

Tablelands Destination Development Plan 2020 to 2025

July 2020



Destination
Southern NSW

Disclaimer

The information contained in this Plan is intended only to inform and should not be relied upon for future business investment or other decisions. It is expected that any specific recommended actions should be analysed and appropriate due diligence undertaken prior to making any investment decisions.

Recommended actions contained in the Tablelands Destination Development Plan 2020 to 2025 have been made on the basis of assumptions, methodology and information provided from many sources. The authors, and Destination Southern New South Wales, accept no responsibility or liability for any errors, omissions or resultant consequences including any loss or damage arising from reliance on the information contained in this Plan.

It should also be noted that visitation data presented in this Plan for the Tablelands region is an approximation of the administrative boundaries of the region. Definitions can vary between data sources over time and data should be used with caution.

Acknowledgements

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Sincere thanks are also offered to Destination New South Wales, Visit Canberra and the Destination Southern New South Wales Board for their strategic advice and support of this planning project.

Thanks are also offered to Councillors and senior staff of the five Local Governments (Goulburn Mulwaree, Hilltops, Upper Lachlan, Yass Valley and Queanbeyan-Palerang) for their interest and cooperation in this project.

We would also like to acknowledge the representatives of stakeholder organisations across the Tablelands region that participated in the engagement process representing government, business and community interests. Thank you for your interest and your valuable contributions to help create this Plan, and the associated local area Destination Action Plans, to serve as a framework to guide and foster on-going collaboration, and aspirations to grow and further develop the region's visitor economy over the next five years.



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Acronyms used in this report

ACT	Australian Capital Territory
ARTN	Australian Regional Tourism Network
CRJO	Canberra Regional Joint Organisation
DAP	Destination Action Plan
DMP	Destination Management Plan
DNSW	Destination New South Wales
DSNSW	Destination Southern New South Wales
GVA	Gross Value Added
LGA	Local Government Area
NBT	Nature based tourism
NSW	New South Wales
SC	Steering Committee
TRA	Tourism Research Australia
TDDP	Tablelands Destination Development Plan
UNWTO	United Nations World Tourism Organisation
VC	Visit Canberra
VFR	Visiting Friends & Relatives
YE	Year Ending



Executive Summary

The Tablelands Destination Development Plan has been developed to create a roadmap to guide the collaborative work of local, regional and state tourism stakeholders to grow, develop and promote the Tablelands region and its towns and villages as a distinct new, appealing and competitive tourism region in NSW.

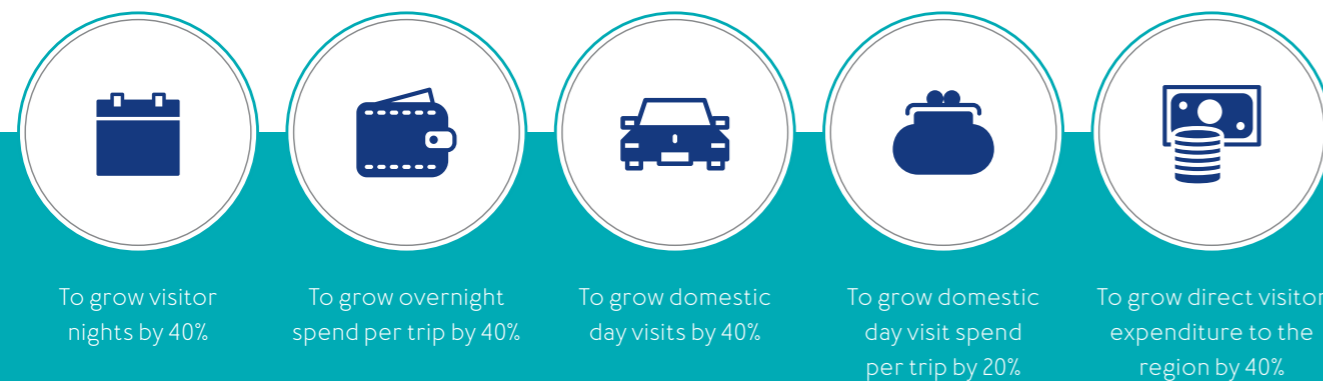
The Tablelands' region comprises the five Local Government Areas (LGAs) – Goulburn Mulwaree Council, Hilltops Council, Yass Valley Council, Upper Lachlan Shire Council and Queanbeyan-Palerang Regional Council. DSNSW committed funding to the project that was supported with funding from the LGAs.

The region has achieved incremental growth over the past ten years and each LGA has been working individually, some with relatively limited resources (human and financial), to grow their local visitor economies. All stakeholders agree, the time is right to kick start a new way to think about how to further develop and sustainably grow the visitor economy so it can be better positioned as an appealing and emerging tourism region in NSW.

The Tablelands Destination Development Plan 2020 to 2025 is an important outcome of comprehensive research, analysis and stakeholder engagement processes, and has been prepared to integrate and leverage with other stakeholder strategic plans across local, regional and state/territory levels.

Tourism is currently estimated to contribute \$539 million direct visitor expenditure to the Tablelands visitor economy². Daytrips currently account for the bulk of visitors to the region. Increasing direct visitor expenditure and overnight visitation are therefore important to growing the region's visitor economy. Collaboration is the key to ensure each LGA has the opportunity to achieve equal growth as part of the development of the region.

Tablelands Visitor Economy Objectives 2025



¹The name Tablelands is used to identify the region throughout the Plan. It is recommended that a brand identity process be undertaken as an early priority of this plan to determine a clear brand identity and positioning story for the region.

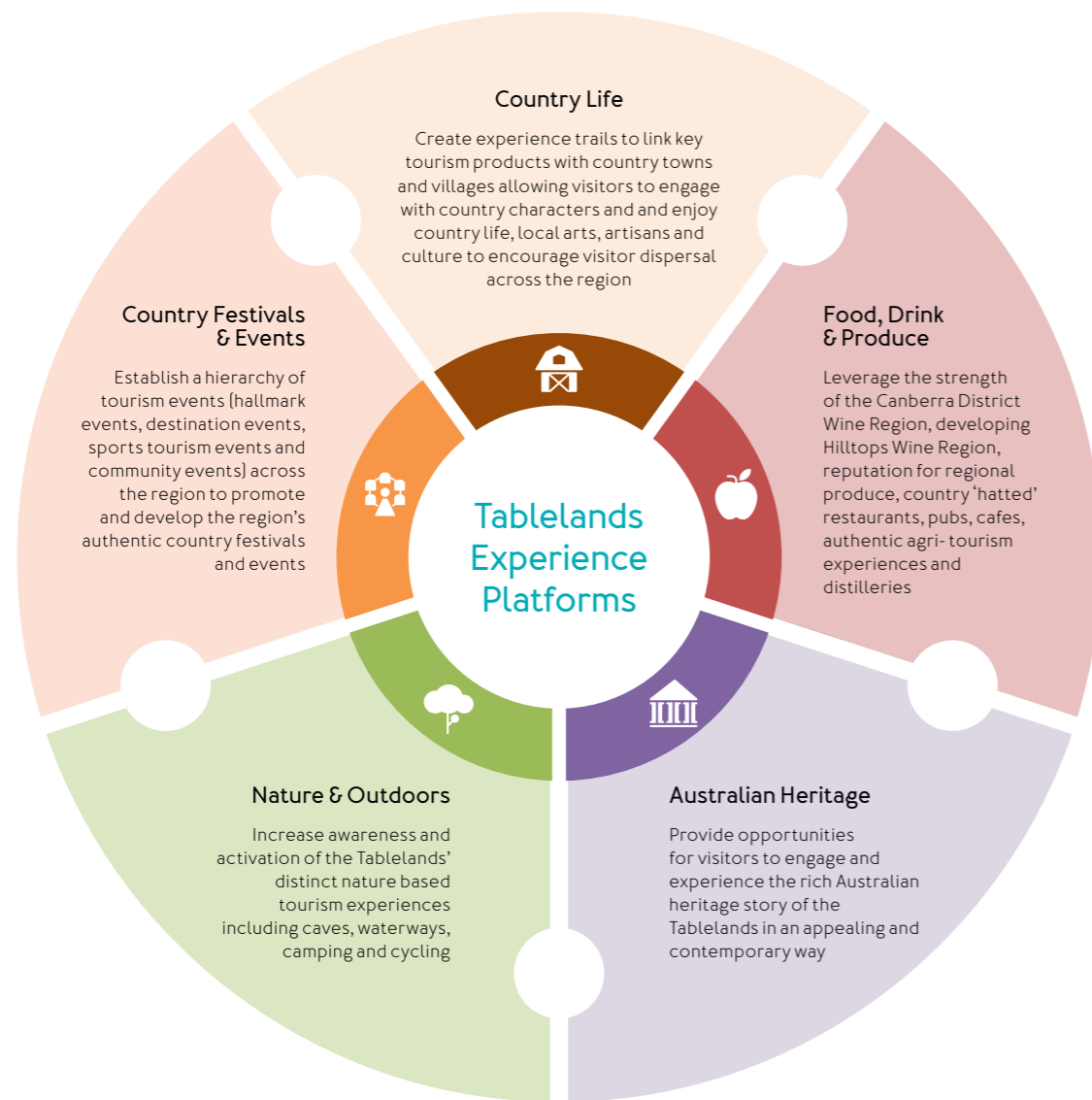
²TRA (2018) visitor regional expenditure data at LGA Profiles

It should be noted that the TRA data provides the only consistent measures of visitation and visitor expenditure data. Visitor economy objectives are based on analysis of this data at the time of preparation of this Plan. Achievement of benchmark goals may also be influenced by external factors such as changes to broader economic conditions and other unforeseen conditions/influences.

The region is currently not widely acknowledged and promoted as a tourism region by government, industry, community stakeholders and visitors. Priorities for the next five years focus on establishing a sound collaborative delivery framework to lead and implement the actions of this Plan, as well as supporting the five LGAs and industry stakeholders to further develop tourism products, experiences and infrastructure to position the region as a distinct tourism region to grow the Tablelands visitor economy. Six strategic priorities and associated actions have been established to guide the work of tourism stakeholders over the next five years.

Priority	Action	Strategy
1	Collaborate	Work collaboratively with local, regional and state tourism stakeholders to support the positioning of the region and its towns and villages as a distinct tourism region within New South Wales
2	Develop	Support LGAs to further develop tourism products and infrastructure to increase the appeal and attractiveness of the region and its towns and villages
3	Brand	Create a clear brand identity and positioning story for the region
4	Promote	Create a 3-year cooperative marketing campaign and review visitor information service content and delivery across the region to ensure a consistent approach to the promotion of the region to key visitor markets
5	Advocate	Advocate the benefits of growing the visitor economy to local governments, industry and communities
6	Evaluate	Establish a set of consistent evaluation measures to track visitor economy growth and evaluate the implementation of the TDDP and DAPs annually

Five experience platforms are proposed to drive and coordinate tourism product and experience development across the Tablelands region over the next five years. It is proposed that experience trails be created to link key tourism products with towns and villages allowing visitors to experience and enjoy country life while encouraging visitor dispersal across the region.



Five LGA Destination Action Plans (DAPs) have been prepared that integrate with the priorities of the Tablelands Destination Development Plan providing specific local level priorities and associated actions for each of the LGAs to develop and grow their visitor economies.

The five LGAs have an important lead role in place-making and development of supporting infrastructure and facilities to make their towns and villages good places to live and visit. LGA business development support to new and existing private investors and entrepreneurs is also critical to create an attractive investment environment for the development of tourism products and experiences that can drive increased overnight stays and visitation expenditure to their local areas. The LGA Destination Action Plans provide specific actions related to this objective.

This Plan is intended to be a living, practical document and includes tangible actions and catalyst opportunities to activate the potential of the region to gain competitive advantage in the regional tourism marketplace. A shared annual review process is also embedded to respond to the dynamic tourism environment.

The Tablelands Destination Development Plan 2020 to 2025 will guide the region's priorities over the next five years and will require cooperative support from other tourism stakeholders across local, regional and state/territory levels to successfully implement the Plans' initiatives. Stakeholder engagement confirmed a commitment from local governments, tourism businesses, Destination Southern New South Wales, Destination New South Wales and Visit Canberra to develop a solid working relationship to achieve the outcomes prioritised in this Plan.

Regional Visitor Economy Vision:

By 2025, the Tablelands will be recognised as a distinct tourism region within NSW offering diverse attractions and experiences to attract overnight and daytrip visitors to explore the region year-round. The visitor economy will be acknowledged as an important contributor to the social and economic fabric of the region.

1.0 Introduction

Destination Southern New South Wales commissioned the preparation of the Tablelands Destination Development Plan 2020 to 2025, and integrated local Destination Actions Plans, to create a collaborative Regional Visitor Economy Action Planning Framework to guide the work of local, regional and state tourism stakeholders to grow, develop and promote the region’s visitor economy to 2025.

The Tablelands Destination Development Project³ is identified as one of seven priorities derived in the *Destination Southern New South Wales Regional Destination Management Plan (DMP) 2018 to 2020*.

The Project involves Destination Southern New South Wales (DSNSW), Destination New South Wales (DNSW) and the five Local Government Areas (LGAs) – Goulburn Mulwaree Council, Hilltops Council, Yass Valley Council, Upper Lachlan Shire Council and Queanbeyan-Palerang Regional Council. DSNSW committed funding to the project that was supported with funding from the LGAs.

The aim of the project is to prepare a realistic, achievable and collaborative Regional Visitor Economy Planning Framework that fosters learning, trust and rapport amongst stakeholders to create a roadmap to work collaboratively to grow, develop and promote the region and its towns and villages as a distinct new, appealing and competitive tourism region in NSW.

The region has achieved incremental growth over the past ten years and each LGA has been working individually, some with relatively limited resources (human and financial), to grow their local visitor economies. All stakeholders agree, the time is right to kick start a new way to think about how to further develop and sustainably grow the visitor economy so it can be better positioned as an appealing and emerging tourism region in NSW.

The Tablelands Destination Development Plan 2020 to 2025 is an important outcome of comprehensive research, analysis and stakeholder engagement processes, and has been prepared to integrate and leverage with other stakeholder strategic plans across local, regional and state/territory levels.

Priorities for the next five years focus on establishing a sound collaborative delivery framework to lead and implement the actions of this Plan, as well as supporting the five LGAs and industry stakeholders to further develop tourism products, experiences and infrastructure to position the region as a distinct tourism region to grow the Tablelands visitor economy. Six strategic priorities and associated actions have been established to guide the work of tourism stakeholders over the next five years.

³ The name Tablelands is used to identify the region throughout the Plan. It is recommended that a brand identity process be undertaken as an early priority of this plan to determine a clear brand identity and positioning story for the region.

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The five LGAs have an important lead role in place-making and development of supporting infrastructure and facilities to make their towns and villages good places to live and visit. LGA business development support to new and existing private investors and entrepreneurs is also critical to create an attractive investment environment for the development of tourism products and experiences that can drive increased overnight stays and visitation expenditure to their local areas. The LGA Destination Action Plans provide specific actions related to this objective.

The Tablelands Destination Development Plan 2020 to 2025 will guide the region’s priorities over the next five years and will require cooperative support from other tourism stakeholders across local, regional and state/territory levels to successfully implement the Plans’ initiatives. Stakeholder engagement confirmed a commitment from local governments, tourism businesses, Destination Southern New South Wales, Destination New South Wales and Visit Canberra to develop a solid working relationship to achieve the outcomes prioritised in this Plan.

Figure 1: Tablelands Regional Visitor Economy Action Planning Framework



Planning for Recovery of Regional Tourism in Australia

This Plan has been prepared in the context of global, national, state, regional and local trends and issues. This project commenced in November 2019 at the time when regional Australia continued to be in drought and then suffered severe bushfires over the summer period 2019/2020. From March 2020, the Australian visitor economy was then severely impacted by the Covid-19 global pandemic that stopped international and domestic travel. A survey undertaken with 1200 Australians in March 2020 found aspiration to travel remains strong among Australians with 43% of Australians looking to travel. Older [55+], more affluent, educated and socially engaged Australians are most likely to be open to travelling. Domestic travel is the most likely to recover first - driven by this group with local being king*. In terms of international travel, the UNWTO advises 'considering the unparalleled and fast-evolving nature of the crisis, it is extremely challenging to estimate the impact of COVID-19 on international tourism...we don't know when we will see the end of this crisis. Coordinated and strong mitigation and recovery plans to support the sector can generate massive returns across the whole economy and jobs'. As such, this Plan has been prepared to provide a framework to best position the Tablelands and its LGAs to grow and develop following recovery and in a highly dynamic tourism environment.

The Tablelands Destination Development Plan has been designed as a living strategic document that has been developed to:

- **Respond to important issues and opportunities** that were identified in research and engagement processes undertaken to inform the development of this Plan
- **Establish a shared vision** with government, business and community stakeholders for the future of tourism across the region
- **Integrate recognised best practice strategies** for the sustainable development, management and marketing of the region
- **Encourage a productive and integrated working relationship** between industry and government stakeholders, guided by an appropriate collaborative management framework for on-going resourcing for collaborative marketing and development activities to help grow the visitor economy across the region over the next five years
- **Determine important implementation priorities** over the first year
- **Identify the roles and responsibilities of tourism stakeholders** in the implementation of the plan to 2025
- **Recognise the role of local governments** leading the sustainable tourism growth and development of their local visitor economies through the provision of financial and human resources, and as the custodian and manager of key assets, supporting facilities and amenities
- **Develop, grow and promote the range and quality of tourism product and experiences** across the region
- **Ensure that tourism is recognised as an important source of economic development** by local governments and the private sector
- **Enable the industry across all parts of the region to be sustainable** and contribute positively to the local communities and environment
- **Adapt to changing conditions, issues and opportunities** as they arise
- **Incorporate an annual monitoring and evaluation process.**

*MyTravel Research.com [2020] Australian responses to bushfires and Covid-19, April.

*UNWTO [2020] Impact assessment of the Covid-19 outbreak on international tourism, 24 March.

2.0 Integrated Planning Approach

The Tablelands Destination Development Project proposes a new and integrated approach to regional tourism planning in New South Wales that is bottom-up, evidence-based and action orientated across local, regional and state levels.

A comprehensive strategic planning process was created to inform and guide the development of a five-year Tablelands Destination Development Plan (TDDP) and aligned LGA Destination Actions Plans (DAPs). The process involved four stages that were undertaken from November 2019 to June 2020 (see Table 1). A Tablelands Project Steering Committee, comprising a representative from DSNSW, DNSW and each of the five LGAs, was established at the outset of the project to guide and inform the planning process.

The Project adopts a ‘bottom-up approach’ that considers how LGAs plan, manage and market their local areas and stakeholder views about a vision for tourism and opportunities, and challenges for development of their visitor economies. From this local level understanding it is then possible to understand the region as a whole and identify regional strategic priorities to best support the LGAs to come together as a collaborative tourism region. The strategic approach used to inform the development of this Plan is depicted in Figure 2.

Why a Bottom-Up Approach?

Given the potential of tourism to contribute to the sustainability of regional economies, governments around the world are encouraging the development of bottom-up, locally designed and owned strategies aimed at promoting growth potential for local and regional economies, and tapping into unused potential within regional areas to address sustainable development and human wellbeing. For tourism, new policies should therefore aim to increase the competitiveness of the local region through improving quality of the tourism experience and promoting innovation in tourism services⁶.

⁶Tomaney, J. (2010). Place-based approaches to regional development: Global trends and Australian implications. Australian Business Association: Sydney, Australia.

Table 1: Tablelands Destination Development Strategic Planning Process

Stage	Timing	Description	
Confirm	October 2019	Consultation undertaken by DSNSW with Council General Managers and tourism staff representing the five LGAs, confirmed an understanding that collaboration is beneficial and a willingness to work together and commit funds to contribute to the development of LGA Destination Action Plans	
Learn	November 2019	Explore Project Steering Committee views for a regional vision for the visitor economy and about the main opportunities and challenges to further develop and position the region	
Evidence	January to March 2020	Prepare a comprehensive Tablelands Visitation Analysis Report of Tourism Research Australia (TRA) findings for the Tablelands region to YE June 2019 including five-year trends, visitor profiles, source markets, visitor expenditure, visitor activities and comparison regions Undertake consumer perceptions research to better understand short break travel behaviour and views about the region as a tourism destination (current and potential visitors) in key source regions (e.g. Sydney, regional NSW, ACT) and prepare a Report of Findings	
Plan	February to April 2020	Analyse	Prepare a Situational Analysis Report that reviews background information relevant to the Tablelands visitor economy including local, regional strategies, plans and research relevant to growing the visitor economy
		Engage	Engage with the five Councils and their industry stakeholders to help determine a vision for tourism for their local area and identify important opportunities and challenges to sustainably grow tourism over the next five years Engage with key state and regional stakeholders (e.g. DSNSW, DNSW, Visit Canberra) to explore how the region can best work together to improve visitor economy outcomes Prepare a Stakeholder Engagement Report of findings <i>A variety of engagement methods were used to engage diverse stakeholder interests (see Appendix 1)</i>
	May/June 2020	Develop	Consider findings from the stages above to develop five individual LGA draft Destination Action Plans (DAPs) that link to a draft regional Tablelands Destination Development Plan (TDDP) Review by Project Steering Committee prior to presentation of Draft Plans to Council and industry representatives for feedback prior to the preparation of Final Plans

Figure 2: Strategic Tourism Planning Approach



Adapted from Dredge, D. 2008. Managing Local Tourism Master Class: Eastern Metropolitan Regional Council Workshop Materials, Southern Cross University, Tweed Heads, Australia.



3.0 Regional Vision

The following vision was created from engagement with local government, industry and community stakeholders and will be used to guide the implementation of the Tablelands Destination Development Plan to 2025.

Regional Visitor Economy Vision:

By 2025, the Tablelands will be recognised as a distinct tourism region within NSW offering diverse attractions and experiences to attract overnight and daytrip visitors to explore the region year-round. The visitor economy will be acknowledged as an important contributor to the social and economic fabric of the region.

This vision aligns with current LGA community visions and related visitor economy strategies.

Table 2: LGA Community visions and related visitor economy strategies

LGA	Community Vision	Related Visitor Economy Strategies
Goulburn Mulwaree Yass Valley Upper Lachlan	To build and maintain sustainable communities while retaining the region's natural beauty ⁷	Strategic Priority: Our Economy: Strategy EC2 Jointly develop appropriate tourism opportunities and promote the region as a destination
Hilltops	In 2030 the Hilltops is a thriving region offering a relaxed country lifestyle and diverse economy. We value and protect our friendly community spirit, pristine natural environment, and deep cultural heritage. There are strong connections between our community, environment, economy, infrastructure and Council, making the Hilltops region a vibrant place to live, work and visit	Objective 1: A thriving and diverse economy for business, tourism and investment
Queanbeyan-Palerang	A place offering a wonderful lifestyle for families, a lifestyle created in large part by passive and active enjoyment of the natural and built environment	Strategic Pillar 2: Choice 2.2 We will promote Queanbeyan-Palerang as a tourism destination of choice

Local Visitor Economy Visions 2025

LGA	Visitor Economy Vision
Goulburn Mulwaree Council	Continue to support the development of catalyst infrastructure and facilities to stimulate new business investment, attract sports tourism and vibrant cultural events to grow a year-round visitor economy and help position the Goulburn area as a great place to live, stay and explore the Tablelands region.
Hilltops Council	By 2025, Hilltops will be recognised as a quality regional food, wine and produce region offering visitors opportunities to stay and experience its beautiful landscapes and authentic country experiences. The visitor economy is also recognised by Council and community as an important contributor to the wellbeing of the community.
Upper Lachlan Shire Council	By 2025 Council, community and industry are united to ensure that tourism is a leading driver of the sustainable development of the Upper Lachlan economy offering appealing products and experiences for visitors to stop, stay and spend in the local area.
Yass Valley Council	By 2025 Council and industry will be working cooperatively to develop and position the Yass Valley as home to the Canberra District Wine Region offering visitors opportunities to stay and explore Tablelands' food, wine and drink, local artisans, distinct Australian heritage and culture, nature based tourism opportunities, and country festivals and events.
Queanbeyan-Palerang Regional Council	To be a desired short stay destination where our visitor economy connects our region, honours our heritage and inspires a future of possibilities.

⁷Goulburn-Mulwaree, Yass Valley and Upper Lachlan share the same Community Vision as identified in The Tablelands Regional Community Strategic Plan 2016 to 2036.

4.0 Defining the region

The Tablelands is recognised in the Destination Southern New South Wales Destination Management Plan (DMP) as a 'sub-region' of Southern New South Wales. The region comprises the five LGA areas, Goulburn Mulwaree Council, Hilltops Council, Yass Valley Council, Upper Lachlan Shire Council and Queanbeyan-Palerang Regional Council.

The region includes the major towns of Crookwell, Goulburn, Queanbeyan, Yass, Young and a number of smaller towns and villages (see Figure 3).

The region's proximity to population centres in Canberra and Sydney provide important opportunities to position the region and its towns and villages as a distinct tourism region in NSW. The towns of Goulburn and Yass lie on the main north-south road between Sydney and Melbourne and are important gateways for visitors to stay and explore the region while Queanbeyan and Braidwood provide gateways for Canberrans and visitors coming to and from the South Coast of NSW.

The region is, however, currently not widely acknowledged and promoted as a tourism region by stakeholders – government, industry, community and visitors.

The concept of 'liveability – a great place to live, work and invest' is also identified as an important growth opportunity across the region's LGAs, with people attracted to live in the region for a range of lifestyle and economic opportunities that may have implications for further enhancing the region as a good place to visit. Continued transport infrastructure development across the region is recognised as important to servicing the regions' growing populations, facilitating improved visitor access and destination appeal. The development of other community infrastructure and place-making initiatives will also help to strengthen the character and liveability of the region for residents and visitors.

Growing the region's appeal, as a place to live and visit will, however, require on-going infrastructure improvements as identified in the respective Regional Economic Development and LGA strategies. Consideration of visitor needs in terms of appealing tourism product and experience development and supporting infrastructure, amenities and services will also be important.

Figure 3: The Tablelands Region



The ACT Connection

Queanbeyan-Palerang, Yass Valley and parts of Upper Lachlan are highly connected to the ACT and this is likely to become more significant into the future.

Queanbeyan-Palerang is located only 10km from Canberra International Airport and acts as a regional centre for state government service delivery. The ACT Government promotes 'Canberra plus 3 hours' as an economic zone of 800,000+ people that was highlighted as part of the ACT Government's business case to secure direct international flights to Canberra Airport. Significantly, 63% of people (about 18,500) that live in Queanbeyan-Palerang work in the ACT. Projections indicate a high rate of population growth for the Queanbeyan-Palerang region to 2036, with the population increasing by more than 50 per cent to around 86,200 people.

The Yass Valley area is also fast becoming a dormitory area for Canberra and there are increased commuter flows from Goulburn to Canberra that are predicted to become more significant into the future. The southern regions of the Upper Lachlan have also become dormitories for Canberra workers.

Tablelands Local Government Areas

A brief snapshot of the five LGAs is presented below.

Table 3: LGA Descriptions and Visitor Economy Drivers

LGA	Description	Visitor Economy Drivers
Goulburn Mulwaree	As Australia's first inland city, Goulburn's rich modern services complement the city's heritage and natural beauty. The city and villages combine genuine country warmth with easy access from the Hume Highway.	<ul style="list-style-type: none"> ■ Goulburn is an important stopover point for visitors travelling by road (and rail) between Sydney, Canberra and Melbourne ■ Goulburn has a good range of accommodation options for overnight visitors including the recent development of new properties ■ Council has invested in infrastructure and facilities development that help to make Goulburn a good place to live, invest and visit (e.g. new Performing Arts Centre, refurbished Regional Art Gallery, Adventure Playground, Wollondilly River Walking Track, Aquatic Centre Redevelopment, War Memorial Museum) ■ Council recognises the importance of taking a lead role in the development and marketing of tourism and events for the Goulburn Mulwaree area ■ Council is committed to growing a year-round calendar of cultural and sports tourism events.
Yass Valley	Yass Valley has a proud heritage, a modern and well renowned food and wine scene, a thriving arts scene, boutique shopping and abundant outdoor experiences.	<ul style="list-style-type: none"> ■ Close proximity to Canberra and the Australian Capital Territory ■ Canberra District Wine Region that is positioned as one of the leading wine regions in New South Wales ■ Yass Valley has a good range of accommodation options for overnight visitors including the recent development of a new property in Murrumbateman ■ Council resourcing support for tourism ■ Private sector investment and passionate local entrepreneurs that have recognised the potential of the area.

Table 3: LGA Descriptions and Visitor Economy Drivers

LGA	Description	Visitor Economy Drivers
Upper Lachlan	Named as the Shire of Villages, the Upper Lachlan is dotted with picturesque townships along the Great Dividing Range each with their own stories. The major townships of Gunning, Crookwell and Taralga offer the visitor an excellent base to explore the countryside, caves and waterways.	<ul style="list-style-type: none"> ■ Well-established nature based tourism assets including Wombeyan Caves and Lake Wyangala that attract recreational visitors ■ The Argyle Inn at Taralga, Laggan Pantry and Collector Wines have put Upper Lachlan's country villages on the regional NSW Food and Wine map ■ Distinct country events including the Collector Pumpkin Festival, Crookwell Potato Festival, Binda Picnic Races and Taralga Rodeo create authentic opportunities for visitors to take part in fun country experiences ■ Road infrastructure upgrades have resulted in townships being well positioned as stopover destinations for visitors travelling between Goulburn and Orange and Bathurst and Lithgow, Oberon and the Blue Mountains ■ Strategic locations of Gunning on the Sydney to Melbourne corridor (Hume Highway) and Collector on the Canberra to Sydney corridor (Federal Highway).
Hilltops	The Hilltops Region includes Young, Harden-Murrumburrah, Jugiong & Boorowa. It yields some of Australia's finest food and wine. Through wide open country and intimate valleys, our towns and villages offer the visitor heritage buildings, a varied retail experience for shopping enthusiasts and the warmth of country hospitality.	<ul style="list-style-type: none"> ■ Proximity to Canberra, Western Sydney and the regional centres of Wagga Wagga and Orange ■ The area is recognised for its quality and authentic regional produce and boutique wineries ■ Young is known as the 'Cherry Capital of Australia' ■ The Cherry Festival is a well-established event that attracts visitors and creates awareness for the region ■ Council delivers other authentic destination events that are linked to the area's heritage and culture (e.g. Irish Woolfest, Kite Festival and Lambing Flat Chinese Festival) ■ Jugiong has attracted private investors that have created a cluster of appealing quality food, wine, boutique shopping and accommodation experiences that has put Jugiong on the road-tripper map.
Queanbeyan-Palerang	Heading east out of Canberra, experience the diversity of one of New South Wales' largest regional cities in Queanbeyan – the city that built Canberra and the rural and historic villages of Bungendore and Braidwood.	<ul style="list-style-type: none"> ■ Close proximity to Canberra and the Australian Capital Territory ■ Growing appeal of Braidwood as a gateway destination to the South Coast ■ Part of the Canberra District Wine Region that is positioned as one of the leading wine regions in New South Wales ■ Council resourcing support for tourism ■ Passionate local entrepreneurs and artisans that have recognised the potential of the area ■ The significant NSW State Heritage asset of the township of Braidwood ■ The easy access to unspoilt natural areas and National Parks.

5.0 Growing the regional visitor economy

Increasing direct visitor expenditure and overnight visitation is important to growing the region's visitor economy.

Analysis of recent visitation data shows that tourism is currently estimated to contribute \$539 million in direct visitor expenditure to the Tablelands visitor economy⁸.

The industry directly employed an estimated 1,910 people, with a further 784 indirect jobs created – accounting for a combined 6% of the total workforce in the region⁹. Visitation to cafes, restaurants and beverage services account for the highest portion of jobs generated [3%], followed by retail food and shopping [2%], and accommodation [1%]¹⁰. The Tablelands has an estimated 1,000 tourism businesses, many of which are SMEs - 70% of these have less than 5 employees¹¹. See Appendix 2 for breakdown for each LGA.

The Tablelands visitor economy is estimated to contribute \$242 million of value added for the Tablelands region (5.1% of \$4.7 billion)¹². This is slightly below tourism contribution to NSW Gross Value Added (GVA) [5.7%]¹³.

Table 4: Estimated number of jobs (number and % of total workforce) that are directly and indirectly supported by tourism

	Total jobs supported by tourism	% of workforce total
Direct jobs in region*	1910	4%
Indirect jobs in region	784	2%
Total for region	2964	6%

*This is in line with the average for NSW (7% total)¹³.

Table 5: Estimated number of tourism businesses

Tourism Businesses ¹	Total businesses	% of total
Non-employing	465	43
1 to 4 employees	333	31
5 to 19 employees	231	21
20 or more employees	57	5
Total	1086	100

¹TRA (2018) visitor regional expenditure data at LGA Profiles

²As shown in economy.id (NIER) - This dataset presents National Economics microsimulation model of the Tourism Satellite Account at the local level, showing the value of total sales and value add, as well as annual estimates of employment and FTE employment for the tourism sector

³TRA. (2018) LGA profiles: Number of tourism businesses

⁴As measured by GVA in economy.id

⁵DNSW. (2018) State Tourism Satellite Accounts 2017–18. Canberra: Tourism Research Australia

⁶DNSW. (2018). Economic Contribution of Tourism to NSW 2017-18. Sydney

Daytrips currently account for the bulk of visitors to the region and there has been incremental growth in overnight visitors .

Tourism Research Australia visitation trends over the past five years show:

- Domestic daytrip visitation represent 64% of visitation to the region and has increased 12% per year over the past 5 years, with 2.2 million day visitors in 2018/19
- Domestic overnight visitation represents 35% of visitation and has achieved incremental growth of 6% per year over the past 5 years, with 1.1 million visitors that spent 2.4 million visitor nights in the area at an average of 2.2 nights in 2018/19
- International visitation is very low and accounts for 20,000 visitors (1%) and 364,000 visitor nights, which are decreasing [see Table 6].

Visitor expenditure by domestic overnight, day and international visitors is also less than NSW regional averages:

- Domestic day visitors to the Tablelands LGA's spend an average of \$99 per trip, a little lower than the average for regional NSW (\$110 per trip 2019)
- Domestic overnight visitors spend an average of \$127 per night, which is lower than the \$159 per night estimated for Regional NSW
- International visitors spent an average \$42 per night, which is lower than Regional NSW at \$70 per night.

Table 6: Visitor Summary: 5 Year Average Domestic Overnight Visitors¹⁴

Visitors	2014/15	2015/16	2016/17	2017/8	2018/9	5 year avg.
Domestic Overnight						
# of visitors '000	671	828	823	996	1,090	882
% increase on yr	-19%	23%	-1%	21%	9%	6%
Nights	1,576	2,100	1,836	2,195	2,400	2,021
Av night	2.3	2.5	2.2	2.2	2.2	2.3
Sample	327	828	301	379	401	354
Domestic Day						
# of visitors '000	1,546	1,196	1,509	1,608	2,213	1,614
% increase on yr	n/a	-23%	26%	7%	38%	12%
Sample size*	185	161	175	184	245	
International Overnight						
# of visitors	16	16	21	21	20	20
% change on year		3%	30%	-1%	-5%	7%
Nights	458	353	432	275	300	364
Av night stay	28.9	21.6	20.3	13.0	15.0	20.0
Sample size*	110	91	113	121	119	

* NB: Caution should be given to these statistics given limited sample sizes

¹⁴ Tourism Visitation Analysis Report 2020

Regional Comparisons

In contrast to other NSW tourism regions, the Tablelands is positioned as the 11th largest region in terms of domestic visitor nights behind the Blue Mountains and ahead of Outback NSW (Figure 4).

In terms of day visitors, the Tablelands is ranked 6th with New England, behind the Blue Mountains and ahead of The Murray and Riverina regions (Figure 5).

Overall, the Tablelands attracted more total visitors, but less visitor nights than the Murray or Riverina regions. Comparison to the destinations of Southern Highlands, Orange and Mudgee, which are considered competitor regions to key source visitor markets of Sydney and Regional NSW also show the Tablelands ahead in domestic visitor nights.

Figure 4: NSW Regional Comparison (Domestic Visitor Nights)¹⁴

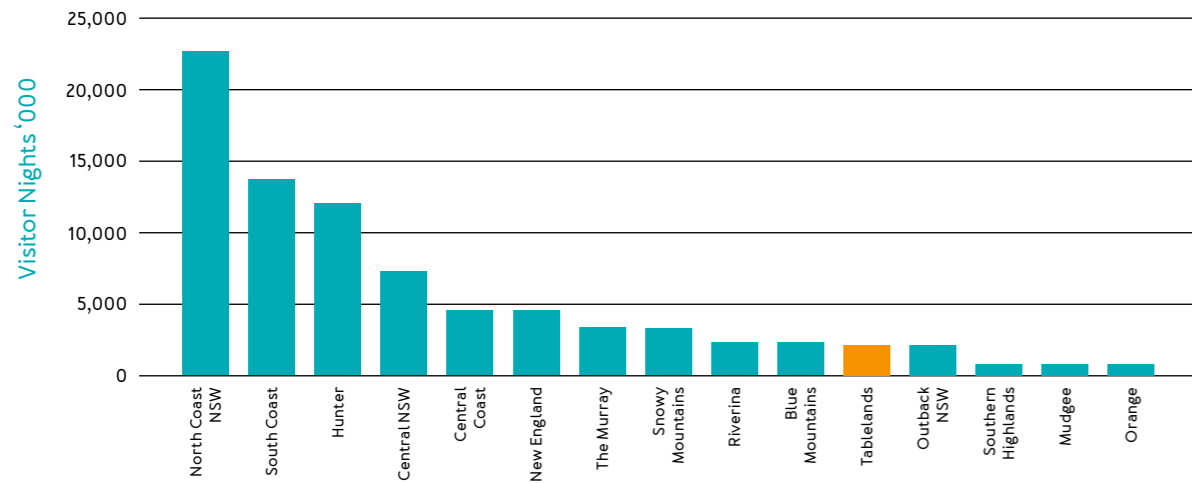
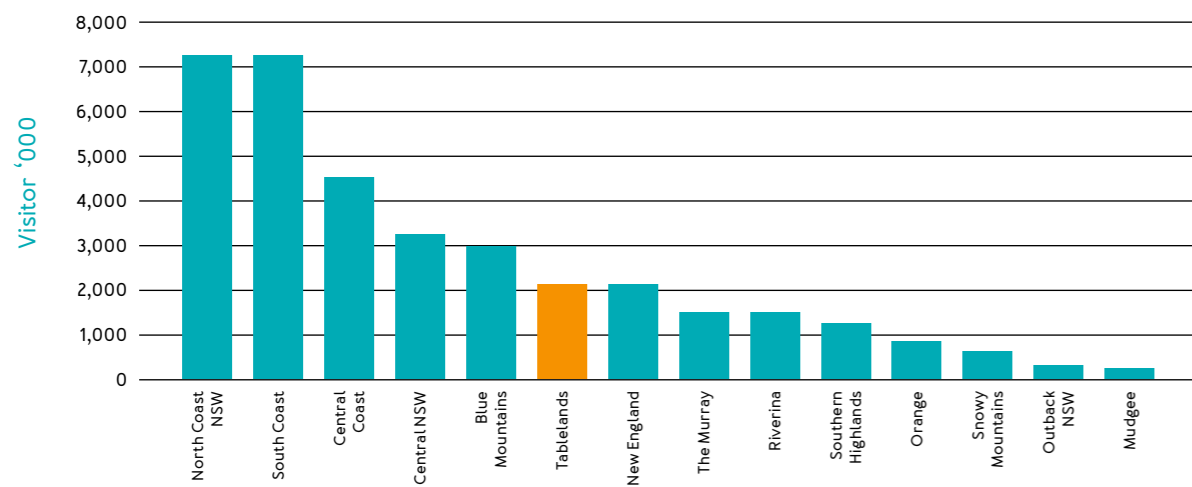


Figure 5: NSW Regional Comparison (Domestic Day Visitors)



¹⁴ Tourism Visitation Analysis Report 2020



6.0 Visitor Economy Objectives

Based on the previous visitor economy analysis the following outlines proposed objectives to be achieved by YE June 2025.

Table 7: Proposed Visitor Nights and Day Trips to 2025

Visitor Nights/daytrips	YE June 2016	YE June 2019	% change 2016 to 2019	Objective YE June 2025 [% increase on YE 2019]	Objective 2025
Domestic visitor nights	2.1 m	2.4 m	+14	+40	3.4m
Domestic day visitors	1.2 m	2.2 m	+83	+40	4m
International visitor nights	16,000	20,000	+25	+40	28,000

Table 8: Proposed Visitor Spend to 2025

Visitor spend per trip	Tablelands Av. 2018 supported by tourism	NSW Av. 2018	Difference	Objective YE June 2025 %	Objective YE June 2025 \$
Domestic overnight spend per night	127	159	-20%	+40	180
Domestic day spend per day	99	110	-10%	+20	140
International overnight spend per night	42	70	-40%	+40	60

Table 9: Visitor Economy Objectives to 2025

Visitor Economy Measures	Benchmark 2018	Objective 2025 %	Objective 2025
Direct visitor expenditure	\$539m	+40	\$775m

It should be noted that the TRA data provides the only consistent measures of visitation and visitor expenditure data. Visitor economy objectives are based on analysis of this data at the time of preparation of this Plan. Achievement of benchmark goals may also be influenced by external factors such as changes to broader economic conditions and other unforeseen conditions/influences.



7.0 Key Visitor Markets

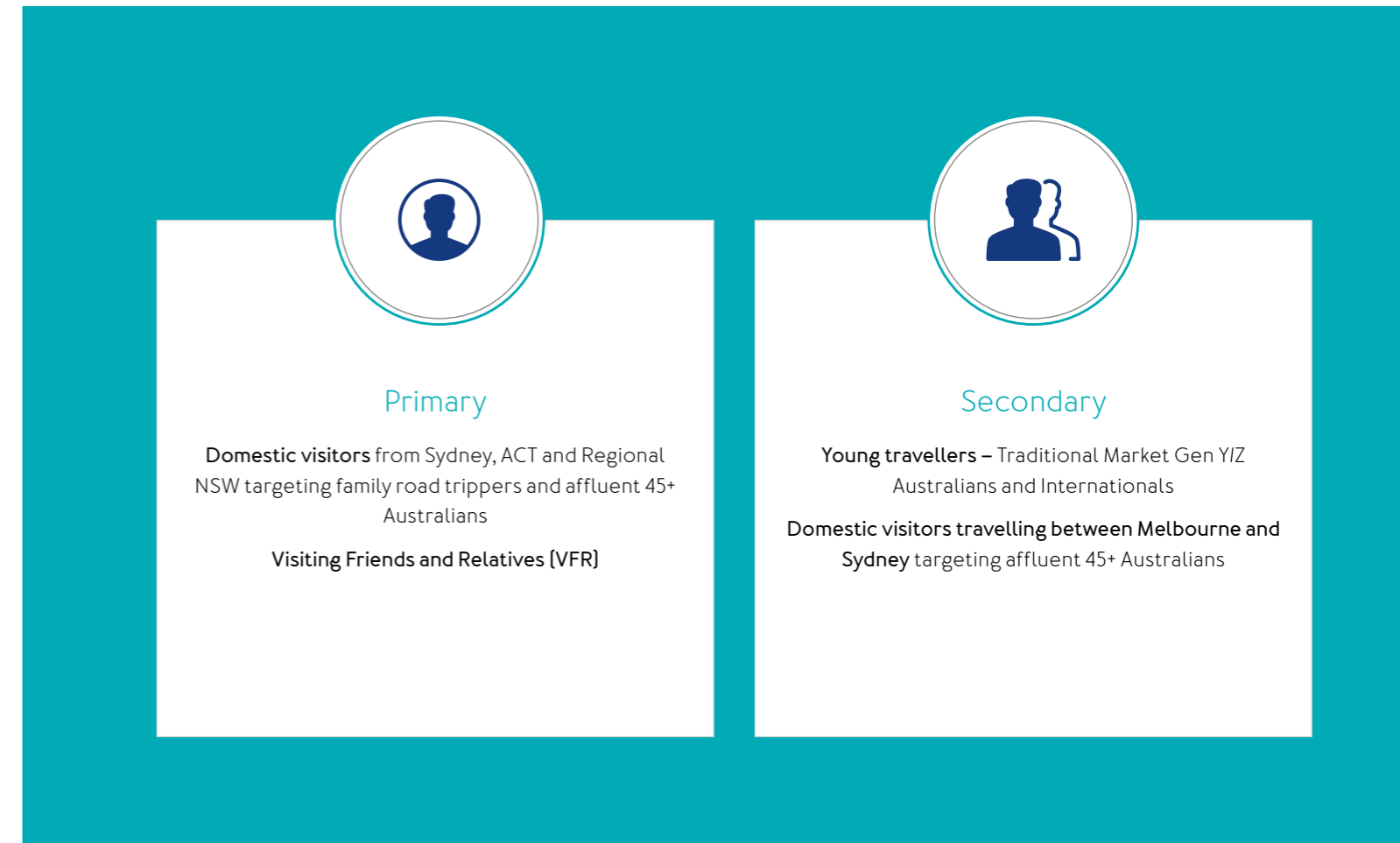
The Tablelands current main visitor markets are shown in Table 10.

Table 10: Tablelands Main Visitor Markets and Activities (5 Year Average to YE June 2019)¹⁴

	Domestic overnight	Domestic day trip	International
Lifecycle	<ul style="list-style-type: none"> Families (27%) 55+ retired (22%) 45+ workers (20%) Young singles (18%) 	<ul style="list-style-type: none"> Families (28%) 55+ retired (27%) 45+ workers (16%) Young singles (24%) 	<ul style="list-style-type: none"> Young nomads (39%) Couples (38%)
Activities	<ul style="list-style-type: none"> Social (dining, VFR) Outdoor/nature Active sports 	<ul style="list-style-type: none"> Social (dining, VFR) Outdoor/nature Arts/heritage 	<ul style="list-style-type: none"> Social & dining Nature Attractions
Source markets	<ul style="list-style-type: none"> Sydney (34%) South Coast (10%) Victoria (10%) ACT (9%) 	<ul style="list-style-type: none"> Canberra (38%) Intra region (26%) Sydney (18%) 	<ul style="list-style-type: none"> UK/Europe (42%) NZ (20%) Nth America (14%) Asia (19%)
Purpose of Visit	<ul style="list-style-type: none"> VFR (36%) Holiday (36%) 	<ul style="list-style-type: none"> Holiday (48%) VFR (30%) 	<ul style="list-style-type: none"> N/A

Key Visitor Markets

Based on visitation research findings and recommendations of the Tourism Research Australia 'The Beach, Bush and Beyond' report¹⁵ on the regional dispersal for Australian tourists, the focus for Tablelands marketing initiatives should be concentrated on the following key visitor markets with the intention of attracting repeat and new visitors and encouraging them to stay and explore the region:



As further explained in Strategic Priority 3, a brand review and identity process should confirm which visitor markets (geographic, demographic and psychographic) are best targeted to achieve effective growth over the next five years.

See Appendix 3 for a description of personas most likely and least likely to visit Australia's region identified in the TRA report.

¹⁴ Tourism Visitation Analysis Report 2020

¹⁵ Tourism Research Australia (2019) The Beach, Bush and Beyond: Understanding Regional Dispersal of Australian Tourists, October

8.0 Strategic Priorities

Priorities for the next five years focus on establishing a sound collaborative delivery framework to lead and implement the actions of this Plan, as well as supporting the five LGAs to further develop tourism products, experiences and infrastructure to position the region as a distinct tourism region to grow the Tablelands visitor economy.

Six strategic priorities and associated actions have been established to guide the work of tourism stakeholders over the next five years.

Priority	Action	Strategy
1	Collaborate	Work collaboratively with local, regional and state tourism stakeholders to support the positioning of the region and its towns and villages as a distinct tourism region within New South Wales
2	Develop	Support LGAs to further develop tourism products and infrastructure to increase the appeal and attractiveness of the region and its towns and villages
3	Brand	Create a clear brand identity and positioning story for the region
4	Promote	Create a 3-year cooperative marketing campaign and review visitor information service content and delivery across the region to ensure a consistent approach to the promotion of the region to key visitor markets
5	Advocate	Advocate the benefits of growing the visitor economy to local governments, industry and communities
6	Evaluate	Establish a set of consistent evaluation measures to track visitor economy growth and evaluate the implementation of the TDDP and DAPs annually

Priorities and associated actions in this Plan have been assigned stakeholder responsibility within a priority time frame:

- IMMEDIATE within six months (by Dec 2020)
- HIGH within the first year (by July 2021)
- MEDIUM within two to three years (by July 2023)
- LOW within the next four to five years (by July 2025)

The following pages explain these priorities and identify associated actions to be implemented over the next five years to 2025 to drive and grow the Tablelands visitor economy.

Stakeholder Roles and Responsibilities

To ensure the effective implementation of this Plan, it is important that the roles and responsibilities of Destination Southern New South Wales, the five local governments and other key tourism industry stakeholder organisations are clearly understood and communicated.

It is recommended that:

- **Destination Southern New South Wales** advocates the Plans' endorsement with tourism stakeholders across local, regional and state levels, and coordinates resources to assist with implementation of key priority strategies and actions
- **The Tablelands Destination Development Project Steering Committee** is responsible for implementing the priorities and actions in this Plan over the next five years
- **Other key stakeholder organisations and agencies identified in this Plan as having a supporting role** are encouraged to provide on-going support to assist with the implementation of strategies over the next five years in addition to the adoption and inclusion of relevant actions into their own plans and initiatives.

Collaborate

Priority 1: Work collaboratively with local, regional and state tourism stakeholders to support the positioning of the region and its towns and villages as a distinct tourism region within New South Wales.

Critical to the success of the delivery of this Plan will be the establishment of an agreed and reliable collaborative delivery framework across local, regional and state/territory levels to further develop and promote the Tablelands region.

Although the concept of collaboration has been discussed amongst local and regional stakeholders over the past five years, it is only recently that support to explore how collaboration could work has been undertaken in a strategic and coordinated way. Key events and strategic initiatives that have been undertaken since 2015 to inform a collaborative solution are outlined in Table 11.

There is, however, a strong level of knowledge, trust and rapport that has been established amongst the five LGA Tourism Managers that have been engaged in these initiatives over this time.

The TDDP Project Steering Committee that was established to inform this planning process agreed at the outset of this project that the time was right to start exploring strategies and solutions to work collaboratively to further develop and promote the Tablelands region. This Committee is therefore well positioned to continue to work together to guide the implementation of the Tablelands Destination Development Plan 2020 to 2025.

It is therefore recommended that the implementation of this Plan be coordinated by Destination Southern New South Wales in cooperation with the TDDP Project Steering Committee that is expanded to include a representative of Visit Canberra.

Support and agreement to establish the Tablelands as a distinct tourism region in NSW from the LGAs, Destination Southern New South Wales, Destination New South Wales and Visit Canberra is also important to achieving outcomes of this Plan. This includes identification of strategic support and resourcing from these stakeholders to assist with implementation of this Plan.

It will also be important to establish an agreement with the five LGAs to work cooperatively over the next five years to develop and promote the Tablelands as a distinct tourism region in NSW. The five LGAs are responsible for the implementation of local level priorities and actions identified in their individual Destination Actions Plans, including engaging with local tourism businesses.

A review of the collaborative delivery arrangements could be facilitated in the fourth year of implementation of the TDDP to determine its efficacy.

Figure 6: TDDP Collaborative Delivery Framework

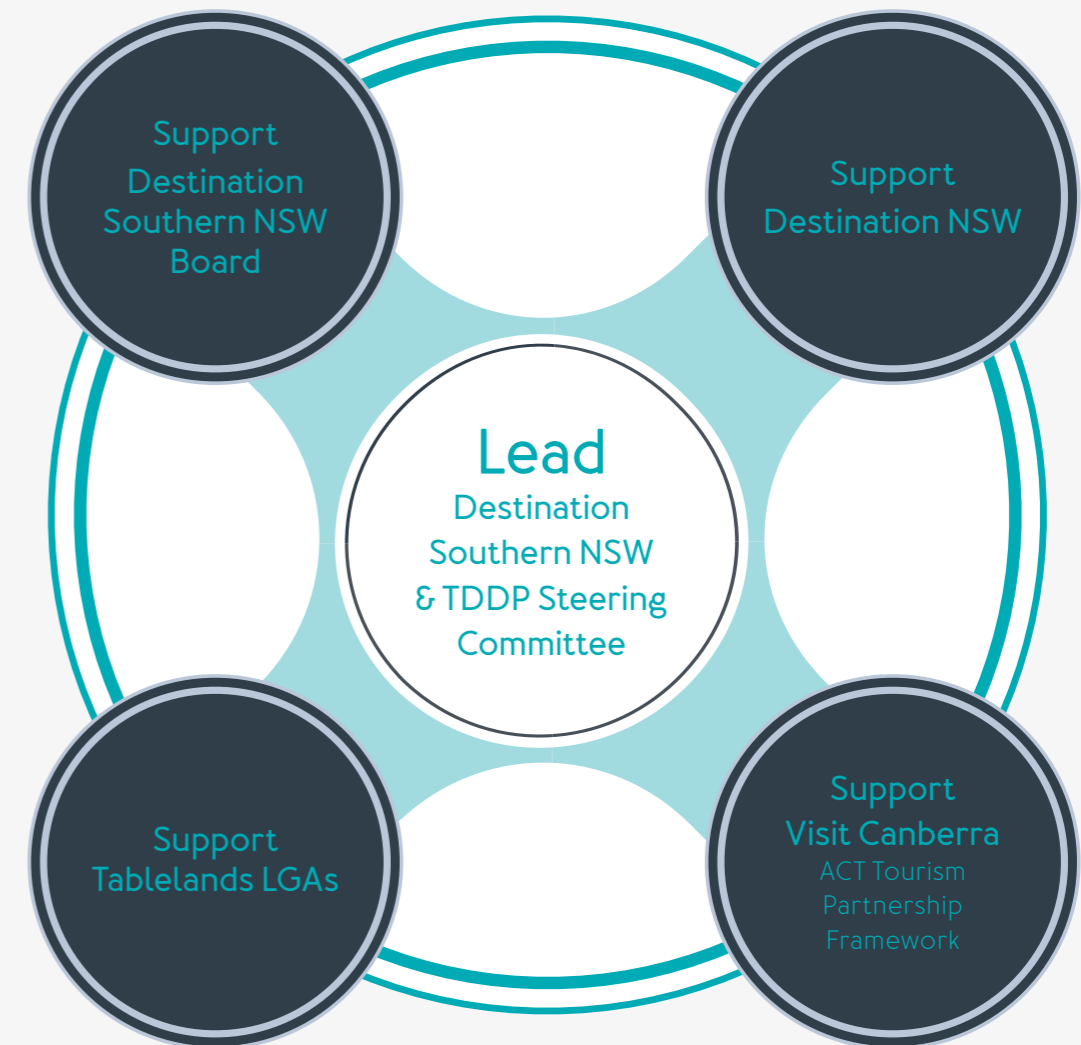


Table 11: Key events and strategic initiatives undertaken to inform a collaborative approach

Timing	Initiative
2015	Tablelands' Councils separate from Inland New South Wales Regional Tourism Organisation.
2016	Tablelands' LGAs work cooperatively with consultants to develop Canberra Region Tablelands - People, Place, Produce Brand Book. Following this brand work, a Canberra Region Tablelands website was developed and is linked on the Visit Canberra website. A regional visitor guide was also developed. Other cooperative marketing activities include some collaboration at Consumer Shows and contributions to social media channels. NSW Local Government amalgamations take effect (8 Tablelands' Councils become 5).
2017	Australian Regional Tourism Network (ARTN) report on Local Government Spend Report highlights large investment of regional and remote Councils in the operation of visitor information centres prompting the opportunity for review of local spend.
2017	Destination Southern New South Wales is established as one of six Destination Networks in NSW comprising eight LGAs.
2018	The Tablelands Destination Development Project is identified as one of seven priority projects in the Destination Southern New South Wales Regional Destination Management Plan 2018 to 2020. The DMP also identifies that greater collaboration and partnership with the ACT was needed to leverage relationships in a coordinated and consistent way. The DMP identifies three distinct sub-regions of Tablelands, Snowies and Coast.
2018	The Canberra Region Tablelands Tourism Services and Structural Review identified a clear opportunity for 'an all of region approach' to reduce duplication, improve efficiencies for destination management activities and provide the opportunity to scale up destination marketing, research and industry development activity to improve the competitiveness of the region, subject to 'the establishment of an appropriate model to guide collaboration'.
2019	Meeting with Destination New South Wales to explore potential of regional collaboration for the Tablelands' LGAs.
2019	A Tourism Partnership Framework for the Destination Southern New South Wales Region and ACT is established following extensive stakeholder engagement.
2019	The Tablelands Destination Development Project was initiated by DSNSW to create a framework for the Tablelands LGAs to work collaboratively to further develop and promote the region and its towns and villages as a distinct new, appealing and competitive tourism region in NSW.

Research and engagement activities undertaken to inform this Plan have confirmed support for regional collaboration and highlighted the following opportunities and challenges to working collaboratively to develop and promote the Tablelands region:

- If each LGA continues to work individually, only incremental growth in local visitor economies will occur at best
- LGAs have already started to work collaboratively but need a strategic framework to guide collaboration moving forward
- Hilltops and Upper Lachlan recognise that Yass Valley and Goulburn Mulwaree are more developed and have greater resources for tourism (including accommodation) so collaboration is important to encourage dispersal to their areas
- Yass Valley and Goulburn Mulwaree recognise that Hilltops and Upper Lachlan provide different experiences that can extend visitor length of stay and spend
- There is hesitation about how Queanbeyan-Palerang fits geographically within a regional positioning framework
- Each LGA currently has their own financial and human resources for tourism and events and creation of a region will require consideration of resourcing to implement the directions of the Tablelands Destination Development Plan
- There are shifting attitudes amongst Councils that are beginning to recognise the value of tourism to local economies
- There is good initial support from Destination New South Wales and Visit Canberra to further develop and position the region
- There is more work to do to further develop infrastructure, town amenities and tourism products and experiences to enhance the visitor appeal of the region
- There is a need to determine a strong brand positioning and story for the region based on its collective and distinct experience strengths and determine how local area marketing activities and visitor information services best align
- The development of a distinct tourism region may help to leverage funding and support for key projects from government stakeholders across different sectors (e.g. tourism, arts, heritage, infrastructure)
- The Industry Have Your Say confirmed that 69% of respondents (N=32) really liked the idea of regional collaboration, there were no participants who didn't like this idea.

The Role of Local Governments in Tourism in Developing Regional Areas

In Australia, local governments in remote and regional areas often take greater responsibility for community economic outcomes and to improve their tourism competitiveness through innovative economic development strategies. As a consequence of the need for destinations to actively compete at domestic and international levels, local governments in developing regional areas often assume a strong leadership position within their communities as compared to more popular and well-established destinations¹⁸. Destination Action Planning is used as a mechanism to guide the work of local governments to better coordinate local resources and engage with their local tourism industry and other stakeholders to support the sustainable development of tourism.

¹⁸ Wray, M. & Wilde, S. (2013). Sustainable tourism planning and regional competitiveness in the Outback: The Case of Broken Hill, Australia, in proceedings of the Sustainability Issues and Challenges in Tourism Conference, Istanbul, October.

1. Collaborate

Actions		Priority
1.1	Determine resource support (financial and human) needed for implementation of the TDDP.	IMMEDIATE
1.2	Present the TDDP to DSNSW Board for endorsement.	IMMEDIATE
1.3	Expand representation on the TDDP Steering Committee to include a representative from Visit Canberra.	IMMEDIATE
1.4	Present the TDDP and DAPs to DNSW to seek support to establish the Tablelands as a distinct tourism region in NSW.	IMMEDIATE
1.5	Present the TDDP and DAPs to Visit Canberra to seek support to establish the Tablelands as a distinct tourism region in NSW as part of the Tourism Partnership Framework for the Destination Southern Region NSW and ACT.	IMMEDIATE
1.6	Present the TDDP and DAPs to the 5 LGA General Managers, explain proposed resourcing (human and financial) to implement the TDDP, and seek support for cooperation and adoption of their DAP into Council's Operational Planning Framework.	IMMEDIATE
1.7	Establish a Tablelands LGA Coordination Agreement with the five LGAs to work cooperatively and contribute resources to implement the TDDP over the next five years.	IMMEDIATE
1.8	Facilitate monthly meetings with the TDDP Project Steering Committee to discuss implementation of the TDDP and LGA DAPs.	IMMEDIATE
1.9	Establish a TDDP Industry Reference Group to provide advice to the TDDP Steering Committee on the implementation of the TDDP.	HIGH
1.10	Undertake a review of the TDDP collaborative delivery arrangements in 2024 (Year 4) to evaluate its efficacy.	LOW

Key: Timing

- IMMEDIATE within six months (by Dec 2020)
- HIGH within the first year (by July 2021)
- MEDIUM within two to three years (by July 2023)
- LOW within the next four to five years (by July 2025)



Develop

Priority 2: Support LGAs to further develop tourism products and infrastructure to increase the appeal and attractiveness of the region and its towns and villages

To compete effectively in a cluttered regional tourism landscape will require on-going development of appealing and contemporary tourism product and experiences across the Tablelands region. On-going infrastructure and facilities development is also essential to improve the attractiveness and amenity of the region and its towns and villages for residents and visitors.

There is, however, much more work needed to further develop, cluster and promote tourism products and experience strengths across the region. This will require the LGAs focusing on further development of their key experience strengths and continuing to undertake place-making planning and develop public infrastructure and amenities to enhance the appeal of their local towns and villages (for residents and visitors). They also have a role in encouraging and supporting appropriate private sector investment and development.

Current 'hero experiences' for the 'Canberra Region Tablelands' as identified in the NSW Statewide DMP have been identified as 'extensive and varied authentic experiences on the doorstep of the nation's capital'. Realistically, the Canberra District Wine Region can be considered as the only current draw card experience in region that is strong enough in its own right to attract potential new and repeat visitors to the area. There is potential to better leverage this experience strength to attract visitors to stay and explore the region and link to the region's reputation for quality food, produce and new distilleries and distinct natural experiences including caves, waterways, camping and cycling experiences.

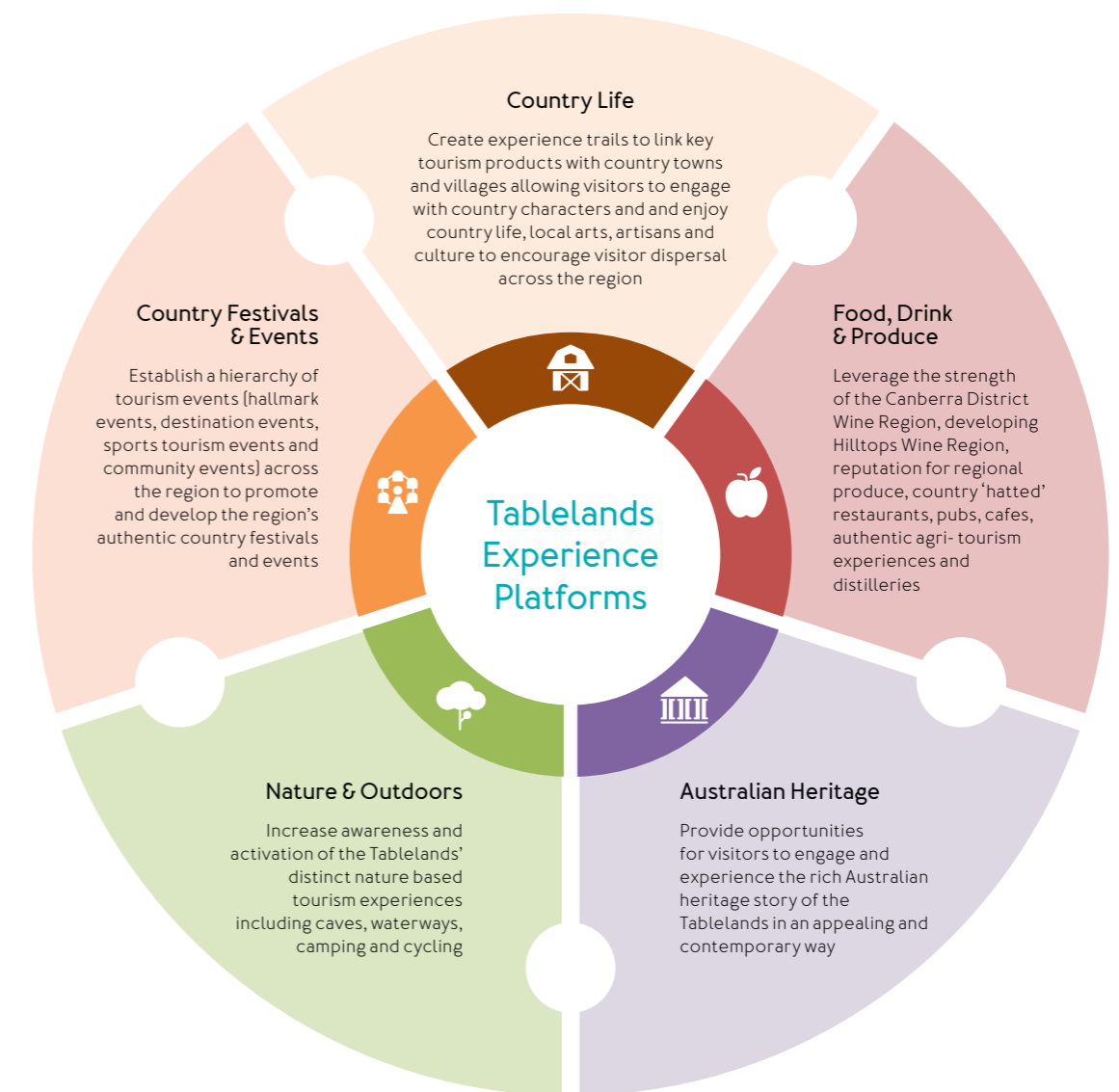
The Tablelands offers significant opportunities to capitalise on its strategic location and access to important visitor markets from Sydney and Canberra. The towns of Goulburn and Yass that lie on the main north-south road between Sydney and Melbourne are important gateways for visitors to stay and explore the region. Both destinations offer a good range of affordable accommodation options, including some new properties. Braidwood also has the ability to capture visitors from Canberra traveling to and from the South Coast.

Consumer perceptions research undertaken to inform this Plan identified that the Tablelands is perceived as a relaxing, interesting, family friendly destination for short breaks. The most appealing attractions and experiences for visitors relate to its scenic countryside, country life, towns and villages that provide an escape from city life. This may be an advantage, in the short-term, given the health and economic consequences of the Covid-19 global pandemic, with people seeking safe, risk-free, authentic and affordable breaks from their urban lifestyle. This was confirmed by research undertaken by the University of Queensland with 528 Australians that found participants were keen to travel close to home when Covid-19 restrictions are lifted with coastal destinations the most popular, followed by country and regional destinations. Cities were the least appealing destination for future travel, and half of the travellers stated they would prefer to drive to their destination¹⁹.

Furthermore, potential visitors seek a diversity of attractions and experiences when travelling for short breaks. Although each LGA across the Tablelands has different product and experience strengths, collectively there are opportunities to create strong integrated experience clusters to attract visitors to stay and explore the region. Creating experience clusters or themes involves taking a helicopter perspective of the region to identify distinct attractions and experiences in terms of their accessibility, visitor appeal and ability to encourage visitor dispersal.

¹⁹ <https://www.uq.edu.au/news/article/2020/04/sunny-outlook-domestic-tourism-post-covid-19-restrictions>

Five experience platforms are proposed to drive and coordinate tourism product and experience development across the Tablelands region over the next five years. It is proposed that experience trails be created to link key tourism products with country towns and villages allowing visitors to experience and enjoy country life whilst encouraging visitor dispersal across the region. These align with the four experience pillars identified in the Destination Southern New South Wales Regional DMP – Savour the Southern, Remarkable Journeys, Challenge Yourself in Nature, and Our Heritage Past.



The five LGAs have an important lead role in place-making and development of supporting infrastructure and facilities to make their towns and villages good places to live and visit. LGA business development support to new and existing private investors and entrepreneurs is also critical to create an attractive investment environment for the development of tourism products and experiences that can drive increased overnight stays and visitation expenditure to their local areas. The LGA Destination Action Plans provide specific actions related to this objective.

Research and engagement activities undertaken to inform this Plan identified a number of opportunities and challenges for each of these experience themes:

- Food and Wine is an important tourism experience, particularly for the Yass Valley and Hilltops. Opportunities for further development of agri-tourism and wine experiences were identified for Upper Lachlan, and Queanbeyan-Palerang. Goulburn Mulwaree also recognise the need to strengthen their food and wine offerings
- The Tablelands already hosts a number of key Food and Wine festivals and events that celebrate local wine and produce that can be further leveraged to position the region as an important food and wine destination in NSW
- The Tablelands is fortunate to have established wine industry associations that actively develop and promote the region's food and wine products and events
- Identifying and supporting regional producers to add tourism to their business plan may represent an opportunity to offer authentic agri-tourism experiences
- The DNSW Statewide Wine Product Audit and Gap Analysis provides recommendations to inform the future development of wine tourism in the Canberra District Wine Region and Hilltops Wine Region
- Other themes identified as providing opportunities for further development relate to: Heritage & Culture; Nature & Outdoors (including cycle tourism); Drives & Trails; and Festivals & Events (including sports tourism)
- Promotion of local art and culture – e.g. artisans, handmade trades
- Goulburn Mulwaree Council has invested in the development of a new Performing Arts Centre and refurbishment of the Regional Gallery that will help position Goulburn as a cultural hub in the region
- There is opportunity to establish a national significant Heritage Centre in Braidwood to offer artisan workshops on 'lost crafts' and ancillary heritage tourism activities around research, education, museum conservation, events and accommodation development
- There are some seasonality issues associated with nature-based tourism in cooler months
- Cycling tourism is recognised as providing growth opportunities for Goulburn Mulwaree, Queanbeyan-Palerang, Upper Lachlan and Hilltops
- DNSW recognise the need to support the growth of events and collate regional, themed and seasonal event calendars to increase visitation and leverage Canberra's major events, highlighting seasonal opportunities
- Attracting sports tourism is a key focus for Goulburn Mulwaree and Queanbeyan-Palerang
- Long-term sustainability of events is important - volunteer fatigue, lack of accommodation can limit destinations ability to attract major events and maintain community run events
- There is a need to continue to improve the quality and capacity of accommodation across the region.

Effective tourism product and experience development requires consideration of a number of features often in combination including clustering, critical mass, accessibility and uniqueness. There is also a need to provide a diversity of visitor products and activities to complement core visitor attractions including a range of accommodation types to suit different visitor markets, vibrant events and festivals, nature-based experiences, recreational and leisure activities, quality food and beverage experiences, and cultural and heritage experiences. Support is also required to identify the gaps and opportunities to encourage entrepreneurs to establish quality and innovative tourism products.

2. Develop

Actions		Priority
2.1	Review tourism products and experiences across the region related to 4 experience platforms (Country Life, Regional Food & Drink, Australian Heritage, and Nature and Outdoors) to create a Tablelands Product and Experience Framework that establishes a hierarchy of tourism products and experiences based on visitor appeal and cluster strengths.	HIGH
2.2	Based on findings of the Tablelands Product and Experience Framework review, establish experience trails/roadtrips related to the four experience platforms (Country Life; Food, Drink & Produce; Australian Heritage; and Nature and Outdoors) to package, promote and connect experiences (including bookable products) to drive visitor dispersal across the region.	HIGH
2.3	Create a Tablelands Events Framework that establishes a hierarchy of tourism events (hallmark events, destination events, sports tourism events and community events) across the region to identify opportunities to develop new tourism events.	HIGH
2.4	Develop a Tablelands Industry Mentoring Program that identifies the skills and training needs of tourism and event operators and provides on-going support to key operators wishing to grow and develop their business specific to the Tablelands' four experience platforms (Country Life; Food, Drink & Produce; Australian Heritage; and Nature and Outdoors).	HIGH
2.5	Support LGAs to prepare Destination Event Strategies that establish a hierarchy of tourism events (hallmark events, destination events, sports tourism events, community events) to identify strategies and actions to procure and support tourism events to increase visitation expenditure across the year, attract event funding support, and to leverage public and private sector investment for new event infrastructure and facilities relevant to each local area.	MEDIUM
2.6	Explore a region-wide policy approach to support the regulation of short term holiday letting as a way to diversify tourism accommodation offerings and grow capacity.	MEDIUM
2.7	Prepare a Tablelands food, drink and Produce Growth Strategy that identifies strategies to further develop and connect food, drink and produce experiences across the region including local art and culture (e.g. artisans, handmade trades).	MEDIUM
2.8	Prepare a Tablelands Tourism Signage Strategy that considers in region and en route signage and wayfinding that aligns with findings of the brand review and Marketing Coordination Framework (Action 3.2) to create new and distinctive signage to encourage dispersal and promote the diversity of experiences across the region.	MEDIUM
2.9	Investigate the development of a Tablelands Australian Heritage Cultural Experience Trail to provide opportunities for visitors to engage and experience the rich Australian heritage story of the Tablelands in an appealing and contemporary way.	MEDIUM
2.10	Support LGAs to identify and leverage government grant funding for infrastructure and tourism product, experience and event development.	ON-GOING
2.11	Support LGAs to assess and plan for potential environmental and economic risks related to the local visitor economies that ensures visitor safety and security is assessed and integrated into current and future Council plans and policies.	ON-GOING

Key: Timing

- IMMEDIATE within six months (by Dec 2020)
- HIGH within the first year (by July 2021)
- MEDIUM within two to three years (by July 2023)
- LOW within the next four to five years (by July 2025)

Brand

Priority 3: Create a clear brand identity and positioning story for the region

There is a need to determine a strong brand identity and positioning story for the region based on its collective and distinct experience strengths and to determine how LGA marketing activities and visitor information services best align to promote the region.

Research and engagement activities undertaken to inform the development of this Plan has highlighted the potential for establishing the region as a distinct region in NSW. Changing perceptions and growing awareness of the region will require determining a clear brand identity and positioning story for the region given there are a number of consumer facing names that are used for the Tablelands region in NSW and the ACT including:

- NSW Southern Tablelands
- Canberra Region Tablelands (Visit Canberra)
- Canberra District
- Canberra District Wine Region
- Capital Country (previously used by Visit NSW).

Destination NSW have also proposed the need for a brand review for the region, explaining that perceptions for the region need to be shifted.

The need to develop a strong regional character was also identified as a strategic priority as part of the development of the Destination Southern NSW Tourism Partnership Program with the ACT in 2019. The goal is to develop 'a shared regional narrative' that describes the region, its features and value proposition, ensuring the narrative is based on sound market research and customer feedback when determining the use of terms, names and descriptions and is responsive to market demand. In addition this priority seeks to capitalise on international visitors and those visiting friends and relatives by ensuring that packages hubbing in and out of Canberra are marketed effectively.

The five LGAs worked cooperatively in 2016 to create a unified regional brand to assist the LGAs and tourism industry to communicate consistently to target audiences about the experiences the region has to offer. The project adopted the regional brand positioning - 'Canberra Region Tablelands'. The People, Place, Produce Brand Book was the key output from this work. Given this brand positioning work is now four years old it should be reviewed as part of any proposed brand review, including consideration of the regional positioning Canberra Region Tablelands.

A brand review process should also consider the LGA sub-region identities under any proposed umbrella regional positioning:

- Goulburn Australia – 'right now in Goulburn'
- Queanbeyan, Palerang & Braidwood - 'take time to wander'
- Crookwell Gunning – Taralga - 'so close but a world away'
- Yass Valley NSW Australia - 'the best of the Canberra region'
- HILLTOPS, Boorowa, Harden, Young, Jugiong

Consumer perceptions research undertaken to inform this Plan identified:

- Confusion about regional brand identity - NSW Southern Tablelands, Capital Country, Canberra District Wine Region were all identified
- 73% of participants had heard of the NSW Southern Tablelands
- The name that was identified as best identifying the region is NSW Southern Tablelands (55%)
- There is high awareness of the Tablelands towns and villages for participants living in the ACT
- There is low awareness for LGA sub-region names, particularly Hilltops and Upper Lachlan
- There is work to do to differentiate the region from the Southern Highlands
- 40% of participants indicated 'there are better places to visit' - so there is work to do
- The most appealing attractions and experiences of visitors to the NSW Southern Tablelands related to its scenic countryside, country life, towns and villages that provide an escape from city life
- The Tablelands region is perceived as a relaxing, interesting, family-friendly destination
- Price of accommodation is most important in deciding on a destination as well as quality and range
- Visitors seek a range of attractions, local food and produce, quality of restaurants and cafes, shopping, VFR
- Enjoying Food & Wine rates in the middle – so part of the mix
- There is strong preference for coastal destinations highlighting the need for development and promotion of appealing product and experiences to attract visitors to country areas
- Although summer is main travel time, people also travel in spring and autumn, but not winter
- People from Sydney, ACT and Regional NSW will travel 2 to 4 hours for a short break which is a good fit for the geographic location of the Tablelands
- Events, sports, arts, adventure not currently key motivators for potential visitors to travel.

Other research and engagement activities undertaken to inform this Plan identified a number of opportunities and challenges to inform a brand identity and positioning story for the region:

- The region, and its LGAs, currently have low visitor awareness and appeal
- Visitors don't visit LGAs or recognise LGA borders (consider tourism marketing vs LGA marketing)
- Food, wine, drink and produce is a key opportunity for the region
- There is an opportunity to bring destination silos together, like Orange 360 and Mudgee, to be out there marketing as a destination
- There is greater opportunity to compete as a region than as a destination
- Make the region the destination with sub-destinations
- It's important to retain local identity & positioning for local areas as they do offer something different
- Hilltops, Yass & Upper Lachlan are on the same page in terms of experiences and marketing and this has developed organically and collaborate at consumer shows with good success
- Queanbeyan-Palerang & Goulburn Mulwaree may have different directions, e.g. Goulburn - sports tourism, good place to live and invest
- Tablelands 'People, Place, Produce' needs some more thinking and it's difficult for visitors to find Tablelands website
- There is a need to consider how far apart LGAs are geographically and how this affects potential product offering, marketing and packaging with sub-destinations.

3. Brand

Actions		Priority
3.1	Engage tourism marketing consultants to undertake a brand review of the Canberra Region People, Place, Produce Brand Book and current regional brand identities to develop a Tablelands Brand Identity Strategy to determine a single brand identity/story and associated creative concepts to best position and promote the region and its towns and villages to key visitor markets.	IMMEDIATE
3.2	Establish a Tablelands Marketing Coordination Framework that determines a clear brand architecture for the region that explains the connections between the region, its LGAs and towns and villages, wine regions, and roles and responsibilities of stakeholders in the promotion of the region to key visitor markets. (based on outcomes of Action 3.1).	IMMEDIATE
3.3	Develop a Tablelands Brand Style Guide and Marketing Tool Kit for the region and deliver workshops with LGA tourism and events staff and industry operators to explain the brand identity, creative concepts and Marketing Coordination Framework to ensure consistent messaging, imagery and promotional activities across the region that link with LGA marketing activities.	HIGH

Key: Timing

- IMMEDIATE within six months (by Dec 2020)
- HIGH within the first year (by July 2021)
- MEDIUM within two to three years (by July 2023)
- LOW within the next four to five years (by July 2025)

Promote

Priority 4: Create a 3-year cooperative marketing campaign and review visitor information service content and delivery across the region to ensure a consistent approach to the promotion of the region to key visitor markets.

Each of the Tablelands' Councils undertakes significant effort and invests considerable resources to coordinate their own destination marketing initiatives and visitor information services within their budgets and staff resources to promote their local areas.

It is estimated that the five LGAs currently contribute around \$3 million to grow their local visitor economies through the delivery of similar services: visitor information services; product development and research; marketing; festivals and event; and industry development and partnerships.²⁰ LGA marketing activities are mainly focused on operation of Visitor Information Centres, content updates of LGA tourism websites, preparation and ad-sales of visitor guides, social media, and in-house brochure production distributed through Visitor Information Centres with limited strategic marketing campaign activity. The LGAs do not currently prepare a dedicated Marketing Strategy or Plan to coordinate their marketing efforts. Some LGA staff are also highly engaged in event management and coordination activities for events that drive destination awareness and visitation.

This suggests that there are opportunities to create synergies, and avoid duplication, in the development of promotional (ex-region) and visitor information collateral (in-region) as part of a consistent regional brand story and cooperative campaign.

Each LGA also has its own approach to delivery of visitor information services.

It is estimated that operation of Visitor Centres accounts for \$1.4 million across the five LGAs. Visitation to the VICs has, however, declined 15% in the period 2013/14 to 2017/18, whilst website usage increased by 91% and social media increased significantly (e.g. Facebook +538%)²⁰. A review of local government spend on tourism undertaken by the Australian Regional Tourism Network in 2016 found that 35% of local government spending on tourism was on operating Visitor Information Centres²¹. In contrast, 45% of the five Tablelands LGAs' budget is allocated to the operation of VICs²¹. A comprehensive visitor information services review across the region would also help to ascertain common goals and delivery strategies.

There is also work to do to better align Destination New South Wales and Visit Canberra consumer channels to communicate a consistent Tablelands brand story.

²⁰ Agora Consulting (2019) Canberra Region Tablelands Tourism Services and Structural Review Final Report

²¹ DBM Consultants (2017) Local Government Spend on Tourism: The Contribution of Local Government to the Australian Tourism Industry, January.

4. Promote

Actions		Priority
4.1	Based on findings of the brand identity process (Action 3.1) prepare a 3-year Tablelands Cooperative Marketing Plan that identifies cooperative marketing campaign and promotional activities (ex-region and in-region), budgets, and responsibilities to promote the region.	HIGH
4.2	Review current LGA event calendars to create a Tablelands Regional Events Calendar using a hierarchy of tourism events (hallmark events, destination events, sports tourism events, community events) to promote festivals and events across the region (see also Action 2.3).	HIGH
4.3	Based on findings of the brand review (Action 3.1) create a stand-alone Tablelands website and other consumer channels for the region that can also be linked to Visit Canberra and LGA websites.	HIGH
4.4	Review LGA websites, online channels and visitor information collateral to ensure the Tablelands brand identity and experience pillars are linked through content and imagery to ensure a consistent approach to communications, promotional messaging and visitor information across the region.	HIGH
4.5	Work with DNSW and VC to create new dedicated Tablelands pages on Visit NSW and Visit Canberra websites based on the brand review to highlight key experience themes and trails and ensure content use of imagery that is reviewed and updated regularly.	HIGH
4.6	Review visitor information service delivery across the region to inform a coordinated approach.	MEDIUM
4.7	Prepare a Tablelands International Ready Marketing Plan to effectively reach self-drive international visitor markets (ex-Canberra and Sydney) including the development of focused itineraries of international ready products and distinctive experiences.	MEDIUM

Key: Timing

- IMMEDIATE within six months (by Dec 2020)
- HIGH within the first year (by July 2021)
- MEDIUM within two to three years (by July 2023)
- LOW within the next four to five years (by July 2025)

Advocate

Priority 5: Advocate the benefits of growing the visitor economy to local governments, industry and communities

Advocating the potential of tourism is important to increase awareness and support of local governments, local industry operators and their communities to grow their local economies and enhance community wellbeing.

Tourism has not traditionally been a priority industry sector for the Tablelands. Stakeholder engagement undertaken to inform this project highlighted that there are shifting attitudes amongst Councils that are beginning to recognise the value and potential of tourism to grow local economies and enhance community wellbeing. Furthermore, many local communities don't currently recognise the benefits of tourism.

Given the visitor economy across the region comprises many small businesses, many operators don't have the time, or an understanding of the dynamics of regional tourism to engage in initiatives to grow and develop the sector. This has meant industry engagement is often difficult for local governments that are often left to get on with the job of leading tourism development and marketing. Effective industry engagement and development is, however, critical to support and encourage existing operators to be sustainable and grow. It will be critical to drive the positioning of the Tablelands as a distinct region in NSW.

There is also a need to support LGA Tourism Managers to advance their strategic knowledge of the dynamics of regional tourism and leadership capacity, so they are well equipped to effectively engage with their Councils, industry and communities.

5. Advocate

Actions		Priority
5.1	Establish a Tablelands Professional Development Program that provides professional development opportunities for LGA Tourism Managers to advance their strategic tourism knowledge and leadership capacity – e.g. strategic land-use planning, crisis management planning & recovery, tourism research, event planning and evaluation, strategic marketing, industry development.	ON-GOING
5.2	Develop a Tablelands Destination Development Awareness Program for Councillors and relevant Council staff to advocate the importance of tourism as part of Council physical and community infrastructure planning and development, to attract quality tourism and hospitality investment and provide exceptional experiences for visitors and residents.	MEDIUM
5.3	Create a Tablelands VFR Program that educates and informs the community about the significance of tourism for their local areas, enhances their pride and highlights key experiences to attract their family and friends to visit.	MEDIUM
5.4	Identify and promote opportunities for tourism industry operators to engage in tourism capacity building initiatives (e.g. tourism forums, networking events, tourism awards).	ON-GOING

Key: Timing

- IMMEDIATE within six months (by Dec 2020)
- HIGH within the first year (by July 2021)
- MEDIUM within two to three years (by July 2023)
- LOW within the next four to five years (by July 2025)

Evaluate

Priority 6: Establish a set of consistent evaluation measures to track visitor economy growth and evaluate the implementation of the TDDP and DAPs annually

Findings from the research and engagement processes undertaken to develop this Plan identified the need to establish clear evaluation measures to better understand the value of tourism and events to local economies and how they contribute to community wellbeing. This was considered important to understand the return on local government investment in tourism and importance of on-going stakeholder support to grow local visitor economies.

Although some LGAs have established measures to monitor marketing and event performance there is a need to develop consistent and robust evaluation methods to monitor visitation, consumer perceptions, marketing, and event performance across the region. This was also considered something that individual LGAs did not have expertise to do locally. It was also identified that there are new consumer data technologies emerging and being adopted by local and state governments (e.g. monitoring consumer credit transactions such as the Westpac Tourism Monitor) that could be used to gain further insights into consumer travel patterns and behavior.

The Visitation Analysis Report and Consumer Perceptions Research undertaken to gather evidence to inform this project were very well supported by the LGAs, highlighting the need to continue this research into the future to monitor visitation trends and consumer perceptions of the region.

6. Evaluate

Actions		Priority
6.1	Advocate that the Tablelands is established as a region within the NSW TRA visitation data collection.	HIGH
6.2	Engage specialist tourism research consultants to prepare a Tablelands Visitor Economy Performance Report that monitors annual tourism visitation across the region, track annual visitation performance and visitor economy objectives established in this plan.	HIGH
6.3	Establish a set of measures to evaluate performance of cooperative marketing campaigns to ensure these provide effective results and to inform future campaign development.	MEDIUM
6.4	Establish a Tablelands Event Evaluation Program to consistently measure attendance, visitor profiles, satisfaction, and economic outcomes for hallmark and key destination events across the region (see also Actions 2.3 and 2.5).	MEDIUM
6.5	Establish a consistent approach to evaluate the delivery of visitor information services across the region annually including visitor use of VICs, digital services, retail and referral services to inform a visitor information service delivery review (see Action 4.6).	MEDIUM
6.6	Engage specialist tourism research consultants to undertake consumer perceptions research in key visitor markets to monitor brand and awareness of the Tablelands region.	LOW
6.7	Engage specialist tourism research consultants to establish a tool or dashboard to evaluate community support/sentiment for tourism across the region.	LOW

Key: Timing

- IMMEDIATE within six months (by Dec 2020)
- HIGH within the first year (by July 2021)
- MEDIUM within two to three years (by July 2023)
- LOW within the next four to five years (by July 2025)

9.0 Action Plan Summary

Action	IMMEDIATE
1.1	Determine resource support
1.2	Present TDDP to DSNSW Board
1.3	Expand TDDP Project Steering Committee to include Visit Canberra
1.4	Present the TDDP and DAPs to DNSW
1.5	Present the TDDP and DAPs to Visit Canberra
1.6	Present the TDDP and DAPs to the 5 LGA Councils and executive staff
1.7	Establish a Tablelands LGA Coordination Agreement with the five LGAs
1.8	Facilitate monthly meetings with the TDDP
3.1	Engage tourism marketing consultants to develop a Tablelands Brand Identity Strategy
3.2	Establish a Tablelands Marketing Coordination Framework

Action	HIGH
2.1	Review tourism products and experiences across the region related to 4 experience platforms
2.2	Establish experience trails related to the four experience platforms
2.3	Create a Tablelands Events Framework that establishes a hierarchy of tourism events
2.4	Develop a Tablelands Industry Mentoring Program
3.3	Develop a Tablelands Brand Style Guide and Marketing Tool Kit
4.1	Prepare a 3-year Tablelands Cooperative Marketing Plan
4.2	Create a Tablelands Regional Events Calendar
4.3	Create a stand-alone Tablelands website and other consumer channels
4.4	Review LGA websites, online channels and visitor information collateral
4.5	Create new dedicated Tablelands pages on Visit NSW and Visit Canberra websites
6.1	Advocate that the Tablelands is established as a region within the NSW TRA visitation data collection.
6.2	Engage specialist tourism research consultants to monitor annual tourism visitation

Action	MEDIUM
2.5	Support LGAs to prepare Destination Event Strategies
2.6	Explore a region wide policy approach to short term holiday letting
2.7	Prepare a Tablelands Food, Drink and Produce Growth Strategy
2.8	Prepare a Tablelands Tourism Signage Strategy
2.9	Investigate the development of a Tablelands Australian Heritage Cultural Experience Trail
4.6	Review visitor information service delivery across the region
4.7	Prepare a Tablelands International Ready Marketing plan
5.2	Develop a Tablelands Destination Development Awareness Program for Councillors and Council staff
5.3	Create a Tablelands VFR program
6.3	Establish a set of measures to evaluate performance of cooperative marketing campaigns
6.4	Establish an Event Evaluation Program
6.5	Establish a consistent approach to evaluate the delivery of visitor information services across the region

Action	LOW
1.9	Undertake a review of the TDDP collaborative delivery arrangements in 2024 (Year 4) to evaluate its efficacy
6.6	Engage specialist tourism research consultants to review consumer perceptions research
6.7	Engage specialist tourism research consultants to establish a tool or dashboard to evaluate community support for tourism

Action	ON-GOING
2.10	Support LGAs to identify and leverage government grant funding
2.11	Support LGAs to assess and plan for potential environmental and economic risks
5.1	Provide professional development opportunities for LGA Tourism Managers
5.4	Identify and promote opportunities for tourism industry operators to engage in tourism capacity building initiatives

Key: Timing

- IMMEDIATE within six months (by Dec 2020)
- HIGH within the first year (by July 2021)
- MEDIUM within two to three years (by July 2023)
- LOW within the next four to five years (by July 2025)

10.0 Review

Monitoring of 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 Tablelands visitor economy over the next five years.

Annual Review and Reporting Process

The following review and reporting process is recommended to monitor the implementation of the Plan:

Destination Southern New South Wales and the Tablelands Destination Development Steering Committee prepare an annual report to evaluate and communicate the progress undertaken to achieve the priorities and actions contained in this plan. An annual review workshop with the Committee may assist with this process.

The review should:

- Evaluate progress of the implementation of strategic priorities and actions within this Plan
- Monitor visitor economy and visitation objectives established in this Plan
- Identify new or emerging opportunities and challenges to the visitor economy
- Monitor the effectiveness of the collaborative delivery framework
- Review implementation of LGA Destination Action Plans
- Recommend any proposed changes to the Plan based on the findings of the review process.



11.0 Appendices

Appendix 1: Stakeholder Engagement Methods used to Inform the TDDP Planning Process

A variety of engagement methods were used to engage diverse stakeholder interests.

Destination/LGA Engagement

The following engagement activities were undertaken with the five LGAs:

LGA Tourism Managers

- **Online Survey** with the 5 LGA Tourism Managers to explore their views about a local vision for tourism, opportunities and challenges to grow and enhance the local visitor economy; tourism product development strengths, opportunities and challenges; key tourism related private and public sector infrastructure projects
- **Meeting (1 hour phone)** with the 5 LGA Tourism Managers to find out more about the local tourism context and LGA specific opportunities and challenges. Feedback from these meetings was distributed to the Tourism Managers for feedback, except QPRC – review of Action Plan.

Council & Industry Engagement - Hilltops, Upper Lachlan and Goulburn Mulwaree (February 2020)

- **A Local Government Meeting (up to 2 hours)** with representatives of the LGA (e.g. senior Council executives, tourism managers, interested Councillors) to explain the project and to understand their vision for tourism and views as to important opportunities, challenges and solutions for tourism for their LGA and the region. This included exploring their interest in working more collaboratively as a region.
- **Destination Workshops (up to 2 hours)** with key industry representatives of each of the 5 LGAs to explain the project and review visitation trends. Participants were then asked to consider:
 - **A vision for tourism for their local area** over the next five years (i.e. what do they want tourism to look like in 2025/ what would they hope to see achieved over the next 5 years)
 - **Important opportunities and challenges** to sustainably grow tourism over the next five years in their local areas
 - **Key priority areas** to be delivered within existing Council and industry resources and extend activities if further funding was available
- These sessions were not open forums (except for Goulburn Mulwaree) but limited to 15 to 20 operators (influencers) with a good understanding of tourism for their local area (e.g. experienced tourism operators, event managers, tourism association/chamber of commerce executive members).
- See Appendix 1 for a list of stakeholder representatives that participated in the workshops

Council & Industry Engagement - Yass Valley

- Industry and Council stakeholder engagement plans for Yass Valley scheduled for mid-March 2020 were cancelled due to social distancing restrictions associated with Covid-19. Plans had previously been delayed awaiting new appointment of Tourism Manager for Yass Valley Council in March.
- As a way to continue engagement plans with Yass Valley, a video recording providing background to the project was prepared and distributed to key tourism industry operators. Phone interviews were also facilitated with key tourism stakeholders (see Appendix 2). It was difficult to schedule an online consultation session with Councillors and executive staff given the Covid-19 restrictions, and it was decided to postpone this engagement. The Industry Have Your Say Survey was distributed to all industry operators.

Council & Industry Engagement - Queanbeyan-Palerang

- Given the significant consultation that had been undertaken to inform the Queanbeyan-Palerang Tourism Plan, the concurrent timing of impacts from bushfires and Covid-19 and the conducting of impact assessments on businesses, the most appropriate consultation was via a 'Have Your Say' survey to industry and presentation to Council's Tourism Advisory Panel in May. The QPRC tourism Action Plan was also reviewed by the consultant, in consultation with the Tourism Coordinator.

Informal site visits to key tourism businesses across the region undertaken by the consultant while in the region in February 2020.

Engagement with Council strategic land use planners was undertaken in May and June 2020 to understand directions for tourism in Local Strategic Planning Statements.

Appendix 2: LGA Visitor Economy Measures

Table 11: LGA Visitor Economy Measures

Measure	Queanbeyan-Palerang	Hilltops	Goulburn Mulwaree	Yass Valley	Upper Lachlan Shire	Total Tablelands
EMPLOYMENT**						
Employment (total)						
Direct	486.0	393.0	746.0	235.0	50.0	1910.0
Indirect	144.0	176.0	359.0	92.0	13.0	784.0
Total	630.0	568.0	1105.0	327.0	63.0	2694.0
Employment (FTE)						
Direct	304.0	267.0	505.0	140.0	35.0	1251.0
Indirect	140.0	142.0	334.0	86.0	13.0	715.0
Total	444.0	409.0	839.0	226.0	48.0	1966.0
Output/Sales (\$m)						
Direct	79.1	54.5	102.6	32.3	6.7	275.2
Indirect	46.9	31.6	94.4	24.3	4.0	201.1
Total	126.0	86.1	197.0	56.6	10.7	476.3
Value added (\$m)						
Direct	41.0	29.8	52.4	15.9	3.1	142.1
Indirect	22.7	17.5	45.4	12.9	1.7	100.1
Total	63.6	47.3	97.8	28.7	4.8	242.2
TOURISM BUSINESSES**						
Non-employing	135	85	141	72	32	465
1 to 4 employees	91	58	99	64	21	333
5 to 19 employees	75	47	60	31	18	231
20 or more employees	17	11	21	4	4	57
Total	318	201	321	171	75	1,086
Total jobs in region	47,207		Tourism direct jobs	4%		
Total GVA for region	\$4,773	4.7 billion	Tourism GVA	5%		

** As shown in economy.id (NIER) - This dataset presents National Economics microsimulation model of the Tourism Satellite Account at the local level, showing the value of total sales and value add, as well as annual estimates of employment and FTE employment for the tourism sector

** TRA. [2018] LGA profiles: Number of tourism businesses



Appendix 3: TRA Persona Descriptions²⁴

THE PERSONAS MOST LIKELY AND LEAST LIKELY TO VISIT AUSTRALIA'S REGIONS

<p>1ST (MOST LIKELY)</p> <p>FAMILY ROAD TRIPPERS (20% of domestic leisure visitors)</p> <ul style="list-style-type: none"> 62% visited a regional area on their last trip repeat customers – 33% had been before 28% use word-of-mouth as a key information source <p><i>For this group, taking a holiday means spending quality time with the family – and regional Australia offers an affordable, easy to access option</i></p>	<p>1ST (LEAST LIKELY)</p> <p>ASIAN VISITING FRIENDS AND RELATIVES (VFR) MARKET (4% of international leisure visitors)</p> <ul style="list-style-type: none"> 19% visited a regional area on their last trip gaining knowledge, natural attractions and iconic wildlife are important choose destinations with direct flights <p><i>Among those who did not visit regional Australia, more than seven-in-ten agreed that regional Australia would be a good place to visit if time permitted. However, they require more information on what is on offer</i></p>
<p>2ND</p> <p>TRADITIONAL MARKET GEN Y/Z (4% of international leisure visitors) on their first trip</p> <ul style="list-style-type: none"> 59% visited a regional area on their last trip use the internet to decide where to travel and what to do when they get there <p><i>Regional Australia is part of their 'bucket list' and a chance to learn something new, but they are more price-sensitive than other travellers</i></p>	<p>2ND</p> <p>FESTIVAL AND EVENT GOERS</p> <ul style="list-style-type: none"> 34% visited a regional area on their last trip those who did visit had a preference for regional areas, and are strongly motivated by the opportunity to explore <p><i>Those preferring capital cities identified ease of travel and greater shopping and dining experiences as ways to influence them to travel to regional Australia</i></p>
<p>3RD</p> <p>AFFLUENT 55+ AUSTRALIANS (10% of domestic leisure visitors)</p> <ul style="list-style-type: none"> 56% visited a regional destination on their last trip enjoy eating out at restaurants and shopping and stay longer at regional destinations (6.9 nights on average) than capital cities (5.8 nights) repeat customers – 44% had been before <p><i>For these older Australians, travel offers the chance to escape day-to-day life and gain knowledge</i></p>	<p>3RD</p> <p>ASIAN GEN Y AND Z MARKET (7% of international leisure visitors)</p> <ul style="list-style-type: none"> 41% visited a regional area on their last trip Once there, they typically stay 9.6 nights – less than the 15 night average for international leisure visitors use social media for both inspiration and planning travel <p><i>Drawn to natural wonders and food and wine experiences, those who have not travelled to regional Australia could be induced to visit with a better range of shopping, dining and experiences</i></p>



²⁴Tourism Research Australia (2019) The Beach, Bush and Beyond: Understanding Regional Dispersal of Australian Tourists, October



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