

DRAFT **MIDCOAST DESTINATION** **MANAGEMENT PLAN**

2024-2030





Acknowledgement of Country

We acknowledge the traditional custodians of the land on which we work and live, the Gathang-speaking people and pay our respects to all Aboriginal and Torres Strait Islander people who now reside in the MidCoast Council area. We extend our respect to Elders past and present, and to all future cultural-knowledge holders.

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Executive summary

The MidCoast Destination Management Plan sets the direction and prioritises the sustainable growth of the visitor economy of the MidCoast Council Local Government Area to 2030 and beyond.

It includes a practical and prioritised ‘action plan’ that supports regional promotion, visitation and prosperity while addressing the barriers and challenges faced by the region. Importantly, it is a plan for the whole destination, not just individual businesses or operators. It aims to foster a vibrant visitor economy and promote liveability, which will deliver tangible benefits to businesses as well as the community.

This plan builds on the extensive work that has been completed since the previous destination management plan, which was finalised and launched in 2017, and included the development and implementation of the Destination Barrington Coast brand and its award-winning marketing campaign.

Over recent years, and despite the challenges brought by COVID-19 and significant natural events (such as bushfires and floods), the awareness and appeal of the Barrington Coast as a short break and holiday destination has continued to strengthen.

This is primarily the result of focused marketing efforts that have profiled the natural beauty and nature-based offering of the region and events, which have resonated with target markets, their expectations and desires.

Existing and emerging strengths

There is little doubt that a clear strength of the region relates specifically to its nature-based setting, including a myriad of waterways, a spectacular coastline and beautiful hinterland and valleys. The region is blessed with national parks of international significance due to their conservation values.

However, there are many other existing and emerging strengths of the region, from an enlivened, diverse, year-round events program through to high-quality produce, an emerging culinary tourism offering, vibrant arts and music scene and a wide range of accommodation options. Added to this is the region’s proximity to its core source markets in Sydney and Newcastle. It means that the region is well positioned to capitalise on its existing and emerging strengths to continue to sustainably grow the region’s visitor economy.

Informed, prioritised, future-focused and visitor-centric

A detailed ‘situation analysis’ was prepared as part of informing this plan. It analysed and considered insights from a wide range of credible sources as well as from significant consultation undertaken with Council, stakeholders, the local industry and community representatives.

It also involved detailed consideration of important local, regional and state strategies, plans and programs, including (but not limited to) the MidCoast Economic Development Strategy as well as the Destination North Coast Destination Management Plan 2022 – 2030 and the NSW Government’s Visitor Economy Strategy 2030. The result is a plan that is both future-focused and visitor-centric. A summary of these findings is outlined in Part B, *Setting the Scene*.

In alignment with best practice planning, this destination management plan is designed to address:

- Supply: the region's experience offering;
- Demand: marketing and visitor servicing; and
- Enablers: priorities that assist and enable implementation.

Part C, 'priority projects', is structured around these three core areas. Importantly, prioritised action plans are provided in this section, which enables all of the strategies and actions identified to be aligned to available resources, both human and financial.

It is important to note that not all strategies and actions are the responsibility of MidCoast Council. Collaboration, partnerships and cooperation with stakeholders, the industry and the community will be critical to the successful implementation of this plan between 2024 – 2030.

Snapshot: strategies and actions identified for 2024 to 2030



FOCAL AREA	ENABLERS	SUPPLY	DEMAND
STRATEGIES	6	7	5
ACTIONS	14	27	9

Turning challenges into opportunities

This destination management plan highlights and aims to address a number of challenges facing the region. While its outstanding nature offering and natural beauty are strengths of the region, conservation values must be protected. Over-tourism, which is occurring at some locations during peak seasons should be addressed proactively, not as a 'too little, too late' reaction when people arrive in-destination. This involves much more than year-round marketing efforts to drive regional dispersal. A holistic approach to sustainability and encouraging sustainable tourism sits at the heart of the recommended strategies and actions.

Likewise, there is clearly an imperative for the industry to take greater responsibility for marketing and distribution of their own products, services and experiences. Advances in technology and familiarity with online booking of all markets (across all demographics) means that local businesses need to be connected and taking greater advantage of third-party online channels to market.

Across Australia, the industry is challenged with several significant issues or externalities, from staffing shortages to limited housing supply, cost of living pressures and a downturn in global economic conditions. These will continue to impact the region. Fortunately, Destination Barrington Coast is well positioned to create new opportunities for attracting markets that continue to take

holidays and short breaks, albeit while more closely managing their discretionary spend on travel. The continued growth in caravan and camping is just one example of how the region's proximity to core source markets in Sydney and Newcastle can benefit from these challenges.

Targeting the right visitor markets

A critical success factor is attracting the right visitors, who will enjoy their Destination Barrington Coast experience and become advocates for the region. While there are many markets that will be attracted to the region and its diverse experience offering, as a destination it is critical to identify and target those market segments with the greatest propensity to visit the destination, year-round.

This plan highlights several priority emerging markets, specifically:

- Active families (millennials);
- Wellness tourism market (esp. women);
- Younger adults (Generation Z);
- The work from anywhere market.

These market segments represent the sweet-spot between psychographic and demographic or generational market segments. They leverage the existing and emerging strengths of the region. Importantly, these emerging markets are already arriving, and while they could be classified as 'existing' they are still an emerging market opportunity for the region.

In addition, the visiting friends and relatives market remains a high priority. This market is already significant and is important to the region's visitor economy year-round. With the visiting friends and relatives market it is critical to remember that the primary target audience is the local host, who plays a major influence on the market's travel decisions.

Enablers for success

Tourism is a dynamic industry, which means it is essential to know the preferences, expectations and needs of today's travellers as well as their barriers to travel. It's also important to recognise that sometimes the little things make the biggest difference.

Long-term success starts with building a broad base of support with residents and local businesses as well as across all areas of Council. This should be coupled with genuine and effective industry engagement. These strategies provide the foundations to sustainably grow a vibrant visitor economy and enhance the liveability of the region.

Strengthening the experience offering

A significant challenge identified for Destination Barrington Coast is the lack of paid visitor experiences, such as guided tours and activities as well as culinary and agri-tourism experiences that take advantage of the region's spectacular natural and rural setting.

A broad experience offering that appeals to a range of target markets would enable the MidCoast to realise an even greater potential from its visitor economy. This involves, among other things:

- Experience-led itineraries and destination events that support and reinforce the destination's positioning and point of difference.

- Influence of contemporary consumer behaviour on travel, including the motivations, expectations, and barriers to travel as well as for events and other leisure activities.

Investment in and activation of shared infrastructure is also important for both visitors and the community, including connectivity between town centres, community assets and attractions, and the surrounding nature-based offering (from beaches and waterways to national parks and the World-Heritage listed Barrington Tops). Ancillary infrastructure or facilities, such as parking, pedestrian access, and toilets should be integrated into a best-practice, landscape-based approach to place planning.

Effective marketing and visitor services

There are a range of influences on demand for Destination Barrington Coast. These have been outlined clearly throughout the plan. Knowing how to integrate these influences and effectively reach, inspire, engage and connect with our target markets is the next step. This plan sets out several priorities to achieve this, including:

- Developing and implementing a multi-year marketing plan that drives consistency in the way in which Destination Barrington Coast is reflected in the marketplace, finding the balance between always-on content and that shared through paid, owned and earned channels along the visitor journey.
- Creating and distributing content, including videos, images, copy and inspiring itineraries that:
 - Brings Destination Barrington Coast's stories, characters and landscape to life by 'pulling on the heart strings' (inspirational content)
 - Provides high quality information to assist visitors plan and enjoy their trip (informational or rational content)
 - Enables multichannel distribution, including through third-party channels such as Destination NSW, National Parks and Wildlife Service, Tourism Australia and online travel agencies as well as to support public relations
- Leverage and cross-promote marketing activities undertaken for North Coast NSW, including by Destination North Coast and the Feel New in NSW campaign.
- Continue to grow the visiting friends and relatives market through engaging the local community to invite their friends and family to visit.

Evaluating success

The plan represents the next stage in evolving the region's visitor economy and keeping pace with a dynamic industry and marketplace. As a result, it should be reviewed and updated across its lifespan, from 2024 to 2030 and beyond.

Measuring and evaluating success is critical to highlight where strategies and actions can be adjusted over time to ensure they remain relevant and effective.

Appreciation to all involved

The development of this plan is the result of a comprehensive process. There were many people involved, representing MidCoast Council, local, regional and state-wide stakeholders, local businesses and the region's community. The insights so generously shared have informed and helped shape this document.

PART A

INTRODUCTION

Part A - Introduction

About the MidCoast Destination Management Plan

The MidCoast Destination Management Plan sets the direction and prioritises the sustainable growth of the visitor economy of the MidCoast Council Local Government Area to 2030 and beyond.

It includes a practical and prioritised 'action plan' that supports regional promotion, visitation and prosperity while addressing the barriers and challenges faced by the region. Importantly, it builds on the extensive work done since the previous plan, which was finalised and launched in 2017, including the subsequent development and implementation of Destination Barrington Coast brand and award-winning marketing campaign.

The guiding principles established for this plan are that it is:

1. Inclusive of the whole region and all communities
2. Informed - evidence-based
3. Showcasing the destination's existing and emerging strengths
4. Customer-centric - putting the visitor first
5. Future-focused and sustainable - understanding a dynamic industry and the importance of protecting the destination's values and attributes
6. Fostering collaboration across sectors and between industries and stakeholders
7. Demonstrating leadership through effective implementation, partnerships and communication - including through alignment with NSW Visitor Economy Strategy 2030
8. Measurable in terms of both deliverables and outcomes

This plan has been informed by a comprehensive 'situation analysis', including:

1. Global and domestic trends from Tourism Australia's Consumer Demand Project, SKIFT Research, Forbes, Euromonitor International, and Booking.com, among others. These include:
 - Motivations, interests, preferences, and barriers to travel
 - Future-focused and putting the visitor first
2. Visitor research:
 - Influences on travel to the destination over time and as consumer behaviours have evolved
3. Existing strategies, plans and programs at National, State, regional and local level

Extensive consultation with Council, industry and other stakeholders has also been undertake, including ongoing engagement with MidCoast Council's Industry Reference Group.

Destination Management Plan Framework

AMBITION

Barrington Coast is celebrated as a leading sustainable destination where outstanding natural beauty meets vibrant country living, inspiring healthy and active lifestyles.

PURPOSE

Provide a prioritised roadmap for the continued sustainable growth of the MidCoast visitor economy from 2024-2030.

GOALS	1. Ensure that the visitor economy is viable and vibrant, year round	2. Benefits of the visitor economy are shared across the region (inclusive)	3. Contribute to enhancing social & environmental values (sense of place)
HIGH-LEVEL OBJECTIVES			
ENABLERS	1. Foster a broad base of support for the visitor economy	2. Lead genuine and effective industry engagement	3. Ensure the region's natural and cultural values are protected, sustained and enhanced
SUPPLY	1. Increase the supply of paid visitor experiences and events	2. Attract and enable investment for infrastructure projects and facilities that deliver shared benefits	3. Attract investment in sustainable, nature and cultural tourism experiences, accommodation and hospitality
DEMAND	1. Increase low and shoulder season as well as encouraging mid-week visitation	2. Increase overnight visitor yield, year-round	3. Encourage greater regional dispersal
PRIORITISED ACTION PLAN			

Existing and emerging strengths

Over recent years and despite the challenges brought by COVID-19 and significant natural events (such as bushfires and floods), the awareness and appeal of the Barrington Coast as a short break and holiday destination has continued to strengthen.

This is primarily the result of focused marketing efforts that have profiled the natural beauty and nature-based offering of the region and events, which have resonated with target markets, their expectations and desires.

There is little doubt that a clear strength of the region relates specifically to its nature-based setting, including the myriad waterways, its spectacular coastline and beautiful hinterland and valleys. The region is blessed with national parks of international significance due to their conservation values. Myall Lakes National Park is internationally recognised under the Ramsar Convention for its diverse natural wetlands within a relatively unmodified coastal lake system. Barrington Tops National Park forms part of the Gondwana Rainforests of Australia World Heritage Area.

While nature is accessible throughout the region, the paid visitor experience offering is still emerging. Encouraging the growth of experiences that provide different ways for different audiences to engage with and access nature (in all its forms) is a priority for further development. Accommodation that provides direct access to or immersion in nature, such as caravan and camping as well as boutique accommodation is a further strength of the region.

The region's abundance of high-quality produce is another strength. the region is inundated with great produce from local farms and the sea, it is not easily available to visitors. Culinary tourism is another emerging strength that would continue to enhance the appeal and preference for Destination Barrington Coast.

There are also a number of other strengths that have emerged over recent years. This includes:

1. A local community who actively welcomes the market known as visiting friends and relatives. This market offers significant advantages, including that they are more trusted and respectful visitors and are more likely to visit outside of peak season or periods.
2. Proximity to the region's core source markets of Sydney and Newcastle. This proximity was further amplified during the COVID-19 period and is likely to remain in focus during uncertain economic times, with cost-of-living pressures reducing budgets but not appetites for travel and holidays. It is also a great advantage when younger generations, including both Gen Z and Millennials, are choosing to travel more frequently for short breaks. The opportunity for more flexible working arrangements means people are looking to escape for longer short breaks. The closer to home that they can achieve a sense of freedom yet still be connected (for at least some part of their trip) is likely to continue strengthening the appeal of destinations such as the Barrington Coast.
3. An enlivened and diverse year-round events program, which covers themes as diverse as sports to the arts, music, produce and food and drink. This plays into the clear trend for visitors to investigate 'what's on' as part of their trip planning.

This plan seeks to capitalise on these existing and emerging strengths to continue evolving and enriching the visitor economy of Destination Barrington Coast.

Ambition, purpose and measurable objectives

Ambition

Barrington Coast is celebrated as a leading sustainable destination where outstanding natural beauty meets vibrant country living, inspiring healthy and active lifestyles.

Purpose

Provide a prioritised roadmap for the continued sustainable growth of the MidCoast visitor economy from 2024 – 2030.

High level objectives	Key performance indicators or outputs delivered
Goal 1 Ensure that the visitor economy is viable and vibrant, year-round	
Increase low and shoulder season as well as encouraging mid-week visitation	Increase of 10%* overnight visitation on 2019 data by 2030 for low and shoulder season and mid-week (for example utilising Spendmapp data)
Increase overnight visitor yield, year-round	Increase of 10%* overnight visitor spend on 2019 by 2030 (Spendmapp data as well as TRA data for international)
Increase the supply of paid visitor experiences and events	<ul style="list-style-type: none"> • Increase paid experiences by 20% on Australian Tourism Data Warehouse -listed experiences, events or attractions between 2024 to 2030 • New First Nations experiences created and operating by 2030 • Increase in the number of packages involving existing tourism providers • Increase the number of wellness, agritourism and farmgate experiences.
Lead genuine and effective industry engagement	<ul style="list-style-type: none"> • Establish an ongoing Industry Advisory Group, which meets a minimum of four times per year • Host a minimum of four networking sessions for industry annually • Conduct an industry (businesses involved in the region's visitor economy) satisfaction survey every second year
Goal 2 Benefits of the visitor economy are shared across the region (inclusive)	
Encourage greater regional dispersal	Increase of 10%* overnight visitor spend on 2019 across all sub-regions by 2030 (Spendmapp Data)

Attract and enable investment for infrastructure projects and facilities that deliver shared benefits	<p>Attract and enable investment for and implement priorities identified within the:</p> <ul style="list-style-type: none"> • MidCoast Economic Development Strategy • MidCoast Open Space and Recreation Strategy <p><i>Note: Focus will be on infrastructure and facilities planned but as yet unfunded for significant experiences</i></p>
Foster a broad base of support for the visitor economy	<ul style="list-style-type: none"> • Implement a proactive annual communication and local champions program to reinforce the value of the visitor economy to a vibrant destination • Continue to implement a multi-year visiting friends and relatives campaign to engage residents as part of a more sustainable visitor economy <ul style="list-style-type: none"> - 10%* increase in the number of visiting friends and relatives to the MidCoast Local Government Area by 2030 (baseline: 2022 TRA data) - Increase low and shoulder season visitation in visiting friends and relatives market (purpose of travel) by 15%* by 2030 (baseline 2022 TRA data for Quarters 2,3 & 4)

Goal 3 Contribute to enhancing social and environmental values (sense of place)

Attract investment in sustainable, nature and cultural tourism experiences, accommodation, and hospitality	<ul style="list-style-type: none"> • 15% increase in new sustainable tourism^ experiences and accommodation by 2030 • 30% increase in the number of existing tourism businesses and accommodation providers achieving sustainable tourism^ accreditation or certification by 2030
Ensure the region's natural and cultural values are protected, sustained and enhanced	<ul style="list-style-type: none"> • MidCoast Council achieves green destination accreditation by 2026 • MidCoast Council implements an annual program involving a proactive approach to managing unbalanced tourism at specific sites during peak season

**Adjusted for CPI to take account of inflation over the period 2019 – 2030*

Note: Given the unpredictable fluctuations in the visitor economy due to COVID-19, the 2019 data is being used as a baseline unless otherwise stated eg VFR TRA data from 2022

^ Sustainable tourism businesses are defined as those that have achieved appropriate accreditation or certification (eg Ecotourism Australia (EA) or Earth Check programs) or completed programs such as EA's Sustainability Scorecard with a satisfactory rating

Guiding priorities for Council and industry: Aligning primary experience themes with opportunities to attract and enable investment

Following a review of MidCoast Council's 2017 Destination Management Plan as well as the Barrington Coast destination brand strategy, it is recommended that the primary experience themes from the 2017 plan remain unchanged. While these themes remain current, the way in which they are expressed through marketing and visitor services should be evolved, for example, to maximise opportunities from the increased and growing interest in wellness tourism.

The extract on the following page is from the *Barrington Coast Brand Guidelines*. It outlines the primary experience themes taking into consideration destination positioning and the attributes of the sub-regions within the broader MidCoast Council Local Government Area. It is important to note that while these serve as primary experience themes, there are many other experiences, products, activities and interests that are addressed within the plan.

Emerging strengths of the region include a vibrant arts, music and cultural sector as well as a range of heritage assets, including museums, galleries, events and trails that bring the region's culture and heritage to life. Likewise, the culinary and local produce offering of the region has continued to grow. The regulatory reforms to agri-tourism in NSW will hopefully assist to further strengthen this sector and its experience offering. Investment in outdoor recreation and sports infrastructure and facilities reinforces the value of these activities to the positioning of the region and the success of the Barrington Coast marketing campaign over recent years.

It will also be important to take advantage of major initiatives, such as the further development of Newcastle Airport as well as the grant funding secured to enhance the region's experience offering, including the following projects: the Gathang Cultural Centre and Manning Regional Art Gallery; the Mara Wakulda 'Come Together' project in Gloucester and the Regional Sports Hub in Taree.

It is important to remember that the themes are interrelated and together enrich the overall perception and appeal of Destination Barrington Coast.

More importantly, it is essential that the strategic directions and primary themes of the plan align with or reinforce the priorities identified within the MidCoast Economic Development Strategy 2023 – 2028. Specifically:

- Attracting and enabling investment and funding
- Attracting businesses and business events
- Developing or revitalising accommodation, products and paid experiences

Guiding priorities for Council and industry: Aligning primary experience themes with opportunities to attract and enable investment

The extract below is from the *Barrington Coast Brand Guidelines*, which draws directly from the MidCoast Council's 2017 Destination Management Plan.

It is important to remember that the themes are interrelated and together enrich the overall perception and appeal of Destination Barrington Coast.



PART B

SETTING THE SCENE

Part B – Setting the scene

Importance of collaboration, partnerships and personalisation

A key to success for any destination is to foster and strengthen collaboration and partnerships within the region and beyond its borders. This in turn creates opportunities for personalisation.

Tourism Australia in the *Future of Global Tourism Demand* research report, recognised the importance of collaboration and personalisation for international markets, which equally applies to domestic markets:

Collaboration and Personalisation: *travellers enjoy drawing from multiple experiences within and across sectors. Understanding the underlying patterns in traveller appeal for experiences unlocks opportunities to cross-sell experiences, ... develop partnerships, ... and build out compelling touring trails or itinerary packaging tailored to audience desires*

Collaboration can deliver bigger and better results by strengthening cooperation and building partnerships. Cooperation and partnerships with industry within the MidCoast region as well as cooperation and partnerships with external stakeholders involved in the NSW North Coast like the NSW National Parks and Wildlife Service, NSW Forestry Corporation (State Forests), Crown Lands NSW, Destination NSW, Destination North Coast NSW, Hunter Joint Organisation, and The Caravan, Camping and Touring Industry and Manufactured Housing Industry Association of NSW (also known as the Caravan and Camping Industry Association of NSW), among many others.

Shared infrastructure projects, such as those identified within the context of the *MidCoast Open Space and Recreation Strategy 2023 - 2035*, enable connectivity with core features of the destination, including its towns and villages and all elements of the overall experience. This will be critical to the success of major initiatives such as sports tourism facilities, multi-day walks, mountain bike trail networks and kayaking and waterway trails, which will need to link to and help activate accommodation, tours, attractions, retail and hospitality as well as amenities and services such as parking, toilets and bike hire.

Collaboration means stakeholder insights and 'buy-in' are critical. The product offer will be as important as the brand identity. The visitor experience as important as the visitor marketing.

An important outcome is the creation of personalised or tailored packages or the bundling of products and experiences that meet the desires, expectations and preferences of specific target market segments. This should be core to any experience and event development program. It also provides an opportunity to integrate First Nations' experiences into destination packages and itineraries as well as attracting the smaller-scale and boutique business events market.

Only by adopting a holistic approach will the full potential of Destination Barrington Coast's brand and positioning, *Blaze your own Trail* be delivered.

NSW Visitor Economy Strategy 2030

The NSW Visitor Economy Strategy 2030 sets a target to triple 2019 overnight visitor expenditure in NSW by 2030, surpassing previous targets despite recent challenges. There are specific targets set for regional NSW as well as for domestic tourism:

- Regional Overnight Visitor Expenditure: \$25 billion by 2030 (from \$20.5 billion in 2019)
- Total Domestic Visitor Expenditure: \$47 billion by 2030 (from \$31.9 billion in 2019)

Five strategic pillars underpin the NSW Government's vision to be the premier visitor economy in the Asia-Pacific by 2030.

It identifies five guiding principles (one of which is provided below and applies directly to the Barrington Coast) as well as three core phases: Recovery (to 2024); Momentum (to 2026); and Accelerate (to 2030).

Strategic Pillar 3 of the NSW Visitor Economy Strategy focuses on showcasing strengths – both our existing strengths and emerging ones. From vibrant contemporary culture, reconnecting with nature and small-town charm through to events and eco-wellbeing, there are significant opportunities for the MidCoast to contribute to the regional NSW targets.

For further information see: <https://www.destinationnsw.com.au/about-us/strategies-and-plans/visitor-economy-strategy-2030>

“Guiding Principle 1: Put the visitor first

We have put visitors front and centre of this strategy to enable better targeted marketing, experience design and industry support through a greater understanding of potential visitors. Every visit should be an unforgettable one that inspires and encourages visitors to keep exploring and returning to NSW. Consumer trends and visitor needs will inform experience design, event development, infrastructure investment and marketing. This visitor-centric approach will involve:

- *A deep understanding of the needs and aspirations of potential visitors.*
- *Tracking and analysis of evolving consumer preferences and trends.*
- *A dynamic market prioritisation and segmentation approach.*
- *Working with industry to deliver exceptional visitor experiences.*
- *Personalised marketing and communications to guide visitors to experiences in NSW that match their specific interests and needs and encourage them to return.”*

(NSW Visitor Economy Strategy 2030, page 28)

Destination North Coast NSW Destination Management Plan 2022 - 2030

Destination North Coast's Destination Management Plan 2022 – 2030 was released in early 2023.

Destination North Coast is an important conduit between the NSW Government, Local Government, tourism organisations and businesses. Destination North Coast's primary role is to coordinate tourism related strategies and projects that promote the growth and prominence of the visitor economy across the region. They do this by delivering regional funding and industry development programs and identifying infrastructure needs and investment opportunities.

Destination North Coast's priorities align with the objectives, strategies, and commitments of the NSW Government and are facilitated in partnership with government agencies, tourism organisations, and operators, guided by their Destination Management Plan 2022 – 2030 .

It incorporates:

- A clear vision for the North Coast of NSW:

“To sustainably grow the yield of visitors to the NSW North Coast supporting the regional NSW goal of generating \$25 billion by 2030, without compromising the distinct natural beauty and communities that makes the region so unique”.

- A set of strategic objectives and an associated plan of action from 2022 to 2030, reflecting current market trends and local priorities, and aligning with NSW Visitor Economy Strategy 2030.
- Primary actions specifically relevant to MidCoast Council
 - Create distinctive experience trails and itineraries related to positioning the strengths of the region
 - Advocate and support the development of new heritage and First Nations products and experiences including tailored industry development and support to help bring forward new cultural tourism product development opportunities
 - Further develop agritourism and produce product development opportunities to enhance the region's food bowl reputation
 - Advocate and support the development of experiences and infrastructure that will drive visitation by improving access to and activation of the region's waterways as critical visitor assets
 - Enhance the caravan, camping and RV sector maintaining the market leading position of the NSW North Coast and address the shortage of contemporary and creative family focused product within the region
 - Attract and deliver events either independently or collaboratively that have the capacity to grow visitation to the region and secure key new events that have the potential to be amplified to attract increased or new audience segments
 - Support the attraction and continued development of participatory sporting events and advocate for regional hosting of training camps and sporting events including the 2032 Olympic and Paralympic Games
 - Continue to build momentum in strategically attracting business events to the region
 - Grow the quantity, diversity, and quality of accommodation across the region
 - Advocate to the Australian and NSW Government to improve digital and transport connectivity
 - Leverage opportunities for international and domestic airway route development to improve the visitor experience
 - Facilitate capacity building programs to enhance operator knowledge and engagement with sustainability principles

For further information see: <https://dncnsw.com/strategies-and-plans/>

MidCoast Economic Development Strategy 2023 – 2028

Tourism is and will continue to be a significant driving force in the MidCoast economy. As a result, this plan identifies specific actions that align with the goals, high-level priorities, and opportunities identified in the MidCoast Economic Development Strategy.

The Economic Development Strategy has a focus on 'attract and grow' priorities for the local economy. It recognises the importance of the visitor economy to the region's overall economy as well as its sense of vibrancy.

This plan provides an action plan to guide the implementation of specific priorities that are linked to the Economic Development Strategy.

Linkages include:

- A focus on attracting visitors during low and shoulder season while also growing yield year-round
- Ensuring that the experience offer, accommodation supply and access meets the needs and expectations of target markets for the region – this includes opportunities to attract investment as well as attracting high value travellers to the region
- Ensuring that efforts to grow the visitor economy are sustainable and don't impact on the environmental, social, and cultural values of the region
- Aboriginal cultural experiences, including artists, artisans, and other businesses, would contribute to the prosperity of local Aboriginal communities while also enriching the experience offering of the region (such as the Gathang Cultural Centre and Regional Art Gallery)
- A focus on events which represent an opportunity to build awareness of the destination, especially during low and shoulder seasons. However, a strategic approach to managing and supporting events will be required
- Providing shared infrastructure and facilities that deliver benefits to residents and visitors is a high priority. This will support overall health and well-being as well as nature-based, wellness and sports tourism – place planning and precinct master-planning will be critical to the achievement of this goal
- Continuing to engage with local communities to encourage residents to invite their friends and relatives to visit (especially during low and shoulder seasons). This will enhance the year-round sustainability of the visitor economy and the local economy more broadly
- Fostering collaboration and partnerships between Council and industry and between sectors and with other stakeholders from outside the region will be a key to success – this includes with Newcastle Airport as well as other regional organisations and NSW Government agencies.

Target markets

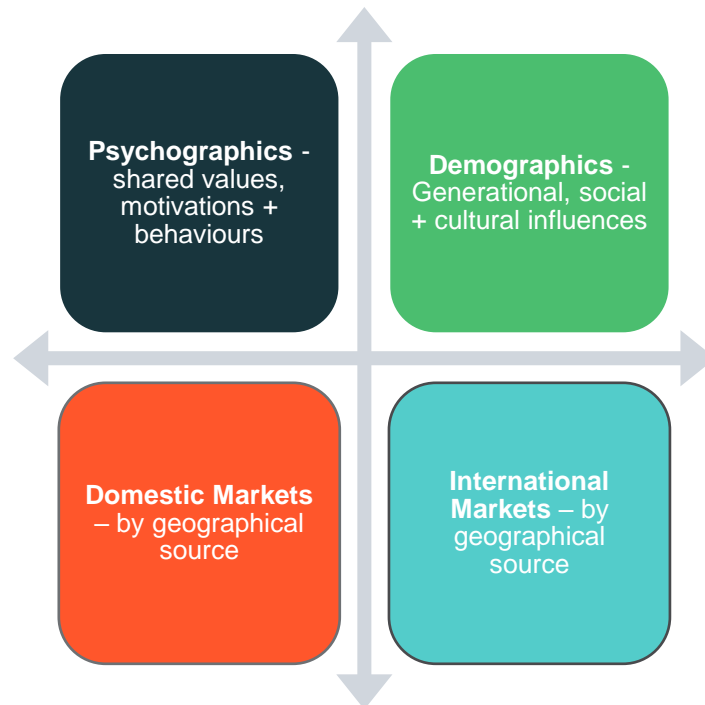
Understanding the motivations, preferences and interests of your target market segments as well as addressing barriers to travel is critical to success as a destination. This is achieved by building an understanding of who, and why people would be interested in choosing your destination for their holiday or travel.

Demographic market segments can be a useful guide. However, to really understand your target markets, it is important to consider psychographic profiles. This is because not everyone in a demographic market has the same motivations, interests, preferences, or even budget. Even in special interest activities, such as mountain biking, there are important differences in the characteristics and behaviours of the market across various segments.

The relationship between psychographic market segments (the 'common ground') and demographic market segments as well as generational influences (for example, between Gen Z, Millennials, Gen X and Baby Boomers) and their mindset are important – for example, are they travelling as a family, a group of close friends, as a couple or to attend an event or wedding (etc).

Another key consideration is the aspirational target market that has underpinned the destination brand strategy and subsequently the success of Destination Barrington Coast campaign to date - *Whatever it takes/ Who cares if.*

Contemporary women travellers were initially identified as a high priority target market within the previous plan. This market has continued to grow and strengthen as a target audience while also remaining highly relevant to the region, especially when considering the generational market segments and mindset for travel.



The high-level objectives for target markets have largely remained unchanged since first identified in the 2017 Destination Management Plan. This is because they continue to be relevant, if not more-so in the current environment. A minor change is the focus on emerging markets (described as new markets in the 2017 Destination Management Plan), where the emphasis on overall visitor numbers has been removed and a greater emphasis has been placed on attracting visitors during the non-peak season. This is consistent with the MidCoast Economic Development Strategy.

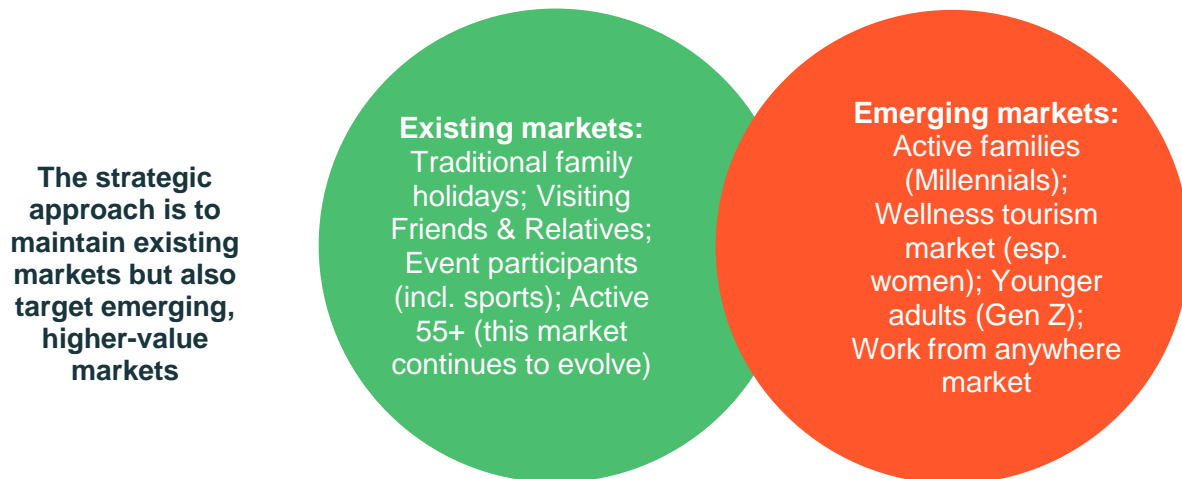
However, what has changed more significantly, is the profile of the existing and emerging markets. These have been updated based on a detailed review of contemporary visitor markets, which is summarised on the following pages.

Below is an updated diagram, which provides a summary of existing markets and emerging markets. The approach represents the sweet-spot between psychographic and demographic or generational market segments. It leverages the existing and emerging strengths of the region. It should also be noted that the emerging markets are already arriving – while they could be classified as ‘existing’ they are still an emerging market opportunity for the region.

High-level objectives

1. **Existing markets** – strengthen the appeal of the destination to existing markets to:
 - a. Extend length of stay
 - b. Encourage repeat visitation
 - c. Increase participation in tours and activities (paid experiences)
 - d. Increase regional dispersal (especially during peak coastal periods)

2. **Emerging markets** – focus on those markets with greatest propensity to grow the visitor economy:
- Increase visitation during non-peak periods
 - Increase yield (through development of higher-yield experiences and accommodation offer)



The following psychographic market segments have been identified by Tourism Australia in their Future of Global Tourism Demand report (November 2022). These segments have been identified following extensive research undertaken by Tourism Australia through their Consumer Demand Project. Importantly, they include the domestic market in Australia.

These market segments are also considered within the new Destination Management Plan. However, the use of these psychographics is not intended to be exclusive nor replace the more traditional visitor markets for the Barrington Coast, including the family market. In fact, they assist in evolving our understanding of these markets in a more contemporary way.

Tourism Australia's psychographic market segments are as follows:

- **Reconnection Traveller:** motivated to spend time with loved ones. It's about relaxing and escaping the daily grind of their everyday lives, having fun, and enjoying themselves.
- **Into Nature Traveller:** they want to escape, to feel secure and comfortable, to have a sense of adventure and have a focus on mental and/or physical wellbeing.
- **Exploration Traveller:** is motivated to explore new destinations and to learn and experience new things. This traveller is a key target audience for Indigenous tourism experiences as well as cultural institutions and attractions.
- **Adventure Traveller:** travel for fun, enjoyment, and a strong sense of adventure. They're keen to meet new people, make friends and challenge themselves. They have a need for stimulation and escape. They connect with remoteness and ruggedness but are also activity oriented.
- **Wellness Traveller:** they are looking for destinations and experiences to nourish their body, mind, and soul to stave off burn-out and fatigue. They are looking to reset, to re-equilibrate and re-centre; they seek travel that relaxes the mind, slow travel; and screenless solitude.

These psychographic market segments are more likely to be interested in the experience offer and competitive advantage of the Barrington Coast and are also more likely to be high value travellers, which provides opportunities for increasing yield as well as travel outside of peak season (year-round).

There are four additional influences on travel choice that should be considered:

- **Food and drink:** travellers are seeking culinary adventures, to sample authentic cuisines, ingredients, and drinks ... to dive into a kaleidoscope of flavours, textures, and the stories of people, process and place that go into them.
- **Sustainability:** Sustainability is at the front and centre of the global psyche, shaping demand for low carbon footprint travel options and experiences that touch the earth and its communities lightly, leaving places and people better off than when they arrived. More than 75% of travellers are committed to sustainability in some way. Sustainability is increasingly influencing traveller choices in terms of where to go, how to get there, where to stay, and which experiences they engage with at the destination.
- **Indigenous tourism:** Indigenous businesses and Indigenous-led partnerships will be critical to meeting demand in a way that balances respect with best-practice customer experiences. An Indigenous lens can value-add when paired with appealing experiences that play to Australia's strengths: natural environment, wildlife, coastal and agritourism.
- **Accessibility:** travellers with accessibility needs are seeking a range of experiences and are more often travelling for adventure, transformation, and to engage in passions. Accessibility goes beyond physical or visibly noticeable impairments and extends into mobility, visual, audio, or cognitive impairment. This is even more important given 2023 is the Year of Accessible Tourism.

Additional market segment considerations

There are several market segments where significant growth is expected to continue both within Australia and around the world, including:

- The continuing rise in the numbers of **contemporary female travellers**, who are more likely to have a higher disposable income and to travel either on their own or in small groups of friends. They are also key influencers in family travel and seek new experiences that immerse them in the destination and local culture.
- The continuing evolution of the **fifties plus market**. More people are choosing to travel earlier than retirement to enjoy the more active or immersive experiences that destinations have to offer. Globally, the 55 + market has the highest disposable income and this demographic are seeking new destinations to add to their bucket-list. They are as equally excited about an Australian holiday as they are about an overseas trip. This market is largely misunderstood; they want to engage and be part of the 'local scene'. They are also much more active and want to be perceived as being 'young at heart.' Domestically, they are also looking for short-break escapes and often choose to travel outside of peak periods to avoid the crowds.
- **Active families** are attracted to a destination that offers happy, healthy, sustainable and safe family adventure. This trend has seen a significant growth in more recent years, particularly following the COVID-19 travel restrictions and lockdowns. They seek opportunities for their children to experience the great outdoors and self-select a break from screen time by providing a fun and exciting alternative. This increasingly includes short breaks as well as aligning with the significant growth in demand for caravan, campervan and camping accommodation and facilities. The Barrington Coast is well positioned to offer this type of holiday.

- **Millennials and Gen Z** continue to travel more domestically than previous generations of their age. This market is highly likely to be attracted to the region as they seek more sustainable, nature-based destinations that offer a variety of accommodation, quality food and drink and contemporary arts and culture. They travel in couples or small groups of close friends, avoid older-style youth hostels and desire to experience a destination 'like a local' (ie seek out local experiences). Millennials are also travelling with their young families and seek out more experiential travel opportunities that engage the whole family, including through increased demand for camping, caravan and campervan and short-term rental accommodation.
- **Digital nomads** and the **remote working** revolution. Even though this market is relatively small it is growing rapidly. This market is seeking places that have connectivity (for ease of remote working), opportunities for short-term rental accommodation and co-working space, as well as activities and experiences to do while they are in the region. They can also create short term VFR opportunities. The remote working market want to feel like a local for the time they are in your town, village, or region. They want to be part of the community and short-term rental accommodation is high on their list of accommodation choices/options.

A recent study from Accenture on the future of work found that 63% of high-growth companies have already adopted a 'productivity anywhere' workforce model. A large share of travellers surveyed for the 2022 SKIFT Report - Sustainability and Remote Work Shaping the Future of Travel, state that being able to work remotely will be a major factor in their future job decisions.

- **Cycle tourism and mountain bike market segments** – there is an increasing interest throughout Australia in opportunities for cycle tourism. A common misperception is that all riders are the same. This is not the case, even among mountain bikers there are significant differences (as opposed to other forms of cycle tourism).

Given the recent investment in mountain bike trails in the region, there is an opportunity for Destination Barrington Coast to further strengthen its appeal to cycle tourism markets, especially for mountain biking and gravel bikes. However, it will be important to consider who the target audience should be. For mountain biking, it is most likely the mountain biking leisure segment, who are more likely to have a mountain bike experience while taking a holiday. However, specific experiences such as those associated with Kiwarra State Forest Mountain Bike Park and The Steps Barrington and Barrington Bike Park are more likely to attract the mountain bike enthusiast segment, who will travel for the primary purpose of a mountain bike experience.

A further consideration is the opportunity for collaboration with Hunter Joint Organisation on the development of the Hunter Cycle Tourism Strategy, which will incorporate the MidCoast Council Local Government Area.

Business events: smaller scale and more bespoke events

Even before COVID-19, there had been a significant shift in business events. This shift has been away from large-scale conferences towards more tailor-made, smaller-scale business events. Another important shift has been towards hosting these events in destinations that have more to offer than the standard conferencing facilities. Specifically, an experience offering that can be shared and enjoyed by participants.

A key consideration will be to consider how to best support smaller-scale and bespoke business events and encourage business travellers to extend their stay for leisure.

'Bleisure', as the name suggests, is the blending of business and leisure trips. It's an overlapping trend that is also fuelling growth in remote working. It's a trend that was first identified by SKIFT in 2013 and has been slowly growing year on year as remote working technology tools like Zoom and Microsoft Teams were launched.

In recent times the trend has grown rapidly as a result of COVID-19 quarantine and lock down restrictions.

International markets

International visitors to the Barrington Coast currently occupy a very low proportion of the total annual visitation to the region. However, a number of emerging opportunities may enable MidCoast Council to grow awareness of and a preference for the Barrington Coast in international markets.

Specifically, the Hunter Joint Organisation has received funding for the Hunter Global Tourism project, which incorporates MidCoast Council, to leverage the investment in and expansion of the Newcastle Airport to welcome international arrivals. It is most likely that the international markets that would be interested in Barrington Coast will be:

- Free and independent travellers who are visiting Australia for the second or third time, and
- International Visiting Friends and Relatives, who may be returning home or visiting friends or family who now reside in the region or within key domestic source markets to Barrington Coast (eg Greater Sydney or Greater Newcastle areas).

As a result, it is recommended that MidCoast Council collaborate with the Hunter Joint Organisation on the development of the Hunter Global Tourism project to identify and pursue opportunities to grow international visitation to the Barrington Coast. This will be a longer-term outcome and would benefit from growth in the availability of international-ready products, experiences and accommodation (to suit the preferences of these market segments) across the region.

A more sustainable environment – protecting and enhancing environmental values

A clear theme that has emerged through consultation and multiple forums relating to Council's policy, planning and program initiatives is the importance of protecting and enhancing the region's outstanding environmental values. This is motivated by a number of reasons, from simple aesthetics to opportunities for outdoor recreation and the importance of a quality natural environment to support agricultural industry and productivity, including but not limited to oyster farming.

As a result, it is critical that any development and place planning is undertaken with these values and sense of place at the centre of decision-making. This includes proactive management of environmental values and sensitive sites as well as building a greater understanding of management priorities to enable protection and enhancement of the region's natural environment. This should be done in line with the principles of adaptive management, as articulated in MidCoast Council's planning framework.

A clear benefit of this approach is to enable and encourage active lifestyles and health and well-being, including the development of active transport initiatives and corridors that link open space, sporting and recreation facilities with town centres and other important assets, facilities and infrastructure in the region. This should enable better access to the destination's natural assets, encourage greater dispersal and align with the growing trend for wellness tourism.

MidCoast Council has already developed a number of plans, strategies and programs that specifically address environmental management and protection of the environment, including:

- MidCoast Greening Strategy
- Manning River Estuary Catchment and Management Program 2021 - 2031

- MidCoast Council Climate Change Strategy
- MidCoast Council Biodiversity Framework 2021-2030
- MidCoast Waste Management Strategy 2030

Unbalanced tourism

Associated with this priority is the challenge of proactively managing the impacts of unbalanced tourism. If this is not done effectively, it contributes to undermining both the perception and reality of the region's natural beauty, assets and sustainability.

Unbalanced tourism occurs when there are too many visitors to a particular site or location within a destination, resulting in negative impacts on the environment, local communities, quality of life for residents as well as the visitor experience.

Managing unbalanced tourism requires a coordinated effort from multiple stakeholders, including both State and Local Government, land managers, the tourism industry, local communities, and the visitors themselves.

A key to success is a proactive program that involves the community and local businesses. This can be difficult to achieve given the range of views and perceptions that are held by people with competing interests.

However, there are examples of success from around the world, particularly in highly sensitive natural environments, where an annual communication and threat mitigation approach has been implemented.

This approach and associated actions links directly to the Council's *Open Space and Recreation Strategy* as well as planned initiatives such as the *Walking and Cycling Plan*.

<u>Defining Sustainable Tourism</u>	
Tourism Australia: Future of Global Tourism Demand, November 2022 (page 89)	
At a simplistic level, ' sustainable tourism ' today can be defined as:	
1.	Do not harm, leave destinations as found
2.	Try to take up/choose sustainable options if available or when offered
3.	Follow any local sustainable practices (related to the environment, culture and community/economy)
4.	Avoid unsustainable or harmful practices

PART C

PRIORITY PROJECTS

Part C – Priority projects

Enablers for success

Remaining informed, visitor-centric and future-focused will underpin the success of this plan. However, collaboration and ensuring that the visitor economy is viewed as an important contributor to a vibrant economy and liveability are also critical. Key enablers for success include:

1. Fostering a broad base of support for the visitor economy.
2. Leading genuine and effective industry engagement.
3. Ensuring the region's natural and cultural values are protected, sustained and enhanced.

Tourism is a dynamic industry, which means it's essential to know the preferences, expectations and needs of today's travellers as well as their barriers to travel. It is also important to recognise that sometimes the little things make the biggest difference.

The enablers identified above, while inter-related, have been broadly grouped from six strategies as follows:

1. Build a broad base of support for the visitor economy with residents and local businesses as well as across all areas of Council
2. Facilitate genuine and effective industry engagement
3. Protect, sustain and enhance the region's natural and cultural values
4. Strengthen collaboration and partnerships
5. Foster and facilitate a strategic approach to attracting investment and talent
6. Advocate to address constraints on the sustainable growth of the visitor economy

Priority actions to address these strategies are shown in the 'Enabler' action plan below, which includes timeframes, primary responsibilities and partnerships:

Table 1 - 'Enabler' action plan

Priority actions	Timeframe	Primary responsibilities, program partners and linkages
Strategy 1.1 Build a broad base of support for the visitor economy with residents and local businesses as well as across all areas of Council		
Implement a proactive, annual communication program with residents and businesses to facilitate a positive understanding of the value of the visitor economy to the region	2024 and then ongoing	<ul style="list-style-type: none">– MidCoast Council - Lead– Involve Business Chambers, community groups and local organisations– Identify local champions who can support and communicate the benefits of the visitor economy to the LGA

		<ul style="list-style-type: none"> – Leverage the success of our ComeVisit visiting friends and relatives campaign with residents.
Strategy 1.2 Facilitate genuine and effective industry engagement		
i. Create an ongoing Industry Advisory (or Reference) Group that can provide advice to Council on the implementation of the destination management plan as well as other matters relating to the visitor economy.	2024 and then ongoing	<ul style="list-style-type: none"> – MidCoast Council - Lead – Involve Business Chambers from across the region.
ii. Develop and implement a shared engagement and capacity development program, including: <ul style="list-style-type: none"> a. Establish a dedicated industry engagement and regular communication program, including but not limited: <ul style="list-style-type: none"> • Integration of ‘fast facts’ and progress updates on the implementation of the destination management plan. • Identifying opportunities for networking and the sharing of information, ideas and initiatives across the region. This could include a MidCoast Visitor Economy Summit and familiarisation programs with operators and other sectors to encourage increased collaboration, partnerships, and packaging of experiences/products. • Sharing insights from research and trend analysis to keep the industry informed of evolving markets and emerging opportunities. b. Establish a 12-month rolling calendar of industry capability development programs, workshops, seminars, etc in which industry can participate to build their capabilities and network with industry colleagues. This can be linked to the forward program delivered by other organisations and agencies, including Destination North Coast NSW and Destination NSW. c. Work with industry, tourism operators and event owners to identify specific issues or challenges that we can advocate for or represent industry, especially with other levels of Government and regional stakeholders such as Destination North Coast. E.g. - the significant issue of insurance for adventure and nature-based tourism providers, including accommodation in natural areas. d. Continue the regular MidCoast Council visitor research program to provide meaningful insights into the region’s visitor economy and the dynamic and evolving 	Start in 2024 then ongoing	<ul style="list-style-type: none"> – MidCoast Council - Lead – Involve the local tourism industry – Partner with Destination North Coast NSW and Destination NSW

<p>nature of consumer behaviour in tourism and travel, including for events as well as ongoing sentiment analysis.</p> <p>e. Increase industry awareness of consumer behavior and expectations, especially in relation to online and digital services, including e-commerce, online booking and flexibility.</p> <p>f. Encourage the adoption of technology to promote the region and provide contemporary visitor services at all touch points along the customer journey.</p>		
Strategy 1.3 Protect, sustain and enhance the region's natural and cultural values		
<p>i. Continue to complete the work commenced on green destination accreditation for MidCoast Council with Ecotourism Australia</p>	<p>2024 and then ongoing</p>	<ul style="list-style-type: none"> – MidCoast Council - Lead – Ecotourism Australia
<p>ii. Implement an annual program involving a proactive approach to managing unbalanced tourism at specific sites. The program would include:</p> <ul style="list-style-type: none"> • Focusing on sustainable and appropriate destination management and development planning, in line with adaptative management principles, including Council's policy and regulatory settings and compliance. A range of initiatives could be included such as: <ul style="list-style-type: none"> - Introducing parking restrictions during peak times (can be adjusted seasonally as required) – Investigating funding options to support effective compliance - Restricting beach access for 4WD vehicles during peak season and during sensitive wildlife breeding seasons - Actively encouraging and supporting development applications for environmentally and socially sustainable developments to reinforce these principles and maintain a sense of place • Engage with impacted communities to build an understanding of the need for any new measures and involve them in potential solutions • Develop a proactive communication program for visitors to the region ahead of and during peak season 	<p>2024 and then ongoing</p>	<ul style="list-style-type: none"> – MidCoast Council - Lead – Local community and industry involvement as required – Links to the Open Space and Recreation Strategy 2023 - 2028

<ul style="list-style-type: none"> • Continue to encourage greater regional dispersal, especially during peak season • Continue to implement the Waste Strategy, including continued promotion of waste reduction and monitoring waste collection during peak periods in key visitor sites 		
Strategy 1.4 Strengthen collaboration and partnership		
<p>i. Continue regular communication with other stakeholders involved in the NSW North Coast, such as Commonwealth and State Government agencies, Destination North Coast NSW and Hunter Joint Organisation.</p> <p>ii. Work with NSW National Parks and Wildlife Service (NPWS), Forestry Corporation and Crown Lands NSW to progress and support major landscape-scale and significant projects involving multiple tenure as well as facilitating greater waterway access and activation.</p> <p>iii. Continue regular engagement with Commonwealth and State Government agencies with program or land management responsibilities within the MidCoast Council Local Government Area. Involve local stakeholders and groups (including the Business Chambers, Traditional Owners, Local Aboriginal Land Councils and organisations such as TIDE) to identify matters for resolution and to assist in delivering and communicating positive outcomes from the engagement process.</p>	Ongoing	<ul style="list-style-type: none"> – MidCoast Council - Lead – Key stakeholders identified, including Destination North Coast, Hunter Joint Organisation, Destination NSW, Department of Regional NSW, National Parks and Wildlife Service, Forestry Corporation, Crown Lands NSW, among others
Strategy 1.5 Foster and facilitate a strategic approach to attracting investment and talent		
<p>i. Provide advice and support to local businesses, organisations and community or volunteer groups to apply for visitor economy or other grants that can assist them grow, revitalise or enhance their experience or offering, including for events. This involves ongoing liaison with Destination North Coast as the key regional partner and conduit to DNSW, Department of Regional NSW and other government agencies</p>	Ongoing	<ul style="list-style-type: none"> – MidCoast Council - Lead – Involve the Tourism Industry Advisory Group – Ongoing liaison with Destination North Coast, Destination NSW, Department of Regional NSW, and other government agencies – Links to MidCoast Economic Development Strategy 2023 - 2028
<p>ii. Identify infrastructure projects that enhance experiences in the Barrington Coast. Ensure customer-centric design and the costs associated with attracting investment are built into all proposals for new major projects. This</p>	Ongoing	<ul style="list-style-type: none"> – MidCoast Council - Lead – Involve the Industry Advisory Group

includes robust master planning, feasibility and return on investment analysis		<ul style="list-style-type: none"> – Ongoing liaison with Destination North Coast, Destination NSW, Department of Regional NSW and other government agencies – Links to MidCoast Economic Development Strategy 2023 - 2028
iii. As part of the industry engagement program, share insights into best practice workforce strategies with industry to shift focus on to the quality of the employee and invest in their ability to grow and learn to create meaningful career pathways	Ongoing	<ul style="list-style-type: none"> – MidCoast Council - Lead – Involve the Industry Advisory Group – Ongoing liaison with Destination North Coast, Destination NSW, Department of Regional NSW and other government agencies – Links to <i>MidCoast Economic Development Strategy 2023 - 2028</i>
Strategy 1.6 Advocate to address constraints and barriers to the sustainable growth of the visitor economy		
Work with industry to identify, advocate for and address (within the scope of Council's responsibilities) significant constraints on the sustainable growth of the visitor economy, including staff shortages, housing supply, road access and maintenance and technology (mobile and internet connectivity)	Ongoing	<ul style="list-style-type: none"> – MidCoast Council - Lead – Involve the Industry Advisory Group

Supply: Experience offering

A significant challenge identified for Destination Barrington Coast is the lack of paid visitor experiences, such as guided tours and activities as well as agritourism experiences that take advantage of the region's spectacular nature and rural setting. Key objectives for success include:

1. Increasing the supply of paid visitor experiences and events
2. Attracting and enabling investment for infrastructure projects and facilities that deliver shared benefits.
3. Attracting investment in sustainable, nature and cultural tourism experiences, accommodation and hospitality.

A broad experience offering that appeals to a range of target markets would enable the MidCoast to realise an even greater potential from its visitor economy. This involves, among other things:

- Experience-led itineraries and destination events that support and reinforce the destination's positioning and point of difference.
- Understanding contemporary consumer behaviour on travel, including the motivations, expectations and barriers to travel as well as for events and other leisure activities.

A detailed review of global and domestic trends in travel, which is included in the situation analysis, highlights the growing importance of nature-based and outdoor activities (including special interests such as kayaking and mountain biking), First Nations cultural tourism (in line with the MidCoast Council's Cultural Plan 2036), health and well-being (wellness), sustainability, quality food and drink, agritourism and more immersive and personalised small group experiences.

As a result, a high priority initiative is to encourage and enable the enhancement of existing and the development of new products, experiences and accommodation.

Travellers' desire for experiential travel will create a need for new offerings. While there has been investment over recent years, continuing to create the infrastructure to support greater access to the nature-based and cultural experience offerings of the region should be a priority (within the limits of available resources, both human and financial, including for ongoing maintenance).

A priority area is to activate and increase access to the region's waterways, including rivers, lakes and ocean. Enhancing experientially focused itineraries and packages in line with the MidCosat Council Visitor Servicing Strategy is a first step towards growing the experiential travel offering and increasing the awareness and appeal to high value travellers. This also links to culinary and agri-tourism.

Investment in shared infrastructure is also important, including connectivity between town centres, community assets and attractions, and the surrounding nature-based offering (from beaches and waterways to national parks and the World-Heritage listed Barrington Tops). This includes cycleways, walking trails and waterway access, as well as outdoor event spaces. Importantly, ancillary infrastructure or facilities, including parking, pedestrian access, and toilets should be integrated into a landscape-based approach to place planning.

To address the objectives identified above seven strategies have been developed as follows:

1. Co-design a model for encouraging, supporting and developing First Nations cultural experiences
2. Implement a product and experience development program
3. Review the strategic approach to and sponsorship of events
4. Attract investment for infrastructure and facilities that deliver shared benefits for residents and visitors
5. Attract investment in sustainable, nature and cultural tourism experiences, accommodation, and hospitality
6. Encourage diversification and revitalisation of accommodation supply
7. Deliver game changer projects for the region

Priority actions to address these strategies are shown in the 'Supply' action plan below, which includes timeframes, primary responsibilities and partnerships. These priorities will contribute to enriching the experience offering, providing more reasons for visitors to extend their stay, spend more (growing yield) and encourage regional dispersal across the destination, year round.

Table 2 - 'Supply' action plan

Priority actions	Timeframe	Primary responsibilities, program partners and linkages
Strategy 2.1 Co-design a model for encouraging, supporting and developing First Nations cultural experiences		
i. In collaboration with local First Nations organisations, host or facilitate a First Nations tourism operators forum to strengthen local networks, showcase the current experience offering and inspire new market entrants – utilise this forum to commence a co-design process that encourages the participation of local First Nations communities in the visitor economy, including identification of barriers to participation. Involve local organisations such as TIDE in this program	Host forum in late 2024 or 2025	<ul style="list-style-type: none"> – MidCoast Council to facilitate – Local First Nations businesses and community representatives, including Local Aboriginal Land Councils – NSW Aboriginal Tourism Operators Council – Destination NSW – Destination North Coast – Links to: <ul style="list-style-type: none"> • MidCoast Cultural Plan 2036 • MidCoast Economic Development Strategy 2023 - 2028
ii. Work with Destination NSW, NSW Aboriginal Tour Operators Council and Department of Regional NSW to undertake an experience development program for First Nations cultural experiences. This should be developed as a specialist program for encouraging the development of new or enhancing existing cultural experiences and assist in addressing key barriers to participation.	Host program in late 2024 or 2025	<ul style="list-style-type: none"> – MidCoast Council to facilitate – Local First Nations businesses and community representatives, including Local Aboriginal Land Councils – NSW Aboriginal Tourism Operators Council – Destination NSW – Destination North Coast – Links to: <ul style="list-style-type: none"> • MidCoast Cultural Plan 2036 • MidCoast Economic Development Strategy 2023 - 2028
Strategy 2.2 Implement a product and experience development program		
i. Implement an experience and product development program as part of a broader annual industry capability development program focused on enhancing existing and developing new experiences, products, accommodation and events. Including:	2024 then ongoing annually	<ul style="list-style-type: none"> – MidCoast Council - Lead – Industry Advisory Group

<ul style="list-style-type: none"> • Revitalisation of existing accommodation and hospitality offerings • Improving customer service standards to meet the needs and expectations of visitor markets • Strengthening the supply of agritourism experiences as well as encouraging the increased use of local produce • Addressing the need for accessible tourism as well as more pet-friendly accommodation • Experience packaging, bundling and multi-day itinerary development to meet the needs of difference target market segments. • Develop and offer more paid experiences and ensure they are listed through online distribution partners • Continuing to grow the listing of products on the Australian Tourism Data Warehouse including linking with Destination NSW's <i>NSW First, Get Connected</i> and export-ready programs 		<ul style="list-style-type: none"> – Ongoing liaison with Destination North Coast and Destination NSW
ii. Encourage an increase in the supply and diversity of sustainable tourism, including eco-accredited accommodation, experiences and products	Ongoing	<ul style="list-style-type: none"> – MidCoast Council - Lead – Involve the tourism industry – Ecotourism Australia & similar organisations such as EarthCheck
iii. Implement a program to connect major industry tourism operators with local tourism and hospitality providers, including private air charters and international-ready partners or wholesale operators, including rental car companies (esp. those that specialise in RV and campervans)	2025	<ul style="list-style-type: none"> – MidCoast Council - Lead – Involve the Industry Advisory Group and broader industry – Destination NSW and Destination North Coast
Strategy 2.3 Review the strategic approach to and sponsorship of events		
i. Review and update the MidCoast Events and Festivals Sponsorship Policy to consider: <ul style="list-style-type: none"> • Creating a framework that distinguishes between the different types of events, by primary objectives or outcomes to be achieved, for example: <ul style="list-style-type: none"> - Community and local events, with defined social and community-focused objectives and outcomes - Major events, which have <u>shared benefits</u> between the community and visitors to the region 	2024	<ul style="list-style-type: none"> – MidCoast Council - Lead – Involve the tourism industry – Destination NSW and Destination North Coast

<ul style="list-style-type: none"> - Sport events, which deliver <u>shared benefits</u> between the community and surrounding regions (i.e. cross-regional benefits) - Signature events, which are primarily focused on attracting overnight visitors to the region, contribute to yield and reinforce Barrington Coast's positioning, point of difference & themes (primary economic benefit with social outcomes) • Integrating assessment criteria for Council support or sponsorship, which may include cash or in-kind support, to enable a transparent, efficient and effective assessment process, with outcomes more easily communicated to organisations and individuals seeking support. • Encouraging opportunities for improving or diversifying revenue sources relating to destination events (separate to community events) • Addressing seasonality in order to activate the region's assets and attractions, including galleries and museums • Achieving a balance between attracting new markets and maintaining or growing existing ones • Integrating sport and outdoor recreation events as part of activating the future development of sporting and outdoor recreation facilities and infrastructure 		
<p>ii. Develop a strategic approach to attract business and private events (such as weddings) to the region</p> <ul style="list-style-type: none"> • Initial focus on small-scale and boutique business and private events, including utilising existing venues, both indoor and outdoor, especially those that link to the region's broader experience offering • Encourage event venue (indoor and outdoor) owners and/or managers to ensure they are listed as a venue on ATDW and <i>Meet in Regional NSW</i> website • Encourage extended length of stay (in line with the trend for combining business trips with leisure i.e. 'bleisure') • Collaborate with Destination North Coast as well as Hunter Joint Organisation and participate as part of their <i>Events 10</i> project to attract events to the wider region and leverage the power of the collective voice in market 	2024	<ul style="list-style-type: none"> – MidCoast Council - Lead – Involve the tourism industry – Destination NSW and Destination North Coast

iii. Identify priorities for sport and outdoor recreation events linked to the core attributes of the sub-regions, for example adventure racing and recreation events for the hinterland and Great Lakes sub-regions while Taree and surrounds is more suited to hosting regional sport events such as rowing, hockey and basketball, among others (albeit with current limited accommodation supply).	Ongoing	<ul style="list-style-type: none"> – MidCoast Council - Lead – Involve local sporting associations and groups – Destination NSW and Destination North Coast Department of Regional NSW
Strategy 2.4 Attract investment for infrastructure and facilities that deliver shared benefits for residents and visitors		
i. Attract investment for and implement the priorities identified within Council's existing plans, strategies and initiatives, including but not limited to: <ul style="list-style-type: none"> • Open Space and Recreation Strategy • Regional Sports Hub (Redevelopment of the Taree Sports Grounds) feasibility • Figtrees on the Manning – Masterplan 	Ongoing	<ul style="list-style-type: none"> – MidCoast Council -Lead – Links to: <ul style="list-style-type: none"> • Open Space and Recreation Strategy • Regional Sports Hub (redevelopment of the Taree Sports Grounds) feasibility • Figtrees on the Manning Masterplan
ii. Prioritise future place planning or masterplans for revitalisation of town centres to facilitate connectivity to the region's nature-based assets as well as activate waterways, including rivers, lakes and foreshore access <ul style="list-style-type: none"> • Identify and prioritise connectivity with core features of the destination from accommodation to tours, attractions, retail and hospitality through to amenities and services such as parking and toilets • Integrate initiatives to facilitate enhanced waterway access both on to and from the water, including to support water-based tours and activities through to potential for seaplane docking on Lake Wallis • Support opportunities for adaptive reuse of heritage sites that enable activation for community and visitor-related purposes, such as retail, accommodation or events • In the above context, prioritise master and place planning for Tea Gardens – Hawks Nest, especially revitalisation of the foreshore and enhancing connectivity (future game-changer project) – Crown Lands NSW will be a key stakeholder in this initiative 	Ongoing	<ul style="list-style-type: none"> – MidCoast Council - Lead – Crown Lands – Links to: <ul style="list-style-type: none"> • Future initiatives, including those outlined in the Local Strategic Planning Statement
iii. Implement refreshed and consistent wayfinding and welcome signage as well as interpretation and dual naming opportunities.	Start 2025/2026	MidCoast Council - Lead

Consider the use of digital signage (where appropriate and relevant).		
Strategy 2.5 Attract investment in sustainable, nature and cultural tourism experiences, accommodation, and hospitality		
i. Provide incentives and support for sustainable tourism development including accommodation and experiences through place or master planning initiatives undertaken by Council	Non-time specific – consider within planning frameworks	MidCoast Council - Lead
ii. Encourage more operators to achieve ecotourism accreditation	Start 2025	<ul style="list-style-type: none"> – MidCoast Council - Lead – Involve industry – Ecotourism Australia and similar organisations
iii. Provide information to industry and support applications to sustainable tourism grant programs, such as Destination NSW's Nature-based Visitor Experience Development grants.	Ongoing	<ul style="list-style-type: none"> – MidCoast Council - Lead – Destination North Coast – Destination NSW – Department of Regional NSW
iv. Profile existing sustainable tourism products, experiences and accommodation on all consumer-facing channels for marketing the Barrington Coast.	Ongoing	<ul style="list-style-type: none"> – MidCoast Council - Lead – Involve industry
Strategy 2.6 Encourage diversification and revitalisation of accommodation supply		
<p>Develop an accommodation supply strategy that addresses the revitalisation of existing accommodation as well as attracting investment for new accommodation (including different styles and types of accommodation). This strategy should:</p> <ul style="list-style-type: none"> • Be informed by a comprehensive audit of the existing accommodation supply • Consider the specific needs and demand for accommodation <u>relative to</u> each sub-region or geographical area within the broader MidCoast LGA • Integrate insights from emerging trends, such as: <ul style="list-style-type: none"> – Workable spaces creating blended accommodation in the hospitality sector. This and other similar initiatives would support the new market segment relating to 'work from anywhere.' – Nature-based, sport and recreation and wellness tourism accommodation, linked to the region's diverse nature-based assets, sports facilities and attractions 	Start 2025	<ul style="list-style-type: none"> – MidCoast Council -Lead – Destination North Coast – Involve the Industry Advisory Group – Links to Destination North Coast's <i>North Coast Accommodation Strategy</i>

<ul style="list-style-type: none"> – Continuing strong growth in demand for caravans, campervans and camping, including for the Millennial active family market – this should also include opportunities for ‘glamping’ – Accommodation that is fit for purpose, including: <ul style="list-style-type: none"> ▪ More suitable for those travelling on ‘tighter budgets’ or travelling for regional sport events ▪ More boutique and high-end accommodation that links to the experience offering they seek (for example, nature-based, wellness and agri- tourism) ▪ Pet-friendly and accessible accommodation, for which demand in the domestic market is increasing at a higher rate post COVID-19 		
Strategy 2.7 Game changer projects for the region - subject to available resources, completing business cases and feasibility studies and attracting investment from public or private sources		
<p>Longer-term game-changer projects for the region include:</p> <p>i. Progress concepts and feasibility analysis for the Forster 360° walk and potential for alternative parking to that provided along Memorial Drive to enable other uses, including for hospitality and events (further investigation to be undertaken in line with MidCoast Council’s 2017 Destination Management Plan).</p> <ul style="list-style-type: none"> • Subject to feasibility assessment, commence detailed master planning, which should include consideration of opportunities for private or public partnerships to attract investment. • This initiative would contribute to the sense of vibrancy of Forster (for residents and visitors alike) as well as support efforts to attract investment into other businesses and attractions within this area. 	To be determined	<ul style="list-style-type: none"> – MidCoast Council - Lead – Industry Advisory Group – Local community and industry – NSW Government agencies including NPWS, Crown Lands, NSW Fisheries
<p>ii. Identify and progress wild river access points within the hinterland areas of the region.</p>	To be determined	<ul style="list-style-type: none"> – MidCoast Council - Lead
<p>iii. Upgrade and maintain road access to key nature-based attractions such as Ellenborough Falls as well as to profile access to the region via Thunderbolt’s Way.</p>	To be determined	<ul style="list-style-type: none"> – MidCoast Council - Lead
<p>iv. Subject to the finalisation of the business case and feasibility assessment progress the Gathang Cultural Centre and Regional Art</p>	To be determined	<ul style="list-style-type: none"> – MidCoast Council - Lead Local community

Gallery – this initiative would strengthen the region's First Nation's cultural experience offering in line with the MidCoast <i>Cultural Plan 2036</i> .		
v. Subject to the finalisation of the business case and feasibility assessment support the Mara Wakulda 'Come Together' Project in Gloucester	To be determined	– Bucketts Way Neighbourhood Centre
vi. Where possible and appropriate, work with the private developer on the potential adaptive reuse of Gloucester's Old Butter Factory	To be determined	– Local community and industry
vii. Progress the development, maintenance and ongoing enhancement of the mountain bike trail network and facilities at Kiwarra State Forest Mountain Bike Park.	To be determined	– Local community – NSW Forestry Corporation
viii. Progress higher-priority stages identified within the feasibility analysis and masterplan for the <i>Great Lakes Great Walk and Aquatic Trails</i> project. This project links to other activities below: <ul style="list-style-type: none"> • Provide proactive support for the development of the Great North Coast Trail and its proposed route through MidCoast Council LGA • Incorporate cycle tourism and separate cycleway planning into the overall concept – initial focus should be on a cycling trail or network from Elizabeth Beach and Pacific Palms to Smiths Lake 	To be determined	– MidCoast Council - Lead National Parks and Wildlife Service – Local community and industry – Links to the Great North Coast Trail
ix. Progress the concept, planning and design (including investment attraction) to develop an Adventure Hub in Gloucester.	To be determined	– MidCoast Council - Lead Crown Lands NSW
x. Support the advancement of the Mountain Maid gold mine visitor precinct for tourism purposes, which is a priority for National Parks and Wildlife Service. This initiative should involve landscape-scale planning to enhance connectivity to the site from Gloucester and provide opportunities for packaging and bundling of experiences in the Barrington Tops area.	To be determined	– National Parks and Wildlife Service
xi. Support significant visitor-related projects on lands managed by NSW Government agencies, including National Parks and Wildlife Service, Forestry Corporation and Crown Lands NSW, especially to enable connectivity at a landscape-scale.	To be determined	– National Parks and Wildlife Service – NSW Forestry Corporation – Crown Lands NSW

Demand: Marketing and visitor services

There are a number of influences on demand in the Barrington Coast, these include:

- A traveller focus on sustainable tourism which changes the demand for offerings. More than 75% of travellers are committed to sustainability in some way. Sustainable tourism aligns with MidCoast's nature-based experience offering, competitive advantage in the marketplace and community values of the region.
- A continued focus on health driving demand for wellness tourism. The more holistic, secondary wellness market is the key to success with a focus on the wellness tourism elements that make any holiday memorable.
- Events are both a headline and a drawcard. Prioritisation of events for Council support to optimise the annual event calendar, maximise the return on investment (social, cultural, and economic) and reinforce destination positioning in the marketplace is important.
- Activating the community to grow the visitor economy by inviting their friends and relatives to visit. These visitors are more likely to visit during low and shoulder season and tend to stay longer.
- Work from anywhere (remote working) creates a new tourism sector, it focuses on the possibility of taking some extra days while working in another location. A critical point is that not everyone is looking to be connected 100 percent of their time. The balance between 'on the clock and off' can be an advantage when it comes to engaging with this new market segment.
- Culinary tourism is about much more than fine dining. Accessibility to the region's produce as well as food and produce-related events are opportunities to create new and/or enrich existing food trails of the region and encourage more people to visit outside of peak season and return again if they have a positive culinary experience. It links strongly with wellness tourism as well as agritourism, which offers greatest potential across the hinterland areas of the MidCoast region.
- The arts, culture, and heritage of the region are both an existing and growing element of the experience offer. This broad sector will continue to enrich the perception of the region and attract new markets, including high value travellers. This includes opportunities to showcase the rich cultural heritage of the Worimi and Biripi peoples.

Each of these influences are directly related to the high-level demand objectives of the Destination Management Plan which are to:

1. Increase low and shoulder season as well as encouraging mid-week visitation.
2. Increase overnight visitor yield, year-round.
3. Encourage greater regional dispersal

To achieve these objectives, it is critical to ensure that the approach to marketing involves:

- Continuing to ensure that the destination brand and positioning resonate with our target markets by focusing on them and ensuring we use the right channels to reach them.
- Remarkable content, including videos, images, copy and inspiring itineraries that:
 - Bring Destination Barrington Coast's stories, characters and landscape to life by 'pulling on the heart strings' (inspirational content)

- Provide high quality information to assist visitors plan and enjoy their trip (informational or rational content)
- Enable multichannel distribution, including via third-party channels such as Destination NSW, National Parks and Wildlife Service, Tourism Australia and online travel agencies as well as to support public relations.
- Leverage and cross-promote marketing activities undertaken for North Coast NSW, including by Destination NSW and the *Feel New in NSW* campaign.

To address the objectives identified above five strategies have been developed as follows:

1. Continuing our commitment to the Destination Barrington Coast brand and positioning, *Blaze your own trail*
2. Creating a destination marketing plan to guide all marketing and marketing-communication activities
3. Demonstrating and celebrating the success of Destination Barrington Coast brand and marketing with the community and local businesses
4. Continuing to implement our Visitor Services Strategy
5. Continuing to support the growth of the visiting friends and Relatives market

Priority actions to address these strategies are shown in the 'Demand' action plan below, which includes timeframes, primary responsibilities and partnerships:

Table 3 - 'Demand' action plan

Priority actions	Timeframe	Primary responsibilities, program partners and linkages
Strategy 3.1 Continued commitment to the Destination Barrington Coast brand and positioning, <i>Blaze your own trail</i>		
i. Leverage core insights into target market segments to create and enhance an emotional connection with them in order to inform and evolve the Destination Barrington Coast brand.	Ongoing	<ul style="list-style-type: none"> – MidCoast Council - Lead – Involve the Industry Advisory Group – Involve industry
ii. Continue to strengthen or enrich the narrative relating to each of the core areas or sub-regions to reinforce their points of difference or character while maintaining consistency in the way in which Barrington Coast is marketed.		
iii. Continue to implement the successful destination marketing campaign, <i>Whatever it takes</i> , which is currently in market (as at May 2023), and continue to evolve it for future years.		

Strategy 3.2 Create a destination marketing plan to guide all marketing and marketing-communication activities		
<p>Develop a multi-year marketing plan to guide marketing campaigns, content creation, and other activities across owned, earned, and paid channels to reach the target market segments. It should:</p> <ul style="list-style-type: none"> • Continue to leverage the destination brand to underpin and guide marketing activities in a way that strongly resonates with and appeals to the target audience. • Provide a framework to continue the proactive approach undertaken over recent years across digital marketing channels. • Raise awareness and the appeal of the extensive nature-based experience offering of the region, including nature-based trails and activation of and access to waterways (rivers, lakes and ocean) • Focus on special interest markets, including sports tourism and outdoor recreation pursuits, such as mountain biking and kayaking. • Profile the range of accommodation options that resonate with the various target markets for the region. • Focus on primary experience themes, including: <ul style="list-style-type: none"> – Arts, heritage and culture, including galleries, museums and heritage trails – Culinary experiences and local produce that also link to agritourism opportunities. 	<p>2024 – high priority</p>	<ul style="list-style-type: none"> – MidCoast Council - Lead – Involve the Industry Advisory Group
Strategy 3.3 Demonstrate and celebrate the success of Destination Barrington Coast brand and marketing with the community and local businesses		
<p>i. Develop and implement a communication plan to engage the local community on the rationale for and benefits of the MidCoast tourism brand - Destination Barrington Coast</p>	<p>Start 2024 then ongoing</p>	<ul style="list-style-type: none"> – MidCoast Council - Lead – Involve the Industry Advisory Group – Involve Destination North Coast
<p>ii. Recognise and encourage operator excellence through programs such as NSW Tourism Awards</p>	<p>Ongoing</p>	<ul style="list-style-type: none"> – MidCoast Council - Lead – Destination North Coast – Destination NSW – Involve the Industry Advisory Group

Strategy 3.4 Continue to implement our Visitor Services Strategy

i. Integrate new trends and dynamics relating to visitor servicing into the Visitor Services Strategy – specifically to address changing needs or preferences as well as to optimise channels to best reach target market audiences at the right stages along the customer or visitor journey and maximise visitor yield.	Ongoing	<ul style="list-style-type: none"> – MidCoast Council - Lead – Involve the Industry Advisory Group
ii. Continue to create and distribute content, including packages for multichannel distribution, including but not limited to: <ul style="list-style-type: none"> • Itinerary packaging tailored to audience desires, including those tailored for road trips and special-interest markets where the secondary experience offer is also critical. • Strengthening support for events at specific touchpoints on the customer journey: pre-arrival, in-region and post-visit. This should include those tailored to the family market for sport events and for business events. • Encouraging more tour providers and activity operators to list their products through third-party online distribution channels 	Ongoing	<ul style="list-style-type: none"> – MidCoast Council Lead – Involve the Industry Advisory Group
iii. Continue to progress the concepts, planning and development (including investment attraction) of the two primary visitor hubs for the region – that is: the Adventure Hub in Gloucester and the Coastal Hub in Forster	Ongoing subject to available resources	<ul style="list-style-type: none"> – MidCoast Council Lead – Involve the Industry Advisory Group
iv. Continue to support and promote the Manning Valley as an integral part of Destination Barrington Coast and implement the Information Business Partnership Model to engage local businesses and industries to provide visitor Information.	Ongoing	<ul style="list-style-type: none"> – MidCoast Council Lead – Involve the Industry Advisory Group

Strategy 3.5 Continue to support the growth of the visiting friends and relatives market

Continue to implement the hyper-local campaign, ComeVisit to activate residents to invite their friends and relatives to visit in the low or shoulder season.	Ongoing	MidCoast Council Lead
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MidCoast Council's Destination Management Plan was prepared by **Destination Marketing Store** with significant input provided by the Council, stakeholders, communities and businesses of the MidCoast region. We greatly appreciate their time and invaluable insights, which have informed the Destination Management Plan.

