



BALLINA
COAST &
HINTERLAND
**DESTINATION
MANAGEMENT
PLAN 2021-2030**

First published June 2020 by Ballina Shire Council,
40 Cherry Street, Ballina NSW 2478.

© Ballina Shire Council 2020

DISCLAIMER

The information contained in this report is intended only to inform and should not be relied upon for future investment or other decisions. It is expected that any investment decisions made using these specific recommendations will be fully analysed and appropriate due diligence undertaken.

In the course of our preparation of the 2021-2030 Ballina Coast and Hinterland Destination Management Plan, recommendations have been made using information and assumptions provided by many sources and from the methodology adopted for this Plan. The authors accept no responsibility or liability for any errors, omissions or resultant consequences including any loss or damage arising from reliance on the information contained in this report.





TABLE OF CONTENTS

| | |
|---|----|
| EXECUTIVE SUMMARY | 6 |
| INTRODUCTION | 08 |
| DESTINATION ANALYSIS | 11 |
| destination footprint | |
| stakeholders | |
| data and documents | |
| assets and market position | |
| infrastructure | |
| communication channels | |
| unique selling proposition | |
| key imagery and footage | |
| demand from source markets and consumer segments | |
| growth potential | |
| DESTINATION DIRECTION | 43 |
| focus | |
| vision | |
| mission | |
| aim and objectives | |
| DESTINATION REQUIREMENTS | 66 |
| human resources | |
| financial resources | |
| key risks | |
| MONITORING | 69 |
| REFERENCES | 69 |



QUEENSLAND

NEW SOUTH WALES

Brisbane

Gold Coast

Tweed Heads

Byron Bay

Lismore

BALLINA

Grafton

Coffs Harbour

Port Macquarie

Taree

Newcastle

Sydney

BACKGROUND

PURPOSE

The purpose of this plan is to:

- *Provide vision and strategic direction for the future of the Ballina Coast and Hinterland visitor economy*
- *Enable industry stakeholders to demonstrate strategic alignment in their business plan and grant applications*
- *Enhance and maintain the community's shared values*
- *Enhance Ballina Coast and Hinterland's Unique Selling Proposition (USP)*

PHILOSOPHY

Ballina Shire Council has prepared this Destination Management Plan (DMP) following guidelines set out in Australian and NSW Government's best practice guides. For NSW Government grant funding and investment, the Government is interested in the most compelling business cases that are going to deliver on the NSW Government's goal of increasing overnight visitor expenditure.

This DMP is the next phase of destination development and builds on the strengths of the *2014 - 2020 Ballina Coast & Hinterland Destination Management Plan (2014 DMP)*. Actions within the 2014 DMP are now either complete or those that required resourcing to be complete, have been put forward again to be resourced and actioned. The overall objective of the 2014 DMP was to double overnight visitor expenditure to \$300 million by 2020. For the 2018 calendar year, visitors to the destination spent a total of \$311 million.

The visitor economy is an important economic driver, generating jobs and contributing vibrant lifestyle benefits to our local community. For this reason, the visitor economy needs to be considered in the broader context of regional development and ensure it is recognised for its contribution and economic value to the region.

The visitor economy is heavily intertwined with other forms of regional development, such as place making or economic development. The strong platform on which to strengthen the destination's visitor economy, due to all the current and previous efforts, is acknowledged and appreciated.

EXECUTIVE SUMMARY

ANALYSIS

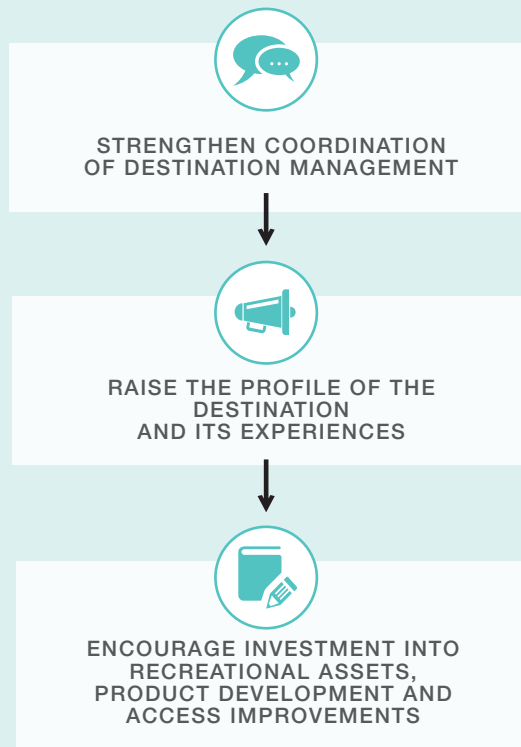
The Ballina Coast and Hinterland is located on the North Coast of New South Wales, 230 kilometres south of Brisbane. The Shire includes the towns and villages of Ballina (main township), Alstonville, Wollongbar, Wardell and Lennox Head, and a number of hamlets and localities.

The Ballina Coast and Hinterland's unique selling proposition is a combination of its accessible family friendly recreational and cultural activities supported by its geography, natural assets and subtropical climate that collectively enable a safe atmosphere and scenic visual environment. Ballina Shire Council has undertaken a lot of work over the previous decades to consult with community members to determine community values; and to preserve and enhance features of the built environment that make our area so desirable to not only visit, but to also live and invest in.

In 2018, the 816,000 visitors to the destination were made up of 57% day-trippers, 41% domestic overnight visitors and 1.7% international visitors. The majority of day-trippers are from South East Queensland and Regional NSW and travelled to the area by private vehicle.

Domestic visitor arrivals have fluctuated over the past decade. In 2018, the destination attracted 802,000 domestic visitors. The average length of stay for an overnight domestic visitor is between 3 and 4 nights. A need exists to even the demand peaks and troughs, to encourage greater mid-week visitation where capacity remains under-utilised.

PRIORITIES



Now it is time to look to 2030 and implement actions that will achieve the objective of attracting \$450 million per annum to the destination while keeping actions aligned to community values.

The strategy is to gain greater share of mid-week overnight visitation. This will be achieved through:

- Market penetration of existing target audiences of the Experiential Travellers, Visiting Friends and Relatives and Families (VFR)
- Product development to create additional experiences that encourage visitor dispersal, retain visitors in the area for longer and has them coming back sooner
- Market development to facilitate business events, sporting groups and accessible tourism customer segments.

DESTINATION DIRECTION

The destination offers a variety of scenic nature-based coastal attractions that are complemented by activity-based family attractions, hard and soft recreational and cultural products and hinterland village and rural farming landscapes. As our population increases, the qualities that make our destination special, such as our productive farmland and our natural environment, will need to be preserved.

The Ballina Coast and Hinterland has long been viewed as a naturally beautiful, quiet, relaxing family oriented holiday area and attractive retirement location. However locals no longer view Ballina as strictly a retirement area and the Visitor Economy Product Audit confirmed the destination offers food, nature-based tourism attractions, arts, cultural and beach lifestyle experiences. Affordable accommodation, a good public domain and local infrastructure along with ease of access are also key assets of the destination allowing it to become a holiday and business events destination with broad appeal.

The Visitor Economy Product Audit identified gaps in experiences as hinterland-based activities such as visiting a producer; assets to immerse people in the hinterland such as shared paths and cycleways or waterfall site embellishment; festivals and events; and more hosted authentic experiences that fit the character of the destination. Over supply of dated motel accommodation in Ballina that is indistinguishable to the consumer presents an opportunity for operators to invest in their business to revitalise and offer a unique experience to the visitor.

Access to the Ballina Coast and Hinterland has been improved through major road upgrades and growth in air-traffic to the Ballina Byron Gateway Airport in recent years. The destination appeal in the domestic and international markets is unlikely to change significantly without additional substantive investment in key transport infrastructure. Road network investments and a marina are part of Council's long-term plan and rely heavily on the NSW Government's financial contribution and access to land.

REQUIREMENTS

Ballina Shire Council employs Visitor Services staff to oversee destination management and operate the Ballina Visitor Information Centre and associated visitor services and volunteer programs on behalf of the destination. However staffing levels within Council are not sufficient to assume full responsibility to carry forward each and every action listed in this DMP. In-kind and financial support from stakeholders and community interest groups needs to be contributed to carry the destination's tourism agenda forward.

Financially, in order to carry this plan forward, a number of revenue streams have been identified to enable the implementation of actions. Not all identified actions are the responsibility of Council therefore private investment is required. This DMP is available for industry stakeholders to demonstrate strategic alignment in their own business plans for grant funding applications.

A range of risks have been identified, including internal and external factors that could impact on the delivery of the overall goal, being to triple overnight visitor expenditure to the Ballina Coast and Hinterland (from \$149 million in 2009 aligned to the NSW Government objective) to \$450 million by 2030. A number of strategies have been outlined to mitigate these factors.

INTRODUCTION



The visitor economy is an important economic driver, generating jobs and contributing vibrant lifestyle benefits to our local community. For this reason, the visitor economy needs to be considered in the broader context of regional development and ensure it is recognised for its overall contribution and economic value to the region. In the 2018/19 year visitors contributed \$245.3 million to the Ballina Shire local economy equating to 11.7% of the Shire's Gross Regional Product. The visitor economy accounted for 549 full time equivalent direct jobs and an additional 417 indirect full time jobs (NIEIR, 2020).

New residents and investments are closely linked to a destination's tourism story, most often through a direct visit where the positive visitor experience translates into a positive connection with the destination and further interest to relocate to the region. Therefore destination management is everyone's business and through a holistic process, Ballina Shire Council can continue to

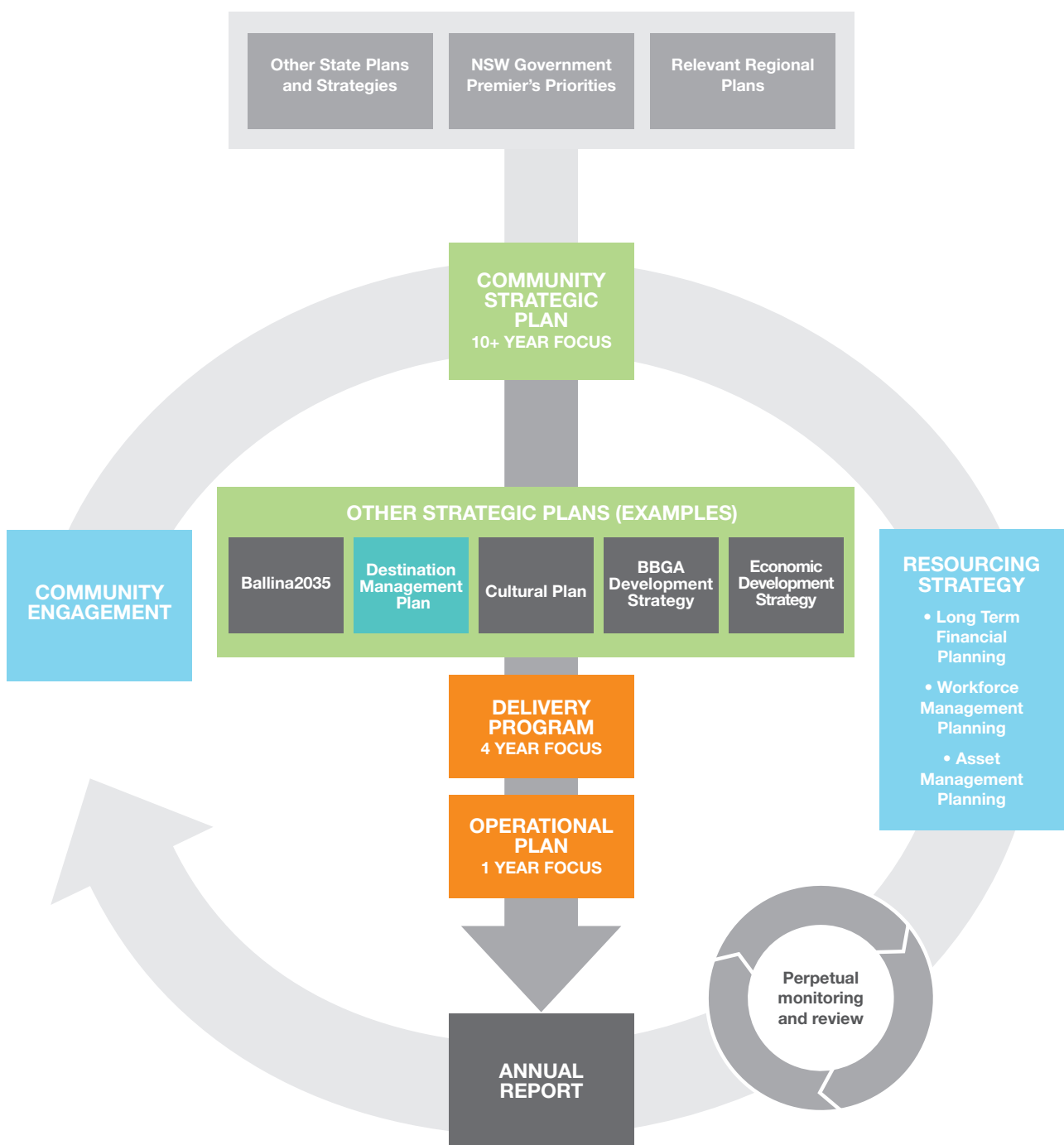
ensure the visitor economy improves liveability for current and future residents. The term recreational assets has been used throughout this DMP with the intent to define built-assets that improve one's recreational time.

Customer segmentation, crisis and risk management, climate change adaptation, communications, as well as opportunities for jobs must all be considered and managed. The role of our local government in the visitor economy is to support, facilitate, advocate and assist with capacity building for the sector to be sustainable and operate in harmony with the community's values.

This DMP continues to build on the strong foundations council has built over decades of work already implemented or planned for implementation. Specific examples of tangible assets are available in sections Key Data and Documents (pg 14), Key Assets and Market Position (pg 16) and Key Infrastructure (pg 18).

The Ballina Coast and Hinterland Destination Management Plan forms part of the NSW Office of Local Government's Integrated Planning and Reporting Framework.

There is a number of key elements in the framework including reporting requirements. The diagram below illustrates where the DMP fits in the overall framework and how our plans interrelate.



PURPOSE

PURPOSE OF THE DMP

The specific purpose of this document is to:

- Provide vision and strategic direction for the future of the Ballina Coast and Hinterland visitor economy
- Enable industry stakeholders to demonstrate strategic alignment in their business plan and grant applications
- Enhance and maintain the community's shared values
- Enhance Ballina Coast and Hinterland's Unique Selling Proposition (USP)

Ballina Shire Council has prepared this DMP, following guidelines set out in the Australia Government's *Guide to Best Practice Destination Management* and Destination NSW's *Destination Management Template*.

Now in 2020 it is timely to look to 2030 and implement actions that will achieve the objective of attracting investment to the destination by 2030 while keeping modifications aligned to community values. For NSW Government grant funding and investment, the Government is interested in the most compelling business case(s) that are going to deliver on the NSW Government's goal of increasing overnight visitor expenditure.

This DMP is the next phase of destination development and builds on the strengths of the *2014-2020 Ballina Coast & Hinterland Destination Management Plan (2014 DMP)*. Actions within the 2014 DMP are now either complete or those that required resourcing to be complete, have been put forward again to be resourced and actioned. The overall objective of the 2014 DMP was to double overnight visitor expenditure by 2020. For the 2018 calendar year visitors to the destination spent a total of \$311 million.

The process of drafting this edition of the DMP commenced with a product audit to review the composition, size and extent of the destination's visitor economy. Findings from this audit are referred to throughout this DMP; and a table summarising the collection of visitor economy assets is included as Attachment A. Visitor economy industry consultation took place in November 2018 and further specific consultation occurred from February 2020 through until April 2020. A review of existing strategic plans and documents was

also undertaken for the items referred to in Table 2.1 to gain a broader context of existing plans for regional development.

The 2019 Product Audit identified 351 visitor products and services that support a visitors stay in destination. It should be noted that while there were 562 visitor economy operators recorded in the Tourism Research Australia 2018 Ballina LGA Profile, the 351 products listed in the Product Audit do not include takeaway stores, accommodation properties without council consent, road side stalls and other businesses with predominately local customers. The product audit list does however include churches, supermarkets, galleries and other infrastructure which is not considered a tourism operator however are important for recognising gaps in the visitor service needs.

Key gaps in the 2019 product audit are identified as:

- A signature festival/event
- Indigenous led experiences
- Nature-based experiences
- Group transport services
- Agri-tourism experiences
- A corporate venue to cater for over 500 seated pax
- Hinterland based self-contained accommodation
- Wet weather attractions

CURRENT CLIMATE

It will be vital to conduct annual product audits commencing in Q2 of 2020 during the recovery phase from the bushfires and COVID-19 as these dual crises had devastating impacts for overnight visitation. A comparison of visitor products and services should be analysed for new gaps as a result of businesses not surviving the crises.

It should be noted that whilst Ballina Shire Council has initiated the process of developing a Ballina Coast and Hinterland DMP, implementation of specific recommendations as a result of this DMP may or may not rest with Ballina Shire Council. Many issues are outside of the control of local government. The NSW Government and visitor economy operators also have a role to play in

DESTINATION ANALYSIS

managing the visitor economy.

Section two of this report the Destination Analysis, examines the attributes and framework of the Ballina Coast and Hinterland destination. This section provides context as to how the author arrived at the specific actions within section three of this DMP.

DESTINATION FOOTPRINT

The Ballina Coast and Hinterland is located on the North Coast of New South Wales, one of the fastest growing regions in Australia. The destination is located 230 kilometres south of Brisbane and is bordered by the Local Government Areas (LGA) of Byron to the north, Richmond Valley to the south, and Lismore City to the west.

Ballina Shire Council is aware that visitors do not see LGA boundaries, and it could reasonably be assumed that the destination's footprint may include components of at least two other LGAs including Byron Shire and Lismore City. For the purposes of this DMP, Ballina Shire LGA is the destination and is referred to as Ballina Coast and Hinterland throughout this plan and also for visitation purposes.

The Shire includes the towns and villages of Ballina (being the main township), Alstonville, Wollongbar, Wardell and Lennox Head, and a number of hamlets and localities (see map on next page). While the region is experiencing an outflow of younger persons to metropolitan areas, there is a net-migration to the area with an inflow of older migrants and families seeking a coastal lifestyle.



DESTINATION ANALYSIS

KEY STAKEHOLDERS

Tourism is a multi-faceted industry that embraces a wide variety of public and private sector stakeholders. Data based on a four-year aggregated average from 2015 to 2018 shows that the Ballina Coast and Hinterland had 562 businesses within the visitor economy. Of these businesses 236 were sole traders; 294 businesses employed less than 19 employees; and 27 organisations employed 20 or more employees (Tourism Research Australia, 2018)

Broad stakeholder and community consultation in the preparation of this DMP helps reflect community aspirations, increases local ownership of the Plan and is instrumental in building partnerships to carry the Plan forward to implementation. A number of actions were undertaken to engage a wide range of stakeholders in the development of this DMP including the following:

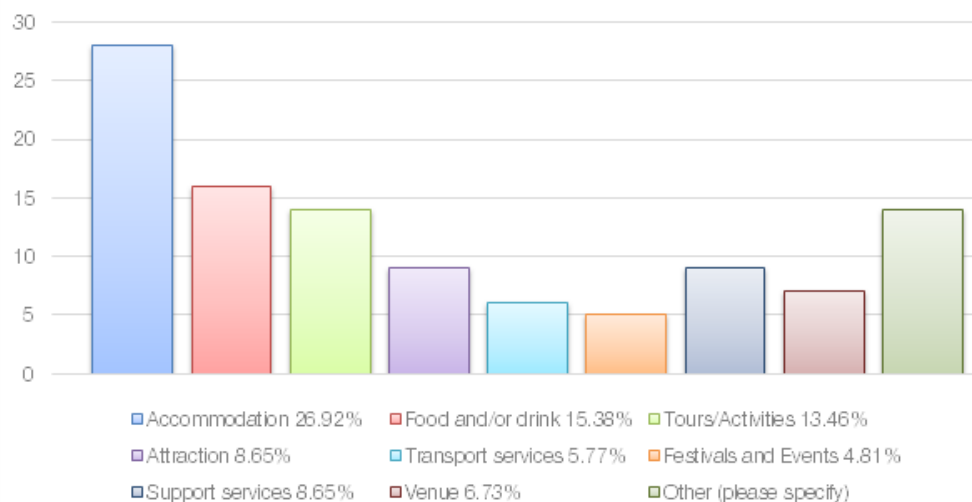
- A survey of 104 visitor economy stakeholders was conducted over a 10-week period from 7 February to 16 April 2020. A copy of the survey instrument is included as Attachment B. Advertisements for the survey were made in industry news articles, Community Connect, within the Ballina Visitor Information Centre and via media releases.
- Thirteen one-to-one meetings with industry experts were conducted comprising of staff from Regional NSW Regions, Industry, Agriculture and Resources;

Business Chamber NSW; Regional Development Australia; Destination North Coast; Ballina Byron Gateway Airport; and Ballina Shire Council.

- A 2019 Southern Cross University study of 161 residents titled *Study of resident perceptions of short-term holiday letting* was undertaken
- Feedback from two facilitated industry workshops in November 2018 comprising of 36 stakeholders was analysed for inclusion in this DMP. Both workshops were facilitated by Dr. R. Derrett and Dr. J. Mackellar.
- The November 2018 Micromex Community Satisfaction Survey result was analysed for inclusion in this DMP
- Further community consultations were cancelled due to COVID-19 restrictions
- The draft DMP was peer reviewed by Destination NSW, Destination North Coast and Southern Cross University (Dr. Kay Dimmock and Professor Betty Weiler, June 2020). Their comments were considered, and where appropriate, included in the document.

The table below identifies the number of responses from stakeholders in specific sectors of Ballina Coast and Hinterland’s visitor economy.

NUMBER OF SURVEY RESPONSES FROM EACH SECTOR WITHIN BALLINA COAST AND HINTERLAND VISITOR ECONOMY



BALLINA COAST AND HINTERLAND



DESTINATION ANALYSIS CONT.

KEY DATA AND DOCUMENTS

A range of national, regional and local policy, planning and promotional documentation was reviewed in the preparation of this DMP, as listed in the table below. The visitor economy is heavily intertwined with other forms of regional development such as place making and economic development. The strong platform on which to strengthen the destination's visitor economy, due to all the current and previous efforts is acknowledged.

KEY BACKGROUND DOCUMENTATION

| ORGANISATION | STRATEGIES / PLANS / RESEARCH |
|----------------------------|---|
| BALLINA SHIRE COUNCIL | <p>Results of Ballina Coast & Hinterland Destination Management Plan Consultation Survey (2020)</p> <p>Visitor Economy Industry Stakeholder Consultation (2018)</p> <p>Results of Ballina Visitor Centre Satisfaction Surveys (2019-2020)</p> <p>Ballina Visitor Information Centre Visitation Data</p> <p>Ballina Visitor Information Centre Operational Task list (2020)</p> <p>Ballina Coast and Hinterland Destination Fact Sheet for Event Organisers</p> <p>In house accommodation, attraction and activity brochures</p> <p>2019 Ballina Coast & Hinterland Product Audit</p> <p>Destination website discoverballina.com.au</p> <p>Airport Masterplan 2030 draft (2019)</p> <p>Community Strategic Plan (2017-2027)</p> <p>20/21-23/24 Draft Delivery Program and 20/21 Operational Plan</p> <p>20/21 – 29/30 Draft Long Term Financial Plan</p> <p>Ballina Major Regional Centre Strategy 2035 (2016)</p> <p>Community Satisfaction Survey Results 2019</p> <p>Ballina Local Environmental Plan (2012)</p> <p>Ballina Local Strategic Planning Statement exhibited version (2020)</p> <p>Ballina Shire Growth Management Strategy (2012)</p> <p>2014-2020 Ballina Destination Management Plan (2013)</p> <p>2020/2021 Fees & Charges</p> <p>20/21 Draft Workforce Management Plan</p> <p>Ballina Shire Economic Development Strategy (2018)</p> <p>Lennox Head Town Centre Community Insights Report (2019)</p> <p>PX Assessment Ballina Street Lennox Head (2019)</p> <p>Killen Falls and Tosha Falls Plan of Management Implantation Status (2019)</p> <p>Wardell Strategic Plan 2015- 2035 (2016)</p> <p>Alstonville Strategic Plan 2017 -2037 (2018)</p> <p>Wollongbar Strategic Plan 2019-2039 (2019)</p> <p>Ballina Shire Rural Character Statements (2014)</p> |
| TOURISM RESEARCH AUSTRALIA | Ballina Local Government Area Profiles (years 2000 - 2018). Please note 2018 data is the latest available |
| AUSTRADE | <p>Understanding Visitor Regional Dispersal in Australia (2019)</p> <p>Technology Disruptors in Tourism (2019)</p> |
| DESTINATION NSW | <p>Destination Management Planning Fact Sheet (2019)</p> <p>Destination Management Template (2019)</p> <p>NSW Government State-wide Destination Management Plan (2019)</p> <p>NSW Food and Wine Tourism Strategy and Action Plan 2018-2022 (2018)</p> <p>Aboriginal Action Plan 2017-2020</p> <p>China Tourism Strategy 2012-2020</p> <p>NSW Regional Conferencing Strategy and Action Plan 2017 – 2021</p> <p>Visitor Centre Accreditation Manual (2017)</p> |

| ORGANISATION | STRATEGIES / PLANS / RESEARCH |
|--|--|
| AURORA RESEARCH | Regional Visitor Services Strategy (2012) |
| DESTINATION NORTH COAST | Destination North Coast Destination Management Plan (2018) Study of Short Term Holiday Letting (STHL) on North Coast NSW council areas (2019) |
| NSW GOVERNMENT | Visitor Economy Industry Action Plan 2030 (2018) Transport for NSW Future Transport 2056 Regional NSW Services and Infrastructure Plan (2018) Tourism and Transport Plan (2018) North Coast Regional Plan 2036 Northern Rivers Regional Economic Development Strategy 2018-2022 NSW Small Business Strategy 2020 Discussion Paper (2019) Department of Planning, Industry and Environment Net Zero Plan 2020-2030 (2020) |
| AUSTRALIAN GOVERNMENT DEPT OF RESOURCES, ENERGY & TOURISM + TOURISM AUSTRALIA | The Guide to Best Practice Destination Management (accessed online 2019) |
| NORTHERN RIVERS JOINT ORGANISATION | Strategic Regional Priorities 2019-2022 |

A number of information gaps were evident during the development of this DMP.

Firstly, visitor arrivals, length of stay and level of spend data is two years old, and is compiled through a Tourism Research Australia (TRA) aggregate of data from a period four years prior. The 2019 data set is anticipated to be available in August 2020.

Secondly, data profiling the level of visitation to key attractions (both public and privately owned), was not available via any source. In concurrence with the second point, the Visitor Economy Product Audit work undertaken during this Plan's preparation highlighted the lack of readily available data profiling tourism-related businesses. This gap is especially significant in the informal short term holiday accommodation sector, where a total of 704 properties with unique addresses were identified as being available for short term holiday let (von der Heidt et al., 2020).

Additionally, the DMP would have benefited from Tourism Research Australia's Destination Profiles however such work is now only completed on a regional basis i.e. North Coast NSW and has not been updated since the 2014-2015 data set was published. This highlights a need to source local or shire based visitation and economic data for decision making.

Furthermore, the sample size of data for targeted sectors such as business events, accessible tourism, Indigenous tourism, agri-tourism, etc. means that publishable data is not available.

DESTINATION ANALYSIS CONT.

BALLINA'S KEY ASSETS

The following table groups the destination's main assets and describes their appeal to visitors based on visitor experiences that our sought by visitors collected through questions to the visitor services team or internet search terms.

| WHAT | DESCRIPTION | CONSUMER APPEAL |
|--|--|--|
| LOCAL BEACHES, WATERWAYS AND AQUATIC ACTIVITIES | <p>Ballina's coastline and waterways (from rivers to bays to lakes and beaches) offer plenty of opportunities for relaxation, recreation and quality family time.</p> <p>Current activities include swimming, surfing, walking, exploring rock pools and fishing. Various commercial operators organise activities such as beach horse riding safaris, surf lessons, scuba diving, wake boarding, stand up paddle boarding, kayaking, kite surfing, river cruising, whale watching adventures.</p> <p>Other aquatic activities include swimming pools, water spray parks and the Ballina Waterslide.</p> | <p>The coastline and aquatic activities are great for family, sporting, nature-based and recreational consumer markets. The ideal climate allows for extended periods of aquatic activities to reconnect and make memories with friends and family.</p> |
| FAMILY ATTRACTIONS | <p>Macadamia Castle, Summerland House Farm, Northern Rivers Community Gallery, Ballina Pool and Waterslide, Ten Pin Bowling, Ballina Cinema, Ballina Naval and Maritime Museum, skate parks and playgrounds.</p> | <p>Easily accessible and affordable family activities for a day/a few hours, featuring entertainment, educational, unique experiences, retail and food and beverage elements. Allows families to get off the beach in the heat of the day. Some offer wet weather alternatives to going to the beach.</p> |
| BALLINA'S ICONS | <p>Ballina is not only famous for its <i>Big Prawn</i>; it also has a strong naval and maritime history. The Ballina Naval and Maritime Museum offers visitors a taste of the past, with the largest collection of model ships in Australia, the only remaining raft of the famous Las Balsas Expedition of 1973, a Port of Ballina display, rare and unique shipwreck items and a reciprocating steam engine.</p> | <p>The Big Prawn standing nine metres high is synonymous with Ballina and allows visitors a point to take that iconic photo and lends itself to an introduction into the fishing industries prevalent in Ballina.</p> <p>The Ballina Naval and Maritime Museum is an accessible and interesting historical learning experience for the whole family. It offers fun activities, hands on displays and educational displays for all markets as well as special-interest markets.</p> |
| QUAINT HINTERLAND VILLAGES E.G. ALSTONVILLE NEWRYBAR TINTENBAR WARDELL | <p>The scenic beauty and surrounding townships throughout the destination allow the visitor to drive and explore points of interest along Tourist Drive 28. The drive incorporates walks through remnants of the 'Big Scrub' rainforest along with visits to local waterfalls. Explore the boutique stores and grab a quality coffee.</p> | <p>The windy country roads offer more than just scenery. There are stops for fresh locally grown produce, family attractions, refreshments from one of the cafes and for a yarn, historic bakery or plantations in the hinterland townships, stroll through nature or a visit to art galleries, artist studios and unique shops selling all sorts of wares.</p> |
| FRESH AIR & NATURE-BASED RECREATION | <p>The Ballina Coast and Hinterland offers many activities for those who love exploring and enjoying the outdoors, including clifftop headland and rainforest walks, cycle paths, lookouts (whale watching off the headland), dolphin-watching, kayaking down the rivers and waterways, kite-surfing and visiting the shire's parks and nature reserves.</p> | <p>The destination offers pristine coast and country, a fantastic climate and a relaxed, safe atmosphere. These create the perfect setting for those who want to escape the crowds and the hassles of everyday life and get back to nature.</p> |

BALLINA'S KEY ASSETS CONT.

| WHAT | DESCRIPTION | CONSUMER APPEAL |
|--|---|---|
| LOCAL EVENTS | Local events and festivals include but are not limited to the Country Music Festival, Ballina Food and Wine Festival, Love Lennox Festival, Alstonville Craft and Garden Fair, Skullcandy Oz Grom Surfing Festival, annual agricultural shows, Northern Rivers Harvest Food Festival, or one of the region's many sporting events. | From the annual country show to music concerts, surfing and skate boarding competitions, art, food and wine events, Ballina's event calendar offers something for everybody, and gives visitors a taste of the local community spirit. |
| FLIGHT BASED ACTIVITIES. GET A BIRD'S EYE VIEW | It is possible to view Ballina from a new angle: hang-glide or paraglide off Pat Morton Lookout, Lennox Head or fly over the Shire in a chartered aeroplane, a WW11 warbird or helicopter flight. | Flying over the destination offers a memorable experience for both adventure seekers (hang-gliding and paragliding) and those less adventurous (charter-planes & microlites). |
| REGIONAL PRODUCE AT WEEKEND MARKETS AND LOCAL STORES | A number of fresh produce, local design, art and craft markets are held in the Ballina Coast & Hinterland throughout the year. There is also a range of quality boutique and major retail shopping outlets. Additionally attractions such as the Macadamia Castle and Summerland House Farm offer family-oriented activities and opportunities to sample/purchase locally grown produce such as macadamia nuts, avocados and coffee. | Visitors have the opportunity to experience the destinations genuine community atmosphere and engage with local residents, as well as sampling and purchasing local arts, crafts and produce. |
| ARTS AND CRAFTS | Local artists display their work at the Northern Rivers Community Gallery (NRCG) for viewing and sale. There are a number of small galleries dotted throughout the destination; additionally artists welcome visitors to their studios throughout the year on special open day events. | The region is well-known for being artistic and creative. Visitors to NRCG can enjoy morning tea at the Ballina Gallery Café as well as viewing and purchasing local artwork. It is a great experience to meet the artist and visitors enjoy visiting local galleries are open to the public at artists own studios or in a number of galleries in the destination. |
| DINING & CAFÉS | Local cuisine and Ballina's growing café culture includes fresh prawns, fish and chips by the beach, to multi-cultural dining options and five star dining. These experiences provide visitors with insights into the local culture and customs that connect visitors to the people, the produce and the place. | Ballina Shire's many dining options provide visitors of all demographics with a great way to enjoy local produce. There are many local producers that are offering so many appealing options, innovative cuisine, quality artisan products, funky cafes and dining venues that are all catering to various dietary and health needs. |
| INDIGENOUS HISTORY AND CULTURE | The shared path from Angels Beach to Flat Rock interprets some of the local Aboriginal keepers of cultural knowledge crossing Country that is of special significance for Aboriginal people. | Hearing cultural stories from Indigenous Australians is an immersive experience with wide appeal. Along the Ballina coastline Visitors are informed of the Goanna and the Snake cultural story. Today this area is important to Aboriginal people for learning about traditional culture and maintaining a connection to Country. |
| NAVAL HISTORY AND RIVER NETWORK | Along the Richmond River front between Captain Cook Park and the North Wall, nineteen signage panels provide historical insights into the history of the area and explain the significance of the Richmond River in early settlement of the area. | The lifestyle of early settlers is diverse from today and visitors love to hear the story of how an area came to be settled. |

DESTINATION ANALYSIS CONT.

BALLINA'S KEY ASSETS CONT.

| WHAT | DESCRIPTION | CONSUMER APPEAL |
|--|---|--|
| <p>VENUES AND MISSINGHAM PARK AMPHITHEATRE</p> | <p>There are a range of private and publicly owned venues for all occasions from informal get togethers, to meetings and events in a range of locations. From dry hire to full service any small scale event (under 400 pax) can take place.</p> <p>For example, a new facility the Ballina Indoor Sports Centre, opened in 2019 offering an indoor sporting venue with sports courts, meeting spaces and retractable seating for 530 people; or the Lennox Cultural Centre offering a theatre for live performances, theatre, bands and large scale community events, with seating for up to 200 people.</p> <p>Missingham Park offers a community event amphitheatre overlooking the Richmond River and adjacent to a skate park and playground</p> | <p>Catering to all budgets the destination offers a range of all-weather venues for specific purpose events some with exceptional water views.</p> |

KEY INFRASTRUCTURE

As illustrated below the destination's key tourism-related infrastructure includes the Ballina Byron Gateway Airport, the highways and other roads, the Ballina Visitor Information Centre, and upgrades to the coastal pathway. These products and services support access to and enable visitation to the destination.

Whilst access to Ballina Coast and Hinterland has been improved through major road upgrades and growth in air-traffic to the Ballina Byron Gateway Airport, the destination appeal in the domestic and international markets is unlikely to change significantly without additional substantive investment in key transport infrastructure. Road network investments and a marina are part of Council's long-term plan and rely heavily on the NSW Government's financial contribution. Until such projects become a reality, growth will likely be underpinned by the successful branding and positioning of the destination.

BALLINA BYRON GATEWAY AIRPORT



Before Covid-19 BBGA was providing 58 flights a week to three destinations (Newcastle, Sydney, Melbourne) from four airlines. Now BBGA also offers a seasonal direct service to Canberra.

Over 533,000 annual passengers as at June 2019. Provides access to the destination by high value visitor segments.

BALLINA BYRON GATEWAY AIRPORT INFORMATION DESK & BROCHURE STAND



A volunteer program managed by staff in the tourism section of council, ambassadors meet arriving passengers 7 days a week and inspire visitors to engage in all that is on offer.

Encourages visitation and dispersal throughout Ballina Coast & Hinterland.

KEY TOURISM-RELATED INFRASTRUCTURE

HIGHWAY ACCESS



Ballina is directly accessible via the Pacific Highway to the north and south and Bruxner Highway to the west.

Majority of visitors (83%) arrive by car to the destination.

BALLINA BP TRAVEL CENTRE & NORTHERN RIVERS DIGITAL VISITOR HUB



Opened in April 2020 at the interchange of the Pacific and Bruxner Highways, the visitor hub offers an interactive information service for the entire region, with 2 large touchscreens, an immersive waterfall scene where people can put themselves in the picture, a floor to ceiling map and a touchscreen with a kid's interactive game.

Raises awareness amongst motorists on the Pacific and Bruxner Highways with estimated foot traffic of over 2 million per annum.

BALLINA VISITOR INFORMATION CENTRE



Provides booking and information service 7 days a week.

Provides visitors and stakeholders with a tangible call to action and a place for the tourism story to be shared.

BOATING ACCESS POINTS



Multiple access points for a variety of water craft to enter and exit the destination's river network.

Allows access for water-based recreation to enjoy the coastal and aquatic assets that appeal to many outdoor enthusiast visitors.

DESTINATION ANALYSIS CONT.

COASTAL SHARED PATHWAY



Connects Ballina to Lennox Head via a coastal walk and cycle path.

13 kilometres of scenic walk and cycle way along coastal escarpment.

SURF PATROL



Ballina Lighthouse and Lismore Surf Lifesaving Club for beach patrols with kiosk, restaurant to access food. Lennox Head Alstonville Surf Lifesaving Club again with access to a kiosk overlooking the water.

The beach patrols provide families with access to the beach with reassurance of flags signalling the better place to swim.

ACCOMMODATION AND HOLIDAY PARKS



There are a range of accommodation options from camping to quality hotels for a diverse mix of budgets.

Provides options that cater for all budgets. It should be noted that there is an over- supply of dated motel accommodation that is undistinguished from property to property.

SWIMMING POOLS AND WATER SPRAY PARKS



New facilities at Ballina and Alstonville opened in late 2018; each offering a 50 metre Fina compliant 8-lane pool, a 25 metre pool heated year round and a water spray park. Ballina also offers two waterslides.

Provides ability to cater for carnivals and events as well as a popular activity in calm water with kiosk facilities.

PAT MORTON LOOKOUT AND NATIONAL SURFING RESERVE



Lennox Point has magnificent views to the Cape Byron Lighthouse on a clear day. It also has views over the township of Lennox Head and the surf break, Lennox Point. Easy access supported by two carparks and a share path.

Lennox Point has been identified as a top ten surfing spot in Australia and is a dedicated National Surfing Reserve.

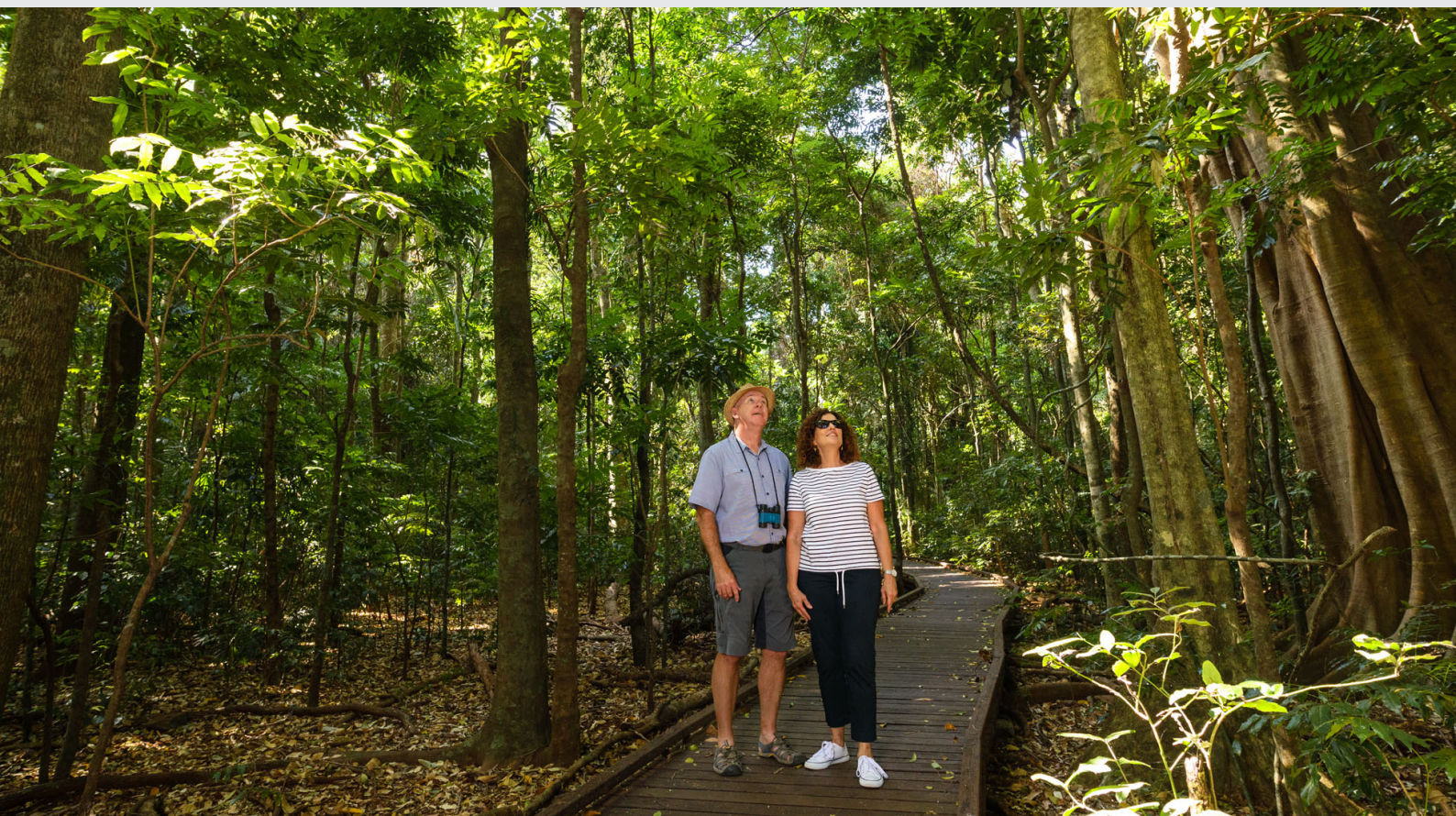
KEY TOURISM-RELATED INFRASTRUCTURE CONT.

Consultation addressed what built assets respondents thought are required to further develop the visitor economy. The top six themes were:

1. More visitor experiences (in general)
2. Improved public transport network
3. Expand the Ballina Byron Gateway Airport services
4. Improve the range of experiences along the foreshore
5. Expand the range of venues
6. A mix of other actions

Stakeholder consultations and the Visitor Economy Product Audit also suggested the destination has a number of asset gaps, in terms of: interpretation of many Indigenous resources; a signature festival/event; a marina; a dedicated business events facility; alternative family attractions including wet weather options; more accommodation options; and increased commitment to expanding a night time dining scene in Ballina.

It is recognised that Ballina Shire Council has some ownership on the above mentioned product gaps list. There are however a number of product asset gaps that require solutions from the private sector or from state government departments. For example, Council provides funding for festivals and events however will not operate a festival/event, instead enabling community led festivals and events.



DESTINATION ANALYSIS CONT.

KEY COMMUNICATION CHANNELS

From the Key Communications Channels table below the reach suggests that social media marketing is the most cost effective method of communicating with visitors through each stage of the visitor journey.

The table outlines the destination's range of communication mediums to engage with a visitor. It is acknowledged the bulk of the mediums enable engagement once a visitor has arrived in the destination. For example, when the customer engagement model e.g. dreaming, planning, booking, experiencing is considered a high proportion of communication channels are used once the visitor is in the destination, as opposed to in source market to capture their interest.

Looking at the range of mediums, for those visitors considering a potential visit (based in source market) the visitor would firstly have to already have the destination in mind (through for example a previous visit or word of mouth promotion) to connect with one of our communication channels. It is acknowledged there is a limit to the number of times resources can be invested to promote the destination in key source markets. Targeted digital campaigns are generally activated when grant funding is secured, which typically occurs only in response to emergency recovery with the aim to bolster demand back into regional NSW.

KEY COMMUNICATION CHANNELS

| COVERAGE | REACH | VISITOR ENGAGEMENT STAGE | ADVANTAGES | DISADVANTAGES |
|--|---|---|---|--|
| DESTINATION WEBSITE discoverballina.com.au | | | | |
| 95% of approved visitor experiences | 82,407 visitors 2018/2019 | Source market and in destination experiencing | Tourism products available in one location for cross selling. Cost effective platform, easy to update and keep current, showcased at BP Travel Centre | Maintaining ranking on Google searches due to competitiveness |
| SOCIAL MEDIA Facebook: BallinaCoast&Hinterland; Instagram: discoverballina & northernrivers_nsw | | | | |
| 40% of assets | Followers: 4525 facebook 3510 Instagram | Source market and in destination experiencing | Efficient way to communicate, cost effective, quick messaging, can target ideal visitor | Constantly changing the platform so need to keep up to date with new strategies |
| BALLINA VISITOR INFORMATION CENTRE | | | | |
| 95% of approved visitor experiences | Services 43,000 enquires per annum | Typically in destination experiencing | Face to face communication, opportunity to tell a story, up-sell, motivate and visitor dispersal, conversion | Resource intensive, only a small proportion of our target audience walk through the door |

KEY COMMUNICATION CHANNELS CONT.

| COVERAGE | REACH | VISITOR ENGAGEMENT STAGE | ADVANTAGES | DISADVANTAGES |
|---|--|---|--|--|
| VISITOR GUIDE | | | | |
| 30% of assets | Print 50,000 in distribution approximately 12-18 months | Source market and in destination experiencing | Raises brand awareness, industry collaboration, material that can be stocked in other destinations | Static content, outdates quickly, expensive, time consuming to design and copy write |
| COMMUNITY CONNECT (COUNCIL NEWSLETTER) | | | | |
| 20% of assets | Quarterly magazine delivered to a high proportion of households in shire | In destination experiencing | Cost effective for targeting locals and promoting tourism initiatives and events | Static content, outdates quickly |
| DESTINATION BLOG Ballina Byron Life | | | | |
| 20% of assets | Pushed through social media and destination website | Source market and in destination experiencing | Efficient way to communicate, current trend | Time/resource hungry, needs regular posts, doesn't tie in with BC&H branding |
| BALLINA BYRON GATEWAY AIRPORT AMBASSADORS (VOLUNTEERS) | | | | |
| 95% of approved visitor experiences | Serviced over 7,300 arrivals enquiries in 2019 | In destination experiencing | Cost effective as ambassadors are volunteers, face to face communication, motivate and visitor dispersal | Lack of knowledge, volunteers not turning up to shift, can be time intensive to manage |
| BP TRAVEL CENTRE NORTHERN RIVERS DIGITAL VISITOR HUB | | | | |
| 95% of approved visitor experiences | Expecting foot traffic of over 2 million per annum | In destination experiencing | Raises awareness and engages visitors who may not of thought about visiting the destination | Resource heavy and expensive to replace displays |
| PROMOTIONAL VIDEO (nature focussed) | | | | |
| 30% of assets | Various marketing campaigns | Source market and in destination experiencing | Visually appealing, can be used by industry operators to apply for events and conferences | Expensive to produce video footage |

DESTINATION ANALYSIS CONT.



UNIQUE SELLING PROPOSITION

The Ballina Coast and Hinterland's unique selling proposition is a combination of its accessible family friendly recreational and cultural activities supported by its geography, natural assets and subtropical climate that collectively enable a safe atmosphere and scenic visual environment. Ballina Shire Council has undertaken a lot of work over the previous decades to consult with community to determine community values and to preserve and enhance features of the built environment that make our area so desirable to not only visit but to live and invest in. To build on these strengths, looking ahead investment for private and/or public sector is needed to:

- Build the destinations range of festivals, recreational events, community-markets, etc.
- Renew and upgrade experiences to ensure they maintain their market position as high-quality, value for money attractions
- Further develop the product base of visitor experiences for example through guided tours, interpretation or hosted offerings
- Collaborate on promoting the destination's experiences.

The table on the following page highlights the destination's unique and distinguishing factors.

The destination's competitive edge in these markets is centred around the destination's unspoiled landscapes, welcoming and safe family-oriented towns and villages, affordability, accessibility, product diversity, and ideal year round climate. By focusing upon these assets and market strengths, the aim is to:

- (a) highlight Ballina Coast and Hinterland's unique experiences and points of interest to targeted markets;
- (b) ensure the destination is positioned alongside its competitors with its own unique appeal.

FEATURES OF THE BALLINA COAST & HINTERLAND

| POINT OF DIFFERENCE | | TARGET MARKET | HOW WE PROMOTE IT |
|---------------------|--|---|---|
| 1 | GREAT ACCESS TO THE COAST AND HINTERLAND | Families Business Events | Destination name, imagery on all communications. Scenic drives incorporating both landscape features. Itineraries developed and promoted through the destination website. |
| 2 | SAFE AND NATURAL ENVIRONMENT WITH AN ABUNDANCE OF OPEN SPACE FOR HARD AND SOFT RECREATION AND ADVENTURE PURSUITS | Families Sporting Conference & Events Accessible | Destination name, imagery on all communications. Supporting and promoting recreational events. Social media Destination website Digital Visitor Hub Ballina Byron Gateway Airport |
| 3 | CLIMATE | All markets | Visitor guide Destination website |
| 4 | FLAT AND ACCESSIBLE TERRAIN | All markets | Destination website Brochures specific to shared paths and cycleways |
| 5 | FREE INFORMATION AND BOOKING SERVICES FOR ACCOMMODATION, TOURS AND UNIQUE EXPERIENCES | All markets | Communicated through Visitor guide, website, social media, local operators, Ballina Byron Gateway Airport and Digital Visitor Hub |
| 6 | SELL LOCALLY MADE PRODUCTS DISTINCTIVE TO THE REGION (EG COFFEE, MACADAMIA NUTS, HONEY) | All markets | Retail store at the Ballina Visitor Information Centre. Promoted through tourism publications and social media. Supporting and promoting local markets and festivals. |
| 7 | HISTORY AND HERITAGE | Business Events Accessible Health and Wellbeing | Visitor Guide Destination website BP Ballina Travel Centre Interpretive signage projects Local knowledge owners/holders provide promotion |
| 8 | COUNCIL'S CONTINUED LONG TERM INVESTMENT TO THE TOURISM INDUSTRY AND VISITOR ECONOMY | All markets | Community Connect Ballina Visitor Information Centre Ballina Shire Council owned websites Visitor Guide |
| 9 | VALUE FOR MONEY DESTINATION WHEN COMPARED TO BYRON BAY | All markets | Use of imagery on all communications. Use of value for money captions. Promote offers through the destination website and social media. Destination Fact Sheet discoverballina.com.au |

DESTINATION ANALYSIS CONT.

BALLINA CLIMATIC DATA

The destination enjoys a subtropical climate that is perfect for a coastal lifestyle all year round mild with winters and balmy summer temperatures. For example high temperatures range from a mean of around 19 in the winter to 28 in the summer; lows range from a mean of 12 in the winter to 21 in the summer. Mean rainfall is relatively high compared to other NSW destinations such as inland regions, varying from 66 mm in September to over 200mm in March.

KEY IMAGERY AND FOOTAGE

Some funds have been allocated over the years to undertake photo shoots and filming of Ballina Coast and Hinterland key assets over a number of years. These high-resolution images highlight some of the destination's "must do" experiences. The images are used in marketing material such as the official visitor guide, destination website and community connect publication. An image gallery has also been set up on the digital operator industry notice board to provide local operators with professional assets to assist promoting the destination's unique and distinguishing products and services.

There are however gaps in this imagery as the diversity of key experiences and the niche markets they appeal

to are not fully embraced. For example: activities that may suit the conferencing market, accessible attractions, sporting facilities, etc. It is also important to keep the images current with images taken as new attractions and infrastructure is completed.

Council has also produced a four-minute video (with shorter social media versions available) to showcase the natural beauty of the region and promote its key assets, coast to hinterland, range of things to see and do, strong food culture, friendly locals, seafood industry, natural environment, proximity to nature, rainforest and waterfalls. The video specifically targets nature loving young families and also couples over 40.

In addition, there are two x 1 minute videos that have been produced to attract target markets that are suitable for social media in the reopening of businesses during COVID-19.

The November 2018 stakeholder consultations confirmed Ballina Coast and Hinterland tourism industry's desire for Ballina Shire Council to set short and medium-term marketing goals, collaborate in promotional activities, and investigate funding options to finance the marketing potential. It was determined that rather than suggest we are on Byron Bay's doorstep that Ballina position itself as a breath of fresh air and a place you can get lost in the moment away from the crowds of Byron Bay or city life.

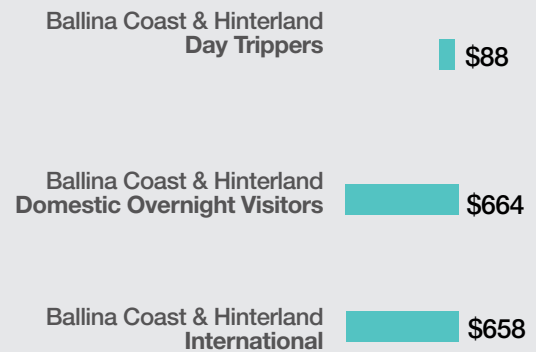


DEMAND FROM KEY SOURCE MARKETS AND CONSUMER SEGMENTS

The visitor economy is an important economic driver, generating jobs and contributing vibrant lifestyle benefits to our local community. Year on year the percentage of the tourism industry's contribution in Ballina's Gross Regional Product fluctuates between 11-13%. For the year ending 2018, visitors contributed \$275 million to the Ballina Shire local economy. In this same period the visitor economy accounted for 549 full time equivalent direct jobs and an additional 417 indirect full time jobs (NIEIR, 2020).

As shown adjacent, domestic overnight visitors are the highest yielding for the destination. When investing resources to communicate with visitors the highest return on investment would typically be from a domestic overnight visitor.

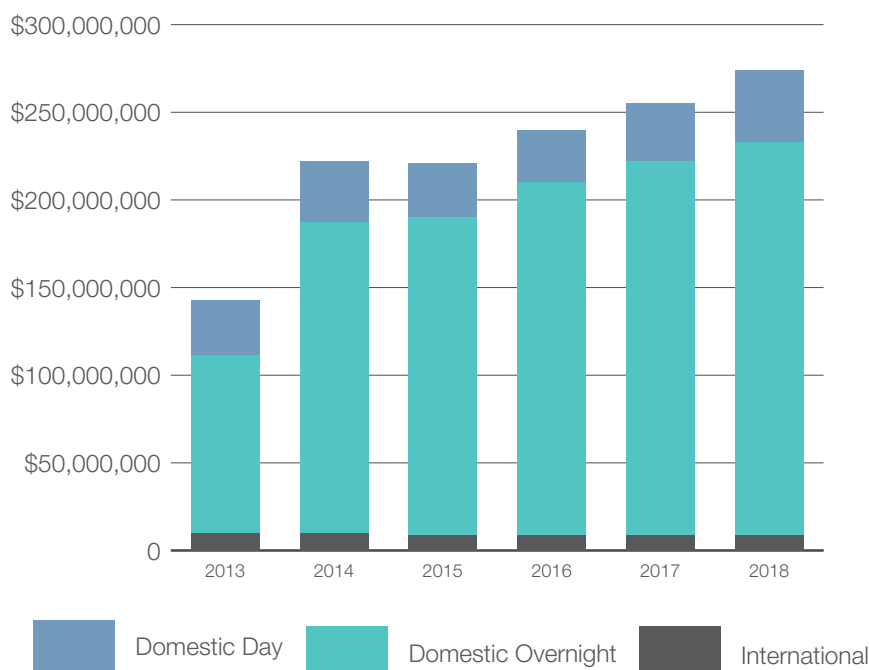
AVERAGE SPEND PER VISITOR



Source: Tourism Research Australia

VISITOR SPEND (\$AUD) 2013-2018

Source: Tourism Research Australia



DESTINATION ANALYSIS CONT.

VISITORS TO THE BALLINA COAST & HINTERLAND

Domestic visitor arrivals to Ballina Coast and Hinterland have fluctuated over the last decade, with highs in 2000, 2004 and 2010, 2016, 2017 and 2018 and lows in 2005 and 2009. International visitor arrivals remain stable over the same period, albeit in much lower numbers. At the time of writing, anecdotal evidence suggests international arrivals will see a downturn during 2020 and 2021 due to state and international border closures as a result of COVID-19.

To compare the neighbouring destination, Byron Shire received 1,865,500 domestic and 205,000 international visitors in 2018 vs. the 802, 000 domestic visitors and 14, 000 overnight visitors to the Ballina Coast and Hinterland in that same period. This suggests the market position of Byron has strong market appeal and attracts many visitors to experience Byron culture.

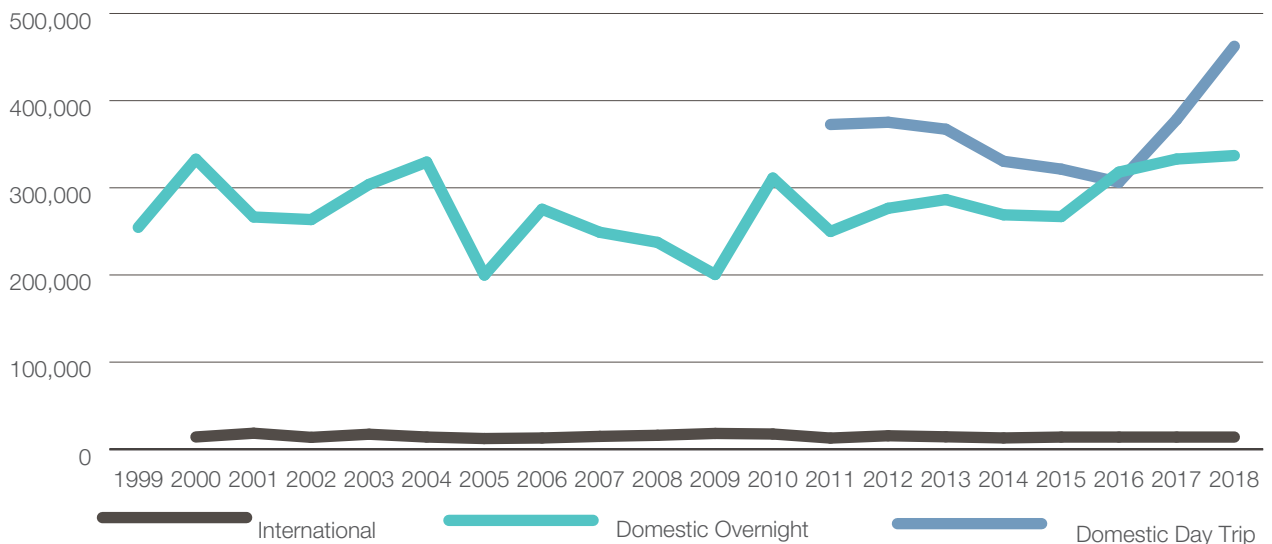
AVERAGE SPEND PER NIGHT



Source: Tourism Research Australia

VISITOR NUMBERS TO BALLINA COAST & HINTERLAND 1999-2018

Source: Tourism Research Australia



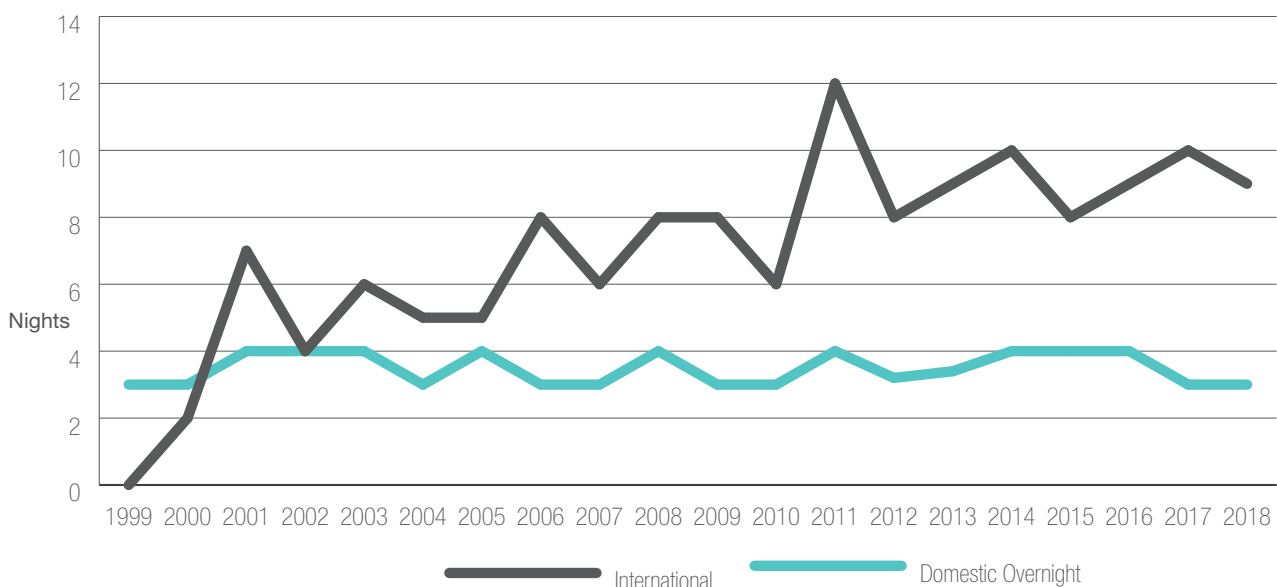
Note well: Domestic Day Trip data only available from 2011 onwards

VISITOR NIGHTS IN THE BALLINA COAST & HINTERLAND

Data suggests that the *average length of stay* for the domestic and international markets has fluctuated over the period from 1999 to 2018. The figure below depicts these variations and illustrates that international visitors have a higher average length of stay than domestic visitors. Interestingly, the data indicates that the average length of stay of international visitors is on an upward trend, rising from 2-3 nights in 2000 to around 12 nights in 2011 but has since plateaued from 2012 at 8-10 nights. The *average length of stay* of domestic visitors has more or less plateaued at around 3-4 nights over the 20 year period.

AVERAGE LENGTH OF STAY VISITORS TO BALLINA COAST & HINTERLAND 1999-2018

Source: Tourism Research Australia



DESTINATION ANALYSIS CONT.

The chart below depicts the total visitor nights spent in the destination for the years 1999 to 2018. The data suggests the *total domestic visitor nights* halved from a high of 1.17 million visitor nights in 2003, to around 600,000 visitor nights in 2009. This may have been impacted by the Global Financial Crisis in 2008/09. Total numbers have recovered since this low to a new all-time high in 2016 to 1.12 million visitor nights. By way of contrast total domestic visitor nights in neighbouring Byron Shire for 2018 were around 4.11 million. This suggests there may be opportunities to design and deploy tactical marketing strategies to attract greater visitor numbers to Ballina Coast and Hinterland. In-depth market research is required to provide clarity and direction to these strategies.

The total visitor nights figure shows *total international visitor nights* have remained largely constant at between 125,000 – 149,000 nights per year apart from in 2000 and 2002 where visitor nights were less than 60,000 per annum.

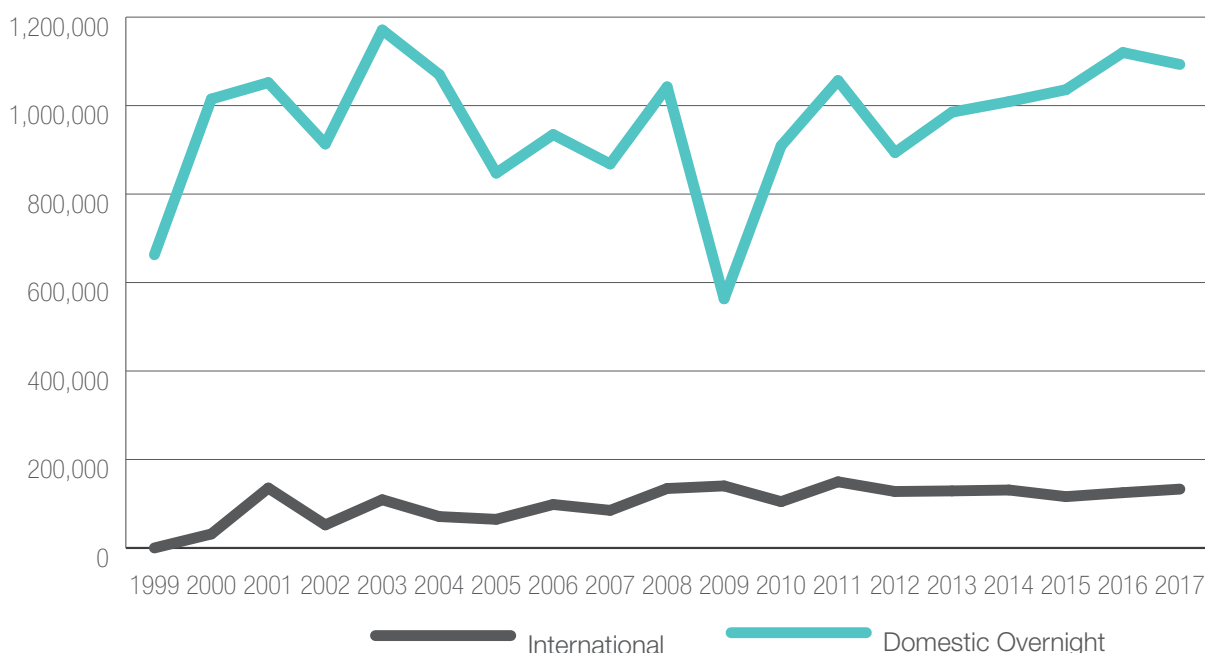
While international visitors stay a greater length of time in the destination by comparison to domestic visitors, the spend per night for an international visitor is only 37% of that of a domestic overnight visitor. The *Average Length of Stay Table* shows the economic contribution from overnight domestic visitors at \$664 per visit achieved over a shorter timeframe i.e. they are a higher yielding market. Given the cost to secure an international visitor vs. a domestic visitor it is recommended that resources for marketing funds are concentrated on domestic source markets unless collaborating on a large scale.

The stakeholders consulted during the preparation of this DMP responded that to further increase a visitors' length of stay:

- more tourism product and experiences are required
- increase the destinations festivals and events; and
- increase promotional campaigns.

TOTAL NUMBER OF VISITOR NIGHTS SPENT IN BALLINA COAST & HINTERLAND 1999-2018

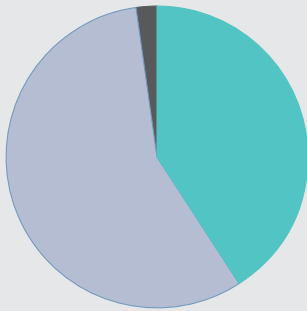
Source: Tourism Research Australia



TYPE OF VISITORS TO THE BALLINA COAST AND HINTERLAND

Tourism Research Australia 2018 aggregated data shows the proportion of visitors to Ballina Coast and Hinterland is broken into the following percentages:

- 41% domestic overnight visitors
- 57% day-trippers
- 1.7% international overnight visitors

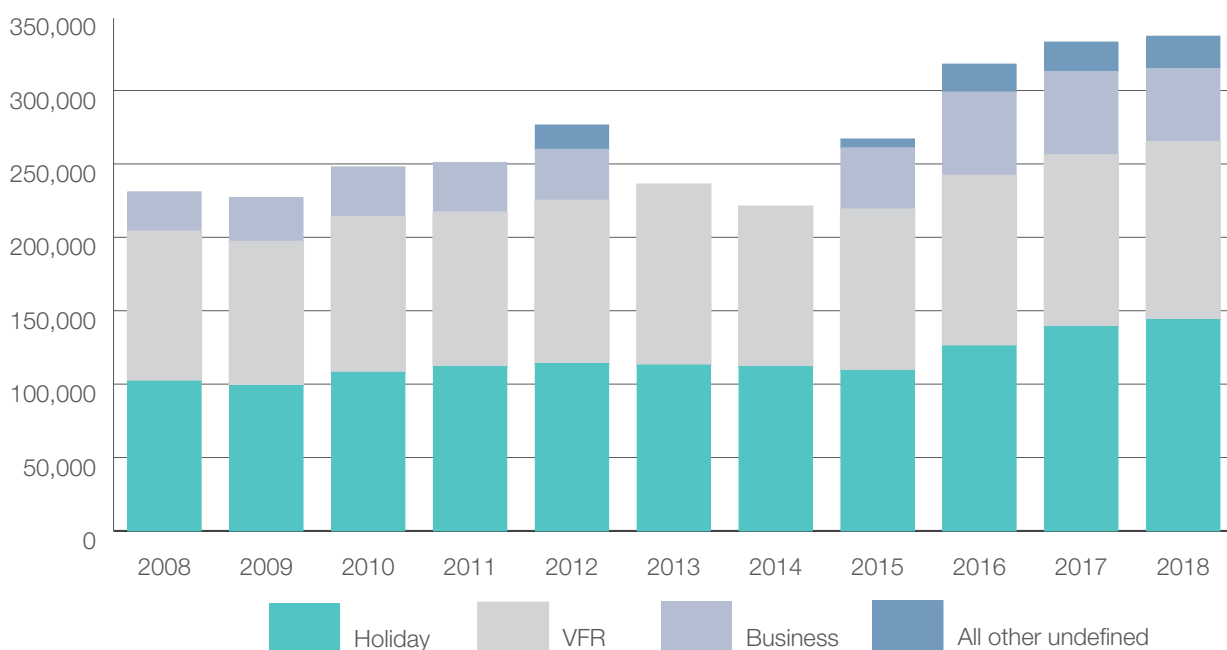


The proportion of domestic overnight visitors is further segmented by purpose of visit. The leisure category, including holidays or visiting friends and relatives (VFR), currently produces the greatest number of overnight stays for the destination. This illustrates the destination has a strong appeal to the leisure category, while also providing opportunity to further host business events. For example, corporates looking to offer incentive and bring delegates to somewhere that doubles as a holiday destination.

Please note below VFR = Visiting Friends and Relatives.

DOMESTIC OVERNIGHT VISITORS BY PURPOSE OF VISIT 2008-2018

Source: Tourism Research Australia



DESTINATION ANALYSIS CONT.

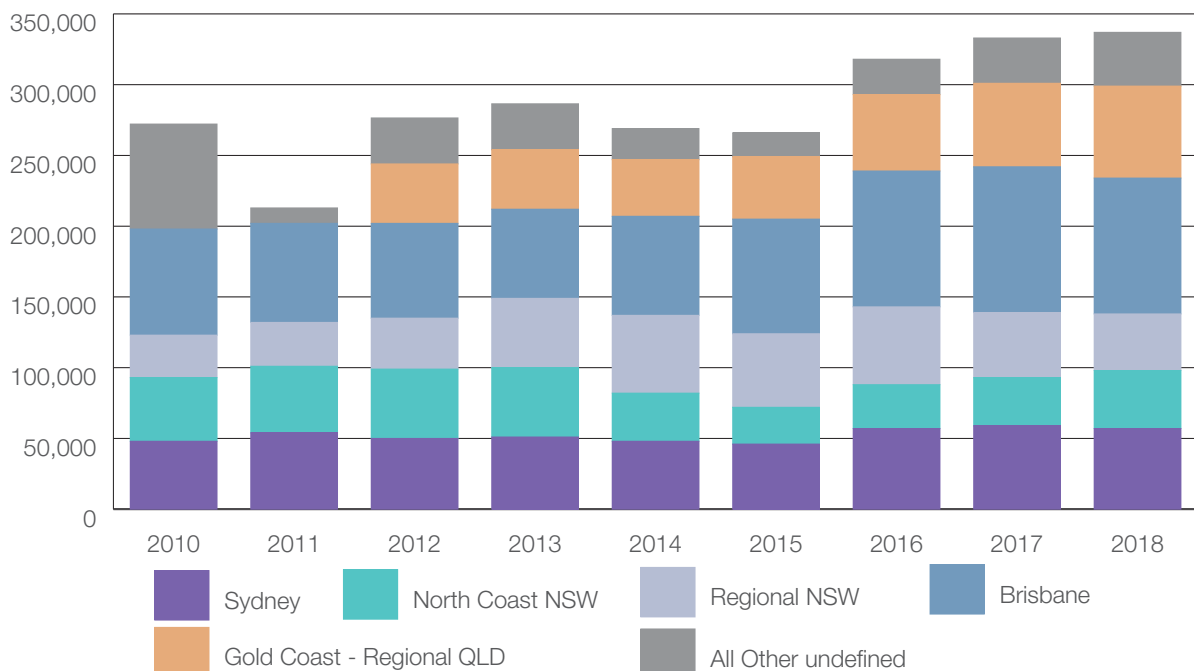
It is suggested that the Pacific Highway upgrades have had a positive effect to connect visitors residing in Brisbane with the destination. Through until 2014, visitors from Regional NSW provided the destination with the greatest volume of visitation. This shifted in 2015 when the destination hosted 81,000 overnight visitors from Brisbane, followed by 78,000 overnight visitors from Regional NSW. This trend has continued and is reflected in available data.

South East Queensland (Brisbane and Gold Coast) together with Regional NSW source markets provide the greatest volume of visitors to the destination as is illustrated by the majority of domestic overnight visitors arriving into the destination via private vehicle. Eighty three percent of domestic overnight visitors arrived via private vehicle, 13% travelled by air, with the remaining 4% arriving by other means such as coach, boat, bike or walking.

Domestic overnight visitors who arrive by aircraft to the destination are economically valuable. In 2018 domestic overnight visitors arriving by aircraft spent \$1,983 per stay vs. \$383 per stay for domestic overnight visitors arriving via private vehicle. Spending per trip by air travellers has increased steadily over the past ten years, while spending by private vehicle travellers has remained relatively stable.

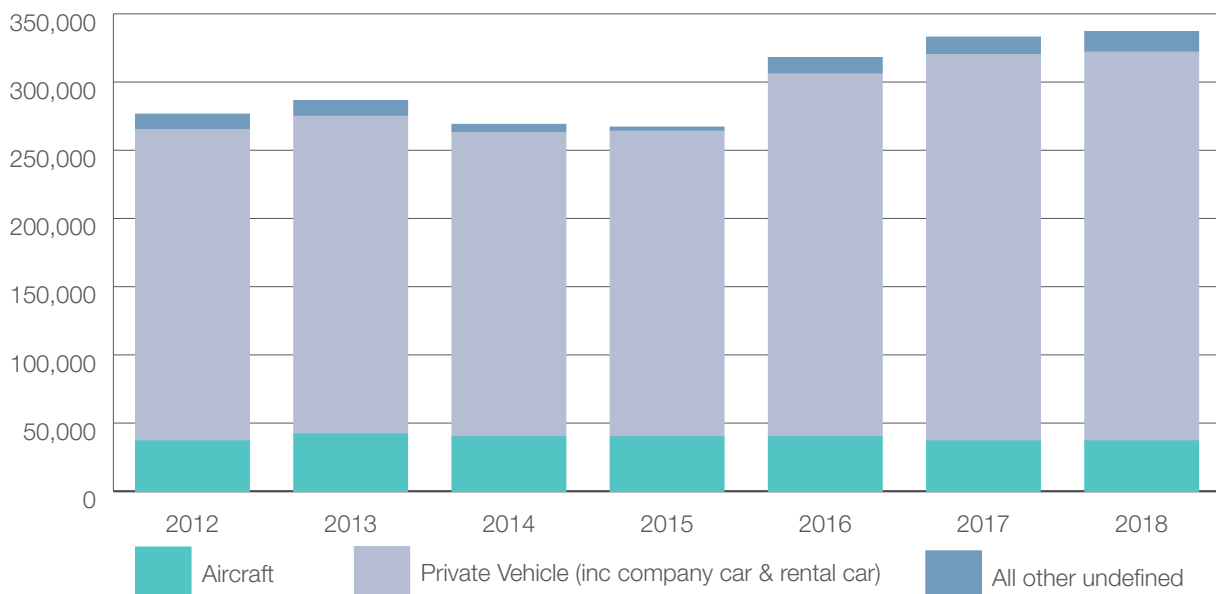
DOMESTIC OVERNIGHT VISITORS BY SOURCE MARKET 2010-2018

Source: Tourism Research Australia



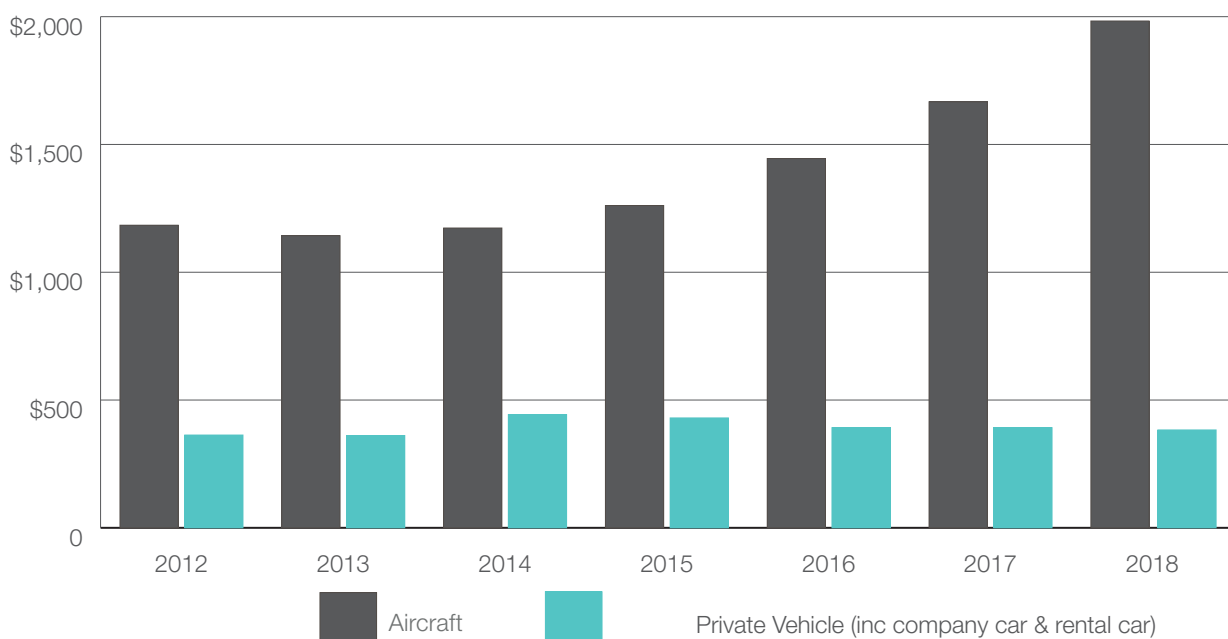
DOMESTIC OVERNIGHT VISITORS TRANSPORT METHOD 2012-2018

Source: Tourism Research Australia



AVERAGE SPEND PER TRIP (\$AUD) BASED ON TRANSPORT METHOD 2012-2018

Source: Tourism Research Australia



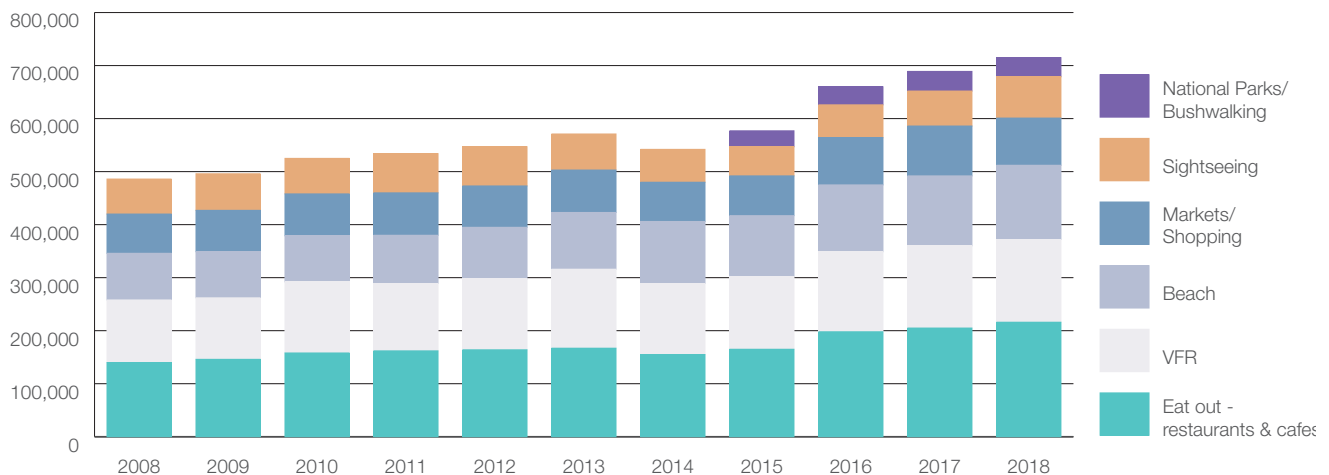
DESTINATION ANALYSIS CONT.

Eating out in restaurants and cafes was consistently the top activity engaged in between 2008 and 2018. Bushwalking and visiting National Parks was introduced as a category in 2015.

With regard to the economic value of activities engaged in by domestic overnight visitors to the Ballina Coast and Hinterland, again there has been little change between 2008 and 2018. As with the activity data, there was growth in expenditure, but no obvious change in relative participation or patterns of expenditure. For the year ending 2018, domestic overnight visitors spent \$150 million engaging in the most popular activity - eating out in restaurants and cafes.

TOP ACTIVITIES ENGAGED IN BY DOMESTIC OVERNIGHT VISITORS 2008-2018

Source: Tourism Research Australia



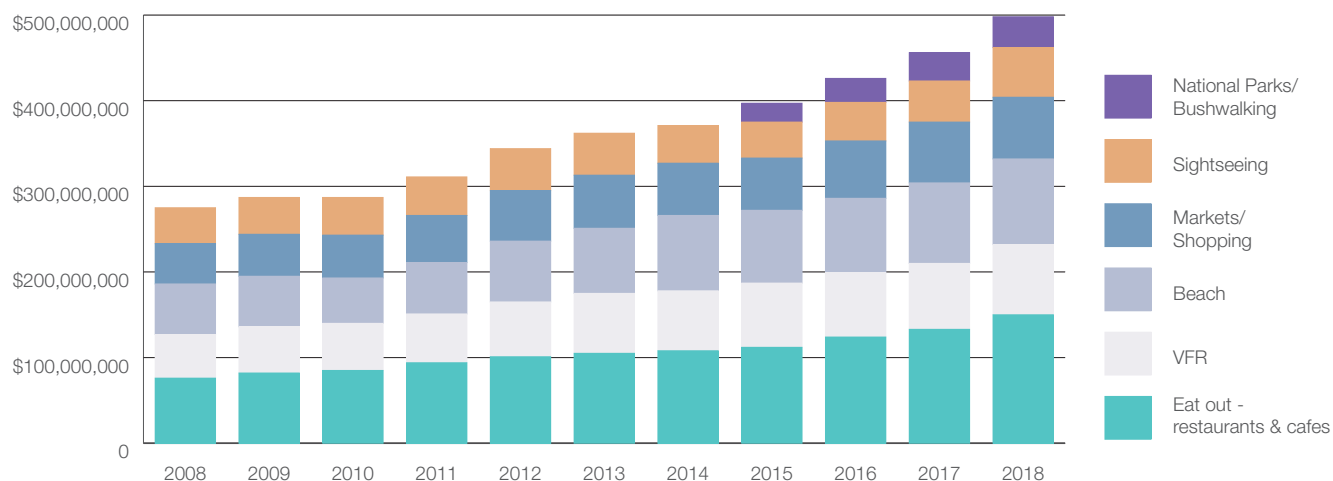
AUSTRALIAN ACCOMMODATION MONITOR (AAM) 2018-2019

Source: STR CoStar international Incorporated

| LOCATION | OCCUPANCY (%) | AVERAGE DAILY RATE (\$AUD) | REVENUE PER AVAILABLE ROOM (\$AUD) |
|------------------------|---------------|----------------------------|------------------------------------|
| North Coast NSW | 65.7 | 180.69 | 118.73 |
| Total New South Wales | 78.0 | 212.80 | 166.03 |
| Sydney | 83.4 | 222.89 | 185.87 |
| Brisbane | 70.3 | 156.45 | 110.04 |
| Gold Coast | 70.2 | 197.60 | 138.72 |
| Hunter | 67.2 | 187.11 | 125.71 |
| New England North West | 55.7 | 149.49 | 83.24 |
| Riverina | 68.1 | 140.63 | 95.79 |
| Snowy Mountains | 41.1 | 195.78 | 80.43 |
| South Coast | 66.1 | 178.31 | 117.88 |

TOTAL SPEND (\$AUD) BY DOMESTIC OVERNIGHT VISITORS ON THE TOP ACTIVITIES 2008-2018

Source: Tourism Research Australia



GROWTH POTENTIAL

A strategy is to gain greater share of mid-week overnight visitation. This can be achieved through:

- Market development to facilitate a greater number of business events, sporting groups and accessible tourism customer segments.
- Product development to create additional experiences that retain visitors in the area for longer and sees them returning sooner.
- Market penetration of existing target audiences for example the Experiential Travellers, Visiting Friends and Relatives and the Families segment.

| TRAVEL PERIOD OR KEY EXPERIENCES | KEY TARGET MARKETS | SOURCE | INTERESTS |
|--|---|---|---|
| MARKET DEVELOPMENT STRATEGY | | | |
| Off peak mid- week travel | Business events, sporting events, adult couples, visiting friends and relatives, accessible tourism | Domestic overnight (1 or more nights) particularly from Melbourne, Sydney, Australian Capital Territory, Newcastle, South East Queensland or regional NSW | Nature based attractions, health and wellness activities, agri-tourism, produce and scenic beauty, special festivals and events |
| PRODUCT DEVELOPMENT STRATEGY | | | |
| Nature based attractions, agri-tourism, road network and public transport improvements, inclusive tourism improvements | Business events, sporting events, adult couples, visiting friends and relatives, accessible tourism | Domestic overnight visitors (1 or more nights) particularly from Melbourne, Sydney, Newcastle, South East Queensland or regional NSW | Nature based activities, agri-tourism, produce and scenic locations |
| MARKET PENETRATION STRATEGY | | | |
| Annual year around | Adult couples, visiting friends and relatives, families | Domestic overnight (1 or more nights) particularly from Melbourne, Sydney, Australian Capital Territory, Newcastle, South East Queensland or regional NSW | Family attractions, nature based attractions and activities, agri-tourism, produce and scenic beauty |

GROWTH POTENTIAL

Off peak low season

The table on page 37 demonstrates there is capacity within North Coast NSW accommodation properties to host further visitors, with an average occupancy of 66%. While no formal data is available at destination level to show that capacity exists anecdotal evidence suggests there is opportunity to grow overnight visitation midweek and outside of school holiday periods where existing demand for accommodation is lower.

Business events

The NSW Government Visitor Economy Taskforce Report and the subsequent Visitor Economy Visitor Industry Action Plan identified, for regional conferencing to grow and to prosper, a strategic approach and funded program was required. The NSW Government has responded through the creation of the Regional Conferencing Unit within Destination NSW.

Please note the sector was formally referred to as the Meetings, Incentives, Conferences and Exhibitions (MICE) however the current terminology is business events.

The NSW regional business events sector is a key part of the broader NSW Visitor Economy, and has the potential to bring significant economic and employment benefits to Regional NSW, particularly during low seasons.

Statewide the sector generates:

- Expenditure of \$290 million by delegates attending business events in regional NSW
- Additional visitor expenditure of \$11.6 million from pre and post conference touring
- Employment of more than 2,300 people (AEC Group, 2013).

In 2018 Destination North Coast (DNC) formed a business events branch to secure business for the whole of the North Coast, including the Ballina Coast and Hinterland. Ballina Shire Council is a financial member of the DNC Business Events program.

A business events visitor is a high yield customer valued at \$356 per night and due to a predominantly weekday visitation pattern from business events, the sector is valuable to the growth of overnight stays within the Ballina Coast and Hinterland where capacity exists midweek.

Value of business events visitors to NSW year ending December 2019

| Domestic overnight | Day visitor | International |
|--------------------|-------------|---------------|
| \$355.90 | \$110.70 | \$263.10 |

Nature based tourism

As evidenced via stakeholder consultation, the destination has a strong natural appeal with scenic beauty associated with both its coastal and hinterland assets. Anecdotal evidence from the Ballina Visitor Information Centre suggests there is demand for nature-based experiences such as guided experiences, Indigenous interpretation, forest and hinterland accommodation and visiting a waterfall amongst other outdoor activities.

Agri-tourism

The destination has a wealth of primary producers and is known for the plethora of produce grown here from coffee to bananas, avocados and macadamia nuts to craft breweries and distilleries. Visitors to the Ballina Visitor Information Centre regularly ask after guided food and drink tours, paddock to plate experiences and farm stays. There is consumer demand, opportunity for primary producer diversification and also a need to preserve the rural character of the destination. Agri-tourism is considered a good fit for the destination.

Accessible tourism

The Ballina Coast and Hinterland has an opportunity to share the accessible features, which make the area a great place to live, with visitors to the destination who require suitable products and services regardless of their physical limitations, abilities or age. An estimate of the size of the current Australian accessible tourism sector for overnight and/or day trip travel is around 1.3 million individuals, or 7% of the total Australian adult

DESTINATION ANALYSIS CONT.

population. The accessible tourism segment was worth an estimated \$8 billion to the Australian economy in 2017 (Tourism Research Australia, 2018).

Ballina, particularly Ballina Island and East Ballina are on their way to accommodating for the accessible tourism market. The destination offers scenic flat, level foreshore environments easy to navigate along wide pathways. Changing places amenities are available in several public areas. There are opportunities for a visitor with accessibility requirements to enjoy the scenic beauty and to also swim, dine and stay in comfort. It is also acknowledged that there is a way to go to in terms of being considered a desirable accessible destination however that trajectory could be implemented with cooperation from key stakeholders.

Ballina Byron Gateway Airport

Passenger numbers to the Ballina Byron Gateway Airport (BBGA) have increased incrementally since the airports opening, from 17,000 passengers in 1987 to 533, 000 in 2019 (Ballina Shire Council, 2019). Passenger numbers increased significantly with the introduction of Virgin and Jetstar airline services and while seat occupancy rates have in some cases been lower than expected, over the medium to long term passenger numbers are expected to increase with further additional services and flight routes, especially as these become more affordable. The strengthening demand from the Melbourne market should be noted, as should the additional services provided via Jetstar to support this visitation.

The BBGA is investigating services to cater for local fly in-fly out (FIFO) workers living in the region, which would further increase traffic flow through the Airport. The Airport's biggest competitor is the Gold Coast Airport with frequent flights scheduled into each of the markets serviced by BBGA, those being Sydney, Melbourne and Newcastle.

Visiting Friends and Relatives

The Visiting Friends and Relatives is a valuable customer segment to the Ballina Coast and Hinterland currently with 221,000 visitors per annum (Tourism Research Australia, 2018). This is one segment that over time has increased in the percentage of overall visitors however

has not seen growth in absolute numbers. With a small investment and strategic actions, the destination can grow the size and value of this segment.

Sporting events

Ballina Shire Council opened the brand new Ballina Indoor Sports Centre (BISC) in 2019. The BISC includes two international standard, full-sized indoor sports courts catering for a range of sports and activities. The courts are line marked for basketball, netball, futsal and volleyball, and are also available for a wide range of sports and activities to suit all ages, from badminton or table tennis, to pickle ball or lifeball. Ballina Shire Council also invests capital into sporting club houses and playing fields. The growth potential for clubs to host regional, state and national events is yet to be scoped due to data not being accessible however with local groups acting as ambassadors a lot could be achieved to bring visiting clubs to town for sporting events and carnivals. Sporting facilities could also open to invite visitors particularly over the school holiday period.

All weather attractions

With 147 days precipitation and average rainfall of 1805mm per annum (Farm Online Weather, 2020), the families segment are offered minimal all-weather experiences (such as ten pin bowling, cinema and limited museums and galleries), suggesting families can be limited for options during wet weather. Local visitor economy operators could consider how modifications to making their experience available in all conditions could see higher satisfaction from the families segment and therefore repeat visitation.





DESTINATION DIRECTION

FOCUS

The destination offers a variety of scenic nature-based coastal attractions that are complemented by activity-based family attractions, hard and soft recreational and cultural products and hinterland village and rural farming landscapes. A need exists to even the demand peaks and troughs, to encourage further mid-week visitation where a lot of capacity remains under-utilised.

VISION

The Ballina Coast and Hinterland will expand and align its tourism product experiences with wider developments shaping the destination and attract growing recognition as a scenic, natural, accessible, creative, and safe destination enticing experiential travellers who enjoy participating in authentic and unique local experiences.

MISSION

To continue growing a resilient, vibrant and inclusive visitor economy through cooperation between all stakeholders and in so doing share the destinations “feel-good factor” and wealth of natural, cultural and historic tourism assets with its visitors.

AIM AND PRIORITY AREAS

Increase overnight visitor expenditure within the destination to \$450 million by 2030 while keeping investment in recreational assets aligned to community values.

Three key priority areas have been identified as themes of work to achieve the aim and mission:



1. STRENGTHEN COORDINATION OF DESTINATION MANAGEMENT



2. RAISE THE PROFILE OF THE DESTINATION AND ITS EXPERIENCES



3. ENCOURAGE INVESTMENT INTO RECREATIONAL ASSETS, PRODUCT DEVELOPMENT AND ACCESS IMPROVEMENTS

Actions include funded initiatives as well as aspirational activities should grant funding become available. Please note actions will be formatted once endorsed commencing with funded actions ordered by implementation timeframe i.e. short term first.

Refer to page 66 for the financial plan supporting the actions.

Legend: Funded actions: ✓ Externally funded actions (C) Aspirational actions ✗

The 2021 -2030 Ballina Coast and Hinterland Destination Management Plan sets action timeframes in which to deliver on priorities with short term (2020 – 2024), medium term (2024 –2027), and long-term (2027 –2030) implementation. It should be noted that once implemented most actions are ongoing.

Ballina Shire Council has initiated the process of developing a Ballina Shire DMP however implementation of the actions as a result of this DMP may or may not rest with Ballina Shire Council. Many issues are outside of the control of local government. The NSW Government departments and visitor economy operators also have a role to play in managing the visitor economy.

KEY PRIORITY ONE



STRENGTHEN COORDINATION OF DESTINATION MANAGEMENT

The Ballina Coast and Hinterland's tourism sector is a significant component of the Shire's overall economy at 11.7% of GRP (NIEIR, 2019). The sector is composed of a diverse range of stakeholders predominantly in micro, small and medium sized businesses who do not have a great sum of capital to invest. The small-scale nature of the sector's operations, combined with a wide diversity of stakeholder interests, and a lack of government and council resources to invest substantially in the sector, creates a difficult planning and management environment for tourism activity to thrive and expand. For this reason strong cooperation and collaboration needs to occur to continue expanding the visitor economy and maintain the unique selling point.

The broad aim of actions under this priority area requires all government levels to place the customer (residents and visitors) at the core of service delivery, adopting a customer-focused approach and improve process. It is the customer experience that will enable the destination to advance the collective interests of all stakeholders. Actions should be implemented to: plan for visitor needs, increase transparency, develop industry knowledge and the skills of managers and employees engaged in front-line services.

| Ref No. | Action | Rationale | Benefits Measures and Targets | Estimated resources / costs | Implementation Timeframe | Funded | Lead Responsibility |
|---------|--|---|----------------------------------|--|--------------------------|--------|--|
| MGT 01 | Develop a series of operator "did you know" web based videos outlining council processes (e.g. setting up a food business, mobile vending permits, festival and event grants, how commercial use of footpaths can assist businesses, commercial activity licencing, etc.). | Stakeholders communicated frustration at understanding Council's application processes | Number of clicks > 500 per annum | In house production approx. 30 hours per video | Short term | ✗ | Council – Tourism |
| MGT 02 | Strengthen coordination of tourism between Council's Visitor Services, local businesses and other regulatory parties for process improvement (e.g. participate in tourism working groups with National Parks and Wildlife Service (NPWS), Destination North Coast (DNC), Destination NSW (DNSW), commercial activity licences, etc.) | Strengthen the coordination of tourism within the destination to provide opportunities for feedback and process improvement | Number of actions implemented | Time from existing resources | Short term | ✓ | Council – numerous sections of council |

| Ref No. | Action | Rationale | Benefits Measures and Targets | Estimated resources / costs | Implementation Timeframe | Funded | Lead Responsibility |
|---------|---|--|---|------------------------------|--------------------------|--------|--|
| MGT 03 | Continue to incorporate visitor experience developments as part of regulatory, policy and plan reviews to provide clarification and confirm an appropriate development type and land use. | Improve the community's liveability; and encourage local businesses to innovate | Growth in number of visitor economy businesses from 562 in 2018. Take new baseline after COVID-19 | Time from existing resources | Short term | ✓ | Council - Planning and Environmental Health Division |
| MGT 04 | Continue to include recognition of natural areas, scenic values and public assets in Plans of Management to enhance and maintain access to natural attractions that enable visitor experiences. | Preserve the features that create appeal for the destination. Maintain lifestyle and unique selling proposition. | Number of Plans of Management that protect the USP | Time from existing resources | Short term | ✓ | Council – Planning and Environmental Health Division |
| MGT 05 | <p>Improve the quality of information disseminated to visitors and locals, by:</p> <ul style="list-style-type: none"> • Maintaining accurate and current records of visitor economy industry key contacts • Hosting product knowledge familiarisation tours that support learning, knowledge building and product confidence • Continuing the operation of the Ballina Visitor Information Centre with its operational actions • Consulting Northern Rivers locals regarding appropriate Visiting Friends and Relatives content • Distributing this plan widely amongst visitor economy stakeholders | <p>Enable two way communication with local visitor economy operators and improve the quality of information disseminated to visitors and locals</p> <p>Knowledgeable staff and volunteers who understand visitor needs and the product offering can motivate visitors to engage with experiences increasing spend within destination</p> | Percentage of businesses responding to communications aim for >40% by June 2024. Currently at 31% June 2020 | Funded of existing resources | Short term | ✓ | Council - Tourism |

KEY PRIORITY ONE CONT.

| Ref No. | Action | Rationale | Benefits Measures and Targets | Estimated resources / costs | Implementation Timeframe | Funded | Lead Responsibility |
|---------|--|---|---|--|--------------------------|--------|--------------------------------|
| MGT 06 | Encourage a holistic approach to visitation through initiatives such as Councillor inductions explaining the benefits of tourism | Tourism is everyone's business. Preserve the features that create appeal for the destination and strengthen the coordination providing opportunities for feedback and process improvement | Percentage of Councillors and planning staff in attendance/acquiring knowledge | Time from existing resources | Short term | ✓ | Council |
| MGT 07 | Support local Indigenous tourism experience development by: <ul style="list-style-type: none"> Continuing to consult local Aboriginal stakeholders Enhancing visitor experiences Maintaining, protecting and enhancing cultural heritage sites; Provide employment opportunities at suitable sites | Encourage sharing of Indigenous cultural stories to increase Indigenous community pride, participation and jobs growth | Number of engagements and participants. ≥3 meetings per annum | External Time from existing resources for meetings | Short term | ↻ | Local Indigenous Land Councils |
| MGT 08 | Explore environmental tourism initiatives including: <ul style="list-style-type: none"> Sustainable travel initiatives Carbon neutral initiatives Environmental visitor experiences with volunteer groups such as Oz Fish, Landcare, etc. | Improve the liveability of the destination for locals and as a place for visitors | Short term goal ≥ 5 percent of visitors the Ballina Visitor Information Centre participating Long term goal ≥ 5 percent of all visitors to the destination participating | 70 hours to plan and communicate 2 hrs p/w ongoing admin time | Short term | ✗ | Council - Tourism |




| Ref No. | Action | Rationale | Benefits Measures and Targets | Estimated resources / costs | Implementation Timeframe | Funded | Lead Responsibility |
|---------|---|---|--|--|--------------------------|--------|----------------------------------|
| MGT 09 | Liaise with tertiary educators to address local training and skills gaps | Identify training and skills gaps to provide courses with jobs at the completion. Ensure relevant training is provided so that industry can depend on qualifications | Twice-annual meetings with relevant tertiary educators | Time from existing resources | Short term | ✓ | Council |
| MGT 10 | Encourage visitor experience asset owners to implement all weather opportunities | There are very limited experiences to engage in during periods of wet weather | Increase the number of experiences available during wet weather from 7 to ≥ 10 | External | Short term | ↻ | Local visitor economy businesses |
| MGT 11 | Local industry operators to disperse visitors throughout the destination by: <ul style="list-style-type: none"> • Providing visitors with visitor guides and related material • Providing access to the destination website • Participating in council organised product knowledge tours | Increase the length of stay | Percentage of visitor economy businesses engaged aim for ≥40% by June 2024. Currently at 31% as at June 2020 | External | Short term | ↻ | Local Visitor Economy Operators |
| MGT 12 | Showcase regional produce on menus including business event menus | Preserve primary production land for food security and diversity purposes | Percentage of menus with local produce showcased. Aim for ≥20 restaurants | External | Short term | ↻ | Northern Rivers Food |
| MGT 13 | Centrally store, disseminate and present visitation data and research by: <ul style="list-style-type: none"> • Investigating options for a visitation data subscription • Sharing data via the destination website • Presenting data at information sessions | There are gaps in the Tourism Research Australia LGA visitation data i.e. activities engaged in, visitor origin, spend etc. This data is required for decision making. Ability for all stakeholders to make data driven decisions | Data presented at information sessions annually | Time from existing resources approx \$21,000 data subscription fee | Short term | ✗ | Council - Tourism |

KEY PRIORITY ONE CONT.

| Ref No. | Action | Rationale | Benefits Measures and Targets | Estimated resources / costs | Implementation Timeframe | Funded | Lead Responsibility |
|---------|--|--|--|---|--------------------------|--------|---|
| MGT 14 | <p>Implement and/or continue survey and review programs including:</p> <ul style="list-style-type: none"> • Media listening software such as Meltwater • Data collection via the provision of free Wi-Fi at Ballina Byron Gateway Airport • Micromex Community Satisfaction Survey | <p>Monitor and increase visitor satisfaction and grow the value of overnight visits.</p> <p>Monitor community sentiment towards visitors and grow the liveability perception</p> | Satisfaction levels \geq 90% | Funded from existing resources \$2,500 for media and social listening software p.a. | Short term | ✓ | Council |
| MGT 15 | Improve the digital literacy of local visitor economy operators to sell (experiences) products online | Raise the visibility of the destination through facilitating technical training for local operators | Percentage of visitor economy businesses participating $>$ 40% | External | Short term | ↻ | Local visitor economy operators NSW Government |
| MGT 16 | Enable visitation and alternative revenue streams that promote the long term viability and agricultural character of our rural areas | A key point of difference for the destination is the abundance of primary producers. Build on this strength and ensure visitors can engage with authentic experiences | From 1 as at March 2020 to \geq 4 visitor experiences by 2024 offered on primary production land | External | Short term | ↻ | Local visitor economy businesses |
| MGT 17 | <p>Encourage investment through the development of documents such as feasibility studies and prospectuses. For example:</p> <ul style="list-style-type: none"> • A Ballina Coast and Hinterland Tourism Investment Prospectus • Feasibility studies into major tourism enablers such as Southern Cross Arts and Industrial Precinct, Ballina Marina, Ballina Harbour and Ballina Byron Gateway Airport, etc. | Attract investment to enable a sustainable visitor economy that improves the liveability of the Ballina Coast and Hinterland | Number of initiatives developed | Time from existing resources | Medium term | ✗ | Council numerous sections of council |

| Ref No. | Action | Rationale | Benefits Measures and Targets | Estimated resources / costs | Implementation Timeframe | Funded | Lead Responsibility |
|---------|---|---|--|---|--------------------------|--------|---|
| MGT 18 | Develop a crisis management plan for visitor economy industry operators | Build reliance and ensure disaster recovery efforts are maximised | A crisis management plan in place by June 2025 | Time from existing resources | Medium term | ✓ | Council - Tourism |
| MGT 19 | Implement accessible tourism actions including: <ul style="list-style-type: none"> • Developing product and visitor experiences • Upskilling operators • Communicating accessibility statements on operators websites • Making assets highly visible • Install accessible counter at Ballina Visitor Information Centre and improving sight and hearing features | A strength of our destination is that we have accessible features such as paths and swimming locations. This can be built upon to improve the visitor experience. The accessible tourism sector is worth \$8 billion annually to the Australian economy (TRA, 2018) | Percentage of visitor economy operators offering accessible tourism experiences ≥ 20 accessible tourism experiences by June 2027 | Time from existing resources Workshop approx \$2,000 Centre modifications approx \$40,000 | Medium term | ✓ | Council Local visitor economy businesses |
| MGT 20 | Assess the need within town centres for additional long vehicle parking for coaches, vehicles towing caravans, etc. | The destination has 10 holiday parks yet there is limited parking for larger vehicles and those towing caravans and trailers, etc. in the Ballina Shire town centres | Audit complete by June 2026 | Audit and consultation 35 hours | Medium term | ✗ | Council – numerous sections of council |
| MGT 21 | Align visitor experiences to the image/market position of the Northern Rivers and advocate for development and funding for renewable, clean green, healthy and sustainable programs. E.g. recycled water and renewable energy used by accommodation, tour and activity providers, etc. | Create a resilient, sustainable visitor economy that improves the liveability of the Ballina Coast and Hinterland | Percentage of visitor economy businesses participating ≥40% | External | Medium term | ↻ | Local visitor economy operators |

KEY PRIORITY ONE CONT.

| Ref No. | Action | Rationale | Benefits Measures and Targets | Estimated resources / costs | Implementation Timeframe | Funded | Lead Responsibility |
|---------|---|--|---|------------------------------|--------------------------|---|--|
| MGT 22 | <p>Improve the transparency of the Short Term Holiday Letting (STHL) sector by:</p> <ul style="list-style-type: none"> Collecting and disseminating visitation data Enabling avenues to lodge complaints of misconduct and enforcement of noncompliance, etc. | <p>Provide a true understanding of who is visiting the destination. Currently the only data received is a snapshot from traditional industry providers. The Ballina Shire had 704 unique addressed STHL properties as at November 2019</p> | <p>External ≥95% of data sets provided Processes for grievances implemented</p> | External | Short term |  | State Government Local hosts |
| MGT 23 | Encourage a carbon neutral visitor economy before 2030 | Create a resilient, sustainable visitor economy that improves the liveability of the Ballina Coast and Hinterland | Number of initiatives communicated | Time from existing resources | Short term |  | Council to advocate |
| MGT 24 | <p>Encourage industry collaboration. For example:</p> <ul style="list-style-type: none"> Encouraging bundling and packaging of experiences Shared training opportunities, Multi experience pass, Co-operative / cross selling / marketing / mentoring, etc. opportunities | <p>Upskill the workforce and invest in industry capability development to improve the visitor experience and drive economic growth</p> | <p>Percentage of visitor economy businesses participating >40%</p> | External | Medium term |  | Local visitor economy operators NSW Government Council - Tourism |

KEY PRIORITY TWO






2. RAISE THE PROFILE OF THE DESTINATION AND ITS EXPERIENCES

While the majority of the destination's visitor economy operators understandably focus their marketing budgets on promoting their individual enterprises, Council lacks a sizable budget to promote the destination in source market on a regular basis. The growth of the destination's visitor economy is critically linked to effective promotion and communications, especially in terms of reaching strategic niche markets and increasing a visitors' length of stay.

| Ref No. | Action | Rationale | Benefits Measures and Targets | Estimated resources / costs | Implementation Timeframe | Funded | Lead Responsibility |
|---------|--|---|--|---|--------------------------|--------|--|
| COM 01 | Grow demand for greater length of overnight visitation by: <ul style="list-style-type: none"> Having all stakeholders distribute the Festival and Events Sheet, Business Events Destination Fact Sheet and other destination material | Encourage repeat visitation and increase the community's sense of pride | Increased accommodation occupancy rates. Baseline data not currently available need to invest in a subscription. Investigate subscription options by June 2022 | Time from existing resources and \$900 for an accommodation monitor report or \$2800 for an annual subscription | Short term | ✓ | Council - Tourism Local Visitor Economy Operators Airport and Airlines |
| COM 02 | Use digital platforms to generate travel motivation for the destination | Inform target audiences of what's happening and encourage visitation | Visits to destination website ≥100,000 by June 2024 | Time from existing resources | Short term | ✓ | Council – Tourism Local Visitor Economy Operators |

KEY PRIORITY TWO CONT.

| Ref No. | Action | Rationale | Benefits Measures and Targets | Estimated resources / costs | Implementation Timeframe | Funded | Lead Responsibility |
|---------|---|---|---|--------------------------------|--------------------------|--------|--|
| COM 03 | <p>Facilitate growth in the business events sector by:</p> <ul style="list-style-type: none"> • Conducting site inspections for Event Organisers • Disseminating the Destination Fact Sheet • Encouraging airlines and Ballina Byron Gateway Airport to communicate with business event organisers • Sharing communications on good news stories, sale flights and general news at BBGA . | Grow value of overnight visitation | <p>Increase number of listings in ATDW to \geq 80% of product</p> <p>Increase number of supplier listings meetinns.com.au \geq 90% of all business event venues</p> | Time from existing resources | Short term | ✓ | Council - Tourism |
| COM 04 | <p>Communicate the destination website and digital assets broadly for example:</p> <ul style="list-style-type: none"> • On place making signage • Within each visitor attraction or accommodation property, etc.. | Encourage visitor dispersal and increase the length of stay | <p>Increase visitor dispersal amongst the destination</p> <p>Grow browsing on site to \geq100,000 users by June 2024</p> | Funded from existing resources | Short term | ✓ | <p>Council – Promotional and Interpretive Signage Taskforce</p> <p>Local visitor economy operators</p> |

| Ref No. | Action | Rationale | Benefits Measures and Targets | Estimated resources / costs | Implementation Timeframe | Funded | Lead Responsibility |
|---------|---|--|--|---|--------------------------|---|---------------------------------|
| COM 05 | Raise the profile of the destination and increase a visitors length of stay by: <ul style="list-style-type: none"> Recording digital guided virtual tours Applying for grant funds to develop product/ visitor experiences Distributing events sheets to guests Encouraging guest use of the destination website Entering tourism award programs Participate in training opportunities Profile experiences on ADTW | Strengthen product base to increase length of stay | External Increase number of listings in ATDW to ≥ 80% of product Increase number of operators participating in NSW First Program ≥ 100 participants Increase number of supplier listings meetinns.com.au ≥90% of all business event venues | External | Short term |  | Local visitor economy operators |
| COM 06 | Determine image gaps, update and centrally store imagery of unique selling proposition assets e.g. accessible tourism assets, scenic landscapes, visitor experiences, recreational assets, etc. | These digital assets are required to visually tell the destination stories | Have visual imagery for ≥90% experiential assets | Allow from \$20K per shoot photographer fee | Short term |  | Council - Tourism |
| COM 07 | Provide proactive local community engagement via platforms identified in Table 2.6 | Develop a positive community sentiment towards visitors | Number of communications published | 3 hours per week | Short term |  | Council - Tourism |



KEY PRIORITY TWO CONT.

| Ref No. | Action | Rationale | Benefits Measures and Targets | Estimated resources / costs | Implementation Timeframe | Funded | Lead Responsibility |
|---------|---|---|--|--|--------------------------|--------|---|
| COM 08 | <p>Encourage further visitor dispersal by providing detailed information to:</p> <ul style="list-style-type: none"> • Approved filming agencies • Business events and groups • Airlines • Industry operators | Grow length of stay and number of overnight visits | Number of itineraries created/accessed | 4 hours per itinerary | Short term | ✗ | Council - Tourism |
| COM 09 | <p>Build on the number of Visiting Friends and Relatives enjoying our destination through strategic actions including</p> <ul style="list-style-type: none"> • Engagement of locals • Offering value add incentives | 221, 000 Visiting Friends and Relatives come to our destination each year as at 2020. This has capacity to be grown with 44, 628 residents to play host to visitors | Number of initiatives implemented ≥ 3 per annum | <p>Examples may include expos/open days, etc. Work with operators and promotion approx. 105 hours per initiative</p> <p>Approx \$2000 per expo</p> | Short term | ✗ | <p>Council – Tourism</p> <p>BBGA</p> <p>Local visitor economy operators</p> |
| COM 10 | Interpret the destination story through current and appealing formats such as virtual reality, interpretive signage, interactive technology and other contemporary mediums at key visitor touch points e.g. BBGA, BVIC, BP Travel Centre, scenic points of interest, attractions and activities | Encourage visitor dispersal throughout the region and increase a visitors length of stay | <p>Display set up</p> <p>Number of bookings reserved</p> <p>Grow visitation to destination website to $\geq 100,000$ by June 2024</p> | Funded from existing resources | Short term | ✓ | <p>Council - Tourism</p> <p>Local visitor economy operators</p> |

| Ref No. | Action | Rationale | Benefits Measures and Targets | Estimated resources / costs | Implementation Timeframe | Funded | Lead Responsibility |
|---------|--|---|--|---|--------------------------|--------|--------------------------------------|
| COM 11 | Continue to digitise itineraries making the region's experiences highly visible to source market and visitors in transit | More people are visiting the destination website than walking into the Visitor Centre | Grow visitation to destination website by 10% year on year | Time from existing resources | Short term | ✓ | Council – Tourism and communications |
| COM 12 | Further develop our destination brand strategy to encourage and build confidence for investment attraction. Fund this brand strategy with a multi-year budget for implementation. | Our destination has traditionally been perceived as a retirement area. We now have experiences that cater for families, accessible tourism, business events and other markets which change this perception. Now is the time to raise the profile of the destination as a place to visit and invest not just a gateway access point or place to retire | Strategy implemented Number of bookings through destination website | Strategy and implementation approx. 70 hours per initiative plus from Minimum \$25K required per annum campaign | Short term | ✗ | Council - Tourism |

KEY PRIORITY TWO CONT.

| Ref No. | Action | Rationale | Benefits Measures and Targets | Estimated resources / costs | Implementation Timeframe | Funded | Lead Responsibility |
|---------|---|---|---|---|--------------------------|--------|---------------------------|
| COM 13 | <p>Market the regions USP to targeted markets. For example:</p> <ul style="list-style-type: none"> • Accessible assets of Ballina Island and East Ballina to the accessibility audience; • Access to foreshores, open space and low key experiences to the health and wellness audiences; • Bespoke business event facilities and experiences to corporate events sector • Family friendly experiences to families and VFR segments • Experiential travel to adult couples | <p>Attract niche markets and build on the destinations strengths For example All Access is beyond wheelchair access to include for example vision, hearing, captions, language barriers, etc.</p> | <p>Clicks to destination webpage ≥100,000 by June 2024</p> | <p>Time from existing resources approx \$21,000 subscription fee</p> | Short term | ✗ | Council - Tourism |
| COM 14 | <p>Deliver tactical marketing campaigns into source markets with high yielding visitors e.g. fly drive audiences, business events visitors, accessible tourism visitors, etc.</p> | <p>Ensure we are communicating with target audience</p> | <p>Number of bookings per campaign measured via bookings to destination website</p> | <p>Strategy and implementation approx. 70 hours per initiative plus</p> | Short term | ✗ | Council –BBGA and Tourism |
| COM 15 | <p>Upskill visitor services staff in graphic design (and continue to maintain website content management skills) to enable effective visual communication through wide reaching platforms</p> | <p>Short term</p> | <p>Staff possess competent digital and graphic design skills</p> | <p>Time from existing resources</p> | Short term | ✓ | Council - Tourism |
| COM 16 | <p>Provide a visual proposal kit to assist in bid preparation for local clubs, sporting groups, etc.</p> | <p>Grow length of stay and number of overnight visits</p> | <p>Number of local groups provided with the bid kit</p> | <p>From \$18K funded once every two-three years for videos</p> | Medium term | ✗ | Council - Tourism |

| Ref No. | Action | Rationale | Benefits Measures and Targets | Estimated resources / costs | Implementation Timeframe | Funded | Lead Responsibility |
|---------|--|--|---|--|--------------------------|---|-------------------------------|
| COM 17 | <p>Improve the festival and event visitor experience by:</p> <ul style="list-style-type: none"> • Collaborating with other local visitor economy providers • Recording and report the number of attendees at festivals and events • Aligning events to community values | Increase total number of overnight stays | <p>External</p> <p>Post event survey incorporated into Council's Festival and Event Sponsorship Program</p> | External | Medium term |  | Festival and Event organisers |
| COM 18 | <p>Package existing product and develop digital itineraries to entice niche markets for example:</p> <ul style="list-style-type: none"> • A trail of compliant roadside stalls and rural food visitor experiences. This could include sustainable transport solutions such as a cycling component, etc. • A waterways touring map using pontoons and other public marine infrastructure • Cycling and bike guide linking in food and beverage visitor experiences along trails, accommodation, events, etc. • Overnight walking trails • Other special interest packaged offering e.g. cafes, accommodation, transport, experiences and scenic views for key segments | Encourage diversification and increase total number of overnight stays | Number of times material accessed via destination website | <p>Approx. 35 hrs per itinerary</p> <p>Liaise with Development Services to determine suitability of identified operators</p> <p>Liaise with operators</p> <p>Source images</p> <p>Design, print and load content to website</p> <p>Print cost based on scope and scale</p> | Long term |  | Council - Tourism |

KEY PRIORITY **THREE** CONT.





3. ENCOURAGE INVESTMENT INTO RECREATIONAL ASSETS, PRODUCT DEVELOPMENT AND ACCESS IMPROVEMENTS

Recognising that tourism depends upon quality infrastructure to attract both visitors and investors, Ballina Shire Council will continue to invest in recreational assets and infrastructure to increase the attractiveness of the destination.

Heightened visitor expectations create competition between destinations to attract visitors. The destination’s visitor economy is steadily expanding and to continue attracting visitors the destination needs to continue to revitalise product offering and public assets. The actions included under this priority area focus upon: embellishing natural assets, improving public transport, growing product base for targeted markets, developing signage and interpretation; and encouraging iconic festivals and events.

| Ref No. | Action | Rationale | Benefits Measures and Targets | Estimated resources / costs | Implementation Timeframe | Funded | Lead Responsibility |
|---------|--|---|-----------------------------------|--------------------------------|--------------------------|---------|---|
| INV 01 | Support nature based embellishment that enables visitor experiences. Examples may include cycle trails and shared paths, viewing platforms, water based play equipment, etc. | Attract the target audiences of nature lovers, health and wellness, experiential travellers | Number of initiatives implemented | Varies based on scope of works | Medium term | X | Council -numerous sections of council Private investment |
| INV 02 | Ensure a playground of regional significance is delivered | Attract the family customer segment to the destination | Initiative implemented | Varies based on scope of works | Short term | Partial | Council – Civil Services |

| Ref No. | Action | Rationale | Benefits Measures and Targets | Estimated resources / costs | Implementation Timeframe | Funded | Lead Responsibility |
|---------|---|---|----------------------------------|--|--------------------------|---|---|
| INV 03 | Key entry points into the Shire i.e. West Ballina, Tamarind Drive and Wardell from Boundary Creek, require beautification via landscaping treatment that fits with the character and values of our place | Interpret the story for visitors so they connect with and appreciate the place. High profile entry points should promote a positive image for the destination | Number of initiatives undertaken | Labour and material costs to be scoped | Medium term | Partial | Council - numerous sections of council Tourist Attraction and Signposting Assessment Committee |
| INV 04 | Investigate low impact sustainable transport options for dispersal to visitor points of interest | Encourage dispersal and improve the liveability of the shire | Investigations completed | External | Medium term |  | Local industry operators |
| INV 05 | Encourage sustainable forms of movement e.g. vehicle sharing and other forms of sustainable transport such as cycling, walking, or park and walk. Link natural sites of interest such as Tosha Falls to town centres via paths and trails to increase sustainable modes of transport | Parking is becoming limited and a detractor for visitors to enter a local business. Improve the engagement space within the public domain and reduce negative impacts of traffic | Number of Initiatives completed | To be scoped | Short term |  | Council - numerous sections of council NSW Government |

KEY PRIORITY THREE CONT.

| Ref No. | Action | Rationale | Benefits Measures and Targets | Estimated resources / costs | Implementation Timeframe | Funded | Lead Responsibility |
|---------|---|---|--|------------------------------|--------------------------|---------|--|
| INV 06 | Ensure the Ballina Byron Gateway Airport keeps pace with passenger needs consistent with an airport of regional significance | Attract target audience Ensure the Ballina Byron Gateway Airport is current, appealing and offers convenience especially when travellers have many options | Guest satisfaction ≥ 90% satisfied | Varies based on scope | Medium term | Partial | Council - numerous sections of council |
| INV 07 | Record visitor requests for tourism products/services that are unable to be met within the Northern Rivers (tourism product gaps). Feed these product gap insights to key stakeholders | Identify tourism product gaps with demand and communicate these with stakeholders | Daily recording of requests | Time from existing resources | Short term | ✓ | Council - Tourism |
| INV 08 | Develop a detailed venue audit of conference facilities and services to support the evolution from a tier three to tier two bespoke business events destination | Attract investment from the business events sector. Grow Business Conference Destination to a Tier Two Boutique Business Conference Destination | Audit documentation prepared and ≥90% of annual audits completed | Time from existing resources | Short term | ✓ | Council - Tourism |

| Ref No. | Action | Rationale | Benefits Measures and Targets | Estimated resources / costs | Implementation Timeframe | Funded | Lead Responsibility |
|---------|--|---|---|------------------------------|--------------------------|--------|----------------------------|
| INV 09 | Facilitate public art installations that fit with community values and provide for word of mouth and social media promotional opportunities | Encourage existing visitors to provide referrals to visit the destination as word of mouth is the most effective means of promotion | Percentage of sites installed | Developer contributions | Short term | ✓ | Council – Public Art Panel |
| INV 10 | Assist with the implementation of tourism actions identified in Ballina Shire Council local place based Strategic Plans. | Actions have been identified as a priority to serve the community of today while preparing for the future | Percentage of Initiatives completed | Time from existing resources | Short term | ✓ | Council - Tourism |
| INV 11 | Conduct an annual product audit to: <ul style="list-style-type: none"> Identify and support the development of export ready products Determine needs/gaps Record of the percentage of empty shop fronts in each town centre | Identify major themes and gaps; communicate these with key stakeholders | Number of town centres audited aim for over 90% of annual audits to be completed Increase the number of experiences working with Online Travel Agencies and increase all online bookable products to ≥200 experiences by June 2024 | Time from existing resources | Short term | ✓ | Council – Tourism |


KEY PRIORITY THREE CONT.

| Ref No. | Action | Rationale | Benefits Measures and Targets | Estimated resources / costs | Implementation Timeframe | Funded | Lead Responsibility |
|---------|---|--|---|---|--------------------------|--------|--|
| INV 12 | Implement a monitoring tool for measuring the walkability scores for towns within the Ballina Coast and Hinterland. | Improve the liveability of the shire | Scores \geq 75 | Monitoring tool to be scoped and costed | Medium term | ✘ | Council - Tourism |
| INV 13 | Advocate for investment to enable peoples connection with bush and native foods from local Indigenous communities as a visitor experience also including to be showcased on regional menus | Facilitate the stories of cultural diversity for our Indigenous populations to encourage the upkeep of local culture | Discussions \geq 3 per annum. Letters of support provided for funding applications | Meeting time | Medium term | 🔄 | Jali Land Council Bunjum Aboriginal Corporation NSW Government |
| INV 14 | Encourage growth of experiences in the areas of: <ul style="list-style-type: none"> • Health and wellness • Nature and outdoors • Wet weather activities • Indigenous cultural experiences • Family experiences • Accessible tourism • Business events • Agri-tourism • Festivals and events | Entice visitors whose values align to that of the community and our natural product offerings | Number of projects identified | External | Medium term | 🔄 | Local visitor economy businesses |
| INV 15 | Renew accommodation product offering to align with accessing new audiences such as the accessibility segment, business events, families, other niche markets or sustainability elements. | Local stakeholders noted the range and quality of accommodation was a barrier to progressing the visitor economy | Number of projects identified | External | Medium term | 🔄 | Local accommodation providers |

| Ref No. | Action | Rationale | Benefits Measures and Targets | Estimated resources / costs | Implementation Timeframe | Funded | Lead Responsibility |
|---------|--|---|---|--|--------------------------|--------|---|
| INV 16 | Consider opportunities for commercial, internationally rated accommodation and meeting space in the Southern Cross expansion or other suitable sites | Meeting time Increase the number of passengers using the Ballina Byron Gateway Airport Provide a large scale venue for business events | Investigation completed | Based on scope | Medium term | ✗ | Council – Planning and Environmental Health Division |
| INV 17 | Encourage the development of an iconic hero visitor experience; and also iconic festivals and events aligned with community values by continuing to provide the Festival and Grants fund | ‘Hero’ experiences are world class, iconic and unique. They have high brand awareness themselves, and also define the character of the area | Have a lead iconic asset to market | Communications time from existing resources. Festival and Event Sponsorship Program approx. \$120,000 per annum | Medium term | ✗ | Local visitor economy operators Council - Tourism |
| INV 18 | Improve links from Ballina Byron Gateway Airport to nature based tourism experiences and National Parks | Encourage visitor dispersal and raise the natural profile of the Ballina Coast and Hinterland | Number of transport options | External | Medium term | ↻ | NSW Government – Transport for NSW |
| INV 19 | Facilitate a group buying scheme for local businesses to offer free Wi-Fi. The login page could encourage people to use services of local businesses | Attract visitors and encourage dispersal | Meeting held with relevant stakeholders | External | Medium term | ↻ | Business Chambers |
| INV 20 | Develop a visual tool kit aimed at primary producers to facilitate agri-tourism product development | Enable visitor experiences on permissible land | Tool kit developed | Approx. 70 hours tool kit development and distribution | Medium term | ✓ | Council –Tourism with support from Planning and Environmental Health Division |

KEY PRIORITY THREE CONT.

| Ref No. | Action | Rationale | Benefits Measures and Targets | Estimated resources / costs | Implementation Timeframe | Funded | Lead Responsibility |
|---------|--|--|--|-----------------------------|--------------------------|--------|--|
| INV 21 | Facilitate connectivity across the Southern Cross precinct expansion to: <ul style="list-style-type: none"> • Enable visitation and diversification of industry contributing to the Gross Regional Product (GRP) • Encourage members of the public to walk/ride • Create an itinerary including visiting local stores | Enable visitation and diversification of income streams | Visitor Services consulted Percentage of stores accessible via path | Varies based on scope | Long term | ✗ | Council – Planning and Environmental Health Division |
| INV 22 | Plan for the provision of electric vehicle charging stations | Be resilient to change | Two exist as at 2020. Number of new sites | External | Long term | ✗ | Local operators |
| INV 23 | Investigate the option for sustainable transport with the North Creek Bridge and road extension between Ballina and Byron | Improve public transport network | Investigation completed | To be scoped | Long term | 🔄 | Council -numerous sections of council |
| INV 24 | Seek investment for developing and maintaining visitor assets and private investment into lifestyle infrastructure | Create a sustainable visitor economy that improves the liveability of the Ballina Coast and Hinterland | Number of initiatives implemented | External | Long term | ✗ | Council to advocate |
| INV 25 | Encourage digital connectivity to enhance economic opportunities and the liveability of the shire | Regional based businesses can compete with city operators. Be considered for and host business events | Percentage of visitor economy businesses satisfied | External | Medium term | 🔄 | Council to advocate |

| Ref No. | Action | Rationale | Benefits Measures and Targets | Estimated resources / costs | Implementation Timeframe | Funded | Lead Responsibility |
|---------|--|--|---|-----------------------------|--------------------------|---|--|
| INV 26 | <p>Advocate to Transport for NSW for an improved transport network by:</p> <ul style="list-style-type: none"> • Completing a transport movement study and implement actions • Providing public transport options between Ballina Byron Gateway Airport and visitor experiences such as National Parks, Rail Trail, etc. • Implementing public transport options using innovative technology • Enabling travel from transport hubs in cities, etc. to the Ballina Coast and Hinterland • Improved ticketing, contactless payment, effective timetabling and access to information • Regional packaging of travel experiences and customer journeys with a presence on digital platforms and ticketing offices • Training for city based booking staff to experience our regional network • Enabling bike carriage | <p>Improve the public transport network and facilitate visitor dispersal to increase their length of stay in NSW</p> | <p>Study undertaken and number of initiatives implemented</p> | <p>External</p> | <p>Medium term</p> |  | <p>Council to advocate to NSW Government</p> |

DESTINATION REQUIREMENTS

HUMAN RESOURCES

Ballina Shire Council employs a visitor services team who operate the Ballina Visitor Information Centre seven days per week and also have responsibility for implementing some of the actions within the destination management plan. Specifically staff include:

- Team Leader Visitor Services (35 hours per week)
- Part Time Visitor Services Officers (67 hours per week)

The above staffing levels are not sufficient to assume full responsibility to carry forward each and every action listed in this DMP. Voluntary and in-kind support from stakeholders, state government and community interest groups needs to be coordinated to carry the destinations tourism agenda forward. The extent to which actions and activities are carried forward will likely be a function of (a) the willingness of key agencies to work together and (b) the financial resources available to fund specific actions. Actions marked with an ☺ are aspirational and will be completed if grant funding or other sources of funds is forthcoming.

FINANCIAL RESOURCES

The actions within the Aim and Priority Areas section of this DMP are either funded by Council, recommended to be funded by an external party or are aspirational and waiting for grant funds or in kind support to initiate. The table below details the cost of the program for the funded actions. As the scope of works for unfunded actions can be significantly varied, each of the actions marked unfunded is best to be scoped as the opportunity to implement arises however some unfunded actions have an indicative cost attached to them.

The Destination Development fund has some funds which have flexibility as to their use and can be used to fund actions within this plan. The funds shown below is the amount that can be spent with discretion to achieve delivery program actions, note well all other funds are committed.

The Festival and Events Sponsorship Program is spent according to the policy including an application process for accessing funds.

FINANCIAL PLAN TO SUPPORT THE ACTIONS OF THE 2021 – 2030 BALLINA COAST AND HINTERLAND DESTINATION MANAGEMENT PLAN

| IMPLEMENTATION TIMEFRAME | FUNDED ACTIONS FROM DESTINATION DEVELOPMENT BUDGET | FUNDING AVAILABLE WITHIN FESTIVAL AND EVENTS BUDGET |
|---|--|---|
| Short term 2020-2024 (Four financial years) | \$43, 900 | \$480, 000 |
| Medium term 2024-2027 (Three financial years) | \$92,500 | \$360, 000 |
| Long term 2027-2030 (Three financial years) | \$44, 300 | \$360,000 |

IDENTIFIED SOURCES OF REVENUE

| REVENUE STREAM | PROGRAMS |
|---|--|
| Ballina Shire Council | Council allocation of approximately \$70,000 to visitor economy projects, funds the visitor information centre. The festival and event support program is approx. \$120,000 per annum |
| Cooperative revenue for marketing campaigns | Tourism industry operators pay to participate in tactical marketing campaigns; Feature in the: BBG Airport brochure stand, destination website (discoverballina.com.au), visitor guide, etc. |
| Destination NSW | Apply for contestable funding |
| NSW Government | Apply for contestable funding |
| Federal Funding | Apply for contestable funding |

DESTINATION REQUIREMENTS CONT.

KEY RISKS

RISKS TO THE BALLINA COAST AND HINTERLAND VISITOR ECONOMY

| RISK | LIKELIHOOD | IMPACT | STRATEGY |
|---|---------------|--------|---|
| Climate change related weather events – flooding, sea level rise, biodiversity loss | Highly likely | Medium | <p>Already have some documents in place to plan for sea level rise, incl. NSW Government Climate Change Policy NSW Sea Level Rise Policy 2009</p> <ul style="list-style-type: none"> • NSW Coastal Planning Guideline: • Adapting to Sea Level Rise 2010 • Formal State directives – e.g. Section 117 Ministerial Directions, State Environmental Planning Policies, Regional Strategies and the Standard Instrument Local Environmental Plan (SILEP) <p>Local Planning Strategies</p> <ul style="list-style-type: none"> • Ballina LEP 2012 • Ballina Shire DCP 2012 • Climate Action Strategy |
| Environmental hazards – e.g. bush fires, pollution, coastal erosion, storms | Likely | Medium | Develop an emergency management plan for tourism industry that sits within council's Business Continuity Planning framework |
| Land use conflict – zoning, development, etc. | Neutral | Low | Recognised council procedures and protocols. Whole of council approach to strategic planning |
| Economic downturn due to health related matters | Highly likely | High | Target domestic visitors. Advocate for the upskilling of industry to offer digital experiences and be highly visible online |
| Budget cuts to government funding for tourism-related programs | Neutral | Medium | A limited budget is currently available for tourism activities. Further cuts to this budget would result in strategic actions within this DMP not being carried out. |
| High Australian dollar resulting in less demand | Likely | Low | Ensure our domestic demand remains strong by focusing on being a value for money family destination, with both paid and free attractions and activities. |
| Lack of niche / market-oriented advertising and promotion | Unlikely | Medium | Annual review and evaluate marketing and promotion actions and activities |
| Digital disruption | Highly likely | Medium | Keep abreast of technology developments and the share economy using assets to support the visitor economy where permissible |
| Strong / growing competition | Highly likely | High | Focus on developing and promoting unique regional assets and engaging in clear marketing activities which highlight the region's attractiveness as a destination in its own right, targeted at a number of key markets (e.g. families). |
| Lack of tourism product / Insufficient infrastructure | Neutral | Medium | Stay in tune with current market needs and wants & continue to invest in tourism-related infrastructure. |

MONITORING

During Council's quarterly reporting process, progressing actions within this DMP will be reported on. A review of all actions will occur every three years.

REFERENCES

- AEC Group. (2013). Regional Business Events Economic Assessment from The NSW Regional Conference Strategy & Action Plan 2017 – 2021. Retrieved from <https://www.meetinnsw.com.au/sites/default/files/2019-04/The-nsw-regional-conference-strategy-and-action-plan.pdf>
- Ballina Shire Council. (2019) Annual Report 2018-2019. Retrieved from https://ballina.nsw.gov.au/files/Annual-Report-2018_2019-resized.pdf
- Farm Online Weather. (2020, 27 May). Retrieved from <http://www.farmonlineweather.com.au/climate/station.jsp?lt=site&lc=58198>
- National Economics (NIEIR) Modelled Series Economic Profile ID. (2020, 14 May). Retrieved from Ballina Shire Council website <https://economy.id.com.au/ballina/tourism-value>
- Tourism Research Australia. (June 2015 - July 2018). Local Government Area Profiles 2018. Retrieved from <https://www.tra.gov.au/Regional/local-government-area-profiles>
- Tourism Research Australia (TRA). (2018) Accessible Tourism in Australia and Queensland. Retrieved from <https://www.tra.gov.au/data-and-research>
- von der Heidt, T., Muschter, S., Caldicott, R., Che, D. & Corlis, P., (2020, 6 January). 2019 Study of resident perceptions of short-term holiday letting (STHL) in North Coast NSW council areas: Ballina Shire. Retrieved from <https://www.discoverballina.com.au/visit/corporate/industry-publications/908-sthresults>

Tourism Research Australia Source Data has been taken from the National Visitor Survey (NVS) and the International Visitor Survey (IVS). These are surveys by the Commonwealth and State Governments and administered by Tourism Research Australia under the guidance of the Australian Standing Committee on Tourism (ASCOT).

The NVS is a major survey of domestic travel by Australians, with an annual sample size of 120,000 (since 2004).

The IVS represents the most comprehensive source of information on international visitors to Australia (since 2004), with an annual sample size of 40,000. Both are recognised as Australia's official sources of tourism data.

ATTACHMENT A

PRODUCT AUDIT SEPTEMBER 2019

Please note while there were 562 visitor economy operators recorded in the Tourism Research Australia 2018 Ballina LGA Profile, the 351 operators listed below do not include takeaway stores, farm gate stalls or accommodation properties without council consent. The list does however include churches, supermarkets, galleries and other infrastructure which is not considered a visitor economy operator however are important for recognising gaps in the visitor service needs

| ACCOMMODATION WITH OPERATIONAL CONSENT | | | |
|---|-------------|-----------|-------------|
| | ALSTONVILLE | BALLINA | LENNOX HEAD |
| Serviced Apartments | 0 | 6 | 4 |
| Un-serviced Apartments | 3 | 20 | 9 |
| Resort | 0 | 1 | 1 |
| Hotel / Motel | 3 | 21 | 2 |
| Caravan camping & Cabins | 0 | 11 | 2 |
| B&B's Guesthouse & Farm stays | 4 | 5 | 0 |
| Backpacker Hostels | 0 | 0 | 0 |
| Total | 10 | 64 | 18 |
| TOTAL ACCOMMODATION UNITS IN BALLINA SHIRE 93 | | | |
| CULTURAL ATTRACTIONS | | | |
| | ALSTONVILLE | BALLINA | LENNOX HEAD |
| Community Market | 2 | 3 | 2 |
| Gallery / Studio | 9 | 7 | 1 |
| Total | 11 | 10 | 3 |
| TOTAL ATTRACTIONS IN BALLINA SHIRE 24 | | | |
| ACTIVITY OPERATORS AND TOURS | | | |
| | ALSTONVILLE | BALLINA | LENNOX HEAD |
| Air Activities | 0 | 7 | 1 |
| Aboriginal Tours | 0 | 1 | 0 |
| Boat Hire | 0 | 2 | 0 |
| Bus Tours | 0 | 1 | 0 |
| Fishing | 0 | 2 | 0 |
| Horse Riding | 1 | 2 | 0 |
| River Cruises | 0 | 1 | 0 |
| Surfing | 0 | 1 | 1 |
| Family | 6 | 8 | 2 |
| Biking | 0 | 1 | 0 |
| Total | 7 | 26 | 4 |
| TOTAL ACTIVITIES AND TOURS IN BALLINA SHIRE 37 | | | |

ATTACHMENT A CONT'D

| COMMUNITY INFRASTRUCTURE, TRANSPORT AND SERVICES | | | |
|--|-------------|-----------|-------------|
| | ALSTONVILLE | BALLINA | LENNOX HEAD |
| Church/Worship Centre | 5 | 8 | 3 |
| Dump Point | 1 | 7 | 1 |
| Fuel Station | 2 | 4 | 1 |
| Vehicle Hire | 0 | 6 | 0 |
| Major Bank | 3 | 10 | 1 |
| Transport | | | |
| Air | 0 | 1 | 0 |
| Bus | 0 | 2 | 0 |
| Taxi | 0 | 1 | 0 |
| Visitor Information Centre | 0 | 1 | 0 |
| Supermarkets | 2 | 7 | 1 |
| Total | 13 | 47 | 7 |
| TOTAL INFRASTRUCTURE AND TRANSPORT SERVICES IN BALLINA SHIRE 67 | | | |
| CONFERENCE AND MEETING VENUES | | | |
| | ALSTONVILLE | BALLINA | LENNOX HEAD |
| Church / Camp | 0 | 0 | 2 |
| Sports Clubs | 0 | 4 | 0 |
| Conference Centre/Space | 1 | 3 | 1 |
| Hotel/Motel | 1 | 3 | 0 |
| Resort | 0 | 5 | 0 |
| Restaurant | 1 | 3 | 1 |
| Society/Association Hall | 0 | 1 | 0 |
| Total | 3 | 19 | 4 |
| TOTAL VENUES IN BALLINA SHIRE 26 | | | |

ATTACHMENT A CONT'D

| FESTIVALS AND SPECIAL EVENTS | | | |
|---|-------------|-----------|-------------|
| | ALSTONVILLE | BALLINA | LENNOX HEAD |
| Agricultural | 1 | 0 | 0 |
| Art / Craft | 1 | 4 | 0 |
| Boat | 0 | 1 | 0 |
| Community | 1 | 0 | 2 |
| Film | 0 | 1 | 0 |
| Food/Wine | 0 | 1 | 0 |
| Fun Run/Walk | 1 | 3 | 0 |
| Music | 0 | 10 | 0 |
| Sport - Land | 0 | 3 | 0 |
| Sport - Water | 0 | 3 | 2 |
| Total | 4 | 26 | 4 |
| TOTAL FESTIVALS AND SPECIAL EVENTS IN BALLINA SHIRE 34 | | | |

| RETAIL / FOOD AND BEVERAGE | | | |
|--|-------------|-----------|-------------|
| | ALSTONVILLE | BALLINA | LENNOX HEAD |
| Liquor Store | 2 | 9 | 3 |
| Café / Restaurant | 4 | 27 | 7 |
| Family Restaurant | 3 | 6 | 1 |
| Total | 9 | 51 | 11 |
| TOTAL RETAIL, FOOD AND BEVERAGE IN BALLINA SHIRE 71 | | | |

ATTACHMENT B

1. Which sector of the visitor economy do you operate within?
 - Accommodation
 - Food/Drink
 - Tours/Activities
 - Attractions
 - Festival and Events
 - Transport Services
 - Support Services
 - Venue
 - Other
2. How would you describe the Ballina region to friends who have never visited?
3. What experiences would you recommend to visitors in the region as a “must do”?
4. What attributes (natural, man-made or intangible) add to or detract from the appeal of the destination?
 - 4a) Add?
 - 4b) Detract?
5. Where would you like to see your business in the future (what are your business development priorities)?
 - 5a) for the next five years?
 - 5b) for the next 10 years?.
6. In your opinion, what built assets are needed to grow the Ballina Shire visitor market? For example a public transport interchange, expanded Airport, conference venue. List all that apply.
7. Who are your key source markets and consumer segments that you wish to be targeting? Think about psychographics as well as demographics. For example you may wish to be targeting business events and their delegates. They may fly from their home in Sydney for a conference and be here for the purpose of business, with an experience seeking mindset. You may wish to refer to Destination NSWs market segments <https://www.destinationnsw.com.au/tourism/facts-and-figures/market-segments>
 - 7a) Where does your ideal visitors originate from?
 - 7b) Typically how do they get here?
 - 7c) What is the purpose for their travel?
 - 7d) What else can you tell us about them?
8. What actions should be undertaken to grow Ballina Shire’s visitor economy?
9. What should be done to increase the length of time visitors stay in the Ballina region?
10. What trends have you noticed influencing the visitor economy and what does this mean for tourism in the next 10 years? To assist you with your response some macro influences include shorter breaks, currency exchange, community acceptance of tourism, securing investment, the share economy, digital disruption, aviation trends, working holiday visa status, immigration status, climate change, Indigenous participation in service delivery.
11. What might be done to strengthen the Ballina Coast and Hinterland’s branding and market position?
12. What do we need to attract business events organisers/delegates to the destination?
13. What are the opportunities for experiences in the region?
14. What transport and access gaps exist to developing the Ballina Coast and Hinterland visitor economy?

BALLINA
COAST &
HINTERLAND
**DESTINATION
MANAGEMENT
PLAN 2021-2030**



Ballina Shire Council
40 Cherry Street Ballina NSW 2478
p: 1300 864 444 | e: council@ballina.nsw.gov.au

ballina.nsw.gov.au