

DESTINATION MANAGEMENT PLAN 2018-2030

CONTENT ONLY (V8)
September 2019

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GENERAL MANAGER – TWEED SHIRE COUNCIL

Mr Troy Green
General Manager - Tweed Shire Council
<to be supplied>

GENERAL MANAGER – THE TWEED TOURISM CO.

A number of local stakeholders have put considerable time and effort into the research, industry consultation and development of this strategic plan which I note is a first for the Tweed region.

The Tweed is in a period of growth and change with new tourism products developing, and entrepreneurial business owners looking to harness the region's natural abundance. With strongly identified themes including nature-based tourism and agri-tourism, this document will provide a strong framework for supporting future growth in a sustainable and value-oriented direction.

As the local destination agency that commenced operations during the process, it has been TTC's role to review the initial drafts (which were noted as having a sound basis), completing a final consultation with identified strategic partners, and delivering a finalised document. We note and thank these strategic partners for their contribution; including the NSW Parks and Wildlife Service, Destination New South Wales, Destination North Coast, Northern Rivers Food, Destination Tweed Collective 2050, and the Tweed Experiences Network.

TTC would additionally like to note the Destination Tweed Collective 2050 and the Regionality consultancy for undertaking a large proportion of the initial consultation with local industry stakeholders and drafting of this plan.

Finally, my thanks to the many operators who attended workshops to give feedback and ultimately direction to this strategic plan. The aim has been to ensure a final document to fit in with the principles of the Tweed as a community, aligning with the ethos of all regional stakeholders. A document to be proudly endorsed by the Tweed, and utilised for the Tweed.

I believe the above has been achieved and look forward to working with all stakeholders on the delivery stages, as they will now ultimately define the success of this Destination Management Plan as a roadmap for the future.

Bradley Nardi
General Manager – The Tweed Tourism Co.

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ACKNOWLEDGEMENTS

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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SECTION 1: EXECUTIVE SUMMARY

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DESTINATION MANAGEMENT PLAN – EXECUTIVE SUMMARY

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

The Draft DMP was developed through independent and extensive consultation with the Tweed Shire Council (TSC), industry and community stakeholders. It was 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. If the Tweed was 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!

The Tweed Tourism Co. (TTC) was directed by TSC to review the Draft DMP undertaken by Destination Tweed, ensure its relevancy and audit the Action Plan to maximise its practical implementation in concise, realistic and timely goals.

This document, informed by the engagement and capacity building process undertaken throughout the Draft DMP development and then review process, has 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 (TA) and Destination NSW (DNSW). To implement this long-term strategy the focus needs to be on managing the destination through:

1. Collective Leadership and unambiguous Destination Management Governance;
2. Enhanced product supply through industry development;
3. Developing visitation demand through marketing; and
4. Planning for any macro impacts (disasters, global geopolitics, economic downturn, etc.) whilst managing the destination in a collaborative approach through TSC, industry and other stakeholders.

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DESTINATION MANAGEMENT PLAN - EXECUTIVE SUMMARY

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, including:

- Research and Planning;
- Destination Development (supply side);
- Destination Marketing (demand side); and
- Stakeholder 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 into:

- Destination Management Governance;
- Destination Development (industry development and supply); and
- Destination Marketing (demand).

Detailed implementation plans and prioritisation are outlined for each area with annual delivery plans.

NEXT STEPS

The document was developed and endorsed by industry and community stakeholders, in consultation with TSC. The review has then tested its validity with further consultation.

Once adopted by TSC under the Economic Development Strategy, the DMP will require the establishment of a broad-based industry and stakeholder Destination Management Group (DMG) led by TSC, through its Economic Development Unit (EDU).

Once adopted, the DMG will steer the DMP's implementation.

Monitoring is via an annual review to track performance and ensure the strategy continues to be in line with the original objectives with a three-year major review of the DMP against long-term strategies.

SECTION 2: RESEARCH

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SECTION 2: BACKGROUND AND CONTEXT

The purpose of developing a Destination Management Plan is to bring key partners in the destination, the community, the industry and government together and establish a long-term strategic vision for the future of the Tweed. We then plan how the visitor experience and offering can evolve to align with the vision. The DMP is as much about the local community as it is the visitor.

Both phases of consultation and stakeholder engagement were 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 then work collectively to ensure they are developed and delivered. Considered strategies to manage the key assets and natural environments that support these experiences are vital. This helps to ensure 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.

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 summarised in Figure 1.

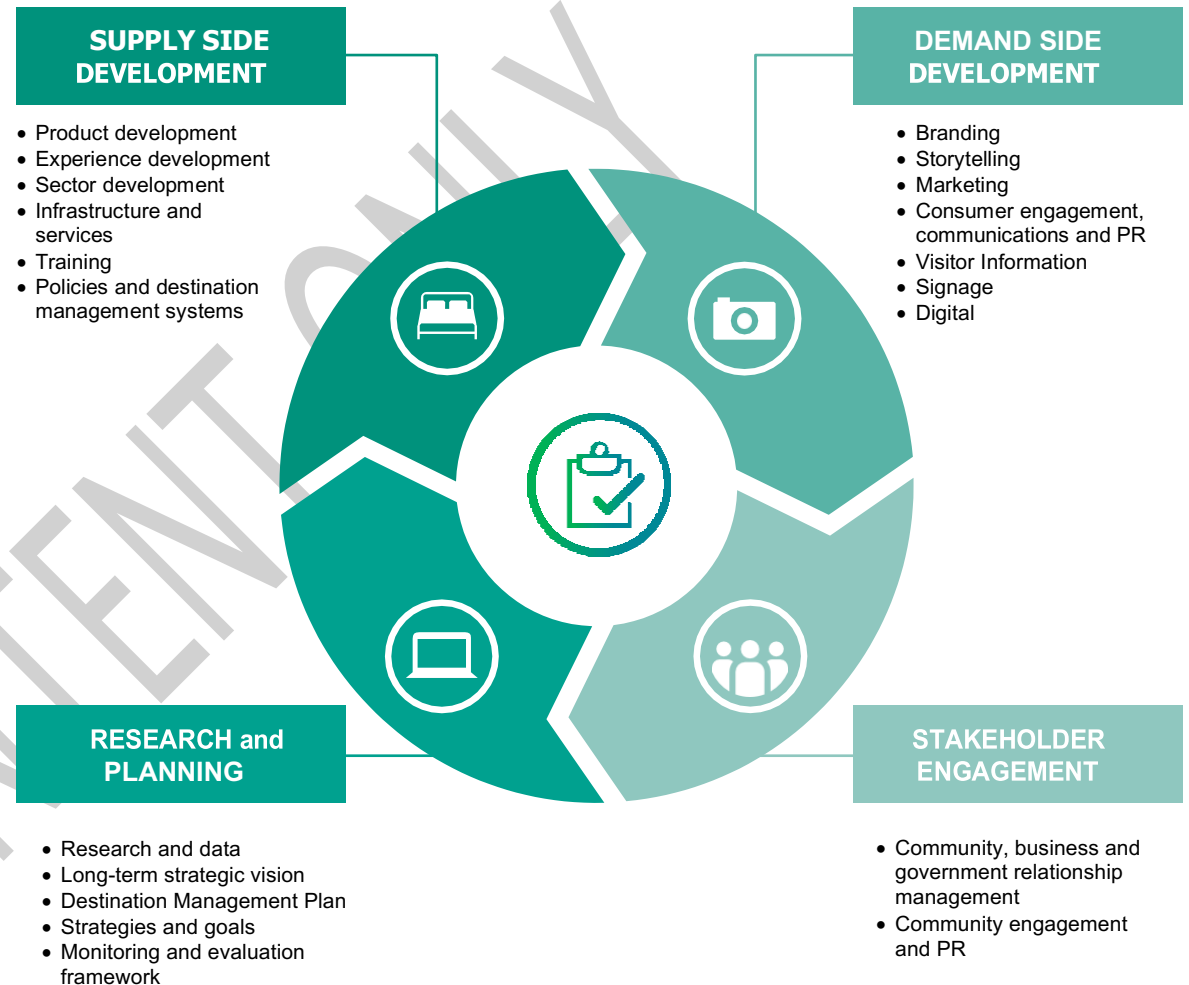


Figure1 Destination Management Overview

SECTION 2: BACKGROUND AND CONTEXT

The Destination Management Plan is a blueprint that sets out a long-term vision for the future with strategies to manage growth ensuring the Tweed's visitor economy continues to grow sustainably, whilst remaining a wonderful place to live and visit.

Tourism is everyone's business. It can enhance our community and way of life by bringing a range of services and experiences. It can enrich our culture, bring diversity and drive the economy by inspiring investment in all manner of industries and businesses through positive experiences. Our stakeholders will be asked to become part of its delivery.

THE ROLE OF RESEARCH

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

- What the consumer wants (both locals and visitors);
- What our destination is capable of offering; and
- 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 (TRA) via the National Visitor Survey (NVS) and the International Visitor Survey (IVS). This data provides long-term comparable data that enables trends and performance to be tracked over time. Whilst TTC includes expenditure statistics in its reporting, we note the following caveat regarding methodology and how this data should be used.

Some local government areas (inclusive of the Tweed) complete the modelling based on the Tourism Region (TR) expenditure applied to the visitation rate (as taken from TRA online). Whilst this methodology is the most effective available, it assumes that visitors have the same spending patterns universally. TRA refuses to make that assumption and as such this data is derived by the LGA and never published. Additionally, TRA also considers the expenditure data on a yearly basis as too volatile.

We recommend that the expenditure data can be a good way to demonstrate the importance of direct visitor expenditure for the local Tweed economy, noting that economic multipliers then mean this injection of new money spreads throughout the community. The data should be used with caution, in particular with large year-to-year fluctuations. A better method is to look at trend information and a gradual change in expenditure over a number of years.

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; and
3. The expenditure – the value of each visitor in terms of how much they spend.

SECTION 2: DESTINATION PERFORMANCE

<note these figures will be updated before final publication to reflect the latest data but will not materially affect the DMP's analysis or related objectives and actions>

The total number of visitors to the Tweed in the year to the year ending December 2018 equalled 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 that the same period last year totalling 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 to the Tweed are only 24,000. Given the volume of international visitors coming to Byron Bay and the Gold Coast and the access to market via Gold Coast Airport, the Tweed must improve this figure with a focused effort and investment.

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 trips at 4.1%pa.

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

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 LGAs in coastal NSW, Gold Coast and Byron Bay. We have the ability to improve the yield.

<Figure2 GRAPH>

<Figure3 GRAPH>

SECTION 2: DESTINATION PERFORMANCE

If the goal is to grow the visitor economy, looking at volume alone does not provide sufficient insight into how the destination is performing. We have chosen two contexts to compare:

1. Our rate of growth when compared to other NSW LGAs; and
2. Comparison to the growth of our neighbouring coastal LGAs, both of which impact upon, and contribute to, the visitor economy in the Tweed.

Figures 4 and 5 provide a 10-year performance index showing domestic and international overnight visitors.

<note these figures will be updated before final publication to reflect the latest data but will not materially affect the DMP's analysis or related objectives and actions>

Significantly, this 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 LGAs during the same decade. This is partly explained as growth from a low base, making direct conclusions to, for example, a mature destination such as the Gold Coast, problematic.

The Tweed's share of international visitation (Figure 5) is surprisingly low, given the size of the market in the neighbouring LGAs and the proximity to Gold Coast Airport. It is deservedly a high priority focus for the DMP.

<Figure 4 10 Year Performance Index of Domestic Overnight Visitation>

<Figure 5 10 Year Performance Index International Overnight Visitation>

SECTION 2: KEY SOURCE MARKETS AND PURPOSE OF VISIT

<note these figures will be updated before final publication to reflect the latest data but will not materially affect the DMP's analysis or related objectives and actions>

Tracking yield is also critical to understand the future focus for destination management and is shown in Figures 6 and 7. We must explore:

- Who is coming to the Tweed?
- How long do visitors stay?
- How much do they spend? and
- What they do within region as 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. Some key points:

- Short stay visitors from within a 200 kilometre drive radius will return frequently and are relatively easier and more cost effective to reach through marketing;
- These customers are usually Free and Independent Travellers (FIT) 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; and
- Currently international visitors stay longer (10 nights YE Sep 2017) but

spend less per night, inferring it is the backpacker market. We need a strategy for a more mature, high disposable FIT market such as the Germans and Dutch that self-drive.

<Figure 6 Domestic Overnight Visitors – Purpose of Visit>

<Figure 7 Domestic Source Markets – Overnight Comparisons>

SECTION 2: KEY SOURCE MARKETS AND PURPOSE OF VISIT

Figure 8 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. The 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. In 2019 Sydney is our second most important market in value. The only export market to make it onto the graph is New Zealand, despite the presence of an international airport partly in our LGA.

<note these figures will be updated before final publication to reflect the latest data but will not materially affect the DMP's analysis or related objectives and actions>

<Figure 8 Percentage of Visitors, Size and Value of markets>

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SECTION 2: STRATEGIC INSIGHTS - STAKEHOLDER AND COMMUNITY ENGAGEMENT

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?
- With whom, and how, do we collaborate to realise this aspiration?; and
- How are we performing in relation to the above?

Secondly, and perhaps most importantly, the role of consultation is to activate the industry, community and businesses to contribute to the planning process, then actively engage in the delivery of the key strategies. The consultation provided informed strategic input into the direction resulting in the following key consultation themes.

KEY CONSULTATION THEMES – INITIAL DRAFT

The consultation revealed that the stakeholders want the Tweed DMP to be a roadmap that encapsulates the following themes:

1. Protect 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. Establish a clear vision of how we want to evolve into the future as a destination.
3. Provide a platform for collaboration between industry, community and local government to manage the Tweed as a destination.
4. Focus investment and effort into key areas of priority by identifying critical infrastructure opportunities that support the DMP and community aspirations.
5. Support sustainable, managed growth in the visitor economy and continued industry viability through a focus on yield over volume.
6. Prioritise the protection and/or enhancement of key public and natural assets to support visitation.
7. Identify potential gaps in products, services and experiences with ways to overcome them.
8. Explore ways visitors can contribute to the cost of sustainably managing the destination.
9. Create a brand framework that reflects our core community values; our promise to visitors and provides strategic direction for destination marketing.
10. Enable us to tell our collective story with authenticity and pride.

KEY CONSULTATION THEMES – DRAFT REVIEW PROCESS

The review consultation highlighted the following themes:

1. Northern Rivers Food (NRF) views local food and agritourism as essential ingredients in the quintessential Tweed visitor experience. NRF is well placed, as

an independent, region-wide industry body to collaborate on the development of this in partnership with other stakeholders to develop an agritourism trail/drive to package and market the cluster of products.

2. Given the abundant produce/agritourism in the region, a natural evolution is to support the development of a cooking school and/or foodie-focused packages.
3. Exploit opportunities in both western and eastern markets by tailoring messages to the respective markets or style of travellers.
4. Sporting and participation events are a part of the Tweed’s rich history with many reflecting the core values and attractions of the area. We must support this sector.
5. There is much reference to Wollumbin throughout the Draft DMP, including visual references suggesting its key ‘hero’ role in positioning the region – this needs to be managed very sensitively with the Wollumbin Aboriginal People and NSW National Parks and Wildlife Service.
6. Tweed Tourism Company’s analysis of the Draft DMP was very good, with a particular focus on developing a succinct final plan with clear priorities and governance for implementation.
7. The Tweed Byron Hinterland Trail (TBHT) has the potential to be the hero experience for this region and NPWS, Tweed Tourism Co, Destination North Coast and Destination NSW should develop the TBHT as a signature experience.
8. There is still an opportunity for the Tweed to capitalise on ‘boutique’ music festivals, as well as festivals servicing the needs of increasingly-specific niches, such as nature, heritage, craft, local produce and wellness.
9. The final DMP must be more robust and targeted.
10. If by 2025 the Tweed hopes to be Australia’s most sustainable destination, the region needs to own this positioning and build/implement a future-focused plan to achieve success around this pillar.
11. The DMG needs a broad set of stakeholders on these management/working groups for the region and reflect this partnership and industry/professional experience in the DMP.

SECTION 2: STRATEGIC INSIGHTS – SITUATION ANALYSIS

The following section is informed by available datasets and consultation.

- Our domestic visitor numbers and length of stay are reasonably well placed. 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%.

<note these figures will be updated before final publication to reflect the latest data but will not materially affect the DMP's analysis or related objectives and actions>

- 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. To encourage spend the destination needs to consider core experience themes that build upon both the destination's potential and the inherent traits that appeal to targeted market segments.

- There is an opportunity to grow international visitation to fill non-peak periods.
- There is a significant opportunity to encourage visitors 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.

<Figure 9 Domestic Overnight Visitors – Activity Categories>

SECTION 2: STRATEGIC INSIGHTS – SITUATION ANALYSIS

- Focus effort on clusters that connect to existing offerings and tourism routes and trails that link villages to enhance awareness and dispersal beyond the coast.
- 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 are also 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.
- 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 sometimes used without the respect and care it deserves.
- We must 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 is a very sensitive environmental and cultural asset that requires greater investment of resources to ensure it is sustainably managed. NPWS has good visitation estimates to work from for Wollumbin National Park and all national parks in the Tweed region for decision making.
- This site has potential to be an exemplar of collaboration between the traditional owners, NPWS, tourism industry and TSC with a significant opportunity to create a sustainable income stream to manage the park’s assets, generate jobs and enterprises for the local community, particularly the Traditional Owners.
- Development of the Nightcap Track and the creation of an integrated trails route that connects to the TVRT and WMW is an opportunity to disperse visitors and to lessen the impact on popular sites such as WMW. There have 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 location 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.
- NPWS has expressed its desire to partner with the region to support operators of the Tweed Byron Hinterland Trail, appealing to the international visitor as packaged and bundled products with premium accommodation and culinary options.

<QUOTE>

“89% of visitors to the Tweed engage in outdoor, nature and sporting activities.”

SECTION 2: STRATEGIC INSIGHTS – SITUATION ANALYSIS

- 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.
- Develop the Visiting Friends and Relatives (VFR) market engages the local community as advocates and local ambassadors for the destination 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 relatively easy and cost effective to access and are already emotionally connected to the destination with trusted social media links and other communication 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 the 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 Southern Cross University (SCU), TAFE and other training providers are also key opportunities to target the VFR market.

- 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. Consider a "Welcome to The Tweed" visitor experience program.
- Our current international visitation is 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 Trade Ready Programs through the Tweed Tourism Academy to help operators prepare for and develop export markets; and
 - 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.

<IMAGE>

SECTION 3: LONG-TERM STRATEGY

<IMAGE>

CONTENT ONLY

SECTION 3: OUR STRATEGIC INTENT

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.

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; and 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, 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. They will 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.

<IMAGE>

SECTION 3: DESTINATION STRETCH GOAL

“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”* <quote citation>

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 destination's current offering. The focus on supply and demand development will aid in sustaining this modest and manageable growth into the future.

Figure 10 shows our current spend per person is comparably low across all key visitor types.

<note these figures will be updated before final publication to reflect the latest data but will not materially affect the DMP's analysis or related objectives and actions>

The comparison of daily expenditure graph demonstrates 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? The destination must be clear about its aspirations and its limitations and focus growth in areas that will ensure we grow sustainably. A clear message will attract and focus public and private investment and yield the best return on investment and meet our community expectations.

The Stretch Goal is ambitious yet achievable! Calculations are based upon assumptions which need to be reviewed annually and include:

- Achieving a 5% growth in volume per annum until 2030; and
- 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 have doubled by 2025 and quadrupled 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 (Figure 11) 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. (Source: <https://forecast.id.com.au/tweed>)

<Figure 10 Regional Comparison of Daily Expenditure>

<Figure 11 Tweed Forecast Population Growth>

SECTION 3: ACHIEVING THE DESTINATION STRETCH GOAL

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

- Raise the bar... Lift the quality and standard of everything we do. 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.
 - 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.
- Outcomes:
- Improved quality of customer service and monitoring and evaluation of visitor satisfaction;
 - Increased bundling and packaging of offerings;
 - Develop VFR program; and
 - Increased VFR and Word of Mouth marketing.
-
- Key investment opportunities identified;
 - Funding obtained; and
 - New products and / or infrastructure developed.

SECTION 3: ACHIEVING THE DESTINATION STRETCH GOAL

STRATEGIC GOALS

BECOME THE BRAND, DELIVER THE PROMISE ... THE TWEED, NATURALLY BEAUTIFUL 02

- 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.
 - Manage the destination and consider difficult 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.
- Outcomes:
- Demonstrated changes to business practice to reflect brand values – annual business survey; and
 - Improved brand recognition – brand awareness monitoring.
 - Adoption of sustainable destination management policies and strategies by TSC and TTC; and
 - Consider options for a visitor-based funding model for destination management.

SECTION 3: ACHIEVING THE DESTINATION STRETCH GOAL

STRATEGIC GOALS

FOCUS ON YIELD OVER VOLUME! 03

- Increase the average daily spend in the Tweed by all visitors to be comparable with that of the Gold Coast and Byron Bay (medium to long term goal).
 - Maintain growth trends in domestic tourism.
 - Focus growth in higher yield export markets and in segments through Group Tourism (such as business and private events, sports, etc.) and agri-tourism.
- Outcomes:
- 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 Bay.
 - NVS data demonstrates continued growth at comparable % over the 10 year average.
 - Export and Business Events Strategy developed;
 - Increased business event trade;
 - New investment in business event infrastructure;
 - Increased number of private events partnering to promote the destination appeal; and
 - Increased number, stay and spend data from both private and business events.

SECTION 3: STRATEGIC OPPORTUNITIES SUMMARY

The consultation process and review 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, unspoilt coastline and a river system that brings life to the valley. The Tweed's natural environment is stunningly beautiful, however, not all national parks are accessible.
 - Establish a partnership with NPWS, traditional owners and other stakeholders to identify and pursue new investment in infrastructure to support nature-based tourism where appropriate;
 - Collaborate with NPWS to explore a better system of trails and iconic track-based experiences that link large areas of reserve system and off-park infrastructure;
 - 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; and
 - › Potential key locations such as Wollumbin, Letitia Spit and South Kingscliff with significant opportunity to develop critical infrastructure and enable the traditional owners to develop sustainable businesses and a unique platform to educate and, where appropriate, to share their cultural heritage in a way that respects their traditions;
 - The Tweed Byron Hinterland Trail can be more emblematic of the aspiration to create nature-based experiences which are distinctive unique selling points. Consideration to reference the Tweed Byron Hinterland Trail as a signature experience for the Tweed.
- Agri-based and Culinary Tourism - A stunning agrarian landscape, clean oceans and riverine environments alongside 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 as a remarkable food destination. Solving intractable distribution problems from farm to restaurant requires strategic intervention to facilitate new food systems that support provenance and a local distribution model.
- Accessible Tourism - Increase operator knowledge about the market for accessible tourism, develop strategies to improve the accessibility of their operations to appeal to a wider range of visitors of all abilities and ages and understand their legal obligations in relation to inclusive and accessible tourism.
- Group Tourism – Including business and private events, sports, etc.
- 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 a pull factor for Murwillumbah; and
 - 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.

SECTION 3: STRATEGIC OPPORTUNITIES SUMMARY

- 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. With Gold Coast Airport located so close, the Tweed is very well placed to develop the medium sized conference market with investment in infrastructure. The target is:
 - Weddings and private events; and
 - Hallmark regional food and cultural events and targeted sports events and tournaments.
- Outdoor Lifestyle and Wellness – With nature at the core of our destination appeal, outdoor lifestyle and wellness are key opportunities that require a 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. Wellness is a mega trend internationally, valued at USD \$4.2 trillion and should be a key priority. The Tweed and its nature-based and authentic brand sets it apart from the major centres to the north and south and provides it with an opportunity to deliver a range of associated visitor experiences. The wellness trend also has particular appeal to the high value traveller and in particular the Chinese visitor. The target is:
 - 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; and
 - Mental and spiritual well-being.
- 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.

<IMAGE>

SECTION 3: THREE EXPERIENCE PILLARS

The experience themes have been developed to capitalise on the Tweed's core strengths and to reflect the values of the broader community as expressed in the initial phase of consultation by DT and that undertaken by TSC to inform its 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 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 local government area in Australia. They are drawn to, and inspired by, our beautiful natural environment.

NATURALLY DELICIOUS - The food grown and created by our agri-based 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.

<IMAGE>

SECTION 3: OUR VALUES AND BRAND MANIFESTO

We value and respect our beautiful natural environment; our traditional owners and their ancient culture; our sense of community and way of life; and 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. 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 this manifesto, our strategic intent and being true to our values and becoming the brand.

<IMAGE>

SECTION 3: THE BRAND FRAMEWORK

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 and sharpen the picture we are painting of the region.

The essence of the Tweed's brand is built around one simple thought – “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 its art, culture and many of the other activities visitors can experience, including surfing, bushwalking and cycling.

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 and Agritourism’ and ‘Creativity and Culture’:

- Food and Agritourism - Naturally Delicious
- Creative and Culture - Naturally Different.

<IMAGE>

SECTION 4: STRATEGIC ACTION PLAN

CONTENT ONLY

<IMAGE>

SECTION 4: DMP IMPLEMENTATION

This document, informed by the engagement and capacity building process undertaken throughout the Draft DMP development and review process, offers 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 (TA) and Destination NSW (DNSW). To implement this long-term strategy a focus needs to be on managing the destination through:

1. Collective Leadership and unambiguous destination management governance;
2. Enhanced product supply through industry development;
3. Developing visitation demand through marketing; and
4. Planning for any macro impacts (disasters, global geopolitics, economic downturn, etc.) whilst managing the destination in a collaborative approach through TSC, industry and other stakeholders.

The document is an industry and community owned strategy, endorsed by TSC under its Economic Development Strategy. Stewardship of the DMP sits with TSC who are responsible to collaborate with TTC as the local destination body, as well as DT, TEN and other tourism or business associations existing at the time, the industry and government agencies. A Destination Management Group (DMG) will be auspiced by the EDU within TSC and include a broad stakeholder base. It should be a platform for cohesive planning and collaboration, ensuring all partners work together and utilise resources and maximise opportunities.

<IMAGE>

Figure 12 summarises the DMPs' governance development.

SECTION 4: DMP IMPLEMENTATION

Figure 12 Destination Management Plan Framework

DMP DEVELOPMENT FRAMEWORK



DESTINATION MANAGEMENT AND GOVERNANCE

The DMP is a platform for partners and stakeholders to come together collaboratively to develop, market and manage the destination in a collective approach to owning and sharing the responsibility of managing, marketing and developing the destination, that will make it resilient and strong.



SECTION 4: STRATEGIC ACTION – DESTINATION MANAGEMENT GOVERNANCE

Destination Management and Governance STRATEGIC PRIORITIES

1. Facilitate the adoption of the DMP by TSC and establish a DMG as a collective leadership structure under the EDU to oversee implementation of the DMP

2. Develop and manage revenue and resources to implement DMP

Destination Management and Governance STRATEGIC ACTIONS

- a. Establish terms of reference for the DMG reporting and communication protocols between TSC, TTC and other key partners

- b. Review and establish tourism related policy and planning processes to ensure tourism impact and DMP is considered across all areas of Council
 - Establish internal policy review protocols with TSC
 - Align TSC and other government policy with best practice to enable DMP delivery

- a. Prioritise DMP Annual Action Plan and set KPIs
 - TTC aligns resources and deliverables to its annual Action Plan
 - TSC aligns resources and deliverables to its annual planning
 - Identify key deliverables and resources for industry consideration
 - Other industry associations align resources and deliverables to annual planning

- b. Identify, secure and manage grants for DMP priority projects, establish co-funding programs with industry

- c. Consider options for a visitor-based funding model

IMPLEMENTATION / WHO

Who: TSC and TTC
 How: Collaborative drafting
 When: By 31 October 2019 (or once ratified by TSC), then ongoing

Who: TSC
 How: TSC internal decision making
 When: By June 2020, then ongoing

Who: DMG, TTC, TSC
 How: TTC and TSC coordination, DMG meeting collaboration
 When: By 30 June 2020, then ongoing

Who: DMG, TTC, TSC
 How: DMG meeting/collaborative actions
 When: Ongoing

Who: TSC
 How: TSC investigation
 When: Ongoing

PRIORITY

CRITICAL

HIGH

SECTION 4: STRATEGIC ACTION – DESTINATION MANAGEMENT GOVERNANCE

Destination Management and Governance STRATEGIC PRIORITIES	Destination Management and Governance STRATEGIC ACTIONS	IMPLEMENTATION	PRIORITY
3. Develop Priority Sector Development Plans	a. Action Plans written for: <ul style="list-style-type: none"> - Agritourism - food - Nature - Cultural - Export - Business events - Indigenous - Healthy lifestyle, sport and wellness 	Who: DMG, TTC, DT, TEN, industry/community sector groups How: TTC lead consultation and planning process with DMG partners who are assigned to various plans When: Progressively 2019 to 2021	HIGH
4. Create a DM planning and research framework	a. Monitor and evaluate the implementation of the DMP: <ul style="list-style-type: none"> - Conduct an annual review of DMP reporting progress against key deliverables - Update DMP annual action plans - Conduct a triennial major review of DMP against stretch goals and strategic objectives b. Establish a research framework to monitor and evaluate destination performance against Stretch Goal and DMP <ul style="list-style-type: none"> - Initiate DM, industry and academic research partnership - Establish destination brand tracking in key source markets - Develop a local data collection model - Collection of tailored regional information to provide more accurate insights into ROI and performance - Consider viability of accommodation data monitoring 	Who: DMG How: TTC audit annual progress for DMG, TTC lead triennial review with industry/stakeholders When: October annually for review and Action Plans, Triennial on October cycle Who: Led by TTC with DMG	HIGH
		Who: DMG, TTC, SCU and other universities/partners How: Active participation in working group When: Develop across 2019-2021, then ongoing	HIGH

SECTION 4: STRATEGIC ACTION – DESTINATION MANAGEMENT GOVERNANCE

- | | | | |
|---|--|---|----------|
| 5. Work with, and participate in, the Cross Border Tourism Working Group | a. Continue to work with the Cross Border Tourism Working Group to facilitate cross border collaboration on joint projects | Who: TTC
How: Active participation in working groups
When: Already occurring 2019 as TTC is a member of CBTWG, then ongoing | MODERATE |
| | b. Maintain (or establish) agreements with key partners to: <ul style="list-style-type: none"> - Enable cohesive and collaborative approach to marketing the region; and - Achieve greater leverage of GCA as gateway for domestic and international visitors | Who: TTC
How: Heightened relationships with GCA, DGC and CSGCT (*in 2021 CSGC will be merged with a whole of GCC entity)
When: 2019, then ongoing | |
| 6. Establish the Tweed as an industry leader in sustainably managed tourism | a. Investigate options to develop the Tweed into a recognised leader in sustainable tourism through: <ul style="list-style-type: none"> - Accreditation, benchmarking and monitoring and evaluation platforms - Business programs to support and incentivise take up of a sustainability program - Consider Eco/Sustainable Tourism Advisory Panel in collaboration with TSC and other stakeholders | Who: DMG, industry, TSC, TTC, plus other partners
How: Sustainability working group, source funding for investigation and implementation plan
When: By 30 June 2020, then ongoing/long term | MODERATE |
| | b. Investigate sustainability incentives to fund transition of businesses and investment into infrastructure and marketing to support sustainability objectives | Who: DMG, industry and TSC sustainability team and DNC, other partners
How: DMG works with TSC
When: By 30 June 2020, then ongoing/long term | |

SECTION 4: STRATEGIC ACTION – DESTINATION MANAGEMENT GOVERNANCE

Destination Management and Governance STRATEGIC PRIORITIES

7. Manage 'The Tweed' brand in line with brand framework
 - Brand Essence: Nature
 - Brand Positioning: Naturally Beautiful [Food and Agritourism: Naturally Delicious; Creative and Culture: Naturally Different]
 - Brand Idea: Special Moments Inspired by Nature. This is expressed creatively through the thought - "Find Your Moment"
 - Brand Personality: Natural and Quirky

Destination Management and Governance STRATEGIC ACTIONS

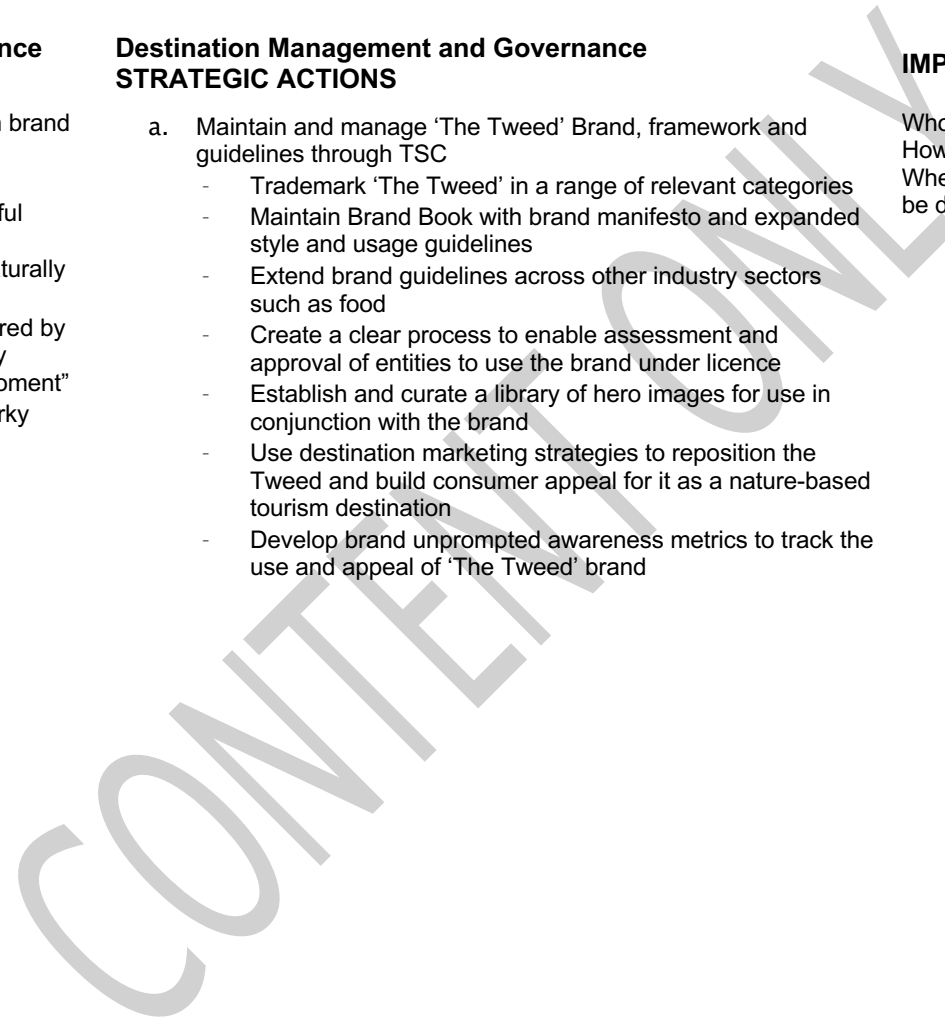
- a. Maintain and manage 'The Tweed' Brand, framework and guidelines through TSC
 - Trademark 'The Tweed' in a range of relevant categories
 - Maintain Brand Book with brand manifesto and expanded style and usage guidelines
 - Extend brand guidelines across other industry sectors such as food
 - Create a clear process to enable assessment and approval of entities to use the brand under licence
 - Establish and curate a library of hero images for use in conjunction with the brand
 - Use destination marketing strategies to reposition the Tweed and build consumer appeal for it as a nature-based tourism destination
 - Develop brand unprompted awareness metrics to track the use and appeal of 'The Tweed' brand

IMPLEMENTATION

Who: TSC Comms, EDU, TTC
 How: TSC Comms and EDU facilitate
 When: most already in place, metrics to be developed across 2020

PRIORITY

CRITICAL



SECTION 4: STRATEGIC ACTION – DESTINATION DEVELOPMENT

Destination Development [Supply] STRATEGIC PRIORITIES

8. Support the growth and development of products and experiences that align with our brand and deliver on the DMP Stretch Goal and objectives in: agritourism – food, nature, cultural, export, business events, indigenous, healthy lifestyle, sport and wellness

Destination Development [Supply] STRATEGIC ACTIONS

- a. Implement and develop the Tweed Tourism Academy offerings including product and experience development programs
- b. Consider incubator and accelerator programs for various sectors and seek funding and co-investment to support delivery
- c. Formalise the Tweed Food and Agribusiness Network to facilitate delivery of Food and Agritourism Sector Development Plan
 - Continue delivery of agri-based and culinary tourism business development programs to build critical mass of quality and authentic products and experiences; and
 - Collaborate with Northern Rivers Food (NRF) for cross regional reach
- d. Formalise the Tweed Tourism Export Cluster
 - Facilitate and coordinate cluster development; and
 - Conduct Tweed Tourism Academy Trade Ready programs
- e. Formalise the Tweed Nature-Based Tourism Cluster
 - Facilitate and coordinate cluster development
 - Work with NPWS and NRRT to deliver product and experience development program to support activation of TVRT and Tweed Byron Hinterland Track

IMPLEMENTATION

Who: TTC, DMG
How: TTC facilitates delivery
When: Underway in 2019, ongoing

Who: DMG, TTC, TSC
How: TTC works on options and funding with TSC
When: Ongoing to 2022

Who: DMG, DT, NRF and TTC
How: Secure funding for a 2-3 year program
When: Core work has commenced, then ongoing to 2021

Who: TTC facilitates the delivery of specialist program
How: Industry partnering, seek funding for a 2-3 year program
When: Underway 2019, then ongoing to 2022

Who: DMG, TTC and TSC
How: TSC/TTC facilitates consultation
When: Ongoing

PRIORITY HIGH

SECTION 4: STRATEGIC ACTION – DESTINATION DEVELOPMENT

Destination Development [Supply] STRATEGIC PRIORITIES

9. Develop priority, brand aligned tourism assets and infrastructure to improve accessibility and dispersal of visitors throughout the region

Destination Development [Supply] STRATEGIC ACTIONS

- a. Support the development of various nature-based projects, and attract investment in nature-based tourism infrastructure:

Mt Warning/Wollumbin

- Improve infrastructure, access and management of Wollumbin Mt Warning (WMW) to ensure natural and cultural heritage is managed, protected and respected by visitors;
- Investigate opportunities for an Aboriginal cultural tourism facility; and
- Consider options for improved security, limiting access to vehicles and potential for user pays access pass

Tweed Valley Rail Trail

- Support the Tweed Valley Rail Trail infrastructure;
- Explore the option to connect to Coast Walk/Cycle Trail through Wooyong Road; and
- Work with NPWS to connect TVRT to Nightcap Track at Upper Burringbar

Tweed Byron Hinterland Walking Trail

- Support the development of infrastructure; and
- Work with NPWS to scope sustainable and desirable private investments options (e.g. Glamping, guided experiences)

Further Actions

- Explore the potential of connecting the rail trail north of Murwillumbah via a River Trail system that connects all the small jetties along each of the villages (Fingal, Chinderah, Tumbulgum, Condong and Murwillumbah);
- Consider installation of infrastructure to support better access to the river for kayaks and non-motorised water craft;
- Improve accessibility to, and amenities at, scenic lookouts throughout the Tweed; and
- Investigate options for low impact ecotourism on Mt Nullum

IMPLEMENTATION

Who: DMG, NPWS, DNC and TTC
How: Identify most effective options to deliver in partnership with agencies and industry
When: By 30 Sep 2020, ongoing

PRIORITY

HIGH

SECTION 4: STRATEGIC ACTION – DESTINATION DEVELOPMENT

Destination Development [Supply] STRATEGIC PRIORITIES

(Develop priority, brand aligned tourism asset and infrastructure to improve accessibility and dispersal of visitors throughout the region
...Continued...)

Destination Development [Supply] STRATEGIC ACTIONS

- b. Implement Tweed Tourism Academy, including product and experience development programs and seek funding and co-investment to support delivery
- c. Consider incubator and accelerator programs for various sectors and seek funding and co-investment to support delivery
- d. Investigate options to establish free WIFI zones in towns and villages throughout the Tweed
- e. Develop options paper for attracting investment in nature-based tourism opportunities on the Tweed Coast and Hinterland
- f. Seek resourcing for a feasibility study to explore demand for a mid-range (up to 500 people) meeting and event facility (conferencing and cultural centre) on the Tweed Coast and support industry to attract investment (if feasible)
- g. Audit current tourism signage and entry statements and develop way-finding strategy

IMPLEMENTATION

Who: TTC with DMG partners for distribution to market
How: TTC
When: Ongoing

Who: TSC, TTC
How: TTC led discussions
When: Ongoing

Who: DMG
How: resource specialist consultancy
When: By 30 Dec 2020

Who: DMG, TSC (EDU) and TTC
How: resource specialist consultancy
When: By 30 Dec 2020

Who: DMG, TSC, TTC and industry/business associations
How: Consultation
When: By 30 June 2020

Who: TSC, TTC and DMG
How: TSC to lead process
When: By 30 June 2020

PRIORITY

HIGH

MODERATE

MODERATE

MODERATE

CRITICAL

10. Develop an accessible tourism strategy and policy	a. Investigate best practice models for the development of accessible tourism strategies and policies	Who: TTC, TSC and DMG How: TTC to lead process When: By 30 June 2020	MODERATE
11. Develop business events network to drive development of sector	a. Partner with DNC to develop the Tweed's Business Capability in line with the Business Events Priority Sector Development Plan	Who: DNC, TTC and TSC How: DNC, TTC and TSC facilitate process and resourcing When: By 30 Jun 2020	MODERATE

SECTION 4: STRATEGIC ACTION – DESTINATION DEVELOPMENT

Destination Development [Supply] STRATEGIC PRIORITIES

12. Manage the impact of visitation in peak periods to mitigate the impact on the sense of place, the community and the environment

Destination Development [Supply] STRATEGIC ACTIONS

- 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

IMPLEMENTATION

Who: DMG and TSC
How: TSC facilitates process
When: By 30 Dec 2020

Who: TTC and DMG
How: TTC facilitates and builds partnering, seeks resources
When: By 30 Dec 2020

PRIORITY

HIGH

MODERATE

SECTION 4: STRATEGIC ACTION – DESTINATION MARKETING

Destination Marketing [Demand] STRATEGIC PRIORITIES

Destination Marketing [Demand] STRATEGIC ACTIONS

IMPLEMENTATION

PRIORITY

<p>13. Develop a “Welcome to the Tweed” (Be Remarkable) program to revitalise the quality service culture in the tourism and business industry by providing a training program focused on customer service and regional specific content</p>	<p>a. Seek funding, collaborators and source content for an online and face to face professional development program to help local businesses and their teams deliver a memorable experience for visitors and local customers alike</p> <ul style="list-style-type: none"> - Revitalise the quality service culture in the tourism industry; and - Focus on customer service and promoting personal connection with visitors via regional specific content storytelling 	<p>Who: TTC, TSC, DMG AND DNC How: TTC with industry consultation, Tweed Tourism Academy, source funding and collaborators When: underway, target is by 30 Sep 2020, then ongoing</p>	<p>MODERATE</p>
<p>14. Develop domestic and international markets to achieve yield targets and Stretch Goals</p>	<p>a. Develop a destination Marketing Strategy that aligns with ‘The Tweed’ brand and delivers on the DMP stretch goal and objectives</p> <ul style="list-style-type: none"> - Develop marketing implementation plan with annual action plan and budget; - Work in partnership with DNC, DNSW and Tourism Australia through key marketing and media opportunities to raise awareness of the Tweed region in key priority markets; - Attend key domestic and international trade shows to meet with key trade distribution partners to encourage destination and product inclusion in key programs, itineraries and brochures; - Develop and implement a domestic and international trade-ready industry program that equips operators with the necessary tools to work key trade partners to grow visitation, increase average length of stay and overnight expenditure; - Design and implement a domestic and international trade familiarisation program – working with local tourism operators to host product managers, agents and key decision makers in region; and - Collaborate with Gold Coast Airport on the opportunity to grow the New Zealand and other key markets it targets 	<p>Who: TTC, DNSW and DMG How: TTC with industry consultation, Tweed Tourism Academy When: trade programs underway 2019, target a major 2019/2020 campaign, media and communications ongoing</p>	<p>HIGH</p>

SECTION 4: STRATEGIC ACTION – DESTINATION MARKETING

15. Establish high quality and innovative visitor servicing models that engages with visitors and locals and aids dispersal of visitors throughout the Tweed region	a. Review the current VIC model and locations and present visitor servicing options paper / strategy to TSC, then decide on redevelopment / new direction of VIC infrastructure and develop new visitor servicing model	Who: TTC and TSC How: TTC formal review and ongoing continuous improvement When: review completed Nov 2018, TSC decisions pending, end of 2019, then ongoing	HIGH
16. Establish strong industry partnerships and engagement program to deliver the DMP and Stretch Goals	a. Create collaborations and MOUs with key stakeholders	Who: TTC How: Negotiation When: completed for 4 entities July 2019, more under negotiation, then ongoing	HIGH
	b. Develop various proposals to encourage industry investment into marketing programs	Who: TTC How: Negotiation When: underway in 2019, annual / ad hoc prospectuses	HIGH

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14. <https://www.tweed.nsw.gov.au/EconomicDevelopmentStrategy>
15. Destination North Coast Network Destination Management Plan

TABLE OF ACRONYMS

TABLE OF ACRONYMS

DMP	Destination Management Plan	NP	National Park
TSC	Tweed Shire Council	TEQ	Tourism Events Queensland
TTC	The Tweed Tourism Co.	GCT	Gold Coast Tourism
EDU	Economic Development Unit	DT	Destination Tweed
DMG	Destination Management Group	DNC	Destination North Coast
LTO	Local Tourism Organisation	B+B	Bed and Breakfast
M+E	Monitoring and Evaluation	CBD	Central Business District
MOU	Memorandum of Understanding	RV	Recreational Vehicle
KPIs	Key Performance Indicators	TAFE	Technical and Further Education
DM	Destination Management	VFR	Visiting Friends and Relatives
ROI	Return on Investment	VIC	Visitor Information Centre
NVS	National Visitor Survey	NPWS	National Parks and Wildlife Service
IVS	International Visitor Survey	NRRT	Northern Rivers Rail Trail
SCU	Southern Cross University	TVRT	Tweed Valley Rail Trail
TBG	Tweed Byron Group	TNBTAP	Tweed Nature-Based Tourism Action Plan
ED	Economic Development	TRA	Tourism Research Australia
WMW	Wollumbin Mt Warning	NRF	Northern Rivers Food
TA	Tourism Australia	CSGC	Connecting Southern Gold Coast
FIT	Free and Independent Travelers	DGC	Destination Gold Coast
TBHT	Tweed Byron Hinterland Trail	SEQ	South East Queensland
TEN	Tweed Experience Network	GCC	Gold Coast Council

DISCLAIMER

The information contained in this report is intended only to inform and should not be relied upon for future investment or other decisions. It is expected that any 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 original authors, Regionality Pty Ltd, and Destination Tweed (DT), and reviewer, the Tweed Tourism Co, 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 (NVA and IVS). It should not be relied upon to inform investment without further investigations and review.