

COMMUNITY ROAD MAP SOUTHERN HIGHLANDS

August 2014



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PREFACE

One of the aims of destination management is to clearly focus the destination's core offering ensuring that the "promise" is both reflective of consumers' needs and wants and that it can be delivered. The overarching goal of this destination management process is to increase the overall visitor expenditure, and links to the Strategic Tourism Plan developed via Wingecarribee Shire Council. Recent years have seen changes in visitor behaviour and travel patterns and regional destinations need to develop and deliver compelling value propositions that align with a growing visitor demand for authentic and accessible experiences. Since experiences are the drivers and motivators that attract visitors to a destination these should form the basis of the destination's promise to visitors.

Our aim is to reposition the Southern Highlands as "a destination in which you can revive your senses, relax or rejuvenate your mind, body and soul".

The Southern Highlands has matured as a destination in recent years and now offers visitors a range of products and experiences throughout the region. The destination has three core components to its promise, or potential promise, requiring varying degrees of development.

Food, wine and agritourism

A focus on food and wine and key seasonal events has ensured that unlike other regional locations, visitor numbers in the Southern Highlands have remained strong. Over the past five years, the development of a food and wine offering has started to position the Southern Highlands as an alternative food and wine escape destination to the traditional Hunter Valley, particularly in consideration of the metropolitan NSW market. These two destinations are vastly different in terms of the scale, style and level of maturity of their offerings. The Southern Highlands is a relatively new wine region whereas the Hunter Valley is Australia's oldest wine region.

The Southern Highlands is known for cold climate wines producing varieties such as Pinot Noir and Pinot Gris, whereas the Hunter is celebrated for its Semillon and Shiraz. The differences in the destinations' wine production profiles provide an excellent opportunity for both wine regions to comfortably and confidently work closely to promote their complimentary experiences to visitors in a shared source market.

Perhaps the most significant difference between the Hunter and the Southern Highlands is the size and scale of the offering. Wine in the Hunter is vast in terms of output and landmass. The Southern Highlands provides a more intimate experience, both in terms of the destination and at the cellar door. The ability to meet the wine maker is quite a different experience to that offered in more established regions. The most significant opportunity in this area is the offer surrounding the quality and diversity of food on offer in the Southern Highlands. The number of quality restaurants and cafés and the variety of

produce grown and value added in the region seems to be more accessible than the Hunter. The hero of the food and wine experience may well be the food in this instance, however more work needs to be done to connect plate with paddock and featuring regional ingredients and producer stories as a truly authentic food offering. This process is now becoming the centre of focus for volunteer groups such as Southern Highlands Harvest and Southern NSW Harvest as they work to develop local trading relationships between producers of local food and wine with restaurants and retailers. These activities demonstrate excellent cross-sectoral collaboration and the potential for dispersal of the visitor economy beyond traditional tourism sectors to other sectors. Greater support is needed to further their work however and assist these groups to bring forward compelling paddock to plate stories and experiences that will encourage increased expenditure, repeat visitation and the development of an ongoing buying relationships post visitation between visitors (consumers) and food and wine makers.

Whilst agritourism works as a theme linking to food and wine, there is significant work to be done to develop this sector. Many opportunities exist, however issues such as land use planning restrictions may be limiting the development of this complimentary sector. Wingecarribee Shire appears to be committed to supporting this type of multifunctional farming to ensure farm viability and to promote the linkages to the visitor economy via short supply chains.

It should be noted here that the Southern Highlands potentially plays a significant role in being a gateway region for the Southern Harvest food and wine experience and has significant opportunities to link to other food and wine production regions on the way to and around Canberra. The importance of this linkage is critical to the future development of new source markets in Canberra. This source market has potential to develop domestic tourism, as well as ultimately international visitation once International operations are established in Canberra.

The Southern Highlands' core food, wine and agritourism offerings presents an intimate paddock to plate experience that allows the visitor to connect with the producer and the landscape, almost creating a sense of terroir.

Nature Based Tourism

The Southern Highlands has a number of significant natural heritage assets that appear to be under-utilised by visitors. Whilst iconic locations such as Fitzroy Falls are well known other locations such as the Illawarra Fly, Wombeyan Caves and the many national parks and waterways on offer provide a vast range of options for any number of recreational activities throughout the area. Being the catchment or source of Sydney's drinking water, the Southern Highlands has a unique opportunity to build a special connection with its source market. Currently with less than half (47%) of those surveyed in the metropolitan New South Wales area nominating the Southern Highlands as a great place for nature activities and only seven per cent aware of the offer for water-based sports it provides significant scope to raise awareness and develop this segment.

There are gaps in both knowledge and product to support growth in this area. For example, whilst Fitzroy Falls is well known there is little recognition of the other two waterfalls in the region, Belmore and Carrington. Similarly, whilst the region is known for “tulip time”, there is little recognition that there are wildflowers in season at Barren Grounds. Wildlife too has potential, with opportunities for night tours for nocturnal animal spotting, bird watching or discovering Glow Worm Glenn.

Recent asset development and interpretation by the catchment authority will provide an opportunity to communicate a new offering to potential consumers. Whilst recreational activities such as fly fishing, horse riding trails, mountain biking, bush walking, primitive camping and soft four wheel driving adventures have potential for further development much of this is consumer ready now and would benefit from more marketing. Saleable nature based tourism product is limited however and so it would be important from an economic perspective to bundle and cluster these nature based activities with other complimentary experiences and services to ensure the Southern Highlands generates and economic benefit from these visitors. An excellent example of such product clustering and packaging has occurred around the development of the Great Ocean Walk in Victoria, where the natural infrastructure has been complimented by tourism, hospitality, health and wellbeing service providers to offering alternative ways to walk the route, stay and experience the region. Within the Southern Highlands, nature based tourism has potential for collaboration with other regions such as the Blue Mountains and the South Coast.

The development of digital communications and appropriate signage is critical to the delivery and communication of this potential part of the promise.

Finally perhaps there is potential for the development of food based tours that forage in the natural environment such as guided mushroom gathering tours, fishing or bush tucker tours and then bring ingredients back for a culinary experience.

Investigate the potential to develop visitor products and experiences that link the natural environment with food, health and wellbeing in conservation areas.

Current and emerging themes

Current and emerging themes such as heritage, arts and culture, health and wellness, gardens and seasonal colours as well as niche markets such as equine, sporting, business, farming and private events all have potential for further development. Limitations exist around the availability of infrastructure for example arts and cultural pursuits are restricted by the limited performance and exhibition space. Whilst plans have been made for a facility to cater to this need, limited funding is available as the region is seen as “affluent”. Many public and private galleries (such as the Sturt Gallery) and artist exhibit and sell works, attracting high-end sales.

New South Wales received almost 9.5 million international and domestic cultural and heritage visitors (up by 10.7% on YE Dec 11). Visitors spent nearly 56.3 million nights in the State (up by 3.0% on YE Dec 11).

Cultural and heritage visitors spent an estimated \$7.9 billion (including package expenditure by overseas visitors) in NSW (up by 1.8% on YE Dec 11). Given the apparent growth in this sector, the Southern Highlands may be well placed to further develop cultural and heritage tourism theme into saleable products and experiences.

The greatest opportunity perhaps is to improve the collaboration within the arts and cultural sector and then engage them in the visitor economy for mutual benefit. Many events and activity opportunities are not showcased as part of the visitor offering.

The region's rich pioneer and settler heritage is another untapped opportunity. The region has potential to develop some of New South Wales' most significant and accessible historic and heritage assets and experiences, and in collaboration with the Southern Inland area develop a very compelling offering that could rival that of Tasmania's heritage. Key to this is the interpretation and the development of commercial operations of some key heritage assets such as the Old Berrima Gaol, Court House, historic houses and gardens and industrial heritage such as the old railways infrastructure and ironworks.

There are impediments to the growth of the meetings and convention market in the limited accommodation and meeting facilities for group of 80 or more. Whilst a good selection of accommodation with excellent range in standards exists, there are no properties that will generally cater for more than 80 rooms and few dedicated meeting venues. If this segment is to be pursued, strategic investment in such infrastructure will need to be considered. A strategy to develop this sector would provide an opportunity to build visitation in the quieter and mid-week periods.

Finally, gardens and season colours have potential to really build a unique offering for the Southern Highlands. The current offering around "tulip time" and spring open gardens experiences is different to the offering of other regions, whilst the Blue Mountains also have elements of this on offer, the Southern Highlands has great potential to feature this as a perhaps a more accessible experience. Specific smaller more intimate experiences in both autumn and spring may create opportunities to attract and disperse visitation. Garden parties and high teas, talks and shows all have potential to attract visitors and need further development and then integrated into the broader tourism offering.

DESTINATION ANALYSIS

This section explores and reviews the 'Destination' and presents the "Community Road Map" for:
Wingecarribee Shire LGA.



IDENTITY

Our identity is who we are: how we see ourselves and how we want our visitors to see us.

“Our Southern Highlands is a place of change and a change of pace, somewhere you can revive your senses. Our people are innovative, vibrant and eclectic, who welcome new ideas and celebrate creativity

Our place is one of contrasts; honouring history and tradition yet open to new technology and design.

Our rugged natural landscape is a green oasis that provides a change of pace, envelops the mosaic of towns and villages, cool climate vineyards and lush farms that provide an abundant rural life.

Our promise to our visitors is to deliver an experience that is as colourful as our seasons”.

OUR VISION

Through the stakeholder engagement process, a number of consistent themes emerged which, combined, comprise our vision for the destination. Our vision aspirational; it articulates the future we envisage and guides our promise to the consumer.

“Our Southern Highlands is a green oasis of rugged natural landscape that envelops the mosaic of towns and villages, cool climate vineyards and lush farms that provide an abundant rural life.

Somewhere close that you can revive your senses, relax or rejuvenate your mind, body and soul.

A place of creativity and discovery, to reconnect or to romance, to delight and experience a way of life as colourful and beautiful as our seasons”.

The vision reaffirms the commitment to being recognised for the regions unique environment, the *green oasis* and *colourful seasons*; the beauty of the natural and man-made environment provides a place where the core target market (Sydney and surrounds) can easily escape to. The reference to *rugged natural landscape* helps to highlight the opportunity for adventure. The lush farmland and cool climate wines emphasizes the agricultural heritage and growing food and wine destination status.

But at the core this vision is about conveying a message that the Southern Highlands is about rejuvenation and reconnecting with the important people in life and creating memories through experiences.

OUR MISSION

Our mission outlines what we must collectively do to achieve our vision for the destination's future.

"We will work together to create prosperity and opportunity, whilst protecting our wilderness environment and natural heritage. Together we will nurture our regional community and celebrate our strong sense of independence. We will welcome visitors to come and experience our culture and environment and discover how good life can be."

PRIORITIES

The key challenges identified for the Southern Highlands highlight some clear destination priorities. These are articulated as the "objectives" for this destination management plan and the section *Destination Priorities and Action Plan* provides a detailed guide to their fulfillment:

- 1: Collaboration --we will work together to manage and develop our destination to increase productivity, yield and visitor numbers
- 2: Be compelling --we will deliver a compelling promise and value proposition to consumers
- 3: Communicate clearly --we will articulate the full scope of our promise to consumers
- 4: Be ahead of the game --we will use information and expertise to innovate our approaches to delivery

DESTINATION ANALYSIS

VISITATION

- International visitors only comprise a small percentage of visitors to the region.
- Domestic Daytrip and Overnight make up the balance of visitation – with almost an equal split between the two.
- Holiday or Leisure was the largest purpose for travel (domestic overnight nights), with VFR a close second.
- Business travel market has declined significantly in the past few years (also reiterated by industry during workshop sessions).
- Regional NSW is the largest source market for visitor nights, followed by Sydney (66% in total, based on YE March 2013).
- True Travelers and Wanderers make up the majority of domestic overnight visitors to the region.
- The majority of travelers are couples, with no children and accessing the region by car (88%).
- Visiting Friends and Relatives is the more common activity undertaken in the region, followed by eating out at restaurants.

ATTRACTIONS & ACTIVITIES

- Nature and Food and Wine are key experience themes across the region. Sport and recreation is a growing sector for the region – with cycle trails, hiking and riding trails etc. continually being developed.
- Top 3 products from the region (as identified by workshop participants) are: International Cricket Hall of Fame, Waterfalls (Fitzroy, Belmore and Carrington Falls) and food and wine offering (cellar doors, restaurants, events).
- Arts and Heritage are a key component of the product offering in the destination.

EVENTS

- Tulip Time Festival and Southern Highlands Food and Wine festival are the two feature events in the region. There are many other more community-based events managed throughout the year, including Bong Bong Races etc. There are Flavours Events held each long weekend throughout the year, Brigadoon, Cycling – the Highland Fling, Southern Highlands Arts Festivals, Southern Highlands Writers Festival to name a few.

ACCOMMODATION

- Majority of accommodation in the region is self-catering / holiday rentals, with few motels / hotels / B&Bs offered.
- There are two large chain hotels in the region: Peppers (two locations) and Grand Mercure.

TRANSPORT + INFRASTRUCTURE

- The region is located on the central throughway between Canberra and Sydney (less than 90-minute drive from each).

AWARENESS + APPEAL

- Bowral (and Southern Highlands) have one of the highest appeal levels in Inland's footprint. As well, both Bowral and Southern Highlands have two of the highest 'Intending to Visit' rankings (Inland research)

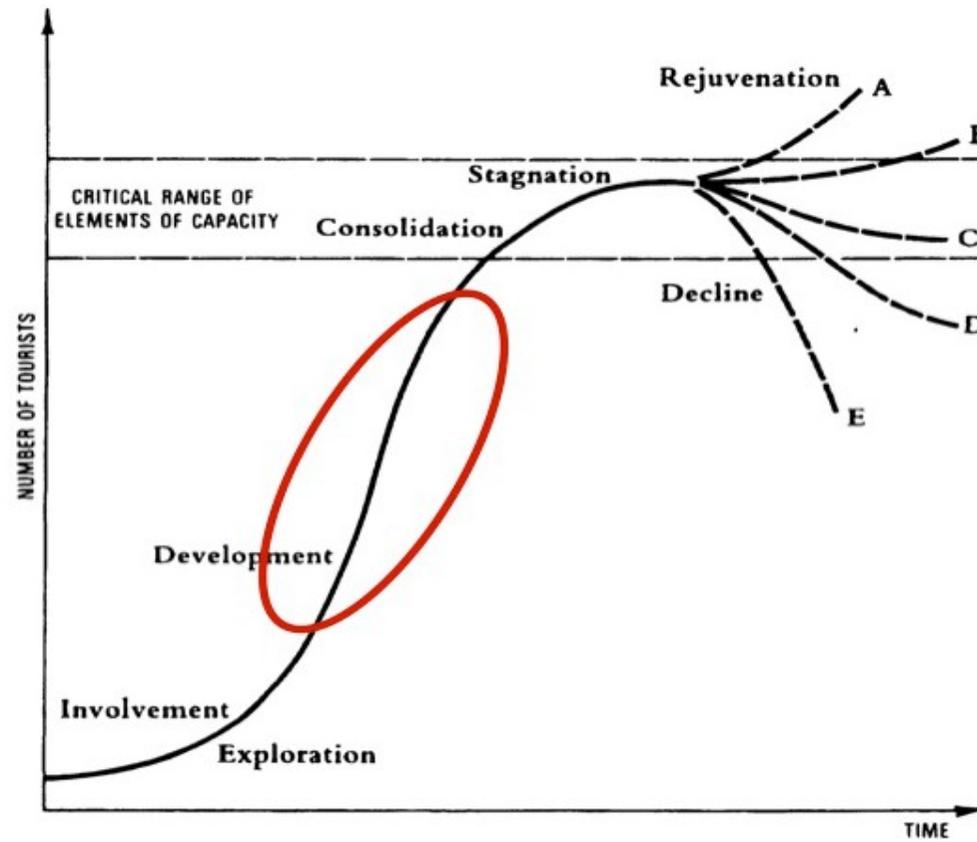
MARKETING

- The bulk of the destination marketing is delivered by Wingecarribee Council (Southern Highlands); their recent activities include the development of a new brand and visual identity and Visitor's Guide. Council has also developed an integrated VFR marketing program, which has been running for the past 24 months in the Southern Highlands (includes iPhone app, website social media, etc.). Some media famil and PR is also undertaken (aligning with events and other activities in the region)
- International Cricket Hall of Fame (Bradman Museum) also manage a limited number of marketing activities as well
- Accor and Mantra Group also manage their own customer database communications, with special features and offers for their regional properties highlighted through regular eDM programs

OTHER

- There can be a lack of commitment by 'lifestyle' business operators, in terms of opening hours and customer service.

DESTINATION LIFECYCLE



GUIDING PRINCIPLES

The following guiding principles are touchstones for our future decision making processes. We must continue to deliver on these in order to fulfil the intent of the destination management process.

- 1: We will double the visitor economy by 2020 and be recognised as a region of prosperity and growth
- 2: We will respect and protect our place – the environment and man-made assets that have provided us with such a rich opportunity
- 3: We will respect our people – both the communities that comprise our region and the visitors who come to experience our magnificent environment
- 4: We promise to tell our compelling story with honesty and be true to ourselves
- 5: We promise to deliver upon our commitment to visitors with quality and integrity

HOW WE GET THERE

In an increasingly competitive environment where destinations struggle to stand out, the southern highlands will need to differentiate itself from other destinations by offering experiences that are both compelling and real. If the region is to grow its visitor economy and contribute to state and national goals, significant changes to the current offering and approaches need to occur

DESTINATION PRIORITIES MATRIX

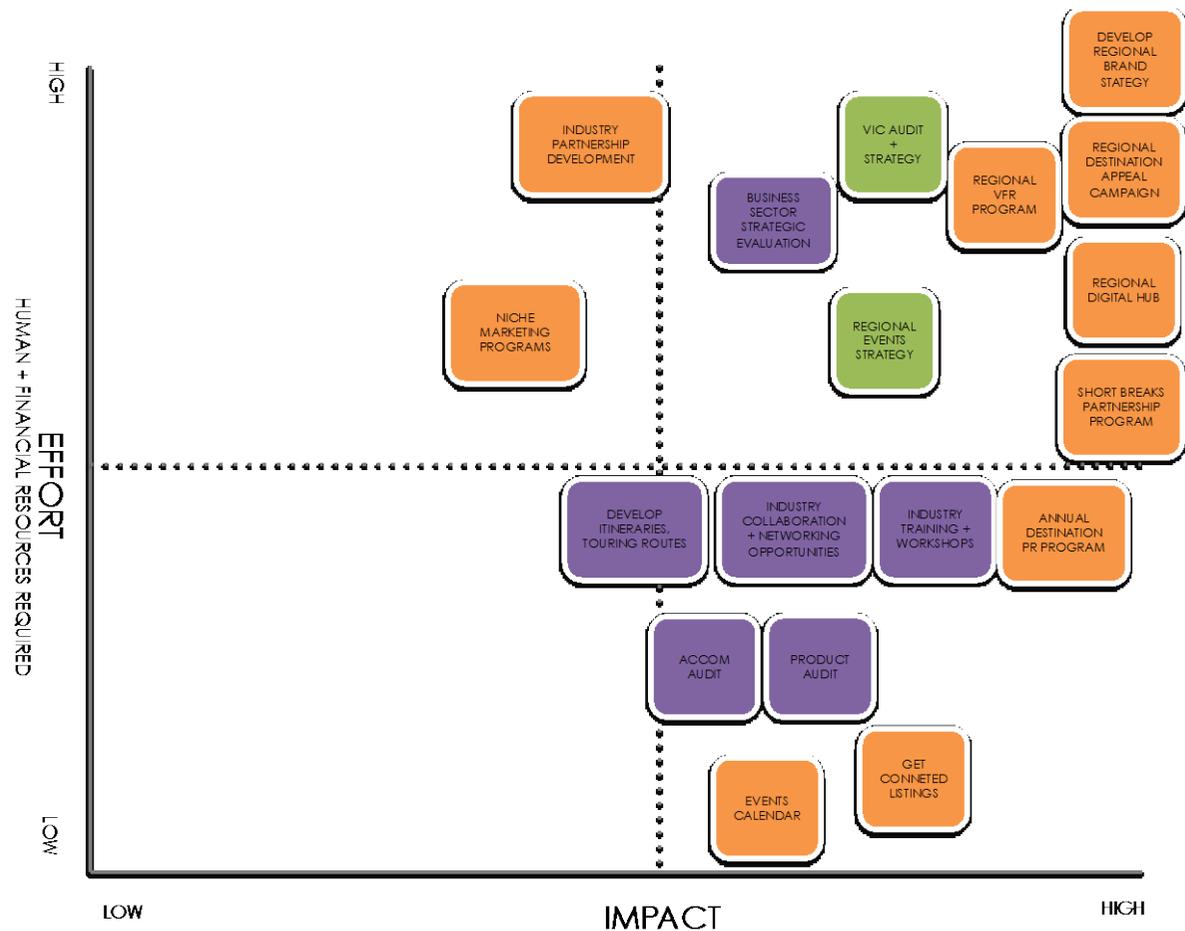
SHORT TERM V. LONG TERM FOCUS

Through Inland NSW Tourism evaluation process a range of opportunities were identified. A strategic Effort versus Impact evaluation was developed to efficiently identify the 20 plus opportunities available. This is illustrated right.

ORANGE squares indicate Inland NSW Tourism's 2013/2014 Priorities

PURPLE squares indicate DM Working Group's 2013/2014 Priorities

GREEN squares indicate 2014 and Priorities



DESTINATION ACTION PLAN

DM WORKING GROUP PRIORITY

1. INDUSTRY COLLABORATION AND NETWORKING OPPORTUNITIES LEADERS: WHOLE GROUP

	MILESTONE	LEADER	TIMING
1	Find appropriate venue and possible event dates	DM Working Group	For June 2014
2	Identify relevant case studies and headliners, encouraging product packaging opportunities.	Inland	Ongoing
3	Source sponsors and partners	DSH / DM Working Group	For February 2014
4	Identify event theme and program	DSH / DM Working Group	For February 2014

2. ANNUAL ACCOMMODATION AUDIT LEADERS: JOHN GRAY AND STEVE ROSA

	MILESTONE	LEADER	TIMING
1	ATDW Listing & Audit Template provided to DM Working Group	Inland and DM Working Group	Immediate – April 2014
2	All information gathered and template populated into theme experience pillars	DM Working Group (from VIC info)	Agenda Item June 2014
3	Group Review and Quality Control	Inland and DM Working Group	
4	Gap Analysis and Opportunities Identified	Inland and DM Working Group	Agenda Item June 2014

3. ANNUAL PRODUCT AUDIT

LEADERS: TO BE DISCUSSED WITH STEVE ROSA AND STAFF

	MILESTONE	LEADER	TIMING
1	ATDW Listing & Audit Template provided to DM Working Group	Inland and DM Working Group	June 2014
2	All information gathered and template populated into theme experience pillars	DM Working Group	
3	Group Review and Quality Control	Inland and DM Working Group	Agenda Item June 2014
4	Gap Analysis and Opportunities Identified	Inland and DM Working Group	

4. ANNUAL SIGNAGE AUDIT (INCLUDING COUNCIL AND TASAC)

LEADERS: STEVE ROSA DMWG IDENTIFIED NO. 1 PRIORITY

	MILESTONE	LEADER	TIMING
1	Current signage listings collected – Jan Gibland	Inland and DM Working Group (Destination SH)	July 2014
2	Signage Audit conducted	DM Working Group	
3	Group Review and Quality Control	Inland and DM Working Group	
4	Gap Analysis and Opportunities Identified	Inland and DM Working Group	

5. MARKET RESEARCH PROGRAM

AGENDA ITEM

	MILESTONE	LEADER	TIMING
1	Identify key areas to be reviewed	DM Working Group / DNSW	Ongoing & Immediate
2	Strategies and processes developed to conduct research	DM Working Group / DNSW	
3	Group Review and Gap analysis (Trip Advisor)	Inland and DM Working Group	
4	Information communicated to stakeholders	Inland and DM Working Group	

6. DEVELOP THEMED ITINERARIES AND TOURING ROUTES

LINKED TO SIGNAGE PRIORITY

	MILESTONE	LEADER	TIMING
1	Product Audit Complete Include GPS	DM Working Group	With product audit – June 2014
2	Draft Itineraries Compiled considering special interest groups	DM Working Group	July / August 2014
3	Group Review and Quality Control	Inland and DM Working Group	
4	Itineraries Designed and Distributed to regional stakeholders	Inland and DM Working Group	

7. INDUSTRY TRAINING AND WORKSHOPS

STAKEHOLDER ONLINE SURVEY MONKEY

	MILESTONE	LEADER	TIMING
1	Market Research re: professional development needs	DM Working Group	Jul / Aug / Sep 2014 onwards
2	Collated response and summary of needs and preferences	DM Working Group	
3	Evaluate opportunities and develop training schedule	Inland and DM Working Group	Chamber & TSH & DMP
4	Liaise with Destination NSW to align efforts and ensure minimal overlap	Inland	ASAP

8. EXPORT READINESS

	MILESTONE	LEADER	TIMING
1	Audit of Export ready business i.e.: local operator and product readiness	DM Working Group	With product audit
2	All information gathered and template populated	DM Working Group	
3	Evaluate opportunities and develop training schedule	Inland and DM Working Group	

4 Liaise with Destination NSW to align efforts and ensure minimal overlap Inland ASAP

9. COMMUNITY PLACE MANAGEMENT

	MILESTONE	LEADER	TIMING
1	Link Destination Management and Strategic Community 2031 Plan & Tourism Plans	Inland and DM Working Group	Ongoing and current August presentation
2	Priorities Opportunities	DM Working Group	
3	Develop Partnership Platform	DM Working Group	
4	Engage Partners	DM Working Group	

INLAND NSW TOURISM 2013/2014 PRIORITIES

10. REGIONAL BRAND COMMUNICATIONS PROGRAM

LINKED TO SIGNAGE PRIORITY

	MILESTONE	LEADER	TIMING - AGENDA
1	Develop summary of partner priorities and objectives	Inland	Ongoing and Immediate
1	Develop partnership program platform	Inland and DM Working Group	Current
2	Review program opportunities with partners	Inland and DM Working Group	Current
3	Develop branded communication templates	Inland	3 Months
4	Work with regional partners to integrate and adopt branded templates	Inland	6 Months
5	Annual review of regional communications	Inland and DM Working Group	

11. REGIONAL DIGITAL HUB

	MILESTONE	LEADER	TIMING
1	Evaluate technology costs / options	Inland	Within 6 Months
2	Integrate learning's from Digital Audit	Inland	Within 6 Months
3	Provide recommendation on platform and assess feasibility	Inland	Within 6 Months
4	Develop formal project plan and commence roll-out	Inland	Within 6 Months

12. REGIONAL VFR PROGRAM

	MILESTONE	LEADER	TIMING
1	Evaluate VFR case studies (local, national, international)	Inland	Current and ongoing
2	Review emerging and current VFR Offerings	Inland and DM Working Group	
3	Seek Expressions of Interest from Inland members	Inland	

13. DEVELOPMENT OF REGIONAL PARTNERSHIP

	MILESTONE	LEADER	TIMING
1	Define partnership objectives	Inland and DM Working Group	Current and ongoing
2	Develop program opportunities	Inland	
3	Priorities Opportunities	Inland and DM Working Group	
4	Develop Partnership Platform	Inland	

5 Engage Partners Inland

14. DEVELOPMENT OF NEW MARKETING PARTNERSHIPS

	MILESTONE	LEADER	TIMING
1	Identify relevant partners	Inland	Current and ongoing
2	Local DM Working Group to identify local partners	DM Working Group	
3	Priorities Opportunities	Inland	
4	Develop Partnership Platform	Inland	
5	Engage Partners	Inland	

15. ANNUAL PR PROGRAM

SEASONAL PROMOTIONS

	MILESTONE	LEADER	TIMING
1	Working Group to identify key stories to support regional positioning	DM Working Group	WIP & ongoing – TV SH pilots
2	Link local events and calendar listings	DM Working Group	WIP & ongoing
3	Develop annual communications schedule	Inland	

16. GET CONNECTED LISTINGS AND EVENTS CALENDAR

LINKED TO SIGNAGE PRIORITY

	MILESTONE	LEADER	TIMING
1	Update Current Inland Regional Calendar	Inland	Clarify
2	Working group to confirm current date and fill in any missing event data	DM Working Group	
3	Ensure all events are listed (and accurate) on Get Connected	Inland and DM Working Group	Southern Highland get connected

17. FOOD AND BEVERAGE PRODUCT DEVELOPMENT

	MILESTONE	LEADER	TIMING
1	Complete Product Audit	DM Working Group and Inland	
2	Identify need and opportunity for investment and development	DM Working Group and Inland	
3	Develop program plan for product development	DM Working Group and Inland	

INLAND NSW TOURISM 2014 + PRIORITIES

18. VIC AUDIT AND STRATEGY

	MILESTONE	LEADER	TIMING
1	Literature Review (local, national, international)	Inland	
2	Program scope developed	Inland	
3	Research rolled out	Inland	

19. REGIONAL EVENTS STRATEGY

	MILESTONE	LEADER	TIMING
1	Review annual calendar and identify duplicating and overlapping event activities	Inland	
2	Identify opportunities to link and leverage existing activities across destinations	Inland	
3	Review events offering in line with Regional Positioning	Inland and DM Working Group	
4	Review opportunities for funding and additional support	Inland and DM Working Group	

20. NICHE MARKETING PROGRAM DEVELOPMENT

	MILESTONE	LEADER	TIMING
1	Develop partnership marketing opportunities	Inland	
2	Merchandise opportunity and engage relevant partners, to gauge interest	Inland	
3	Expressions of Interest submitted by partners	Regional Stakeholders	
4	Partnership integration and program roll-out	Inland	

REGIONAL ANALYSIS

This section explores and reviews the “Southern Inland” region as a whole.

REGIONAL FOOTPRINTS SOUTHERN INLAND

'Southern Inland NSW', as captured in the Southern Inland NSW Destination includes seven local government areas: Wingecarribee Shire (Bowral, Moss Vale, Mittagong, Bundanoon etc.), Boorowa Shire Council, Goulburn Mulwaree Council, Harden Shire Council, Upper Lachlan Shire Council, Yass Valley Council and Young Shire Council.



STRENGTHS OF THE REGION

ATTRACTIONS AND ACTIVITIES

- International Cricket Hall of Fame is a well-recognised experience for Bowral/Southern Highlands.
- Understanding of Food and Wine offering is growing across the entire footprint – cool climate wines/cellar doors, cherries, etc. Southern Highlands also has three five-star restaurants which, in their own right, drive visitation to Bowral and surrounding destinations. There are 11 five star wineries in Murrumbateman and Canberra localities.
- Strong Nature theme (through the Southern Highlands in particular) catering for in excess of 220,000 people per annum at Fitzroy Falls. Walks and other nature based activities are strong. These are linked to State Recreation Parks such as Burrunjuck Dam, etc.
- Golf is a draw card for the region as well (particularly through Southern Highlands) with cycling being a current and emerging sport across the region.
- Sports and other activities are also growing in popularity, although still more focused on community activities and participants rather than spectators or travellers.
- Changing seasons are obvious through the nature / colours of Spring and Autumn (more relevant to Sydney audience, where there is little marked difference between Summer and Winter).
- Niche history and heritage products through Yass and Young (Lambing Flats Chinese Gardens).
- Cultural attractions such as art galleries, antique stores etc. are dispersed throughout the region.
- The Southern Highlands is known for its high quality schools and educational facilities.

EVENTS

- Tulip Time Festival and Southern Highlands Food and Wine draw large crowds each year, as do the National Cherry Festival in Young, Truffle Festival, Irish Woolfest in Boorowa, Summerside Festival, Turning Wave Festival in Yass and the Murrumbateman Field Day to name a few.
- There are some keen operators in Yass / Young who are leading the charge on event management for the region (Poachers Way in particular)
- Three events in Yass Valley and Young have received DNSW Regional Flagship funding from Destination NSW in 2013

ACCOMMODATION

- A range of options for travellers – self-catering and motel chains provide variety

TRANSPORT INFRASTRUCTURE

- Ease of access from both Canberra and Sydney source markets, as well as along major highway on Sydney to Melbourne
- OK access by train to many Southern Inland destinations

MARKETING

- Awareness of Southern Highlands and Bowral are some of the highest in all of Inland's footprint – and intention to travel to the region is the highest of all Inland destinations
- Strong hotel brand names in the region are active in driving tactical promotions and linking key experience themes (particularly Peppers and Food & Wine promotions)
- VFR is a primary driver of visitation in this region and provides a multitude of opportunities to increase overnight tourism expenditure

GEOGRAPHY

- The linkages to Canberra are very important, with the Blockbuster events held there generating high visitation and overnight stays to the region (particularly parts of Southern Tablelands and Hilltops).
- Proximity to Canberra for residents and Visiting Friends and Relatives (VFR) generated in the ACT.
- Good potential to increase overnight visitation resulting from the expansion of Canberra airport and subsequent international services.

- The proximity to other towns within the region is advantageous for travellers, and provides them with a large range of activities and attractions within 1 hours drive.

KEY CHALLENGES FACED IN REGION

ATTRACTIONS AND ACTIVITIES

- Lack of compelling experiences near Goulburn make it a challenge to market; therefore challenge to increase appeal of a holiday there.
- Lack of cohesion across the region (and in some places, a potential 'shortage' of experience to offer travellers).
- Gap in itineraries (for and from operators) to help educate and explain what a travellers would do in a day/two days.
- Lack of understanding from regional operators even, what is available 'on the ground'.
- Some operators (petrol stations, newsagents etc.) may not understand their role in the 'visitor economy'.

EVENTS

- Need to leverage events to stimulate re-visitation, beyond the LGA footprint as well as convert awareness into appeal.
- Events provide a great opportunity to bring together the local community as well as ensure each destination can have their own unique storyline (ideally, under an umbrella events strategy to avoid duplication and maximize funding opportunities).

ACCOMMODATION

- Searching accommodation is 'hard' – not all products linked to ADTW, need to almost search products individually.
- Operators need to be educated on online inventory / booking systems as well as up-skilled re: value-add and packaging.

COLLABORATION / INDUSTRY KNOWLEDGE

- Provide opportunity for more discussions, cross destination collaboration and sharing of information / success stories.
- Educate operators on digital, packaging, value-add, business management etc.

TRANSPORT INFRASTRUCTURE

- Although Sydney Trains / NSW Trains travel through South Inland, it's not an 'easy' transport option – it's a long trip and some of the feature experiences on offer in the region are best accessed by vehicle.

MARKETING

- Disparate marketing programs – everyone off doing their own things, duplication of resources and efforts means regional stakeholders are investing more than they would if they worked collaboratively (and new DNSW RVEF grants makes collaborative a 'must-have' for funding approval).

- Wingecarribee Shire Council does the 'heavy lifting' for Southern Highlands and the stakeholders too often look to Council to drive all activities – however their focus is primarily on VFR market and their priority is to drive visitation within council's footprint (not beyond).
- Better (and consistent) digital presence required – not only for travellers to be able to book more products online, but also help visitors understand the depth and breadth of experiences on offer in the region. Ideally, this would be a central hub to bring together the entire visitor economy (not just tourism operators) to provide a 'go to' digital site to make planning and booking easy, maximizing visitor expenditure.

APPEAL / AWARENESS

- Need to increase the appeal and understanding of destinations within the broader South Inland footprint (take advantage of Bowral's high recognition – although need to ensure they provide experiences and products relevant to traveller's needs and preferences).
- Maximise the linkages to Canberra.

OTHER

- Growth in baby boomer travel segment means region needs to ensure accessibility and interest of this market are met (otherwise they will go elsewhere) – camping and caravan infrastructure might be a new consideration for this region
- Measurement and results are often a challenge – need to ensure program impact can be measured and tracked on a regular basis (funding requires clear ROI)
- On VisitNSW.com, Southern Highlands region is grouped with 'Country' – this should be reviewed.
- Succession planning for volunteer organizations is essential to retain the heritage and cultural knowledge that is currently available.
- The commitment of business operators (particularly from lifestyle seekers) needs to be managed to ensure consistent and accessible availability of product across the region.
- Increase measurement data and metrics to ensure adequate understanding of the marketplace conditions.

OPPORTUNITIES TO INCREASE TOURISM EXPENDITURE IN REGION

ACCOMMODATION - WIP

- Conduct formal accommodation audit to understand gaps and opportunities for investment / development / funding.

INFRASTRUCTURE

- Visitor Information Centres – strategic review of current VIC offering across the footprint and work with Aurora to prioritise and align efforts to maximize impact and influence on visitor experience (and expenditure).
- Link and leverage to possible funding and infrastructure development such as Restart Illawarra Cycling pathways.

PRODUCT DEVELOPMENT

- Conduct annual product audit to understand changes to regional product offering.
- Develop relevant Touring Routes and Trails itineraries and ensure accessible interpretation for travellers – in line with key experience pillars (Food and Wine, Arts, Heritage and History) – these trails can link from Sydney, ACT, Melbourne as well as Wagga / Griffith / Canberra source markets.
- Review current Business Sector offering and related infrastructure opportunities to better understand requirements and opportunities.
- Review Southern Harvest as a case study for collaboration and development across the region, and Southern Tablelands Arts.

EVENTS

- Develop regional events calendar and ensure all events are listed on Get Connected.
- Review regional event offering and develop formal measurement tools to help measure each event's impact on visitor economy (based on Destination NSW measurement requirements – outlined in Regional Flagship Funding guidelines).
- Work with industry and stakeholders to identify highest impact programs and understand whether there is opportunity to bring in other regional partners into the existing events framework (i.e. develop regional events strategy).
- Identify opportunities for additional support and funding for events through Destination NSW (Regional Flagship Funding and Major Events Funding) as well as other partners.
- Destination Weddings are an opportunity (and potential to tap into niche program opportunities with South Coast / Illawarra / Shoalhaven) – most relevant to Poachers Pantry in the south and Bowral in the north.
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BUSINESS TOURISM

- A range of accommodation and attractions makes a strong basis to further develop business tourism as a target group. The proximity to Sydney and Canberra supports this.

INDUSTRY ENGAGEMENT AND EDUCATION

- **INDUSTRY KNOW-HOW / TRAINING:** Facilitate training and industry workshops on key topics to close the skills gap: (1) Customer Service, (2) Business Training and (3) Digital Marketing and Social Media, and potentially sustainable business practices, and environmental sustainability.
- **COLLABORATION, NETWORKING:** Provide opportunities for sharing success stories and for like-minded operators and industry partners to learn from one another (both in person and online – via case studies).
- **INDUSTRY PARTNERSHIPS:** Facilitate the development of new partnerships in the industry (traditional and non-traditional partnerships possible, based on program objectives) – see Marketing below. Also consider partnerships with the Sydney Catchment Authority and National Parks to review access to lakes for fishing and activities on the water.
- **PACKAGING:** Provide education and mentoring to help bring together accommodation / tour operators / others to develop packages.
- Families of the regions to encourage locals to ‘know what’s local’!
- Engage mature community members in business operations, and possibly increase volunteers for events and by default the VFR market.
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MARKETING

- Ensure all regional events are listed on Destination NSW Get Connected to link to regional It’s On! marketing programs
- Ensure all regional operators are listed on ADTW and Get Connected to maximize reach through digital channels and Destination NSW’s marketing efforts
- **VFR:** This is the primary driver of visitation to the region – develop a region-wide program to tap into this segment and maximize influence of hosts to positively influence visitor expenditure – build on the learning from Wingecarribee’s program and continue to grow the program, maximizing influence of hosts to positively influence visitor expenditure. Can also develop co-operative marketing program with regional hotel chains (Mantra, etc.) to leverage VFR (provide discounts to locals who have family / friends visiting)
- Develop a regional brand for the entire footprint, to bring the region stakeholder together and provide the opportunity for the lesser-known destinations to leverage Bowral / Southern Highlands high appeal ratings.
 - Develop an umbrella brand positioning for the region and continue to work with stakeholders to formalise and adopt an umbrella positioning
 - Bring together stakeholders from across the region in a new Destination Appeal Campaign, to bring this positioning to life
 - Wingecarribee Council has recently invested in the development of a new visual identity. Look at the appropriateness of rolling this out across the entire footprint

- Develop a Brand Toolkit and Marketing Templates to help operators and industry partners leverage this positioning and creative assets in their own communications – extends the reach and impact of the program across ‘owned media’ channels
- Develop itineraries and packages to transition day-trip visitors towards overnight visitors
- Nature Lovers: Targeted niche marketing opportunities focused on key nature themes (cycling, bushwalking etc.) as well as potential for Destination Weddings market across the entire footprint (as well as partnership with Illawarra, Shoalhaven etc.)
- Develop new digital hub to provide ‘one stop shop’ for travellers – planning, booking, sharing (as well as easy to use tools for operators to adopt online marketing and inventory management)
- Short Breaks are an increasing trend in Australian holidays
 - Aussies are moving more towards banking their annual leave, to save it for a longer overseas holiday As outlined in Sustainable Tourism Cooperative Research Centre’ Short Breaks – A Competitive Destination Strategy 2010 and as highlighted in TNS’ Domestic research (Australian travellers are looking for short getaways to escape their stressful and complex lives)
 - With region’s close proximity to Canberra and Sydney source markets, develop region-wide Short Breaks program to drive visitation during shoulder / low travel periods.
 - With strong ‘holiday rental’ presence across much of the region, look at developing partnership marketing activities with Fairfax/Stayz
- Look to link and leverage products and experiences with neighbouring regions (particularly ACT and surrounding councils – Wagga, Cowra, Orange, etc. – as well as Riverina Regional Tourism food and beverage marketing program.

INTERNATIONAL

- Review and assess export ready product and link to possible markets for development (China).
- Assess the ability of local operators to provide services such as ‘Union Pay’ to encourage spend in region.
- Assess and develop partnership opportunities with organisations such as ATEC (Australian Tourism Export Council), to provide direction and leadership for language and brochure development, export readiness and pricing strategies and interpretation of information.

BIBLIOGRAPHY

"Inland NSW engaged Knowledge Transfer Services Pty Ltd ("KTS") to design and lead the establishment of a comprehensive destination management process, facilitate engagement and provide mentoring to build the capacity of stakeholders. As an output at the end of this process KTS delivered Destination Management Reports to Inland NSW, 31 August 2013. As this is an ongoing process, the documentation will require regular revision by Inland NSW. This document may include content provided by KTS, which may have been modified by Inland NSW but may not represent the full body of work delivered to Inland NSW by KTS."