

Destination Sydney Surrounds North Destination Management Plan

2022-2030



This Destination Management Plan was prepared by EarthCheck Pty Ltd. Meredith Wray (Wray Sustainable Tourism Research & Planning) was contracted to align it with the Visitor Economy Strategy 2030 (VES).

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FRONT COVER IMAGES (left to right, below)

Audrey Wilkinson Vineyard Hunter Valley, courtesy of Destination NSW

Surfer at Shelly Beach Central Coast, courtesy of Destination NSW

People paddle boarding on Lake Macquarie, courtesy of Lake Macquarie City Council

BACK COVER IMAGE

Merriwa Silos - Painted Silo Trail, courtesy of Upper Hunter Shire Council



Acknowledgement of Country

We pay respect to the Traditional Custodians of the land we now call New South Wales (NSW) and acknowledge their enduring culture and continued connection to Country.

Destination Sydney Surrounds North (DSSN) pays our respects to Elders, past and present, and acknowledges future generations of Aboriginal people. We acknowledge visitors from across Australia and around the world are made welcome on Aboriginal lands by the Traditional Custodians of NSW.

We acknowledge the significant contribution made by Aboriginal people to the development and promotion of the visitor economy.

Message from the Destination Sydney Surrounds North Board

Destination Sydney Surrounds North (DSSN) is one of seven Destination Networks in regional New South Wales. The primary responsibility of the network is to drive the growth of the visitor economy in the region to support the ambition of NSW being the premier visitor economy of Asia-Pacific by 2030 and the reaching of the goal of \$A65 billion in visitor expenditure by 2030 – a figure which includes \$25 billion in regional expenditure.

The Destination Sydney Surrounds North (DSSN) Board consists of an independent Chair appointed by Destination NSW and skills-based Directors. In addition to the Destination Sydney Surrounds North (DSSN) Board and Executive Team, Destination Sydney Surrounds North (DSSN) is supported by Destination NSW and the dedicated teams within the organisation.

Despite the severe impact of the COVID-19 pandemic and repeated extreme weather events, the industry has shown its resilience and professionalism & is well placed to continue building from a position of strength. As a consequence, for areas within DSSN, performance is returning towards pre COVID levels. In the year to June 2022, visitor expenditure in DSSN exceeded \$A4.1 billion (TRA/DNSW).

Fully leveraging the region's natural strengths alongside its proximity to the core Greater Sydney Visitor market, will be central to continued success with connectivity in the form of stakeholder alliances, transportation including Port, Airport & EV market developments, technology, infrastructure, events & cross DN collaboration, being key pillars of the DSSN Destination Management Plan developed in tandem with our Industry stakeholders & the NSW Government Visitor Economy Strategy & 6 Cities Plan.

In combination, the energetic DSSN operations team & engaged DSSN Board have demonstrated a true commitment to stakeholder interest, consumer perspective & a creative vision which will continue to deliver value for & serve the interests of the Visitor Economy in the years ahead.

On behalf of the DSSN team, I encourage you to regularly consider the 2022 DSSN Destination Management Plan as a living blue-print for future success. Organic in nature, the DMP has the inbuilt capability to reflect significant changes in our operating environment as they occur.

David Fellows, Chair - Destination Sydney Surrounds North

Our opportunity

This plan takes a borderless view to identify and quantify regional strategies and actions for Destination Sydney Surrounds North and exists to:

- Align regional visitor economy growth and development activities with the NSW Visitor Economy Strategy (VES) 2030.
- Provide a framework for sub-regional and local Destination Management Plans (DMPs) to be developed or updated within our region.
- Capture stakeholder consultation to ensure the region's stakeholders are invested in the plan.
- Provide a roadmap for the growth of the visitor economy to 2030.
- Provide an action plan with a focus on cross-regional projects for visitor economy growth and development to guide the work of Destination Sydney Surrounds North.
- Ensure the visitor economy is planned through a coordinated and sustainable approach.

Destination Sydney Surrounds North Successes

As Destination Sydney Surrounds North (DSSN) delivers the 2022–2030 Destination Management Plan (DMP), the Board and management reflect on some of the achievements and milestones delivered throughout the duration of the previous strategy (2018 DMP). A key priority for DSSN in the previous DMP was to maximise the funding opportunities to the region. Destination Sydney Surrounds North (DSSN) worked closely with stakeholders across the network to secure a significant amount of funding since 2018, including:

Marketing Funding (\$3 million)

As per the Strategic Priority (2018 DMP) 'Improve destination marketing effectiveness', DSSN has worked with regions to secure over \$3 million. These funding opportunities include DNSW's Cooperative Marketing and the **Now's The Time to Love NSW** Prospectus. Funding was also secured for Newcastle Airport cooperative marketing campaigns and other initiatives for the region.

Product Development Funding (\$1.74 million)

Product development is a key focus for DSSN, whether it's working with Destination NSW through the NSW First Program or assisting operators apply for product development funding through grants. DSSN has worked closely with operators in the region to maximise product development opportunities and secured over \$1.74 million of funding.

Event Funding (\$850,000 plus Major Events)

Regional events continue to be key drivers for visitation to the DSSN region, and we are committed to maximising the funding opportunities for all events across the DSSN LGAs. Over \$850,000 through DNSW regional events programs has been secured. Major events such as Supercars and Surfest are additional to this amount.

Business Event Funding (\$726,500)

Business events are major drivers for the visitor economy within the DSSN region. DSSN has had 18 successful applications through the DNSW Business Development Fund, totalling \$726,500 worth of funding to secure business events.

BESydney Kickstart Funding (\$208,600)

DSSN has secured funding for 26 events through the BESydney funding program delivering \$208,600 of funding to the region.

\$500,000 DMP Projects (\$1,000,000)

Through strong collaboration DSSN partnered with the DSSN stakeholders to deliver \$1 million worth of strategic projects from the 2018 DMP. DSSN secured an additional \$500,000 partnering with stakeholders in the region to maximize the reach of each of the strategic projects.

Regional NSW – Regional Event Acceleration Fund (over \$3 million)

DSSN has worked with event partners and stakeholders and secured over \$3 million of funding through the NSW Government's Regional Events Acceleration Fund, which supports our region's social and economic recovery after the devastating effects of drought, bushfires and COVID-19.

Destination Sydney Surrounds North Successes (continued)

Regional NSW – Regional Tourism Activation Fund (\$8,673,189)

The NSW Government has announced that 37 projects will receive funding through the NSW Government's \$30 million Regional Tourism Activation Fund. The projects will support the development of unique and high-impact tourism infrastructure and improve the accessibility of visitor experiences across regional NSW. DSSN projects will receive \$8,673,189 worth of funding.

Additional Grants (over \$144 million)

Furthermore, DSSN is committed to collaborating with stakeholders to secure funding for the region in other forms of grant programs. This commitment is also reflected in the DSSN DMP, which states, 'The Destination Network will provide support and access to other various sources of funding.' (2018 DMP). DSSN's level of involvement ranges from assisting with the writing of applications, sourcing data and reviewing applications or letters of support. DSSN has supported stakeholders in securing grants totalling over \$144 m for the region (including Newcastle Airport upgrades).

Stakeholder Engagement

In addition to funding, Stakeholder Engagement remains key to DSSN's success. Since 2018 DSSN has, through strong collaboration, delivered:

- Regular communications to industry, highlighting updates and funding opportunities
- Regular online Tourism Manager forums and symposiums
- Co-investment of strategic projects
- Input to regional strategic plans
- Over 890 participants in industry development programs
- Contribution to destination structures and organisations
- Representation at key industry strategies and forums
- Media opportunities to the region.

Vision: *To establish the Destination Sydney Surrounds North (DSSN) region as Australia's premier regional tourism and events destination, where the DSSN visitor economy contributes positively to NSW's regional visitor expenditure ambition of \$25 billion per annum by 2030.*

Overview

Destination Sydney Surrounds North (DSSN) is one of seven Destination Networks in regional New South Wales. Its principal role is to represent and coordinate the growth and development of the Destination Sydney Surrounds North (DSSN) visitor economy.

The Destination Sydney Surrounds North (DSSN) region comprises the 10 Local Government Areas: Central Coast, Cessnock, Dungog, Lake Macquarie, Maitland, Muswellbrook, Newcastle, Port Stephens, Singleton and Upper Hunter. Since publication of the region's previous DMP, the region's boundaries have been refocused to include 10 key Local Government Regions, with Blue Mountains, Penrith and Hawkesbury regions aligning with Western Parkland City.

The Destination Sydney Surrounds North (DSSN) visitor economy delivered 4.9% of the region's jobs, supports 14,762 businesses and directly delivers 3.1% (\$2 billion) of the region's Gross Value Add (GVA). This totals an average growth of 4.5% pa over the 10 year period up to 2019. The region attracted just over 26 million visitors and 25 million visitor nights in 2019 (Year End December).

The Destination Sydney Surrounds North Destination Management Plan has been prepared to create a collaborative framework to guide the work of local, regional and state visitor economy stakeholders to grow, develop and promote the region's visitor economy to 2030 and contribute to the NSW Government's target to achieve \$25 billion in regional visitor expenditure by 2030.

This Plan sets out five strategic objectives and an associated plan of action for the region from 2022 to 2030, reflecting current market trends and local priorities, and aligning with NSW Government's Visitor Economy Strategy (VES) 2030:

1. Advocate and work with partner agencies to address visitor economy workforce shortages and skill gaps to grow the DSSN visitor economy.
2. Support DSSN stakeholders to create clear destination brand identities and work collaboratively to leverage cooperative marketing opportunities.
3. Support DSSN stakeholders to enhance and develop authentic products and experiences that are aligned to the region's positioning strengths.
4. Support the growth and development of events and festivals that showcase the vibrancy and authenticity of the DSSN region including business events.
5. Provide an enabling environment for investment and advocate to governments for new infrastructure development to support the sustainable growth of DSSN.¹

¹ YE December 2019 (pre-COVID-19 health pandemic) Tourism Research Australia visitation data is used as a base measure to recover and grow the visitor economy



Aim: *The aim of the NSW Visitor Economy Strategy (VES) 2030 and the Destination Network DMPs is to stimulate economic prosperity, create new jobs and enhance the lifestyles of the people of NSW.*

Introduction

Destination Sydney Surrounds North (DSSN) commissioned the preparation of the DSSN Destination Management Plan (DMP) to create a collaborative framework to guide the work of local, regional and state visitor economy stakeholders to grow, develop and promote the region's visitor economy to 2030.

The Destination Sydney Surrounds North (DSSN) DMP 2022 to 2030 has been developed to align with the directions of NSW Visitor Economy Strategy (VES) 2030. The VES acknowledges regional NSW as a key to the future of the NSW visitor economy. The NSW statewide target for 2030 is \$65 billion in total visitor expenditure. Regional NSW will contribute \$25 billion in overnight visitor expenditure to this target.

Tourism is identified as one of seven 'engine industries' expected to drive regional NSW economies over the next 18 years and is identified as one of 50 new priorities to drive long-term stimulus impact.²

Following a review of regional tourism in 2017 the NSW Government, through Destination NSW (DNSW), established six administrative zones, referred to as Destination Networks (DNs). In July 2022, one additional DN was added, Destination Central West NSW, and changes were made to DN boundaries to assist the growth of the NSW regional visitor economy.

² NSW 2020 Economic Blueprint

The seven DNs are:

- Destination Central West NSW
- Destination Country and Outback NSW
- Destination North Coast NSW
- Destination Riverina Murray
- Destination Southern NSW
- Destination Sydney Surrounds North
- Destination Sydney Surrounds South

A Destination Network Project Management Group (DNPMG) was established in September 2021 that comprises the General Managers of each Destination Network as well as the General Manager, Destination NSW, Policy Product and Engagement.

Importantly, the DNPMG committed to working collaboratively to deliver a suite of seven new Destination Management Plans (DMPs) (2022 to 2030) that are aligned to the NSW Visitor Economy Strategy (VES) 2030.

A Destination Network DMP planning framework was established to create a consistent and collaborative approach to guide the work of the Destination Networks, consultants, and local, regional, and state visitor economy stakeholders to consider how to grow, develop and promote the NSW regional visitor economy to 2030.

Earthcheck Pty. Ltd, was engaged from January to July 2022 to prepare the Destination Sydney Surrounds North (DSSN) DMP 2022 to 2030. Dr Meredith Wray (Wray Sustainable Tourism Research & Planning) was contracted to coordinate the development of the suite of DMPs and alignment to the VES.



Couple exploring Illalung Park Morpeth, courtesy of Maitland City Council

Destination Sydney Surrounds North DMP 2022 to 2030

Destination Sydney Surrounds North (DSSN) is funded by Destination NSW with an independent skills-based board providing strategic leadership and direction.

The Destination Sydney Surrounds North (DSSN) region is comprised of 10 Local Government Areas (LGAs): Central Coast, Cessnock, Dungog, Lake Macquarie, Maitland, Muswellbrook, Newcastle, Port Stephens, Singleton and Upper Hunter. Since the publication of the region's previous DMP, the region's boundaries have been refocused to the 10 key Local Government Regions.

The Destination Sydney Surrounds North (DSSN) visitor economy delivered 4.9% of the region's jobs, supports 14,762 businesses and directly delivers 3.1% (\$2 billion) of the region's Gross Value Add (GVA). This totals an average growth of 4.5% pa over the 10 year period up to 2019. The region attracted just over 26 million visitors and 25 million visitor nights in 2019 (Year End December).³

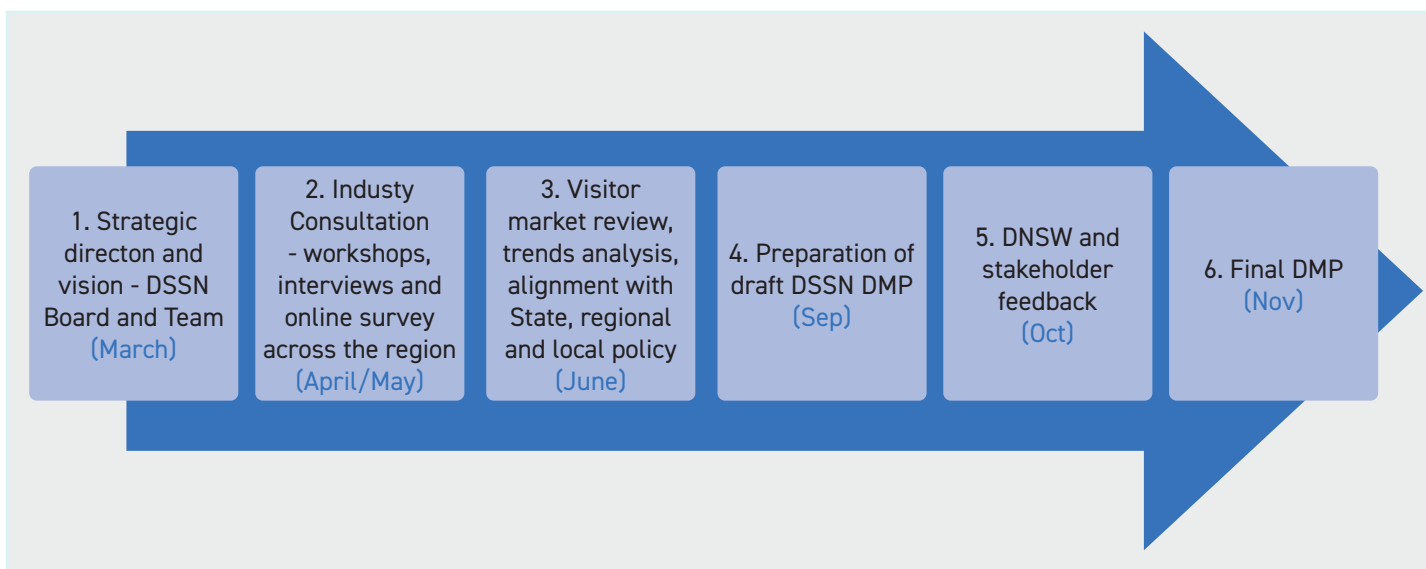


Figure 1. Destination management planning process



Figure 2. Map of Destination Sydney Surrounds North (DSSN)'s region

³ Year End December 2019 (pre-COVID-19 health pandemic) Tourism Research Australia visitation data is used as a base measure to recover and grow the visitor economy

Strategic Context



People enjoying Caves Beach at Lake Macquarie,
courtesy of Destination NSW

Strategic Context

The Destination Sydney Surrounds North (DSSN) DMP 2022 to 2030 has been developed to align with the directions of the NSW Visitor Economy Strategy (VES) 2030. The strategy comprises 3 phases:



Figure 3. NSW Visitor Economy Strategy (VES) 2030 phases

Ambitions, Outcomes and Targets

The ambitions, outcomes and targets of the NSW Visitor Economy Strategy (VES) 2030 are important indicators to this DMP.

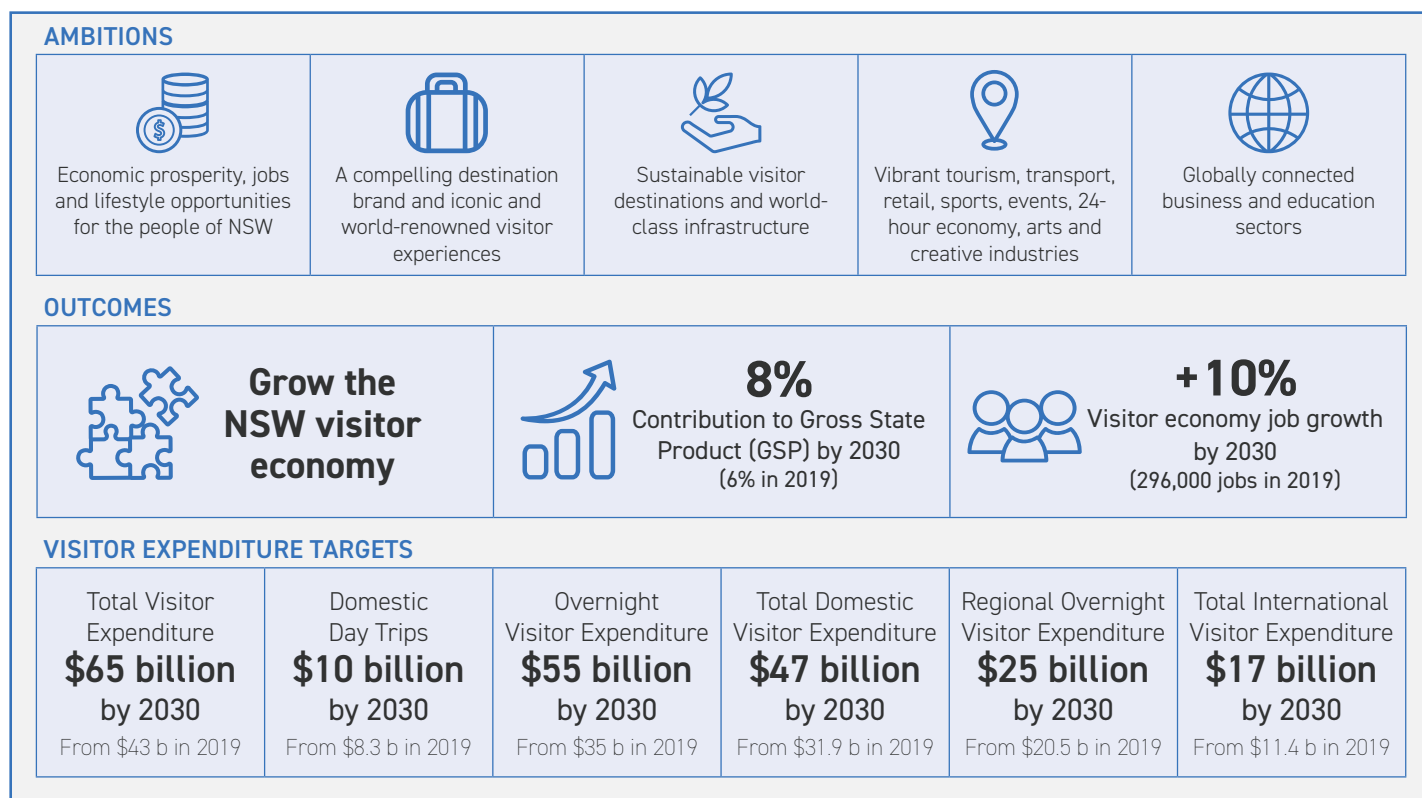


Figure 4. NSW Visitor Economy Strategy (VES) 2030 – ambitions, outcomes, and visitor expenditure targets

Guiding Principles

There are 5 guiding principles that inform the NSW Government's investment and shape policy in relation to the visitor economy.

PUT THE VISITOR FIRST	ACCELERATE DIGITAL INNOVATION	LEAD WITH OUR STRENGTHS	MOVE FAST, BE RESPONSIVE AND AGILE	COLLABORATE WITH INDUSTRY AND GOVERNMENT
We have put the visitor front and centre of this strategy. A greater understanding of potential visitors by segment will deliver high performance marketing solutions and improve the visitor experience.	We will use technology to deliver personalised marketing to potential visitors, streamlined interactions between government and industry, and to enhance the visitor experience.	We will focus on the distinctive character and features of NSW and our people to help us stand out in a crowded market.	We will build agility into the way we operate so we can take advantage of opportunities as they emerge and adapt to changing conditions.	We will foster greater engagement and cooperation with the industry to deliver the vision and take a whole-of-government approach to growing the NSW visitor economy.

Strategic Pillars

The Destination Network Destination Management Plans have been developed to align with the Strategic Pillars and key result areas where relevant:

1. Road to Recovery
2. Building the Brand
3. Showcase our Strengths
4. Invest in World-class Events
5. Facilitate Growth.

These pillars and key result areas are explained further on page 32.

Other Considerations

The Destination Sydney Surrounds North (DSSN) DMP 2022 to 2030 has also been developed to align with:

- The broader NSW Government strategic context and to recognise how different NSW Government priorities and strategies may influence the growth and development of the regional visitor economies (see Appendix 1 for a list of strategies reviewed)
- Relevant regional and local government plans and strategies.



12 Plane display at Warbirds Over Scone event, courtesy of Warbirds Over Scone

Trends Influencing Visitor Demand

The COVID-19 health pandemic has resulted in a range of new consumer trends related to travel decision planning.

The following provides an overview of the main trends influencing recovery from the pandemic as sourced from travel research commissioned in 2022 that is also relevant to regional NSW visitor economy growth and development. It is recommended that continual monitoring of consumer trends be undertaken until 2030.⁴

TREND	DESCRIPTION
Adventures/ Mixing Work & Play	Is about combining education and holidays for the youngest members of the family. While adults may need to telework or attend meetings, their children can be doing workshops and learning in a playful way – workcations.
Transformative Travel Experiences	These are experiences that are less about just looking at things and more about experiencing something new that engages and connects visitors, in a meaningful way, to the place, its history and heritage and its people.
Conscious Travel	Travel to more distant destinations, but with prolonged durations of stay, as consumers look to enjoy as much of each place they visit as possible.
Green Travel	Climate change is a problem that is present and growing. Consumers now are much more responsible and aware of the reality they live in on a daily basis.
Rural Experiences	Rural and regional destinations in Australia will continue to benefit from the desire of source markets for city escapes that continue to boost domestic tourism.
New Faces and Places	2022 will finally be the time to branch out and make new connections with 55% wanting to meet new people while away. A resurgence of vacation romances is also likely, with 41% hoping for one on their next trip.
Travel as Self Care	Travel will become an essential form of self-care. Travellers agree that travel helps their mental and emotional wellbeing more than other forms of self-care.
Community First	Authentic connection with the local community will be a priority. Travellers agree it's important that their trip is beneficial to the local community at their destination.
Just Say Yes	People will be saying YES to travel, making up for lost vacation time with travellers now more open to different types of vacations.
Embracing the Unpredictable	People will use technology to embrace travel's continued unpredictability with travellers agreeing that technology will be more important than ever while on vacation.

⁴ See more at <https://www.unwto-tourismacademy.ie.edu/2021/08/tourism-trends-2022>, <https://skift.com/megatrends-2022/>, <https://skift.com/megatrends-2022/>

Growing the Destination Sydney Surrounds North Visitor Economy

Growing the Destination Sydney Surrounds North Visitor Economy

Growing the Destination Sydney Surrounds North (DSSN) visitor economy will initially require strategies to continue recovery from the impacts of floods, bushfires and the COVID-19 health pandemic to 2024, followed by growth strategies to stimulate and capitalise on investment made in the visitor economy to 2030.

Bushfire and COVID-19 Recovery Impacts

In March 2020, the Commonwealth Government closed its international borders due to the rapid spread of the COVID-19 virus. Domestic travel to NSW was constrained by public health orders resulting in numerous lockdowns and restrictions on intrastate and interstate movement.

The disruption to the tourism sector in 2020 was unprecedented. The immediate halt to people's movement to prevent the spread of COVID-19 was significant to the industry in Australia and worldwide, which experienced: a sudden halt in international visitation, restrictions on domestic mobility, and increased health and safety concerns. Australia's proactive management approach to the pandemic played a key role in protecting domestic demand for tourism despite ongoing disruptions to the tourism industry.⁵

At Year End Dec 2021, the number of total visitors to the Destination Sydney Surrounds North (DSSN) region was 15.8 million, or 40% below the pre-COVID-19 period (Year End 2019).

⁵ Tourism Research Australia, Tourism Investment Monitor 2019-20. Australian tourism investment and COVID-19 impacts

Recovery Goals

The focus of the Recovery Phase to 2024 is to assist businesses and the industry to rebuild and return total visitor expenditure to pre-COVID-19 levels. The following table highlights the Year End 2019 (pre-COVID-19) visitor economy achievements versus the Year End 2021 impacts.⁶







YEAR END DEC 2019 (pre-COVID-19)		YEAR END DEC 2021
26.3 million visitors		15.8 million visitors
25.2 million visitor nights		15.5 million visitor nights
\$5.3 billion visitor expenditure		\$3.9 billion visitor expenditure
7.9 million domestic overnight visitors		5.3 million domestic overnight visitors
18.1 million domestic daytrip visitors		10.5 million domestic daytrip visitors
360,000 international visitors		n/a international visitors
31,215 people directly employed in tourism		28,301 people directly employed in tourism
13,442 people indirectly employed in tourism		10,354 people indirectly employed in tourism

Figure 5. 2019 (pre-COVID-19) visitor economy indicators versus 2021 outcomes⁷

⁶ Boundaries for 2019 visitation research used for 2021 to show comparison

⁷ International visitation data is not statistically reliable for Year End December 2021

Main Opportunities and Challenges

The following strengths, weaknesses, opportunities and threats were identified during the destination management planning process to inform the development of the Destination Sydney Surrounds North (DSSN) DMP.

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Proximity to Sydney region (international airport and large Sydney short break market) • Direct/expanding air access via Newcastle Airport and cruise access via Port of Newcastle • Diverse region comprised of different products and experiences • Significant pipeline of new experience and infrastructure investment in place • Rich history and heritage – industrial, colonial and Indigenous • World Heritage-listed sites, including Barrington Tops and Wollemi National Park • The region's rivers and waterways • World-class wineries • Abundant, high-quality beaches • Natural escarpment landscapes, 1/2-day walks • Historic houses/hotels, artisan, boutique shopping • Quality accommodation, conference and golf facilities across the region • New event infrastructure and capabilities • Diversity of food and wine offerings • Strong calendar of regional events. 	<ul style="list-style-type: none"> • Perceived as a day trip destination • Limited trading hours and lack of evening activities hamper overnight visitor market growth • Negative or outdated perceptions of the region and individual destinations • Lack of clarity on the image and brand identity of some destinations within the region • Transport connectivity challenges (airport, city to wineries, city to region, intra-region) • Destinations/products/experiences are not well linked/packaged • Gateway and wayfinding signage • Digital connectivity blackspots in parts of the region • Lack of accommodation options in parts of the region • Many small operators need help/upskilling/direction • Current workforce challenges • Lack of accessibility infrastructure.

Main Opportunities and Challenges (continued)

OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Facilitating investment in improved and new visitor products and experiences in areas such as nature-based tourism, arts/culture, food and wine, business events, Indigenous tourism, heritage, etc. • Building awareness of new opportunities • Visitor economy-friendly planning regulations • Advocating for improved connectivity to and within the region (e.g. developing Newcastle Airport's route network, improving connectivity from major towns and cities to the hinterland/wineries, improved non-private car transport options) • Building connectivity between accommodation and other visitor economy products • Continue efforts to improve communication and collaboration throughout the region • Maximising the benefits of funding programs by ensuring priority regional projects are included in the plan • Advocating for improved digital connectivity, including addressing blackspots • Facilitating marketing collaboration within the region in line with market demand segments, e.g. wellness, sustainability and electric vehicles • Grow events within the region (major, regional and business events) • Improve industry skills development and knowledge • Creating new bookable experiences across all markets • Improve destination marketing • Improve industry resilience. 	<ul style="list-style-type: none"> • Ongoing disruption from COVID-19 • Climate change and natural disasters impacting the region • Competitiveness from other regions, both domestic, interstate and intra-region, as borders reopen • Disruption to key markets, including international students influencing visitation and workforce • Change of government may influence direction of tourism policy • Pressures of rising living costs • Drop in discretionary spending.



Newcastle Supercars event,
courtesy of City Of Newcastle

Vision and Positioning



Vision and Positioning

Vision and Values

The following vision and values were created from the findings of the destination management planning process:

To establish the Destination Sydney Surrounds North (DSSN) region as Australia's premier regional tourism and events destination, where the DSSN visitor economy contributes positively to NSW's regional visitor expenditure ambition of \$25 billion per annum by 2030.

Destination Sydney Surrounds North (DSSN) will work in close collaboration with industry, communities, and public sector partners to drive sustainable economic growth. The Destination Network will function as a connector, adding value to the work of businesses, State Government agencies and Local Government partners, and ensuring that the region contributes more collectively than the sum of its individual parts.

Positioning

Great destinations have a number of common characteristics. They have a cachet, image or reputation that precedes them. They have a standard in service delivery that is consistent and high quality. They tend to have a depth of experiences that offer visitors a variety of things to see and do. They make it easy for visitors with access, itineraries and information services, making for a well-connected destination. They leave lasting memories – the absolute best travel experiences forge emotional connections with visitors.

For Destination Sydney Surrounds North (DSSN) to cement its position as an exceptional destination and contribute fully to the NSW Visitor Economy Strategy (VES) 2030 targets, the region will leverage its existing strengths and future opportunities.

Themes such as **coastal, city, hinterland and heritage** complement these hero clusters of experiences. Ideally located within a short distance from Sydney and its outer suburbs, the region is a compelling choice for overnight and day visitors.

This distinctive mix of connected experiences provides the opportunity to focus on sustainable growth and maximising yield from target visitor markets.



Figure 6. The positioning strengths of the Destination Sydney Surrounds North (DSSN) region

Experience Strengths

Neatly positioned just north of Sydney and easily accessible via the M1 or through Newcastle International Airport, rail and waterways. DSSN has a diverse range of accommodation, activities, attractions and events for all visitors.

Diverse natural beauty from National Parks to bushland and the largest moving sand dunes in the Southern Hemisphere at Stockton Sand Dunes.

A coastline that ranges from rugged beauty to quiet bays. As well as famous surf breaks, which host world-class surfing events.

Scope for further development for History, Heritage and Aboriginal experiences across DSSN's region.



Each region has its own trails and driving routes unique to their destination. Routes can range from day trips to week-long itineraries.

Thriving bar and restaurant scenes supported by local breweries and distilleries complementing Australia's oldest wine-growing region in the Hunter Valley.

Newcastle continues its transformation of becoming a vibrant city with new hotels and experiences entering the market.

Many regions and operators are focused on sustainability and being eco-friendly. The Central Coast became the first region in DSSN to become a 'Certified Eco Destination'.

Figure 7. The experience strengths of the Destination Sydney Surrounds North (DSSN) region

Target Markets and Visitor Profiles



Sub-region Positioning

The table below summarises the sub-regional positioning, branding and key experiences for the unique destinations throughout Sydney Surrounds North as identified in current Destination Management Plans and brand positioning strategies.

DESCRIPTION	POSITIONING STATEMENT	KEY EXPERIENCES
NEWCASTLE		
Newcastle has emerged as a regional destination of choice known for much more than its pristine beaches. Promising visitors a range of experiences, the city boasts two five star hotels, major sporting and cultural events, cruise port and close proximity to an expanding airport. City of Newcastle is committed to supporting the growth and sustainability of the visitor economy and working with key stakeholders at all levels of government to achieve this growth.	<p><i>Seek Off Beat.</i></p> <p>Surrounded by a stunning coastline and world-renowned surf beaches, the coast feeds the soul of this compact city. When you indulge your curiosity and uncover Newcastle's vibrant culture, rich heritage and electric atmosphere, you'll experience an unexpected feast for the senses all right on your hotel doorstep. Our purpose is to give people an unexpected, eclectic and spirited city escape that exceeds their expectations and turns them into advocates.</p>	<ul style="list-style-type: none"> • Active & Outdoors • Coastal & Aquatic • Culinary • After Dark • Arts, culture & heritage.
PORT STEPHENS		
Port Stephens is a sophisticated tourism destination with established products and experiences. The region is popular for domestic visitors and is a growing international visitor destination. Tourism is a major contributor to the Port Stephens economy.	Port Stephens' destination brand is <i>Incredible by Nature</i> . The brand focus is on offering the visitor the very best of mother nature and human nature. It is a place like no other, with incredible experiences on offer and unique stories to share.	<ul style="list-style-type: none"> • Stunning beach and coastal experiences • Nature-based experiences • Wildlife experiences • High quality food and drink • Relaxation.
HUNTER VALLEY		
The Hunter Valley encompasses both the Cessnock and Singleton Local Government Areas (LGAs). It is Australia's oldest surviving commercial wine region and the most visited in NSW. It is located in the heart of the Hunter region and surrounded by World Heritage National Parks, rich heritage and colonial, Indigenous and industrial history. The area also boasts superior accommodation and golf courses, and has a reputation as a quality short-break destination.	<p><i>Here's To The Good Life.</i></p> <p>The Hunter Valley is globally renowned as a vibrant wine, food and beverage destination with a thriving, dynamic, diverse and sustainable visitor economy.</p>	<ul style="list-style-type: none"> • Wineries and food • Accommodation/ conferencing • Events • Sports tourism inc. golf, cycling • Nature tourism • Arts, culture & heritage • Wellness.
CENTRAL COAST		
From headland to hinterland, the Central Coast is home to an array of coastal, waterway and nature-based treasures, complemented by a breadth of arts, food and cultural experiences. Being one of the first ECO Certified destinations in Australia, having a recently refreshed brand with a strong appeal in the domestic market as well as emerging international market potential, the Central Coast has the opportunity to become a leading contemporary Australian visitor destination.	<p><i>Lovecentralcoast</i> has been established as a new brand for the region.</p> <p>The Central Coast is a vibrant, magnetically attractive place to live, work and play. The destination brand has been developed to elevate this perception and create an advantage for the region.</p>	<ul style="list-style-type: none"> • Coastal, beaches and waterways • Eco Tourism and sustainable experiences • Wildlife experiences • Adventure, nature-based, national parks • Maker, creator, arts and cultural experiences • Aboriginal experiences.

Sub-region Positioning (continued)

DESCRIPTION	POSITIONING STATEMENT	KEY EXPERIENCES
UPPER HUNTER		
Upper Hunter encompasses both the Muswellbrook Shire and Upper Hunter Shire LGAs. The region is one of the closest complete rural environments to Sydney and is home to the largest concentration of thoroughbred breeding businesses in Australia, for which it is internationally recognised. The area has a diverse environment, from western grasslands to subtropical and alpine.	Brand positioning is still being established but has strong potential based around: <ul style="list-style-type: none"> • Scone: horses and warbirds • Merriwa: agriculture • Murrurundi: arts and culture • Aberdeen: Scottish heritage • Denman. 	<ul style="list-style-type: none"> • Adventure • Equine • Nature-based, national parks • Heritage • Wineries.
LAKE MACQUARIE		
Lake Macquarie City is a vibrant coastal destination with magnificent natural assets that provide a distinct sense of place and support a broad range of quality outdoors, adventure and nature-based activities. Lake Macquarie is the heart of our destination and is the largest permanent coastal saltwater lake in the Southern Hemisphere.	<p><i>Love the Lake.</i></p> <p>Relax in beautiful accommodation and escape from the fast pace of life in whatever setting you prefer - beach, lake or mountain. The city's centrepiece is a vast blue water expanse, twice the size of Sydney Harbour. Only 1.5 hours from Sydney.</p>	<ul style="list-style-type: none"> • Adventure • Nature • Walking and cycling • Water sports • Arts and culture.
MAITLAND		
The Maitland region is characterised by its scenic beauty and unique villages. It is one of the oldest and most heritage-rich regional centres in Australia, built on the banks of the Hunter River that brought life and trade to the early city. Maitland Gaol and the historic river port of Morpeth already feature in wholesalers' Newcastle cruise stop itineraries, with the potential to further develop the region.	<p><i>Make it Maitland.</i> A new brand strategy is under development.</p> <p>Located on the banks of the picturesque Hunter River, Maitland is a charming city with a rich history, emerging food scene, thriving arts community, boutique accommodation and vibrant events calendar. Maitland is a mecca for families, couples and group getaways, and is home to the iconic Maitland Gaol, the masterpiece that is Maitland Regional Art Gallery and the historic township of Morpeth.</p>	<ul style="list-style-type: none"> • History and Heritage • Food and produce • Arts and culture • Nature and outdoors • Festivals and events.
DUNOGG		
Dungog Shire is in the Hunter Region and is bordered in the north by the Barrington Tops Plateau and the World Heritage-listed Gondwana Rainforests of Barrington Tops National Park. It is rugged and hilly country renowned for its national parks, forests, mountains and picturesque river villages. The area offers quality rural and adventure experiences within 2.5 hours drive from Sydney.	Dungog Shire's strengths lie in its stunning natural environment, picturesque setting and contemporary country lifestyle. The Shire is being marketed by Dungog Regional Tourism (DRT) under the banner of ' <i>A breath of fresh air</i> '. The marketing features the Shire's spectacular landscapes and focuses on the breathtaking national parks and State forests, great country drives and heritage towns and villages.	<ul style="list-style-type: none"> • Mountain biking • Bush walking • Camping • Heritage.

Target Markets & Visitor Profiles

Strong experience thematic areas for the region include nature, soft adventure, food and beverages. These areas provide significant opportunities to grow the market share of day, domestic overnight and international visitors within the State and attract new visitors to regional NSW.

The region's destinations and LGAs also have distinct market profiles, including individual visitor experience strengths such as city life, equine and sports, as well as business events for some destinations.

The Destination Sydney Surrounds North (DSSN) destination management planning process identified the following main visitor markets and growth development opportunities.

VISITOR MARKET	KEY VISITOR MARKETS	KEY EXPERIENCES	GROWTH OPPORTUNITIES/DRIVERS FOR THE SEGMENT
DAY VISITORS	<p>Greater Sydney</p> <p>Within the DSSN region – Newcastle and Central Coast are population hubs</p> <p>Visiting Friends and Relatives (VFR)</p>	<p>Food and beverage</p> <p>Nature-based/soft adventure</p> <p>Beaches/coastal</p> <p>Heritage</p> <p>City life/culture and arts</p> <p>Business events</p> <p>Events</p>	<p>Maximising potential sustainable growth and raising average daily spend from the day visitor segment is important for the <i>Recovery, Momentum and Accelerate</i> phases up to 2030</p> <p>Leveraging the region's accessibility</p> <p>An increased depth and range of experiences to motivate trip decisions</p> <p>Leveraging forecast population growth</p> <p>Building awareness and advocacy within the region as a means of supporting the VFR segment</p> <p>Increasing yield from day visitor experiences/growing average daily expenditure</p> <p>High-quality and authentic events as triggers for visits</p> <p>Early evening/night-time economy options to boost average daily spend</p>

Target Markets & Visitor Profiles (continued)

VISITOR MARKET	KEY VISITOR MARKETS	KEY EXPERIENCES	GROWTH OPPORTUNITIES/DRIVERS FOR THE SEGMENT
DOMESTIC OVERNIGHT (SHORT BREAKS)	Greater Sydney	Food, wine and beverage	Maximising growth across the visitor segment is important for the <i>Recovery, Momentum and Accelerate</i> phases up to 2030 – the segment is the region's main driver of the visitor economy
	Interstate (Queensland, Victoria)	Nature-based/soft adventure	
	Intra-region/ regional NSW	Beaches/coastal	Connectivity across the region through packaging and linked itineraries, such as commissionable/bookable experiences
		Heritage	
	South Australians (Adelaide - Newcastle Airport route)	City life/culture and arts	Local and collective marketing and brand development, which builds identity and resonates with target markets
		Events	
			An increased depth and range of experiences, including accommodation, where new/improved signature experiences can act as important motivators for trips
			Leveraging new domestic route development at Newcastle Airport
			Enhanced early evening/night-time economy options
			Events as triggers for visits
			Self-drive/touring trips to/within the region
			Education/school groups linked with curriculum-based learning packages, leveraging proximity to Greater Sydney's large school population

Target Markets & Visitor Profiles (continued)

VISITOR MARKET	KEY VISITOR MARKETS	KEY EXPERIENCES	GROWTH OPPORTUNITIES/DRIVERS FOR THE SEGMENT
INTERNATIONAL	<p>Day visits/group travel, ex Sydney</p> <p>Overnight stays</p> <p>Visiting Friends and Relatives</p>	<p>Food, wine and beverage</p> <p>Nature-based/soft adventure</p> <p>Beaches/coastal</p> <p>City life/culture and arts</p> <p>Events</p> <p>Heritage and Aboriginal experiences</p>	<p>As international markets return, aligning opportunities with the Momentum and Accelerate phases up to 2030 are particularly important. VFR and New Zealand are likely to provide the best opportunities in the Recovery phase</p> <p>Leveraging airport development – Newcastle and Western Sydney</p> <p>Development of itinerary options to build appeal</p> <p>Packaging and linked itineraries – commissionable/bookable experiences</p> <p>Visiting Friends and Relatives</p>
BUSINESS EVENTS	<p>Intra-region</p> <p>Greater Sydney</p> <p>Mid-week trade, with links to leisure trips/extensions</p>	<p>Venues, mix of new accommodation options</p> <p>Incentive offerings related to food and wine, coast, arts and culture</p>	<p>Local and regional meetings can be a key driver in the Recovery phase, with the sector being a core part of the business model for hotels and meeting venues</p> <p>New conferencing venues, where supported by market demand</p> <p>Meeting the needs of market requirements for hybrid meetings</p>
CRUISE	<p>Regional and city trips from cruises using the Port of Newcastle</p>	<p>Itinerary options, linking experiences within a short distance from Newcastle</p>	<p>The cruise industry is forecast to bounce back strongly on its reopening in 2022 – domestic markets are the key driver</p> <p>Accessible new/improved experiences can be the driver for additional landside visitor expenditure by cruise visitors to the Port of Newcastle</p>



Strategic Objectives



Strategic Objectives

The following strategic objectives are designed to coordinate the region's tourism industry to grow the Destination Sydney Surrounds North (DSSN) visitor economy to be fit for the future and align to the NSW Visitor Economy Strategy (VES) 2030 strategic pillars and key result areas.

VES Strategic Pillars	Road to Recovery A comprehensive program of marketing and industry development will ensure NSW recovers quickly from the impacts of COVID-19, bushfires, drought and floods and elevates its status as the premier visitor economy in the Asia Pacific	Build the Brand Compelling new brands will be developed for Sydney and NSW to provide a strong foundation for differentiation, consumer messaging, local pride and competitiveness to turbocharge recovery and accelerate future growth	Showcase our Strengths NSW is a state of breathtaking diversity and bucket list visitor attractions and experiences. We will focus on existing strengths and develop new opportunities to ensure place making, destination marketing, events and visitor experiences drive visitation	Invest in World Class Events An accelerated investment in signature sporting and cultural events as well as business events will help position Sydney and NSW as the events capital of the Asia Pacific, drive visitation and enhance the social wellbeing of NSW residents	Facilitate Growth Investing in infrastructure, job creation, industry resilience and sustainability, future planning, and better ways to do business will ensure the continued growth and future prosperity of the NSW visitor economy
DSSN DMP Strategic Objectives	Advocate and work with partner agencies to address visitor economy workforce shortages and skill gaps to grow the Destination Sydney Surrounds North visitor economy	Support Destination Sydney Surrounds North stakeholders to create clear destination brand identities and work collaboratively to leverage cooperative marketing opportunities	Support Destination Sydney Surrounds North stakeholders to enhance and develop authentic products and experiences that are aligned to region's positioning strengths	Support the growth and development of events and festivals that showcase the vibrancy and authenticity of the Destination Sydney Surrounds North region including business events	Provide an enabling environment for investment and advocate to governments for new infrastructure development to support the sustainable growth of Destination Sydney Surrounds North
Key Result Areas	<ul style="list-style-type: none"> • Return visitation and expenditure to pre-COVID-19 levels by 2024 • Sustainable and resilient visitor economy businesses 	<ul style="list-style-type: none"> • Increased demand to visit DSSN region • Greater brand awareness in target markets • Improved response to campaign activity • Increased number of DSSN products that can be transacted digitally 	<ul style="list-style-type: none"> • Increased average length of stay and yield • Growth in visitation and expenditure for DSSN region • Higher levels of repeat visitation 	<ul style="list-style-type: none"> • Increased economic impact and visitor attendance at events • Greater promotion of DSSN region as an events destination • Increased community and visitor satisfaction 	<ul style="list-style-type: none"> • Increased public and private sector investment in visitor infrastructure • Improved access to visitor destinations and visitor attractions • Increased visitor satisfaction with accommodation and experience

Action Plan



Action Plan

The following sections identify actions related to the five Destination Sydney Surrounds North DMP strategic objectives. Actions align with the 3 phases of the NSW Visitor Economy Strategy (VES) 2030:

- Recovery Phase to 2024
- Growth Momentum to 2026
- Growth Accelerate to 2030.

1.0 Road to Recovery

Strategic Objective: Advocate and work with partner agencies to address visitor economy workforce shortages and skill gaps to grow the Destination Sydney Surrounds North visitor economy.

The Recovery phase to 2024 is short-term. The priority is for the region to be front of mind and easy to access/consume for visitors in a crowded market. Actions include the need to focus on marketing and packaging, leveraging the region's product and experience strengths, and its proximity to Greater Sydney's large visitor market.

Delivering exceptional visitor experiences requires a skilled workforce. Building capacity across industry in the Recovery phase will be critical to minimise the acute workforce shortages currently experienced across all parts of the region. Tackling this complex issue requires capacity building, training and partnership with schools, training institutions and universities to build a pathway of career opportunities.

The cumulative impact of COVID-19, bushfires and floods has tested the resilience of visitor economy businesses and destinations like never before. Actions that support ongoing resilience are a priority. Industry capacity covers a multitude of topic areas ranging from consistent quality service delivery to sustainability, digital marketing and trade readiness.

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
1.1	Prepare and implement regional visitor economy partnership and advocacy plans that identify the areas where most impact can be achieved through collaboration, and where there is consensus for collaborative regional action, and the means for engagement (forums, digital communication, working groups etc.). Initial priorities include collaborative marketing, transport links, digital connectivity, workforce, cross-region infrastructure, and business capacity building	DSSN	LGAs LTOs Industry	2022 to 2024
1.2	Work with DNSW to deliver NSW First initiatives to strengthen industry sustainability, capability, and resilience	DNSW	DSSN LGAs LTOs	2022 to 2024
1.3	Work with the Destination Network Project Management Group to create an 'Understanding the Regional Visitor Economy Program' to improve understanding of local government, industry and community about the Destination Sydney Surrounds North visitor economy	DNPMG	DNSW Regional NSW LGAs	2022 to 2024
1.4	Work with the Destination Network Project Management Group to advocate and maximise the opportunities and resources available from external grant funding opportunities to support regional visitor economy resilience and growth	DNPMG	DNSW Regional NSW	2022 to 2030
1.5	Work with the Destination Network Project Management Group and regional stakeholders to advocate for workforce solutions around visitor economy staff and skills and housing shortages	Regional NSW	DNPMG DSSN	2022 to 2030

2.0 Build the Brand

Strategic Objective: Support Destination Sydney Surrounds North stakeholders to create clear destination brand identities and work collaboratively to leverage cooperative marketing opportunities.

While marketing is not part of Destination Sydney Surrounds North's (DSSN)'s remit, supporting the region's Local Government Areas (LGAs) and Local Tourism Organisations (LTOs) to build clear destination identities and communicate effectively with customers are critical success factors for the region's visitor economy. There are also common and complementary sets of experiences across the region, which provide opportunities for further collaboration. Where appropriate to destination priorities, aligning with the NSW brand can extend reach.

The following actions focus on supporting the region's LGAs, LTOs and industry to build their brand identities and work collaboratively.

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
2.1	Work with DNSW, LGAs and LTOs to create a Destination Sydney Surrounds North Marketing Toolkit that communicates clear destination brand identities, product and experience strengths and ways to align with <i>Feel NSW</i> brand	DSSN	DNSW LGAs LTOs	2022 to 2024
2.2	Work with LGAs and LTOs to create coordinated experience trails and itineraries related to positioning strengths of the region	DSSN	DNSW LGAs LTOs	2022 to 2026
2.3	Work with DNSW to coordinate and communicate opportunities for <i>Feel New NSW</i> content development for Destination Sydney Surrounds North stakeholders	DSSN	DNSW LGAs LTOs	2022 to 2030
2.4	Support initiatives which build the region's range of bookable and commissionable products as a means of growing yield and attracting new day and overnight visitors	DSSN	DNSW LGAs LTOs	2022 to 2030
2.5	Work with regional destination management partners to package experiences to grow short break appeal	DSSN	DNSW LGAs LTOs Industry	2022 to 2030

3.0 Showcase our Strengths

Strategic Objective: Support Destination Sydney Surrounds North stakeholders to enhance and develop authentic products and experiences that are aligned to the region's positioning strengths.

Great visitor destinations are often characterised by having a cluster of high-quality and authentic products and experiences. Investment in existing or new experiences/products is a key enabler if the region is to provide the depth of experiences that incentivises trips and encourages visitors to (re)discover the region and its distinctive destinations.

The region's proximity to Australia's largest source visitor market in Greater Sydney provides a significant advantage relative to other regional NSW destinations. The region is diverse, with destinations at different stages of maturity and growth, with local destination management priorities reflecting these varying needs.

The following actions will support the region to capitalise on and showcase its strengths.

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
3.1	Work with DNSW to deliver <i>NSW First</i> programs that encourage and support development and packaging of new and improved existing products and services	DNSW	DSSN	2022 to 2030
3.2	Work with the Destination Network Project Management Group, NPWS and NSWFC and private landowners to identify opportunities for nature-based product and experience development	DNPMG	DNSW NPWS NSWFC LGAs LTOs	2022 to 2030
3.3	Provide support for the development of iconic new or improved experiences aligned to nature-based tourism and soft adventure clusters (including cycling, walking)	DSSN	DNSW NPWS NSWFC LGAs LTOs DNPMG	2022 to 2030
3.4	Facilitate collaboration between destinations which have complementary experiences	DSSN	DNSW LGAs DNPMG	
3.5	Work with the Destination Network Project Management Group to support operators to further develop agritourism and produce product development opportunities	DNPMG	DNSW Regional NSW LGAs	2022 to 2026

3.0 Showcase our Strengths (continued)

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
3.6	Work with the Destination Network Project Management Group to advocate and support the development of Aboriginal and Heritage products and experiences including tailored industry development and support to help bring forward new cultural tourism product development opportunities	DNPMG	DNSW NATOC Museums & Galleries NSW LGAs LTOs LALCs ⁸	2022 to 2030
3.7	Work with DNSW to coordinate the delivery of NSW First programs and resources to support operators to be international ready	DNSW	DSSN LGAs LTOs	2022 to 2030
3.8	Work with local destination managers to identify a cluster of existing businesses who have the potential to elevate their experiences to become signature attractions at State and Australia-wide levels, and support business cases for their development including insights and market trends and data	DSSN LGAs LTOs	DNSW	2022 to 2030
3.9	Leverage the strength of the Hunter Valley's appeal as a food and wine destination by advocating for improved regional connectivity between experiences and destinations as a key enabler to drive further growth in the food and drink area	DSSN	DNSW Regional NSW LGAs LTOs	2022 to 2030
3.10	Advocate for tailored business support and engagement to help bring forward new heritage experiences (Indigenous and European heritage) which can be supported by market demand (e.g. effective storytelling, interpretation)	DSSN	DNSW LGAs LTOs Traditional Owners	2022 to 2030
3.11	Work with Destination Sydney Surrounds North partners to leverage opportunities from new international and domestic route development at Newcastle Airport including new collaborative marketing opportunities	DSSN LGAs LTOs	Newcastle Airport DNSW	2022 to 2030

⁸ LALCs = Local Aboriginal Land Councils

4.0 Invest in World Class Events

Strategic Objective: Support the growth and development of events and festivals that showcase the vibrancy and authenticity of the Destination Sydney Surrounds North region, including business events.

Events can be used within the Recovery phase to drive regional and seasonal visitation. Building momentum from new infrastructure developments due to come online, the region will have the capacity to leverage larger events with greater capacity. As we reach the Accelerate phase, it will be time to build on the reputation earned to build a strategic calendar of events that drives event visitation.

The following actions focus on strategically planning and activating regional events to build the reputation of Destination Sydney Surrounds North for world-class events to drive year-round visitation.

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
4.1	Support LGAs and LTOs to deliver event development resources for organisers of events that have the capacity to grow visitation to the region including effective grant writing resources	DSSN LGAs LTOs	DNSW	2022 to 2026
4.2	Support destination managers, event managers and producers to support growth in existing events/new events linked to the region's positioning strengths	LGAs LTOs	DSSN DNSW Regional NSW	2022 to 2026
4.3	Advocate to LGAs and LTOs to consider event infrastructure development needs for new local precinct and place-building projects including activation of an evening economy	DSSN	DNSW Regional NSW LGAs LTOs	2022 to 2030
4.4	Work with regional partners to establish a 12-month forward calendar of key events for the region to aid more strategic planning of event delivery to reduce seasonality and drive dispersal when required	LGAs LTOs	DSSN DNSW	2022 to 2030
4.5	DSSN will support the development of business events, infrastructure and new events within the region's visitor destinations where supported by market demand	LGAs LTOs Industry	DSSN	2022 to 2030

5.0 Facilitate Growth

Strategic Objective: Provide an enabling environment for investment and advocate to governments for new infrastructure development to support the sustainable growth of Destination Sydney Surrounds North.

Recovery will be aided by maximising the accessibility of experiences to customers and the ability for businesses to connect with them. Business, digital and physical connectivity are also key enablers in delivering a connected region in all its senses.

In the Recovery phase, improved digital connectivity will enable businesses to reach customers and improve customer experience. Business connectivity links experiences and provides collaboration opportunities for businesses, encouraging visitors to stay longer and spend more.

By 2026, as momentum is built, visitor experiences will be connected throughout the region, with Newcastle Airport performing an enhanced gateway role. As we reach the Accelerate phase to 2030, connectivity will increase and it will become easier to see more and do more across DSSN, in turn supporting growth in expenditure and the average length of stay.

The following actions focus on advocating and working collaboratively with visitor economy stakeholders to facilitate growth of the Destination Sydney Surrounds North region.

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
5.1	Continue to advocate and support investment in the proposed projects that have the potential to grow the region's visitor economy related to the regions' positioning strengths	DSSN	DNSW LGAs LTOs	2022 to 2026
5.2	Support private investors, LGAs and LTOs to grow the quantity, diversity, and quality of accommodation across the region	DSSN	DNSW LGAs LTOs	2022 to 2030
5.3	Work with Destination NSW and the Destination Network Project Management to disseminate and communicate relevant visitor economy research to regional stakeholders	DNSW DNPMG	LGAs LTOs	2022 to 2030
5.4	Work with the Destination Network Project Management Group to advocate to the NSW Government and LGAs to streamline planning requirements to better support the growth of the visitor economy	DNPMG	NSW Govt. DNSW Regional NSW LGAs LTOs	2022 to 2030
5.5	Work with the Destination Network Project Management Group to advocate to the Australian and NSW Governments to collectively advocate for improved digital and transport connectivity	DNPMG	NSW Govt. DNSW	2022 to 2030

5.0 Facilitate Growth (continued)

ACTION NUMBER	ACTIONS	RESPONSIBILITY	SUPPORT PARTNERS	TIMEFRAME
5.6	Work with the Destination Network Project Management Group to leverage opportunities for international and domestic airway route development including Newcastle Airport	DNPMG	DNSW	2024 to 2030
5.7	Seek resources to undertake research to investigate inter-region connectivity challenges and solutions, covering public transport, wayfinding, digital communication, cycling/ walking, and ride sharing across Destination Sydney Surrounds North	DSSN	DNSW Regional NSW LGAs LTOs	2022 to 2026
5.8	Advocate for the enhancement of critical road and other transport infrastructure and wayfinding, enhancing the connection of Newcastle Airport with key regional destinations across Sydney Surrounds North	DSSN	DNSW Regional NSW Transport NSW LGAs LTOs	2022 to 2026

Regional Priority Projects



Regional Priority Projects

Several important development projects were identified during the destination management planning process that will help grow the Destination Sydney Surrounds North (DSSN) visitor economy.

There has been significant progress in terms of planning and development of new infrastructure development across the Destination Sydney Surrounds North (DSSN) region. For example, Newcastle Airport continues to develop, and the city continues to rejuvenate after the removal of heavy rail from the CBD and new light rail development. There is also a current pipeline of over \$200 million in visitor economy infrastructure development across the region.

Key projects across the Destination Sydney Surrounds North (DSSN) region are set to drive visitor growth and will support the achievement of the regional NSW target of \$25 billion in expenditure by 2030. Each destination within the DSSN region will be an important element in attracting and delivering new visitor economy infrastructure. The examples below are current at the time of publication. We acknowledge these will change over time.

LGA	COMPLETE	IN PROGRESS	PROPOSED/POTENTIAL
CENTRAL COAST	Leagues Club Park Gosford Terrigal Boardwalk and Rock Pool	Visitor Information Centre Central Coast Stadium Gosford City Centre and Mann Street Revitalisation Gosford Educational Precinct Central Coast Regional Library Mount Penang Bouddi Coastal Walk Upgrade	Mangrove Creek Dam Visitor Space Gosford Waterfront Concept Plan Woy Woy Waterfront Masterplan Central Coast Airport Masterplan Warnervale Business Precinct Masterplan Luxury Accommodation at Mount White Somersby Falls Visitor Precinct Upgrade Central Coast Stadium Precinct Masterplan Glenworth Valley Mountain Bike Park Crackneck Lookout Visitor Precinct Upgrade Peat Island Redevelopment
LAKE MACQUARIE	Lake Macquarie Arts and Cultural Centre Speers Point Upgrade	Cedar Mill Development Cooranbong Eco-Tourism Development	Trinity Point Resort Black Rock Catherine Hill Bay Masterplan Swansea Channel/Fernleigh Track Extension
NEWCASTLE	QT Newcastle Kingsley Hotel The Station	Newcastle Airport Expansion Honeysuckle Redevelopment Newcastle Art Gallery Redevelopment Newcastle Ocean Baths Redevelopment Little National Hotel Hunter Street Mall East End Revitalisation Glenrock SCA Visitor Upgrades	Broadmeadow Sporting Precinct Glenrock State Conservation Area Upgrades Hope at Honeysuckle Light Rail Extensions

Regional Priority Projects (continued)

LGA	COMPLETE	IN PROGRESS	PROPOSED/POTENTIAL
PORT STEPHENS	Port Stephens Koala Hospital	Newcastle Airport Tomaree Coastal Walk Irukandji Shark & Ray Redevelopment Birubi Point Interchange	Bannisters Oakvale Wildlife Park Redevelopment Nelson Bay Foreshore Public Wharf (Eastern Groyne) Redevelopment of Tomaree Lodge Site Murrook Cultural Centre Accommodation Large Scale Conference Facilities and Onsite or Nearby Accommodation Rejuvenation of Nelson Bay and Raymond Terrace Town Centres
HUNTER VALLEY (Cessnock and Singleton)	Brokenwood Estate Spicers Tower Lodge Singleton Arts and Cultural Centre Leogate Villas	Bimbadgen - The Lane at Palmers Lane Krinklewood Accommodation	Ben Ean Redevelopment Cedar Mill Development Roche Estate Redevelopment Belford Land Corporation Richmond Vale Rail Trail Shiraz To Shore
MAITLAND	Maitland Sportsground Redevelopment Maitland Regional Athletics Centre Upgrade Maitland Park Netball Courts Upgrade The Levee Central Maitland Revitalisation Hunter Studios Maitland	Harold Gregson Park Upgrade (Stage 4 of the Regional Sports Complex Upgrades) Morpeth to Walka Water Works Shared Pathway, including Morpeth Railway Building Punthill Maitland Maitland High Street Revitalisation Queens Wharf Morpeth Upgrade Maitland Gaol Redevelopment	Walka Water Works Redevelopment Morpeth Museum Upgrade Maitland Showground Redevelopment Old Maitland Hospital Site Accommodation Development Gateway Visitor Experience Riverside Infrastructure Proposed Boutique Accommodation
DUNOGG	Mountain Bike Trails	Dungog Common	Other mountain bike locations across the Shire
UPPER HUNTER/ MUSWELLBROOK	Hunter Warbirds Museum Scone Airport Bypass Revitalisation		Upper Hunter Museum Scone Racing Club Community Gathering Place: The Aboriginal and Torres Strait Islander Cultural Centre Denman Tourist Park



Long Jetty on the Central Coast,
courtesy of Destination NSW

Stakeholder Roles in Growing the Regional NSW Visitor Economy



Stakeholder Roles in Growing the Regional NSW Visitor Economy

The Destination Sydney Surrounds North (DSSN) Destination Management Plan (DMP) will guide the region's priorities to 2030 and will require cooperative support from other visitor economy stakeholders across Local, Regional, State and Federal levels to successfully implement the plan's initiatives.

Stakeholder engagement confirmed a commitment from local governments, tourism businesses, Destination Sydney Surrounds North and Destination NSW to develop a solid working relationship to achieve the outcomes prioritised in this plan.

The following outlines the roles of these stakeholders in implementing this plan to 2030.

Destination Sydney Surrounds North

Destination Sydney Surrounds North is one of seven Destination Networks in regional NSW and is an important conduit between the NSW Government, the local governments and visitor economy businesses across the Destination Sydney Surrounds North region. It continues to play an important role in delivering regional funding and industry development programs and in identifying infrastructure needs and investment opportunities to grow the regional visitor economy.

The NSW Destination Networks are considered the champions of the visitor economy in their regions, proactively engaging with stakeholders to identify, prioritise and facilitate opportunities for regional visitor economy growth. They also play a key support role for Destination NSW in the delivery of its industry development and visitor experience and regional event funding programs⁹.

The Destination Networks will support Destination NSW in implementing the NSW Visitor Economy Strategy (VES) 2030 to achieve the visitation and expenditure targets for regional NSW. The Destination Management Plan for each Destination Network is aligned with the NSW Visitor Economy Strategy (VES) 2030.

The Destination Networks are predominantly destination managers and are considered the 'shopfront' for Destination NSW in regional NSW and work closely with local government, visitor economy organisations and operators.

Their objective is to facilitate visitor economy growth at the local level by representing and coordinating the region's visitor economy industry.

Their core responsibilities include:

- Industry Engagement and Industry Development
- Product Development
- Training and Education
- Preliminary Review of Local DNSW Grant Applications to ensure quality/compliance with guidelines
- Collaboration with DNSW on cooperative marketing and industry activities that are aligned to Brand NSW.

Specifically, Destination Networks:

- **Develop and implement the region's Destination Management Plan and Business Plan**, in alignment with the NSW Visitor Economy Strategy (VES) 2030, and ensure alignment with local tourism and related plans
- **Work with Local Government and industry** on product development, including investment attraction
- **Work in collaboration with DNSW** led marketing and communications activity for their 'hero' destinations, experiences, events and festivals and regional campaigns
- **Explore Industry Development initiatives** (i.e. identify opportunities for growth) e.g. conferencing, field study tours, local industry education and training needs especially for small to medium-sized tourism operators
- **Assist local industry to prepare DNSW grant applications**¹⁰

The Destination Networks are funded by Destination NSW with an independent skills-based board providing strategic leadership and direction.

⁹ NSW Visitor Economy Strategy (VES) 2030

¹⁰ Destination Networks: Driving Growth of the Visitor Economy in Regional NSW <https://www.destinationnsw.com.au/wp-content/uploads/2016/07/Destination-Networks-29-June-2017.pdf>

Destination NSW

As the lead NSW Government agency for the visitor economy, Destination NSW will coordinate and amplify the delivery of the programs and initiatives of the NSW Visitor Economy Strategy (VES) 2030 across all levels of Government.

A whole-of-government approach has been embedded in visitor economy planning with the establishment of a new Visitor Economy Senior Officers Group to ensure visitor economy strategies are coordinated across government, monitor performance against targets, and respond to emerging issues.

New approaches to industry engagement and consultation are also proposed to inform the development of new NSW Government initiatives and programs for the visitor economy. The NSW Government will continue to develop the Visitor Economy Index to explore new ways of measuring the impact of the visitor economy and guide future decision-making.

DNSW will support the Destination Networks to deliver the strategic directions of the DMPs and grow the visitor economy.

Department of Regional NSW

The Department of Regional NSW is the NSW Government's central agency for regional issues, building resilient regional economies and communities, strengthening primary industries, managing the use of our valuable regional land, overseeing the state's mineral and mining resources and ensuring that government investment into regional NSW is fair and delivers positive outcomes for local communities and businesses.¹¹

The NSW Government's 'Regional Development Framework' and '20-Year Economic Vision for Regional NSW – Refresh' set out the Government's priorities and plans to achieve long-term social and economic success for regional communities across the state. In addition, Regional Economic Development Strategies provide a clear economic development strategy for the regions and guide government investment in economic development initiatives in regional NSW.

¹¹ <https://www.regional.nsw.gov.au>



**Tocal Homestead in Dungog Shire,
courtesy of Destination NSW**

Local Government

Local Government plays a pivotal role in tourism activity, with councils actively involved in promoting tourism, providing infrastructure and services to support tourism, and managing the impacts of tourism. The Australian Regional Tourism and Economic Development Australia benchmarking survey of local governments (2020) shows that each council spends on average \$761,000 on tourism annually. Whether it's through the provision of infrastructure, cultural facilities, events, visitor services or public spaces, councils support the economic development of their local communities via either direct financial or in-kind support of tourism. The role of local government in tourism is also recognised in the State Government's NSW Visitor Economy Strategy (VES) 2030, which contains a commitment for Destination NSW to work closely with councils and a principle of collaboration between the industry and government, including councils¹².

Other Key Support Partners

Other Local, Regional, State and National stakeholders including Industry and Government will have important roles as part of developing the Visitor Economy in the Destination Sydney Surrounds North Region, including:

- Local tourism organisations
- Tourism industry operators
- Regional Joint Organisations
- NSW Government Departments and Agencies (represented by the DNSW Visitor Economy Seniors Officers Group)
- NSW Tourism Industry Associations

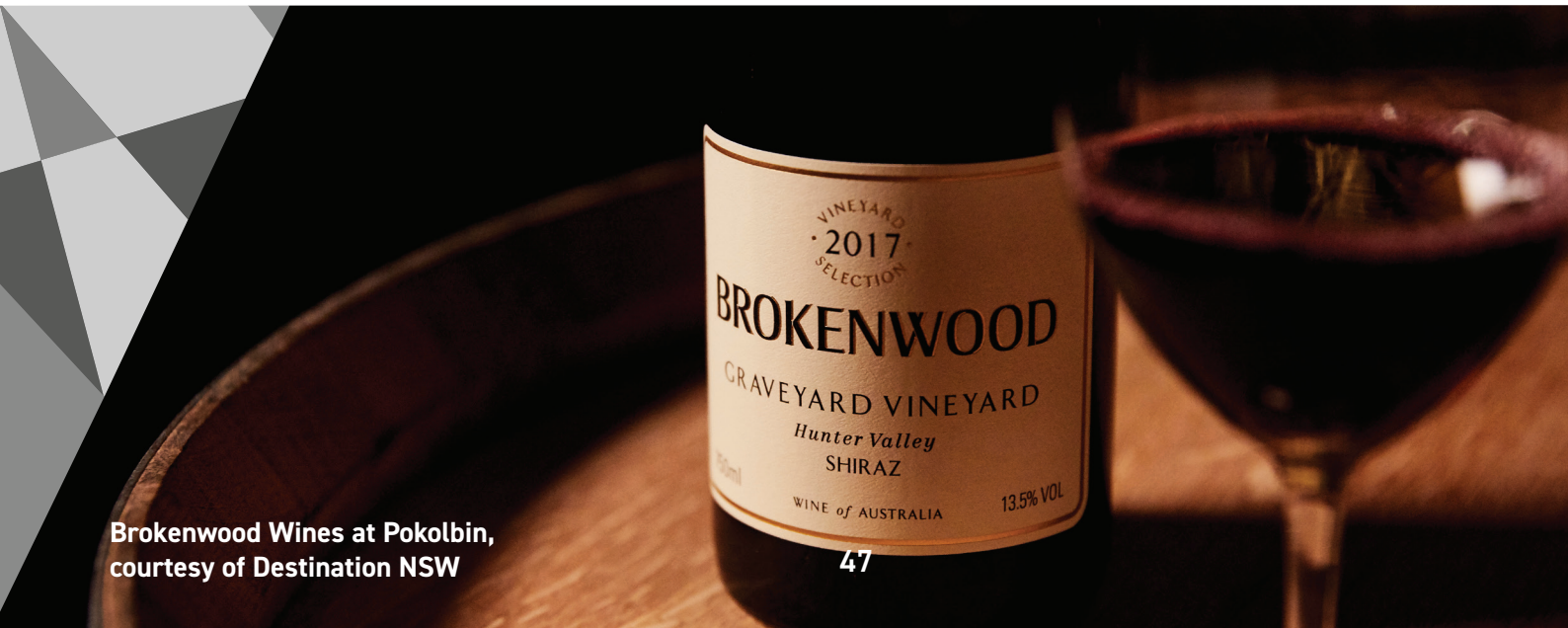
¹² <https://lgnsw.org.au/Public/Public/Policy/Tourism.aspx>

Review

Monitoring the implementation of this Plan's strategies and actions is important to ensure its vision and objectives are achieved and to provide new information that can be used to inform planning and decision-making for the Destination Sydney Surrounds North visitor economy to 2030. A review of this plan will be undertaken in 2024 and 2026.

Visitor Infrastructure Framework Assessment Criteria

The NSW Government uses cost benefit analysis to assess the social, economic and environmental impacts of infrastructure proposals, including visitor economy infrastructure. Where feasible, cost benefit analysis will be used to prioritise proposals for regional NSW visitor economies and has been designed to help guide prioritisation and decision-making. See Appendix 2 for the criteria used by the NSW Government to analyse the cost benefit of infrastructure development proposals.



Appendices



Appendix 1: NSW Government Strategies Relevant To The Regional Visitor Economy

STATEWIDE STRATEGIES

NSW Visitor Economy Strategy (VES) 2030
 NSW 2040 Economic Blueprint
 Global NSW Strategy
 The Greater Sydney Region Plan
 24-Hour Economy Strategy 2020
 Staying Ahead: State Infrastructure 2022 to 2042
 Tourism & Transport Plan: Future Transport Strategy 2056
 Smart Places Strategy
 Study NSW International Education Strategy

REGIONAL STRATEGIES

20-Year Economic Vision for Regional NSW 2021
 Making It Happen in the Regions: Regional Development Framework
 Future Ready Regions 2021
 Regional NSW Services and Infrastructure Plan
 Regional Economic Development Strategies 2018 to 2022 (and updates)
 Department Planning Industry Environment - Regional Plans

RELEVANT VISITOR ECONOMY STRATEGIES

Crown Lands 2031
 NPWS Visitor Infrastructure Program
 NSW Forestry Corporation - Recreation & Tourism Policy 2018
 NSW Marine Estates - Mainland Marine Park Network - Draft Management Plan 2021 to 2031
 Port Authority of NSW - Vision & Strategic Plan 2020 to 2025
 Create NSW - Arts & Cultural Policy Framework
 Heritage NSW - Heritage Act Review 2021
 Invest NSW - Independent Brewers Action Plan 2020
 Planning NSW - STRA Policy 2021 & Planning Amendments for Agritourism

Appendix 2: NSW Government Cost Benefit Analysis

ASSESSMENT CRITERIA

The NSW Government uses cost benefit analysis to assess the social, economic and environmental impacts of infrastructure proposals, including visitor economy infrastructure. Where feasible, cost benefit analysis will be used to prioritise proposals. The following considerations are designed to help guide prioritisation and decision-making.

ASSESSMENT CRITERIA	KEY CONSIDERATIONS
Creates growth opportunities from domestic and international markets	<p>Facilitate growth in demand and address capacity constraints to develop a nationally and globally competitive visitor economy.</p> <ul style="list-style-type: none"> The investment addresses identifiable capacity constraints or supports growth in demand as informed by national and international benchmarking, Regional Economic Development Plans and Destination Management Plans. The investment supports the 2030 Visitor Expenditure Targets and aligns with the Sydney and NSW brand.
Supports a prosperous NSW	<p>Create economic benefits that outweigh the economic costs.</p> <ul style="list-style-type: none"> The investment generates economic benefits either in the form of increased tourism expenditure, which benefits NSW economy through higher employment and value added. The investment generates economic benefits for local residents through access to additional infrastructure and amenities. The investment generates increased opportunities for direct and indirect employment. The economic benefits outweigh the costs to the government of supporting the infrastructure.
Aligns and supports other infrastructure strategies and plans	<p>Recognise alignment and support for other government strategies.</p> <ul style="list-style-type: none"> Promotes urban and regional development. Creates sustainable commercial opportunities for Indigenous cultural businesses and support Indigenous tourism. Supports accessible, inclusive, and special interest tourism and encouraging skill development in the sector. Develops and renew regional government assets. Aligns with the objectives in REDs, DMPS and local government policies and plans.

ASSESSMENT CRITERIA (continued)

ASSESSMENT CRITERIA	KEY CONSIDERATIONS
Supports equity and access for all	<p>Distribute benefits to disadvantaged and local communities.</p> <ul style="list-style-type: none"> • The infrastructure utilises universal design principles and promotes accessibility. • Promotes increased participation of disadvantaged young people. • Promotes increased participation of Aboriginal people. • Sustains jobs and generates additional jobs in the visitor economy and associated supply chains. • Supports and benefits local groups.
Fosters a sustainable visitor economy	<p>Ongoing financial viability and contribution to a sustainable and resilient visitor economy.</p> <ul style="list-style-type: none"> • The investment generates revenue to support operation and management that is likely to minimise unexpected government outlays. • Promotes year-round visitation and grows capacity to reduce reliance on visitation in peak seasons. • Incorporates environmentally sustainable features (such as renewable energy, waste reduction, water, and energy efficiency). • Improves the public realm and adds to the sense of place and community. • Is built in an appropriate location with appropriate materials and responds to the changing climate including more extreme and frequent natural disasters such as bushfires, flood, coastal erosion and inundation.



Personnel



CHAIR David Fellows

David Fellows has over 30 years' corporate experience in the international tourism and customer service industries, including working for Qantas, British Airways and the Hong Kong Tourist Association in a variety of senior marketing and regional development positions.

David has served on the Boards of Central Coast Tourism and the Australian Federation of Travel Agents and as Chairman of the East Asia Travel Association (Australian/New Zealand Chapter) and the Association of National Tourism Office Representatives. David has served as Chair of Destination Sydney Surrounds North since inauguration in 2017.



DIRECTOR John McCarthy

John McCarthy has extensive experience in senior management and corporate governance. Mr McCarthy currently serves as Chairman for Australian Enterprise Holdings Pty Ltd, EP&T Global, Playoust Churcher Architects, Sustainable Built Environment National Research Centre and The Village Building Co. Ltd.

Mr McCarthy is also a Board Member of the McGrath Group and Northern Metropolitan Cemeteries and Crematorium Trust. Mr McCarthy was awarded an Order of Australia in 2009 for his service to the property and construction industry.



DIRECTOR Christina Tulloch

Christina is the great-granddaughter of the original founder of Tulloch Wines and an active member of the Australian Wine industry. She has held various roles on national and regional bodies and was the first female President of the Hunter Valley Wine & Tourism Association from 2020-2021, where she remains as a Director.

Christina has grown Tulloch Wines into an enormously successful direct-to-consumer wine company with a focus on edutainment to bring her love of wine to the people. She has been instrumental in championing the brand philosophy of 'wine, your way' and is a leader in the areas of wine tourism and its associated 'experience economy' through her dedication to creating experiences that reach beyond the bottle, creating better lives of wine, food, family, and friends.



DIRECTOR Andrew MacDonald

Andrew Macdonald is a 25-year veteran of the hospitality industry who currently owns and operates several hospitality businesses: a boutique hotel in Port Stephens, the Hotel Nelson, the Little Nel Café in Nelson Bay, and more recently, the Signal Box restaurant in Newcastle. Signal Box was developed from scratch and involved converting a state listed heritage building into a high-end restaurant, which has become a key dining attraction in Newcastle's fast-developing city centre.

Andrew served on the Board of Destination Port Stephens for ten years including five years as Chairman. He holds a Bachelor of Business in Tourism and a Master of Marketing.






DIRECTOR Fiona Dalton

Fiona has over 30 years of travel and tourism experience across the corporate and leisure sectors in the Australian market. In 2017 she won the Women in Travel Award for the Cruise Sector, and in 2018 she was voted Best Female Leader in Travel by the readers of *Kerry On* and noted as 7th most influential on the *Women in Travel Power List* in Australia.

Fiona holds a Master of Business Administration from Southern Cross University and is a member of the AICD.

Personnel (continued)

	<p>GENERAL MANAGER Glenn Caldwell</p> <p>Glenn has served as General Manager since the inception of the Destination Networks in NSW and comes to this important role with over 20 years' experience in tourism and major events. He has been responsible for developing and implementing Destination Management Plans, including investment attraction, strategic partnerships, major events strategy, tourism research, visitor services, brand and destination marketing.</p> <p>In a range of Regional Tourism roles Glenn has operated successfully in both corporate and government environments. Glenn's skills neatly complement those of the experienced DSSN Board.</p>
	<p>INDUSTRY DEVELOPMENT MANAGER Michael Forster</p> <p>With over 20 years' experience in hospitality and tourism, Michael is a true industry professional. Michael has been with Destination Sydney Surrounds North since early 2018 and has helped deliver on the organisation's Strategic Priorities including 'Maximising Funding Potential To Region' and 'Industry Development'.</p> <p>Michael is well-connected with all levels of the industry as well as having a wealth of knowledge on the Visitor Economy and resources to assist stakeholders.</p> <p>Previously, Michael has worked for international hotel brands, including TFE Hotels and The Minor Hotel Group, as well as the corporate sector. His diverse range of skills nicely complements his strong passion for the Visitor Economy and Regional NSW.</p>
	<p>EXECUTIVE ASSISTANT Michelle Jenkins</p> <p>Michelle Jenkins is a well-rounded and organised Executive Assistant with a solid background in office administration, data and records management, diary management, prioritising work and bookkeeping. She is a multi-tasking Executive Assistant with professional customer service skills and a high work ethic.</p> <p>Michelle has been with Destination Sydney Surrounds North since 2017 and is responsible for the implementation of the administrative systems. Her connections across multiple industries and demographics ensure she is the conduit to event and meeting planning and this complements the smooth operation of the organisation.</p> <p>Michelle is regarded as a highly competent Office Manager who has managed offices in both private enterprise and the public sector.</p>

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