

# The Tweed Tourism Co Destination Management Plan Review Report

Confidential Report to Tweed Shire Council



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## Introduction and Recommendation

There is a contractual obligation with Tweed Shire Council (TSC) for The Tweed Tourism Co (TTC) to review the region's Destination Management Plan (DMP).

The authors note the overall sound basis, particularly the strategic analysis and themes identified, in the version of the Draft DMP it has been given to review (see **Attachment One**). However, as reviewers we analysed its content, brought a fresh perspective on the region's relative performance and sought to align it with the changed circumstances of a new contractor undertaking the activities for TSC.

The Report covers the following aspects of the DMP review:

1. **Overall Strengths and Highlights;**
2. **Gaps and Future Enhancements;**
3. **Document Cosmetic, Structural and Content Changes**  
(proof reading, editing, need to remove superfluous or duplicated information, more pronounced and actionable intent, more conspicuous collaboration with agencies and key entities); and
4. **Implementation and Governance**  
(greater detail needed in the DMP's actions and to reflect the realities of a change in TSC contractor arrangements in a revised governance framework, include TTC's new directions, its capacity and the removal of references to individual businesses or no longer relevant entities in the DMP's *Strategic Action* section.)

It is recommended that:

1. This DMP Review Report is noted.
2. The Tweed Tourism Co is approved to make revisions to the DMP, using the next draft to consult with industry and stakeholders and bring a final document to TSC for approval.

## 1. Overall Strengths and Highlights

The Draft DMP document capably and rightly references the agri-tourism and nature experiential pillars, reinforcing them as the tourism cornerstones for The Tweed.

*Table One* below is a summative assessment of well-focussed DMP elements with the potential for further consolidation through clearer priorities or defining projects to be aligned with them.

Table One DMP Strengths and Potential Consolidation

Strength/Focus	Potential Further Consolidation in DMP
3 Experience Pillars (Section 3)	A strong, clear DMP focus is: “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 challenge is to convert this premise to a sustainable tourism industry balancing the DMP’s stated brand and values: “Our shared approach to tourism is to manage the destination, achieving a return on investment whilst limiting the impact of visitation.”
Agri-tourism	What will make this shine? Is there a defining project or event that can be included? Give consideration to an agri-trails project. How can the cited “cluster” be invigorated?
Nature-tourism	Make the nature tourism development priorities clearer. Could these be: The Rail Trail; Tweed-Byron Hinterland walks; or others to develop?
Wollumbin Mt Warning	<p>We agree that Wollumbin Mt Warning (WMW) is the most identifiable and iconic natural landform – the hero. “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... This site has potential to be a best practice example of collaboration between the traditional owners, NPWS, tourism, TSC and the community.” (Draft DMP)</p> <p>What future plan should be developed with stakeholder input? How does NPWS work in with the Draft DMP (this aspect currently lacks integration)? This should overlap heavily with NPWS’ vision for the National Parks.</p>
Visitation Statistics and Behaviours	The need to maintain growth in domestic tourism but increase average spend per night and encourage visitor dispersal throughout The Tweed, is acknowledged as a high priority goal for much of the DMP. Visitor dispersal is a major challenge and for inland townships the average spend per day may not increase in the short to medium term.

## 2. Gaps and Future Enhancements

There are numerous gaps (omissions in detail, content or focus of future effort) and opportunities to enhance the DMP with new ideas and insights. Revising the document to include contemporaneous industry development and destination management practices which transpose to actionable items is critical. The most obvious and important themes/focus (to meet perceived gaps and opportunities) are detailed in *Table Two* below.

Table Two DMP Gaps and Future Enhancements

<b>Theme/Area of Focus</b>	<b>Comment and Analysis</b>	<b>Possible Action</b>
<i>Trade and International Marketing</i>	Trade and international markets information is a little confused and lacking depth. The document references the Gold Coast Airport and the opportunity to grow in this space (which is good). However, 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.	The draft DMP does not reflect the current operators working with trade as predominantly focusing in Eastern Markets whilst almost all other information in the document is pointing to develop a Western Markets strategy. An amendment may be to bring this to a simple action stating that both an Eastern and Western Marketing Strategy is required and that the Free and Independent Traveller (FIT) market is the likely focus. TTC will pursue close ties and partnering arrangements with Gold Coast Airport.
<i>Operator Trade Development</i>	The document is short on detail and focus on this as a symbiotic pairing with Trade and International Marketing, above. The DMP's Section 2, <i>Key Source Markets and Purpose of Visit</i> , states: "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."	This indicates that the main international visitor is most likely a backpacker, therefore we need to have a strategy in place to promote to a more mature, high disposable FIT market such as the Germans and Dutch that Self Drive.
<i>MICE Markets</i>	The importance and value of this needs to be heightened. References are made but not in a structured manner.	References to trade, MICE and festivals are currently confusing and need some separation and clarity. In 2018, TTC with Destination North Coast (DNC,) TSC and industry has embarked on a tangible project to build the MICE market.
<i>Events (festivals, etc.)</i>	The DMP does not adequately cover consumer events as a driver of visitation and the use of events in key periods.	This should be strengthened in the DMP through the destination's event support (recognising TSC's sponsorship programs), the selection and development of events that fit with "The Tweed" brand message and referencing markets and regular events as a part of the community.

<i>Weddings</i>	Wedding Markets are not referenced in the DMP. TTC's industry consultation shows this to be a sector that is being highly targeted.	More research on this is required but this is a strong yielding market in a changing landscape with increased numbers of weddings occurring in mid-week and similar periods. TTC can deliver on the product development aspects.
<i>Sporting and Group based Tourism</i>	Early consultation revealed a pent up demand for collaboration on Sports Tourism as a perceived DMP gap and major opportunity. It needs to be addressed in the DMP within a Sports Tourism Strategy (currently in Draft via TTC). The primary objectives are to: develop The Tweed as a destination of choice for sports tourism events; focus on more effective regional and interstate marketing; increase visitation, Average Length of Stay and spend; and raise the unprompted awareness of The Tweed as a tourist destination.	Add into the DMP's " <i>Strategic Priorities – Supply Development</i> " that TTC began a process in 2018 to develop a Sports Tourism Strategy and this will focus on collaboration; a cross border focus; building capacity; and cooperative marketing. Its purpose is "to advance the region, in collaboration with neighbouring regions, as a leader in the Sport Tourism industry, maximising both economic benefits and sport development opportunities." ( <i>Draft Sports Tourism Strategy Paper, TTC 2018</i> )
<i>Education Tourism</i>	Although a relatively low yield market, education tourism could benefit a regional centre like Murwillumbah.	Can the region and the TTC budget accommodate meaningful effort in this space? In support of the idea: the area is well-placed to deliver on curriculum outcomes; it has good accessibility; it could target predominantly mid-week business; and it appeals to comments in the DMP which reference tourism 'giving back' to the area.
<i>Accessible Tourism</i>	Accessible Tourism is referenced in the DMP ( <i>Strategic Priorities Designation Management and Governance, 8. Develop an accessible tourism strategy and policy</i> ). The reviewers consider it important to foster a more inclusive and accessible community, using tourism as the catalyst for change.	We need to gather more information, utilise the internal resources and expertise of TTC/DR Tourism and ascertain the appetite and capacity of partners in the disability/accessible sector to collaborate. The market is sizeable: 1 in 5 Australians have a disability (90% holiday each year); this accounts for 8.2 million bed nights; they stay longer – average 8 nights; travel in low seasons; and with the NDIS model implemented, choice and visitor experiences are increasingly available to this sector which will underpin market growth.
<i>Visitor Information Services</i>	Cited in the Draft DMP as a <i>Strategic Priority</i> (Supply Development) and <i>Strategic Action</i> (number 15) this is considered as urgent by the reviewers who have undertaken a mandatory Visitor Information Centre Review Report for TSC in November 2018. That review is comprehensive and actions may differ from those cited in the Draft DMP and will be numerous, so this aspect of the DMP will need a rewrite.	The Tweed's VICs need to be overhauled dramatically and urgently to align with contemporary trends, to overcome many challenges to their sustainability and for their usefulness as a prime enabler of visitor offerings and information. TTC will take direction from TSC based on the VIC Review Report's recommendations being accepted.

<p><i>Tourism and Operator Development</i></p>	<p>The reviewers agree with the challenge cited in the DMP's <i>Section 2, Strategic Insights-Situation Analysis</i>: "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."</p>	<p>Part of TTC's enhancement on this will be woven into its <b>The Tweed Tourism Academy</b> initiative - an umbrella for operator, business and tourism development, experience development and capacity building. From a professional development perspective this will specifically include offering workshops around: Packaging and Bundling; Experience Development, Trade Readiness and our flagship Tourism Futures Leadership Program.</p>
<p><i>Destination Marketing</i></p>	<p>This is a critical element of any DMP, and whilst generally well covered in the Draft, we would separate the VICs overhaul from this and bolster the mechanics of destination marketing with targeted actions in the trade distribution and/or domestic consumer marketing space. We see working in partnership with DNC, DNSW and Tourism Australia, through targeted marketing and media opportunities to raise awareness of The Tweed region in key priority markets, as critical.</p>	<p>Develop a campaign framework to deliver robust and structured periods of marketing activity. Develop and implement a domestic and international Trade Ready industry program that equips operators with the necessary tools to work key trade partners, grow visitation to the region and increase average length of stay and overnight expenditure. Attend key domestic and international trade shows to meet with key trade distribution partners to encourage destination and product inclusion in programs, itineraries and brochures. Design and implement a domestic and international trade familiarisation program.</p>
<p><i>Stretch Goals</i></p>	<p>The Draft DMP Stretch Goals are fine but need to be taken beyond just aspirations. Should a DMP include a "big hairy audacious goal" (BHAG) to focus on?</p>	<p>Possible suggestions to be workshopped and discussed with Councillors and the industry, as they are multi-year goals and need collaboration and funding, include:</p> <ol style="list-style-type: none"> <li>1. UNESCO Biosphere status around Wollumbin.</li> <li>2. A World Surfing Reserve around Cabarita.</li> </ol>

### 3. Document Cosmetic, Structural or Content Changes

There is some duplicated or superfluous information and text and a comprehensive edit is needed to cull the Draft DMP. Secondly, the version given to TTC for review appeared incomplete in parts and only partially proof read. Examples of necessary cosmetic changes include:

1. Items no longer relevant or that need replacing (Chair of Destination Tweed message);
2. References to entities for which it is inappropriate to cite;
3. The Disclaimer and Acknowledgements sections;
4. Editing and grammatical changes (one example is Page 7, last paragraph);
5. Clarification of well-intentioned but broad statements such as being “remarkable” or “quirky” which lack the identification of projects or actions aligned with them.

Items around brand (reference the DMP’s *Strategic Priorities Destination Management and Governance, 7. Establish The Tweed Brand*) need to be revised to reflect TSC’s completion of the branding framework, respect its high level of ownership and the need for a comprehensive and collaborative approach by TTC and TSC on its use and promulgation across the region.

### 4. Implementation and Governance

Section Four of the DMP needs a complete revision as the premise upon which it is based has shifted. The reviewers agree that the DMP is a platform for partners and stakeholders to come together collaboratively to develop, market and manage the destination. 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 cited governance framework is not aligned with current arrangements, despite the Draft DMP being written after the announcement of a new contractor for services to TSC. Rather than point out the unworkable nature of what was proposed, TTC will revise this entire section and provide a new framework aligned with TSC’s expectations, for adoption. This will reflect:

1. A taxonomy of plans and strategies, broadly being TSC’s Community Strategic Plan and Economic Development Strategy, then the DMP in descending order (as now);
2. Acknowledgement of the confidential but highly detailed DR Tourism (implemented via TTC) *Strategic Management Plan* which reflects all key aspects of the contract deliverables;
3. Embrace the notion of broad stewardship of the DMP across the sector including the prominence of TSC, industry and other agencies;
4. Acknowledge that TTC will need to drive the DMP’s implementation;
5. Be realistic in terms of the resourcing available under the contract to implement;
6. Incorporate important recent initiatives and forums such as The Tweed Tourism Thinktank forum, and those project and industry groups which will arise from the revised DMP; and
7. Use a specific DMP focussed forum as required.

## **Attachment One**

### **Draft DMP**