assets. WMW for instance, is a very sensitive environmental and cultural asset that requires greater investment of resources to ensure it is sustainably managed. It is not known exactly how many people use the WMW, nor is it known how it is being used. This site has potential to be a best practice example of collaboration between the traditional owners, NPWS, tourism, TSC and the community. The opportunity to create visitor experiences that respect the significant cultural heritage and natural environment requires careful discussion,

collaboration and planning. There is a significant opportunity to create a sustainable income stream to manage the Park's assets, generate jobs and enterprises for local community and in particular the Traditional Owners.

- Development of the Nightcap Track and the creation of an integrated trails route that connects to the TVRT and WMW provides an opportunity to disperse visitors and to lessen the impact on popular sites such as WMW. There have also been a number of attempts to investigate opportunities on Mount Nullum over the past decades. However, the focus on building the Tweed's reputation as a nature based tourism may create opportunities for a more viable and sustainable approach.
- Whilst the Tweed is a magnificent natural environment and many visitors want to explore away from the coast, there are very few tracks and trails that allow visitors to explore and learn about this magnificent environment. The Tweed Valley Rail Trail (TVRT) is perhaps the most important tourism asset to be considered for the Tweed Valley since the development of the Tweed Regional Gallery. It will aid dispersal, encourage business development and investment and give high yield visitors a reason to leave the coast and spend time and money in the Valley.

**"89% OF VISITORS TO THE  
TWEED ENGAGE IN OUTDOOR,  
NATURE AND SPORTING  
ACTIVITIES"**

- Passive use of our marine and river systems by non-motorised private craft encourages these tranquil and sensitive places to remain that way. Whilst commercial operators can be managed and monitored in terms of their use and impact, the increasing number of private craft on the waterways, particularly in sensitive environmental areas such as Stotts Island and Cudgen Creek may become an issue into the future. Consideration of strategies to preserve the tranquillity of these recreational areas for licensed operators and passive private uses may be considered. Improved infrastructure to enable kayaks and other small non-motorised craft to launch and pull into suitable locations along the Tweed River and main waterways would support and encourage the use of these areas in this way.

**ALMOST 40% OF OUR VISITATION COMES FROM VFR, DESPITE THE FACT THAT LITTLE OR NO FOCUS HAS BEEN PLACED ON DEVELOPING THIS CRITICAL SEGMENT OF THE MARKET.**

- Develop the Visiting Friends and Relatives (VFR) market - VFR engages the local community as advocates for the destination and local ambassadors providing information on things to see and do and places to stay. Our most valuable marketing resource is the Tweed's resident population of more than 93,458 people. They are easy and cost effective to access and are already emotionally connected to the destination, with trusted social media links and other communications with their networks around Australia and the globe. Another target VFR audience is the population of around 92,000 residents living to our north, from Burleigh Heads south to the border. Given their proximity, this population already has a closer affinity with the Tweed than other parts of Gold Coast, and could be encouraged to share local knowledge about the Tweed and visit the region more often with their visiting friends and relatives. Students at SCU, TAFE and other training providers are also key opportunities to market the destination via a VFR program.

**THE AVERAGE SPEND FOR INTERNATIONAL OVERNIGHT VISITORS TO THE TWEED IS COMPARABLE TO KEMPSEY! YET THE TWEED HAS AN INTERNATIONAL AIRPORT ON OUR BOUNDARY!**

- Whilst we have a number of excellent operators in the Tweed, all of us have the potential to innovate and step up! If we are to be remarkable as a destination, we need to innovate, evolve and build a strong culture of quality customer service and memorable experiences at every level. With high yielding export destinations either side of the Tweed, our potential for growing a range of markets that are attracted to our key attributes is excellent. Our current numbers are very low when compared to other coastal regions. Key actions to consider include
  - Develop an export strategy for the Tweed that leverages tourism and the Tweed brand attributes to benefit the broader economy
  - Create a strategic partnership with Gold Coast Airport targeting high yield export markets with connections via Gold Coast Airport
  - Provide programs to help operators prepare for and develop export markets
  - Create export links between food products and tourism experiences to leverage cargo capacity ex Gold Coast and demand for high value food and tourism products

# SECTION 3: LONG TERM STRATEGY

**We believe that the Tweed's beautiful natural environment, our eclectic and creative community, our culture and way of life, our agrarian landscape and local food, are the essence of why we and others are drawn to live in and visit the Tweed. We are custodians of this special place and it is our collective responsibility to ensure it is sustainably managed for future generations.**

To do this we aim to be renowned as a naturally beautiful destination, globally recognised for the quality and authenticity of the experiences on offer and for our highly successful, sustainable approaches to managing the destination.

We will achieve this by ensuring an ongoing, collaborative partnership between the industry, community and Tweed Shire Council. Working together we will apply best practice approaches to destination management, that preserves and protects our destination's key attributes; the natural environment and assets, our sense of community, our way of life and our stories that all underpin our brand and reputation.

**As Destination Managers, our aim is to ensure that the impact of visitation does not harm our environment or sense of place, but positively contributes to the economy, the vibrancy and diversity in our community's way of life and culture.**

We will encourage visitors and locals to discover the beauty of the Tweed by exploring beyond the popular coastal towns and villages, along the river, into the valley, the mountains and rural communities, to immerse themselves and learn about our stunning natural environment, our ancient and modern culture, our passionate producers and creative artisans.

We will share and create our stories with passion and pride and ensure future generations can continue to build upon our legacy that respects and protects the naturally beautiful Tweed.



**“BY 2025 WE WILL DOUBLE OUR VISITOR ECONOMY AND HAVE ESTABLISHED THE TWEED AS AUSTRALIA’S MOST SUSTAINABLE DESTINATION... BY 2030 OUR VISITOR ECONOMY WILL DOUBLE AGAIN TO \$1.46 BILLION DOLLARS”\***

\*Based on TRA September quarter 2017 annual figures



# SECTION 3: DESTINATION STRETCH GOAL

The Tweed has had consistent growth in domestic overnight visitation of around 6% per annum. This organic growth should continue in this way with investment in resources to nurture traditional markets such as SEQ, alongside investment in diversifying the destinations current offering. The focus on supply and demand development will aid in sustaining this modest and manageable growth into the future.

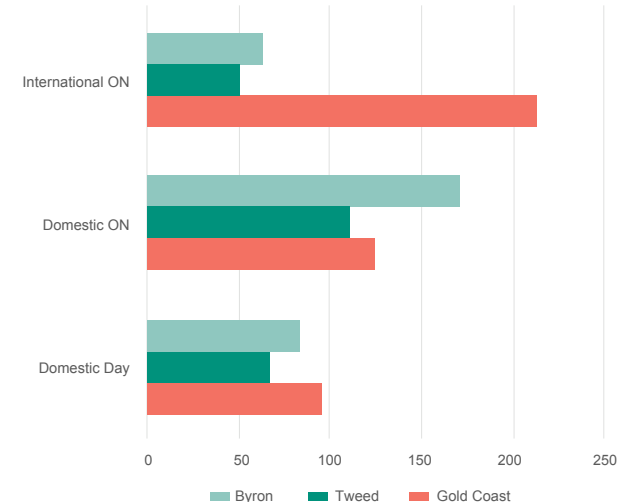
However, the research tells us our current spend per person is comparably low across all key visitor types. By increasing the average spend per person to be comparable to that of neighbouring destinations, we can grow the visitor economy significantly over time and disperse the benefit more evenly across the Tweed region. The focus should be markets that deliver on yield over volume.

The comparison of daily expenditure graph demonstrates the potential and therefore the need to focus on yield. Given the location and proximity of Gold Coast Airport, long term strategic priorities need to focus on developing both the demand in high yielding export and domestic markets that are drawn to our core attributes and experiences. Equally as important is the focus on destination development to ensure we create products and experiences that align with our community's aspirations and our brand values.

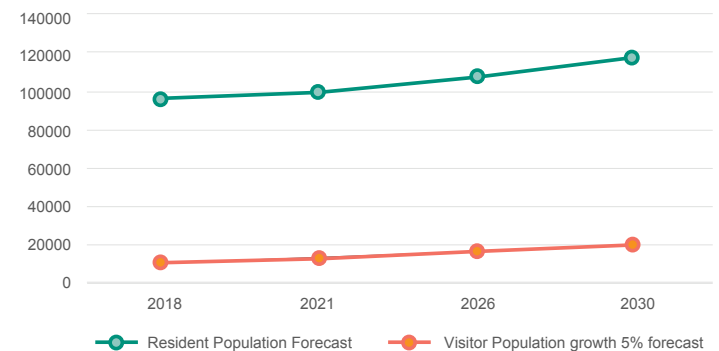
So why set targets and in particular a Stretch Goal? Quite simply the destination must be clear about its aspirations and its limitations and focus growth in areas that will ensure we grow sustainably. Without a clear message we will struggle to attract and focus public and private investment in areas that will yield the best return on investment and meet our community expectations.

The Stretch Goal is ambitious yet achievable! Calculations are based upon achieving a conservative 5% growth in volume per annum until 2030. Whilst the yield targets are based on 10% growth in visitor spend per annum until 2024, increasing to 20% in export markets and decreasing to 5% between 2025 and 2030. If these forecasts are achieved, the 2018 visitor economy figures will doubled by 2025 and quadruple by 2030. Whilst keeping the population-to-visitor ratio between its current level of 11% today to around 16% in 2030. The population to visitor forecast graph demonstrates the proportion of visitors to locals on any one day in the Tweed. Figures are based on population forecasts and projected growth in visitor numbers based on the Stretch Goal targets of 5% per annum.

## COMPARISON OF DAILY EXPENDITURE



## FORECAST TWEED POPULATION GROWTH COMPARED TO GROWTH IN VISITOR NUMBERS



## ► STRATEGIC GOALS

Three clear Strategic Goals have been set to focus the DMP on both achieving the Stretch Goal and delivering on our Strategic Intent

BE REMARKABLE!		01
<ul style="list-style-type: none"> <li>✓ Raise the bar... Lift the quality and standard of everything we do. Not just in how we market the destination, but more importantly the experiences and service we deliver. This does not mean the Tweed will become exclusive and inaccessible to traditional markets, indeed we should target a range of markets to keep our offering real. Everyone deserves to feel welcome. The key is delivering friendly and efficient customer service and remarkable visitor experiences. These things don't need to cost more; it does however require a culture change</li> </ul>	<p>Outcomes:</p> <ul style="list-style-type: none"> <li>✓ Improved quality of customer service</li> <li>✓ Monitoring and evaluation on visitor satisfaction</li> </ul>	
<ul style="list-style-type: none"> <li>✓ Develop the destination and its appeal through quality customer service and extraordinary experiences that over deliver on customers' expectations. Create strategic targeted marketing programs that make locals proud and excite our target audience and compel them to visit</li> </ul>	<ul style="list-style-type: none"> <li>✓ Increased bundling and packaging of offerings</li> <li>✓ Develop VFR program</li> <li>✓ Increased VFR &amp; Word of Mouth marketing</li> </ul>	
<ul style="list-style-type: none"> <li>✓ Work with industry and government to target investment in public and private product and experience development, that builds upon our inherent strengths and develops our existing offerings in ways that deliver on our brand and yield goals</li> </ul>	<ul style="list-style-type: none"> <li>✓ Key investment opportunities identified</li> <li>✓ Funding obtained</li> <li>✓ New products and or infrastructure developed</li> </ul>	

## ▶ STRATEGIC GOALS

<b>BECOME THE BRAND, DELIVER THE PROMISE ... THE TWEED, NATURALLY BEAUTIFUL</b>		<span style="font-size: 2em; font-weight: bold;">02</span>
<ul style="list-style-type: none"> <li>✓ Innovate and evolve the Tweed’s offering - including our experiences, our businesses, our products and services in line with the brand values, creating strong brand recognition in key target markets as a sustainably managed, naturally beautiful destination to visit</li> </ul>	<ul style="list-style-type: none"> <li>✓ Demonstrated changes to business practice to reflect brand values – annual business survey</li> <li>✓ Improved brand recognition – brand awareness monitoring</li> </ul>	
<ul style="list-style-type: none"> <li>✓ Manage the destination and consider hard decisions to sustainably resource and manage tourism related public infrastructure and visitor numbers in popular areas at peak times to ensure our special places remain places locals love and visitors cherish</li> </ul>	<ul style="list-style-type: none"> <li>✓ Adoption of sustainable destination management policies and strategies by TSC &amp; DT</li> <li>✓ Development and adoption of a visitor based funding model for destination management</li> </ul>	

## ▶ STRATEGIC GOALS

<div style="float: left; font-weight: bold; font-size: 1.2em;">FOCUS ON YIELD OVER VOLUME!</div> <div style="float: right; font-size: 2.5em; font-weight: bold; color: white;">03</div>	
<ul style="list-style-type: none"> <li>✓ Increase the average daily spend in the Tweed by all visitors to be comparable with that of the Gold Coast and Byron [Medium to long term goal]</li> </ul>	<p>Outcomes:</p> <ul style="list-style-type: none"> <li>✓ The Tweed has comparable yield data across all relevant metrics NVS/IVS data for both overnight and day trip visitors when compared to the Gold Coast and Byron</li> </ul>
<ul style="list-style-type: none"> <li>✓ Maintain growth averages in domestic tourism; and</li> </ul>	<ul style="list-style-type: none"> <li>✓ NVS data demonstrates continued growth at comparable % over the 10 year average</li> </ul>
<ul style="list-style-type: none"> <li>✓ Focus growth in higher yield export markets and in segments such as business and private events</li> </ul>	<ul style="list-style-type: none"> <li>✓ Export and Business Events Strategy Developed</li> <li>✓ Increased business event trade</li> <li>✓ New investment in business event infrastructure</li> <li>✓ Increased number of private events partnering to promote the destination appeal; and</li> <li>✓ Increased number, stay and spend data from both private and business events</li> </ul>

### THE CONSULTATION PROCESS IDENTIFIED A RANGE OF STRATEGIC OPPORTUNITIES. THESE HAVE BEEN REFLECTED THROUGHOUT THE DMP AND HAVE INFLUENCED STRATEGIC APPROACHES AND PRIORITIES.

- **Nature Based Tourism** - World Heritage National Parks, stunning unspoilt coastline and a river system that brings life to the valley. The Tweed's natural environment is stunningly beautiful, however largely inaccessible as around 90% of national parks are not accessible.
  - Establish a partnership with NPWS, traditional owners and other stakeholders to identify and pursue new investment in infrastructure to support nature based tourism infrastructure where appropriate
  - Work with the traditional owners and indigenous businesses to develop indigenous tourism opportunities and enterprises to ensure that
    - Products and experiences reflect and respect the culture and traditions of the traditional owners
    - Explore potential key locations such as Wollumbin, Letitia Spit and South Kingscliff that have significant opportunity to develop critical infrastructure and enable the traditional owners to develop sustainable businesses that create a unique platform to educate and where appropriate, to share their cultural heritage in a way that respects their traditions
- **Agri and Culinary Tourism** - A stunning agrarian landscape, clean oceans and riverine environments and a growing number of innovative food producers and food artisans and chefs provide a perfect base to develop the Tweed as Australia's next great food destination. However, assistance to support farmers to develop their concepts appropriately and navigate the costly and complex regulatory system is required. A cluster approach focusing on value chain development is important. Dining out continues to be the highest expenditure item in the visitor economy. Linking local food and restaurants will create the farm to plate connection many consumers are seeking. Storytelling and promoting farm-gate trails are important to the overall development of the Tweed a remarkable food destination. Solving intractable distribution problems of distribution from farm to restaurant requires strategic intervention to facilitate new food systems that support provenance and a local distribution model
  - Develop a food and agritourism action plan and form a cluster of agri-food businesses under DT umbrella to create a farm to plate value chain approach to developing and marketing the Tweed as a high quality food production and food tourism destination

- **Cultural Tourism** - The Tweed's significant creative community is an opportunity to create remarkable, bespoke products and experiences
  - Leverage the Tweed River Regional Gallery and Museum as key assets to activate cultural tourism and create pull factor into Murwillumbah.
  - Support the growth of initiatives such as the M Arts Precinct and the Murwillumbah Art Trail Event to foster growth in a number of tourism related experiences.
- **Business and regional events** – Our focus should be on conferencing with a difference, small to medium business gatherings that focus on wellness and connection with the environment as a way to build teams and one's self in terms of mind, body and soul. However we have capacity for 1000+ guests in Salt with a capacity for only 220 in existing conference rooms. Even Twin Towns has limited capacity to house a medium size conference of 400+. With Gold Coast Airport located so close, the Tweed is very well placed to develop the medium sized conference market with investment in infrastructure.
  - Weddings and private events, hallmark regional food and cultural events and targeted sports events and tournaments
- **Outdoor Lifestyle & Wellness** – With nature at the core of our destination appeal, outdoor lifestyle and wellness are key opportunities that require coordinated approach to development as part of the tourism offering. There are many enterprises currently offering services to locals, that could be expanded into tourism offerings for visitors.
  - Surf industry as a sector but also in the context of culture and regional identity
  - Cycling and mountain bike riding
  - Walking and hiking trails
  - Kayaking and low impact water sports
- **Exporting the Tweed**
  - A small group of existing products export, mostly under the Gold Coast brand. Focused medium to long term effort is required to plan, develop and market our approach to export markets. With an international airport crossing our LGA boundary, the Tweed is in an enviable situation and well placed to significantly increase yield with a focus on high yield markets with direct access to Coolangatta.

**Building on our inherent strengths** - The experience themes have been developed to capitalize on the Tweed’s core strengths and to reflect the values of the broader community as expressed in the consultation associated with the DMP and the consultation undertaken by TSC used to inform the TSC Community Plan. Nature, creativity and food are valued strongly by the community and are elements that underpin both the way of life for those who chose to live here and the authentic experiences we currently offer and have the capacity to present in a remarkable way.

The Tweed is

**NATURALLY BEAUTIFUL** - **We live in an extraordinarily beautiful, natural place!** – Our environment and nature are at the heart of why we live here and why we love the Tweed. It underpins our way of life and sets us apart from other places

**NATURALLY CREATIVE** - **Our region is home to a diverse creative community!** – Creativity is at the core of our culture with more artists living in the Tweed than any other LGA in Australia, they are drawn to and inspired by our beautiful natural environment.

**NATURALLY DELICIOUS** - **The food grown and created by our agri and culinary artisans is interesting and delicious!** – The quality and diversity of our food and food-culture, beauty, productivity and abundance of the agrarian landscape are significant. This combined with the talents of food industry creatives, means the Tweed food scene is remarkable and we will build our reputation upon our commitment to regional provenance, authenticity, seasonality and quality.



Figure 8 Destination Experience Framework

**We value and respect our beautiful natural environment;  
our traditional owners and their ancient culture;  
our sense of community and way of life; our sense of freedom and safety.**

**We are creative and innovative, quirky, interesting and vibrant; strong,  
passionate and proud; healthy, active and love the outdoor lifestyle. We  
are connected to the land, environment and each other. We are the Tweed.**

**Our shared approach to tourism is to manage the destination, achieving  
a return on investment whilst limiting the impact of visitation. We will  
achieve this by focusing growth in the visitor economy on value over  
volume and delivering this manifesto and our strategic intent. We aim to  
ensure the amenity, appeal and reputation of the Tweed continues to grow  
as an attractive place to live, work, invest and visit.**

**We will achieve this by delivering our strategic intent, being true to our  
values and becoming the brand.**



In an over-communicated society, you need an over-simplified message. In terms of the destination brand identity, this translates to a set of brand characteristics that are easy to communicate. We need to jettison ambiguities in order to sharpen the picture we are painting of the region.

The essence of the Tweed's brand is built around one simple thought.

A thought that was consistently identified in both the Tweed stakeholder workshops, run in late 2017, and also your resident's responses to the 'Community Vision' section of Council's Planning survey.

For the Tweed, that thought was all about 'nature'. The region's strongest asset is its natural beauty; found along the coast as well as throughout the valley and mountains. Nature is also the inspiration for the region's produce and often it's art, culture and many of the other activities visitors can experience...surfing, bushwalking and cycling, to name just three.

In summary...

- Brand Essence: **Nature.**
- Brand Positioning: **Naturally Beautiful.**
- Brand Idea: **Special Moments Inspired by Nature.**  
This is expressed creatively through the thought - "Find Your Moment".
- Brand Personality: **Natural and Quirky**

The '**Naturally Beautiful**' Brand Positioning has also been translated to the Tweed's two other key Experience Pillars of 'Food & Agritourism' and 'Creativity & Culture'...

Food & Agritourism: **Naturally Delicious**

Creative & Culture: **Naturally Different**



# SECTION 4: STRATEGIC ACTION PLAN

This document along with the engagement and capacity building process undertaken throughout the DMP development process have resulted in a long term strategic *Vision for Tourism in the Tweed to 2030*. The Strategic Intent is designed to be the brand manifesto, which aims to position the Tweed as a world’s best practice sustainably managed destination with nature at the core of the experience.

The Stretch Goal aims to quadruple the visitor economy by 2030 with a focus on high yield experiential based visitation, an approach that aligns with both Tourism Australia and Destination NSW. The Destination Tweed Ltd Board of Directors and tourism industry members have endorsed the DMP, and support the key strategies and goals it seeks to achieve. To implement this long term strategy a focus needs to be on managing the destination through the:

1. Leadership & Governance.
2. Supply through industry development and
3. Developing demand through marketing. Planning and managing the destination cannot be outsourced, it is a collaborative approach by TSC, Industry and other stakeholders.

The document does not belong to one body, moreover it is a community owned and endorsed strategy that sits under the economic development strategy. Delivery and ownership of the DMP is shared with TSC, Destination Tweed Ltd as the the local tourism industry association, the industry at large and various contractors engaged to deliver various components of the plan. A destination management committee or group should sit under the EDU in TSC and include the partners and stakeholders. It should be a platform for cohesive planning and collaboration, ensuring all partners work together and utilise resources and maximise opportunities.

This table demonstrates the strategic contexts of the DMP and demonstrates how the Destination Management Governance sits at the heart of effective destination development and marketing.



## DMP DEVELOPMENT FRAMEWORK

<b>INFORM</b> Community and industry stakeholder consultation, research and planning	▶ <b>STRATEGIC INTENT</b> [BRAND]	▶ <b>EXPERIENCE PILLARS</b> 1. Nature 2. Food & Agritourism 3. Cultural & Creative	▶ <b>Destination STRETCH GOAL</b>	▶ <b>DMP STRATEGIC GOALS</b> 1. Be Remarkable 2. Become the Brand 3. Focus on Yield over Volume	▶ <b>STRATEGIC PRIORITIES</b> 1. Destination Management & Governance 2. Destination Development [Supply] 3. Destination Marketing [Demand]	▶ <b>STRATEGIC ACTION PLAN</b>
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## DESTINATION MANAGEMENT AND GOVERNANCE

The DMP is a platform for partners and stakeholders to come together collaboratively to develop, market and manage the destination. It is not the role of one stakeholder or agency to drive the DMP, moreover it is the collective approach to owning and sharing the responsibility of managing, marketing and developing the destination, that will make it resilient and strong.

The plan should fall under the auspices of Tweed Shire Council's economic development unit with a Destination Management Group acting as custodians of the plan to ensure it is being delivered appropriately. Once adopted by industry, it should be adopted by Tweed Shire Councillors to give it status and recognition. The appointed tourism contractors should be able to then provide a strategic management plan that identifies what they will do to deliver on the DMP via a strategic management plan and an annual action plan outlining what will be delivered.

Tweed Shire Council and Destination Tweed Ltd as the Local Tourism Industry Organisation [LTO] should form the Destination Management Group [DMG]

<b>ENDORSED</b> DMP Endorsed by The Tweed's Tourism Industry Organisation	▶ <b>ADOPTED DMP</b> Presented to TSC for adoption	▶ <b>GOVERNANCE</b> Destination Management Group [DMG] is formed to oversee implementation and to ensure collaboration	▶ <b>RESOURCE</b> TSC Appoints Tourism Contractors to work with LTO for delivery	▶ <b>MONITORING &amp; EVALUATION</b> DMG established benchmarks and M&E framework to assess progress against the DMP	▶ <b>DELIVERY</b> TSC Contractors prepare Strategic Management Plan [SMP] for approval. LTO identifies key projects to deliver	▶ <b>REVIEW</b> DMG commissions annual progress report and triennial review of DMP
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## SECTION 4: STRATEGIC ACTION - DM GOVERNANCE

Destination Management & Governance STRATEGIC PRIORITIES	Destination Management & Governance STRATEGIC ACTIONS	IMPLEMENTATION	PRIORITY
<p>1. Establish DMP GOVERNANCE framework. Facilitate the adoption of the DMP by Industry and TSC and establish a DM Group [DMG] as collaborative LEADERSHIP STRUCTURE under the EDU to oversee implementation of the DMP [e.g TSC 355 committee or advisory group reporting through EDU]</p> <p>NOTE: Critical to success of DMP is an industry and community partnership with TSC to manage the destination with industry and contractor/s to deliver services as agreed</p>	<p>a. Establish terms of reference for DMG and relevant project working groups</p> <ul style="list-style-type: none"> <li>▸ Establish DMP MOU between TSC and stakeholders on DMG to reflect terms of reference</li> <li>▸ Establish collaboration agreement [MOU] between TSC's tourism contractor and Destination Tweed Ltd as the LTO with ongoing communication and collaboration arrangements under the DMP</li> <li>▸ Establish reporting and communication protocols between TSC, other key partners and tourism contractor</li> </ul> <p>b. Review and establish tourism related policy and planning processes to ensure tourism impact and DMP is considered across all areas of Council</p> <ul style="list-style-type: none"> <li>▸ Establish internal policy review protocols with TSC. Align TSC &amp; other government policy with best practice to enable DMP delivery</li> </ul>	<p><b>Who:</b> TSC and Destination Tweed Ltd as LTO industry partner [DMG] plus Tourism Contractor</p> <p><b>How:</b> Joint working group TSC and Destination Tweed Ltd</p> <p><b>When:</b> by 30 Sep 2018</p> <p>1c. is Ongoing</p>	<p>CRITICAL</p>
<p>2. DEVELOP and MANAGE revenue and resources to implement DMP</p>	<p>a. Prioritise DMP Strategic Action Plan; set KPI's and resource allocation</p> <ul style="list-style-type: none"> <li>▸ Assign resources and deliverables to TSC Tourism Contractor.</li> <li>▸ Identify key deliverables and resources for Industry</li> <li>▸ Identify key deliverables and resources for TSC</li> </ul> <p>b. Identify, secure and manage grants for DMP priority projects</p> <p>c. Establish co-funding programs with industry</p> <p>d. Review options for tourism/visitor levy</p>	<p><b>Who:</b> DMG</p> <p><b>How:</b> DMP implementation workshop</p> <p><b>When:</b> by 30 Nov 2018</p> <p>2.b &amp; 2.c are ongoing</p> <p>2.d by 30 June 2019</p>	<p>HIGH</p>

## SECTION 4: STRATEGIC ACTION - DM GOVERNANCE

38

Destination Management & Governance STRATEGIC PRIORITIES	Destination Management & Governance STRATEGIC ACTIONS	IMPLEMENTATION	PRIORITY
3. Develop priority sector plans PRIORITY SECTOR DEVELOPMENT PLANS	<ul style="list-style-type: none"> <li>a. AGRITOURISM - FOOD [Underway]</li> <li>b. NATURE</li> <li>c. CULTURAL</li> <li>d. EXPORT</li> <li>e. BUSINESS EVENTS</li> <li>f. INDIGENOUS and</li> <li>g. HEALTHY LIFESTYLE [SPORT &amp; WELLNESS]</li> </ul>	<p><b>Who:</b> DMG + Industry/community sector groups</p> <p><b>How:</b> Destination Tweed Ltd lead consultation and planning process</p> <p><b>When:</b> 3a. by 30 Sep 2018 3b - 3g. by 30 Jun 2019</p>	HIGH
4. Create a DM planning and research framework	<ul style="list-style-type: none"> <li>a. Monitor and evaluate the implementation of the DMP by               <ul style="list-style-type: none"> <li>a.a. Conduct an annual review of DMP reporting progress against key deliverables</li> <li>a.b. Update DMP annual action plans; and</li> <li>a.c. Conduct a triennial review of DMP against stretch goals and strategic objectives</li> </ul> </li> </ul>	<p><b>Who:</b> DMG oversee process with tourism contractor presenting 4.a.a &amp; 4.a.b. <b>How:</b> Under TSC contract through industry consultation <b>When:</b> by 30 Sep annually</p> <p>4.a.c. <b>Who:</b> Lead by DMG and facilitated by industry <b>How:</b> Active participation in working group</p>	HIGH
	<ul style="list-style-type: none"> <li>b. Establish a research framework to monitor and evaluate destination performance against Stretch Goal and DMP DM               <ul style="list-style-type: none"> <li>b.a. Continue to commission The Tweed Tourism Monitor to maintain continuity of data</li> <li>b.b. Initiate DM, industry and academic research partnership</li> <li>b.c. Establish destination brand tracking in key source markets</li> <li>b.d. Develop local data collection model</li> </ul> </li> <li>- Collection of bespoke information to provide more accurate insights into ROI and performance</li> <li>- Small accommodation operators excluded from NVS/IVS data</li> <li>- Trend data to inform planning and investment</li> </ul>	<p><b>Who:</b> DMG, Destination Tweed Ltd, SCU + other universities</p> <p><b>How:</b> Active participation in working group</p> <p><b>When:</b> 4b. Ongoing</p>	HIGH

## SECTION 4: STRATEGIC ACTION - DM GOVERNANCE

Destination Management & Governance STRATEGIC PRIORITIES	Destination Management & Governance STRATEGIC ACTIONS	IMPLEMENTATION	PRIORITY
<p>5. Advocate for the establishment of a cross border tourism working group</p>	<p>a. Work with Australia’s Green Cauldron Committee to transition to Cross Border Tourism Working Group to facilitate cross border collaboration on joint projects</p> <p>b. Maintain [or establish] agreements with key partners in cross border DNSW/TEQ/GCT/DT+ TSC CONTRACTOR/DNC to:</p> <ul style="list-style-type: none"> <li>▸ enable cohesive and collaborative approach to marketing the region and</li> <li>- greater leverage of GCA as gateway for domestic and international visitors</li> </ul>	<p><b>Who:</b> Destination Tweed Ltd reporting to DMG</p> <p><b>How:</b> Active participation in working group</p> <p><b>When:</b> 5a. by 30 Jun 2019 5b. Ongoing</p>	<p>MODERATE</p>
<p>6. Establish the Tweed as a globally recognised leader in a sustainably managed tourism destination</p>	<p>a. Investigate options for most suitable sustainable DM program to support transition over time for the Tweed region and the tourism businesses. Including [but not limited to]:</p> <ul style="list-style-type: none"> <li>▸ accreditation, benchmarking and monitoring and evaluation platforms</li> <li>▸ business programs to support and incentivise take up of sustainability program</li> <li>▸ Create Eco/Sustainable Tourism Advisory Panel in collaboration with TSC and other stakeholders</li> </ul> <p>b. Investigate sustainability levy to fund transition of businesses and investment into infrastructure and marketing to support sustainability objectives</p>	<p><b>Who:</b> DMG, industry + TSC sustainability team + DNC + SCU</p> <p><b>How:</b> Small sustainability working group; source funding for investigation and implementation plan</p> <p><b>When:</b> by 30 June 2019</p>	<p>MODERATE</p>

## SECTION 4: STRATEGIC ACTION - DM GOVERNANCE

40

Destination Management & Governance STRATEGIC PRIORITIES	Destination Management & Governance STRATEGIC ACTIONS	IMPLEMENTATION	PRIORITY
<p>7. Develop &amp; manage The TWEED brand in line with brand framework</p> <ul style="list-style-type: none"> <li>- Brand Essence: Nature.</li> <li>- Brand Positioning: Naturally Beautiful.</li> <li>- Brand Idea: Special Moments Inspired by Nature. This is expressed creatively through the thought - "Find Your Moment".</li> <li>- Brand Personality: Natural and Quirky</li> </ul> <p>The 'Naturally Beautiful' Brand Positioning has also been translated to the Tweed's two other key Experience Pillars of 'Food &amp; Agritourism' and 'Creativity &amp; Culture'...</p> <p>Food &amp; Agritourism: Naturally Delicious Creative &amp; Culture: Naturally Different</p>	<ul style="list-style-type: none"> <li>a. Establish The Tweed Brand Group [TBG] to oversee the ongoing development and management of the brand</li> <li>b. Trademark The Tweed in a range of relevant categories</li> <li>c. Develop framework, tools and guidelines to protect and manage the use of the brand                             <ul style="list-style-type: none"> <li>c.a. Create Brand Book with brand manifesto and expanded style and usage guidelines</li> <li>c.b. Extend brand guidelines across other industry sectors such as food</li> <li>c.c. Create a transparent process to enable assessment and approval of entities to use the brand under license</li> <li>c.d. Establish and curate a library of hero images for use in conjunction with the brand</li> </ul> </li> <li>d. Use destination marketing strategies to reposition the Tweed and build consumer appeal for it as a nature based tourism destination</li> <li>e. Develop brand health metrics to track the use and appeal of The TWEED brand in key markets across relevant sectors</li> </ul>	<p><b>Who:</b> TBG include TSC Comms, EDO, LTO + Tourism Contractor</p> <p><b>How:</b> Options for 355 or advisory committee of TSC under Comms / ED unit</p> <p><b>When:</b> Commence by 30 Sep 18 - Ongoing</p>	<p>CRITICAL</p>
<p>8. Develop an accessible tourism strategy and policy</p>	<ul style="list-style-type: none"> <li>a. Investigate best practice models for the development of accessible tourism strategies and policies</li> </ul>	<p><b>Who:</b> DMG include TSC Access Committee</p> <p><b>How:</b> Identify resources for specialist strategy</p> <p><b>When:</b> by Dec 2019</p>	<p>MODERATE</p>



# SECTION 4: STRATEGIC ACTION - DESTINATION DEVELOPMENT

Destination Development [Supply] STRATEGIC PRIORITIES	Destination Development [Supply] STRATEGIC ACTIONS	IMPLEMENTATION	PRIORITY
<p>9. Support the growth and development of products and experiences that align with our brand and deliver on the DMP stretch goal and objectives</p> <p>a. AGRITOURISM - FOOD [ Underway ]</p> <p>b. NATURE</p> <p>c. CULTURAL</p> <p>d. EXPORT</p> <p>e. BUSINESS EVENTS</p> <p>f. INDIGENOUS and</p> <p>g. HEALTHY LIFESTYLE [ Sport &amp; Wellness ]</p>	<p>a. Implement product and experience development programs as identified in priority sector development plans [3a. to 3g.]</p> <p>a.a. Seek funding and co-investment to support delivery</p> <p>b. Consider incubator and accelerator programs for various sectors</p> <p>b.a. Seek funding and co-investment to support delivery</p>	<p><b>Who:</b> DMG How: Tourism Contractor + Destination Tweed Ltd to identify most effective deliver mechanisms to align with sector development plans [3a. to 3g.]</p> <p><b>When:</b> Ongoing</p>	<p>HIGH</p>
	<p>c. Formalise The TWEED Food and Agribusiness Network to facilitate delivery of Food and Agritourism Sector Development Plan</p> <p>c.a. Continue delivery of agri and culinary tourism business development programs to build critical mass of quality and authentic products and experiences</p>	<p>3c. <b>Who:</b> Destination Tweed Ltd working with Regionality to deliver specialist program.</p> <p><b>How:</b> Secure funding for a 2-3 year program <b>When:</b> Core work has commenced - Ongoing to 2020.</p>	<p>HIGH</p>
	<p>d. Formalise The Tweed Tourism Export Cluster</p> <p>d.a. Facilitate and coordinate cluster development</p> <p>d.b. Deliver Export Business Development Program to support operators to improve their export readiness and capacity to collaborate and cooperate</p>	<p>3d. <b>Who:</b> Destination Tweed Ltd working with Rees International to deliver specialist program.</p> <p><b>How:</b> Secure funding for a 2-3 year program <b>When:</b> Core work has commenced - Ongoing to 2020.</p>	<p>HIGH</p>
	<p>e. Formalise The Tweed Nature Based Tourism Cluster</p> <p>e.a. Facilitate and coordinate cluster development</p> <p>e.b. Work with NPWS &amp; NRRT et al to deliver product and experience development program to support activation of TVRT and Tweed Byron Hinterland Track</p>	<p><b>Who:</b> DMG How: Destination Tweed Ltd in collaboration with Tourism Contractor to identify most effective deliver mechanisms to align with sector development plans [3a. to 3g.]</p> <p><b>When:</b> Ongoing</p>	<p>HIGH</p>

Destination Development [Supply] STRATEGIC PRIORITIES	Destination Development [Supply] STRATEGIC ACTIONS	IMPLEMENTATION	PRIORITY
<p>10. Develop priority tourism asset and infrastructure that align with our brand and deliver on the DMP stretch goal, objectives and to improve accessibility and dispersal of visitors throughout the region</p>	<ul style="list-style-type: none"> <li>a. Support the development a Tweed Nature Based Tourism Activation Project to leverage the DNC project and attract investment in nature based tourism infrastructure, and prioritise projects identified below                             <ul style="list-style-type: none"> <li>a.a. Improve infrastructure, access and management of Wollumbin Mt Warning [WMW] to ensure natural and cultural heritage is managed, protected and respected by visitors.                                     <ul style="list-style-type: none"> <li>a.a.a. Upgrade existing walking tracks</li> <li>a.a.b. Investigate opportunities for an Aboriginal cultural tourism facility.</li> <li>a.a.c. Consider options for improved security, limiting access to vehicles and potential for user pays access pass</li> </ul> </li> <li>a.b. Support the Tweed Valley Rail Trail infrastructure; and                                     <ul style="list-style-type: none"> <li>a.b.a. Explore the option to connect to Coast Walk/Cycle Trail through Wooyong Road</li> <li>a.b.b. Work with NPWS to connect TVRT to Nightcap Track at Upper Burringbar</li> </ul> </li> <li>a.c. Tweed Byron Hinterland Walking Trail [Nightcap Track/ Mt Jerusalem NP]</li> <li>a.d. Explore the potential of connecting the rail trail north of Murwillumbah via a River Trail system that connects all the small jetty's along in each of the villages [Fingal, Chinderah, Tumbulgum, Condong and Murwillumbah].</li> <li>a.e. Consider installation of infrastructure to support better access to the river for kayaks and non-motorised water craft</li> <li>a.f. Improve accessibility to and amenities at scenic lookouts through out the Tweed</li> <li>a.g. Investigate options for low impact ecotourism on Mt Nullum</li> </ul> </li> </ul>	<p><b>Who:</b> DMG, NPWS + DNC</p> <p><b>How:</b> Identify most effective option to deliver the TNBTAP align with sector development plans [3a]</p> <p><b>When:</b> by 30 Sep 2019</p> <p>All others considered and opportunities assessed by 31 Dec 2019</p>	<p>HIGH</p>

# SECTION 4: STRATEGIC ACTION - DESTINATION DEVELOPMENT

Destination Development [Supply] STRATEGIC PRIORITIES	Destination Development [Supply] STRATEGIC ACTIONS	IMPLEMENTATION	PRIORITY
<p>10. Develop priority tourism asset and infrastructure that align with our brand and deliver on the DMP stretch goal, objectives and to improve accessibility and dispersal of visitors throughout the region Continued....</p>	<p>a. Implement product and experience development programs as identified in priority sector development plans [3a. to 3g.]                      a.a. Seek funding and co-investment to support delivery                      b. Consider incubator and accelerator programs for various sectors                      b.a. Seek funding and co-investment to support delivery</p>	<p><b>Who:</b> DMG <b>How:</b> Tourism Contractor + Destination Tweed Ltd to identify most effective deliver mechanisms to align with sector development plans [3a. to 3g.] <b>When:</b> Ongoing</p>	<p>MODERATE</p>
	<p>c. Investigate options to establish free wifi zones in towns and villages throughout the Tweed</p>	<p><b>Who:</b> DMG <b>How:</b> resource specialist consultancy <b>When:</b> by 30 Dec 2019</p>	<p>MODERATE</p>
	<p>d. Develop options paper for attracting investment in small to medium scale luxury hotels [e.g. Spicers] on the Tweed Coast and Hinterland</p>	<p><b>Who:</b> DMG <b>How:</b> Resource specialist consultancy <b>When:</b> by 30 Dec 2019</p>	<p>MODERATE</p>
	<p>e. Attract investment and funding for a mid range [up to 500 pax] meeting and event facility (conferencing and cultural centre) on the Tweed Coast within close proximity of the Salt accommodation precinct to increase high yield visitors</p>	<p><b>Who:</b> DMG <b>How:</b> Destination Tweed Ltd Business Events Network <b>When:</b> by 30 Dec 2018</p>	<p>CRITICAL</p>
	<p>f. Audit current tourism signage and entry statements and develop way-finding strategy</p>	<p><b>Who:</b> DMG + TSC traffic &amp; signage staff <b>How:</b> Resource specialist consultancy <b>When:</b> by 30 Dec 2019</p>	<p>MODERATE</p>
<p>11. Develop business events network to drive development of sector</p>	<p>a. Partner with DNC to develop The Tweed's Business Capability in line with the Business Events Priority Sector Development Plan</p>	<p><b>Who:</b> DMG + DNC <b>How:</b> Destination Tweed Ltd Business Events Network collaboration wit DNC <b>When:</b> by 30 Jun 2019</p>	<p>HIGH</p>
<p>12. Manage the impact of visitation in peak periods to mitigate the impact on the sense of place, the community and the environment</p>	<p>a. Pilot options for "Limited Traffic Zones" to manage vehicle numbers, parking and overcrowding during peak periods in popular locations [e.g. The Tweed Coast] by creating out of zone visitor parking and "Resident Only Parking" areas.                      b. Investigate other mechanisms used in mass tourism regions to limit impact of visitation on local communities</p>	<p><b>Who:</b> DMG +TSC traffic <b>How:</b> Resource specialist consultancy <b>When:</b> by 30 Dec 2020</p>	<p>LOW</p>

## SECTION 4: STRATEGIC ACTION - DESTINATION MARKETING

Destination Marketing [Demand] STRATEGIC PRIORITIES	Destination Marketing [Demand] STRATEGIC ACTIONS	IMPLEMENTATION	PRIORITY
13. Become Remarkable by raising the bar... Lifting the quality and standard of customer service and local knowledge	<ul style="list-style-type: none"> <li>a. Deliver customer service and local knowledge training, accreditation and awards program for front of house staff and volunteers</li> <li>b. Continue to deliver the Be Remarkable Program</li> </ul>	<p><b>Who:</b> DMG + DNC, TAFE  <b>How:</b> Fund specialist program  <b>When:</b> by 30 Sep 2019</p>	MODERATE
14. Develop priority source markets to achieve yield targets Stretch Goal	<ul style="list-style-type: none"> <li>a. Develop a destination Marketing Strategy that aligns with The TWEED brand and delivers on the DMP stretch goal and objectives</li> <li>b. Develop marketing implementation plan with annual action plan and budget</li> <li>c. establish Visiting Friend and Relatives Program (VFR)</li> </ul>	<p><b>Who:</b> DMG oversee process  <b>How:</b> Under TSC contract through industry consultation  <b>When:</b> 14a. by 31 Dec 2018  14b. by 30 Sep annually  14c. by 31 Dec 2019</p>	HIGH
15. Establish high quality and innovative visitor servicing models, that engages with visitors and locals and aids dispersal of visitors throughout the Tweed region	<ul style="list-style-type: none"> <li>a. Review the current VIC and convert to Visitor Inspiration Centre model and present visitor servicing options paper /strategy for consideration by industry and TSC</li> <li>b. Secure funds for redevelopment of VIC infrastructure</li> <li>c. Develop collateral to support new visitor servicing model</li> </ul>	<p><b>Who:</b> DMG oversee process  <b>How:</b> Under TSC contract through industry consultation  <b>When:</b> 15a by 31 Dec 2018  15b &amp; 15c by 31 Dec 2019</p>	MODERATE
16. Establish strong industry partnerships and engagement program to deliver the DMP and stretch goals	<ul style="list-style-type: none"> <li>a. Create collaboration between the LTO/industry groups and TSC Tourism Services Contractor via the DMG process</li> <li>b. Develop an annual partnership prospectus to encourage industry investment into marketing program</li> </ul>	<p><b>Who:</b> DMG platform  <b>How:</b> TSC contract through industry consultation  <b>When:</b> 16a Ongoing. 16b. by 30 Sep annually</p>	HIGH

1 TRA National Visitor Survey, year ending September 2017

2 TRA National Visitor Survey, average over 5 years to September 2017

3 <https://economy.id.com.au/tweed>. ABS ERP 2016

4 TRA National Visitor Survey, year ending September 2017

5 Based on TRA September quarter 2017 annual figures

6 Based on best practice destination management & development as per UNWTO definition

<http://sdt.unwto.org/content/about-us-5> and conversion tourism related of businesses to sustainable business operations

7 <https://forecast.id.com.au/tweed/population-households-dwellings>

Best Practice Guide to Destination Management

Tourism 2020 Strategy

<http://www.tourism.australia.com/en/about/our-organisation/our-performance-and-reporting/tourism-2020.html>

NSW Visitor Economy Action Plan 2030

[https://www.industry.nsw.gov.au/\\_\\_data/assets/pdf\\_file/0003/172092/Visitor-Economy-Industry-Action-Plan-2030.pdf](https://www.industry.nsw.gov.au/__data/assets/pdf_file/0003/172092/Visitor-Economy-Industry-Action-Plan-2030.pdf)

Tweed Community Strategic Plan 2017 – 2027

<https://www.google.com.au/search?q=tweed+community+straegic+plan&oq=tweed+community+straegic+plan&aqs=chrome..69i57j0j69i64.9023j0j8&sourceid=chrome&ie=UTF-8>

Tweed Shire Economic Development Strategy

<https://www.tweed.nsw.gov.au/EconomicDevelopmentStrategy>

Destination North Coast Network Destination Management Plan

<https://dncnsw.com/app/uploads/2018/07/DNC-Destination-Management-Plan.pdf>

# THE TWEED



Design by [frankiecreative.com](http://frankiecreative.com)

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