



**RESPECT**



**INNOVATION**



**INTEGRITY**



**TEAMWORK**



**EXCELLENCE**

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# Kiama Tourism and Events Strategic Plan 2022-2026

## 1.0 Purpose

This document provides additional context and background on the strategy preparation process for Council's consideration alongside the Draft Kiama Strategic Tourism and Events Plan 2022 – 2026.

## 2.0 Objectives of the Tourism and Events Strategic Plan (2022-26)

The framework for the plan is built around five objectives:

1. Provide strong leadership, partnership and communication
2. Facilitate sustainable tourism growth
3. Deliver authentic branding and marketing
4. Create a thriving, high quality event destination
5. Enable tourism investment and development

## 3.0 Scope

Destination Kiama is the tourism brand of the Tourism & Events Department of Kiama Municipal Council. Its purpose is to achieve economic and social benefits for the Kiama Local Government Area by sustainably growing tourism and events.

The region continues to be a popular day visit destination, however in order to meet our objective to facilitate sustainable growth in visitor expenditure, our target markets are identified as overnight visitors that are:

- Visiting Friends and Relatives
- Travelling domestically (intra and interstate)
- Travelling internationally (ex-Sydney when markets return post COVID-19)
- Special event visitors.

## 4.0 References

Information is presented within two appendices:

Appendix 01: Background Report

Appendix 02: Action Plan and Timeline

## 5.0 External resources and policy

### 5.1 NSW Government

The NSW Government's Visitor Economy Strategy 2030, released in 2021, provides a roadmap to support all industries involved in the visitor economy to recover. It sets out a three phase strategy made up of recovery and rebuilding, momentum with investment and stimulus, and acceleration to a heightened visitor expenditure target to 2030.

The NSW Government's Visitor Economy Strategy 2030 states:

Competition from other destinations will be intense as they try to recover the visitation lost due to COVID-19. Even destinations previously grappling with 'over-tourism' will be vying for share post COVID-19. Travellers will align their values with those of the destinations they plan to visit, seeking out authentic experiences based around communities, arts, screen, and culture.

The Kiama Strategic Tourism and Events Plan 2021 – 2026 has been prepared in a similar context.

## 5.2 Kiama Municipal Council

Tourism is recognised as a key pillar of Kiama's economy in the Regional Economic Development Strategy, it is also Kiama's largest industry and major employer.

Kiama Council's Community Strategic Plan 2017-27 identifies the continued encouragement and support of tourism, along with economic growth and employment and encouragement of economic development being of greatest importance to the community. Similarly, Kiama Council's BISI (Build Invest Sustain Integrate) Cultural Planning document acknowledges the value of tourism collaboration and commits to support strategies that integrate cultural arts.

The revised Tourism and Events Plan seeks to contribute directly to the objectives of these major Council reports that address the role of local government in tourism with regard to Kiama's visitor economy and the Municipality's investment in tourism.

## 6.0 Strategy review process

The Destination Kiama Tourism Opportunities Plan which was developed in 2018 involved a high level of industry and stakeholder consultation and input. This document remains the framework to guide the delivery of the tourism sector locally, and together with this Strategic Plan, ensure Destination Kiama's position as an active tourism advocate and facilitator for the area.

Given the 2018-2021 Tourism Strategic Plan was considered by the Tourism Advisory Committee and determined by and large still appropriate, it provided the basis of the review and preparation of a refreshed Tourism and Events Plan 2022 -2026.

The review process for this new strategy was as follows:

Phase 1: Research

Phase 2: Consultation

Phase 3: Analysis

Phase 4: Draft Strategy

Phase 5: Draft Action Plan

Phase 6: Endorsement and Public Exhibition

The principal amendment to the document (which the Action Plan goes into further detail) was identifying and determining the challenges and opportunities brought about by the COVID-19 pandemic. Much of which is based on COVID-related uncertainty, including:

- Ongoing COVID compliance and long-term impediments (particularly on events)
- Border closures and restrictions in key source markets
- The need for heightened business and industry support
- Loss of consumer confidence
- Industry fatigue
- Requirement to build agility and adapt to changing conditions
- Current industry trends (particularly around safety and reassurance).

Council engaged external consultants, EarthCheck Pty Ltd, to lead consultation and support preparation of the new document. Peter Valerio, Principle, Tourism Strategy Development



Services, was also engaged to review tourism data from the last three years and offer recommendations on the most applicable data set to provide as the base line for growth. Peter also assisted in providing data related trend information to assist in forecasting.

Key stages in the review process for the Tourism and Events Plan were as follows:

**i. Stakeholder survey**

A survey seeking industry's perspectives on strategic tourism priorities and overall vision and direction was distributed via the Destination Kiama newsletter database of 660 recipients. Results of the survey are provided in Appendix C.

**ii. One on one consultation**

One on one consultation sessions were held between the EarthCheck engaged consultant and key industry stakeholders identified by the Acting Manager, Tourism and Events, the Tourism Advisory Committee and Nigel Russell, consultant. The cross section of participation was designed to achieve a balanced input from key industry sectors and those experienced in the local and regional environment. Key stakeholders consulted were:

1. Councillor Matt Brown, past Tourism Minister, and current Tourism Advisory Committee Chair
2. Shannan Perry-Hall, General Manager, Destination Sydney Surround South
3. Melinda Liberato, ISJO
4. Erica Warren, Jamberoo Music Festival, Greyleigh Estate, past Kiama Tourism Board Member and past co-owner of Jamberoo Pub
5. Mark Bryant, Kiama Rugby Sevens
6. Jane Stroud, CEO, Kiama Municipal Council
7. Edward Paterson, Manager Strategic Planning, Kiama Municipal Council
8. Peter Valerio – Tourism Strategy Development Services, Tourism Market Research Analysis and Strategy Development
9. Megan Hutchison, Acting Director Corporate and Commercial Services and Economic Development Manager, Kiama Municipal Council
10. Cameron McDonald, Kiama and District Business Chamber, Tourism Advisory Committee representative.

**iii. Group consultation**

Following review of survey and individual stakeholder feedback, group consultation was then held via a zoom meeting with the Tourism Advisory Committee, consisting of: Councillor Matt Brown, Councillor Warren Steel, Robert Sciacchitano, Marcus Testoni, Cameron McDonald, along with Sally Bursell, Acting Tourism and Events Manager and Megan Hutchison, Acting Director Corporate and Commercial Services and Economic Development Manager.

## **7.0 Tourism sector performance**

Statistics quoted within the Kiama Tourism and Events Strategic Plan 2022-26 have been derived from Tourism Research Australia's National and International Visitor Survey datasets under licence by Peter Valerio. 2020 statistics were collected, however with travel restrictions and stay at home orders in place for much of the time (travel heavily restricted from March 2020), the

numbers do not correlate with a 'normal' year of visitation. Therefore, the statistics from the year ending 2019 have been quoted.

Figure 1: Sydney Market Recovery Monitor

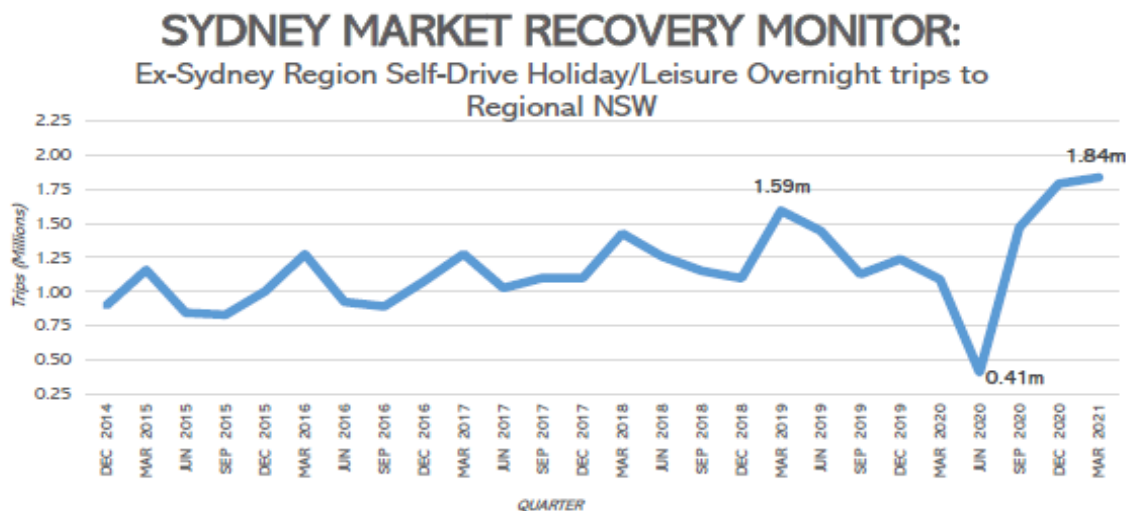
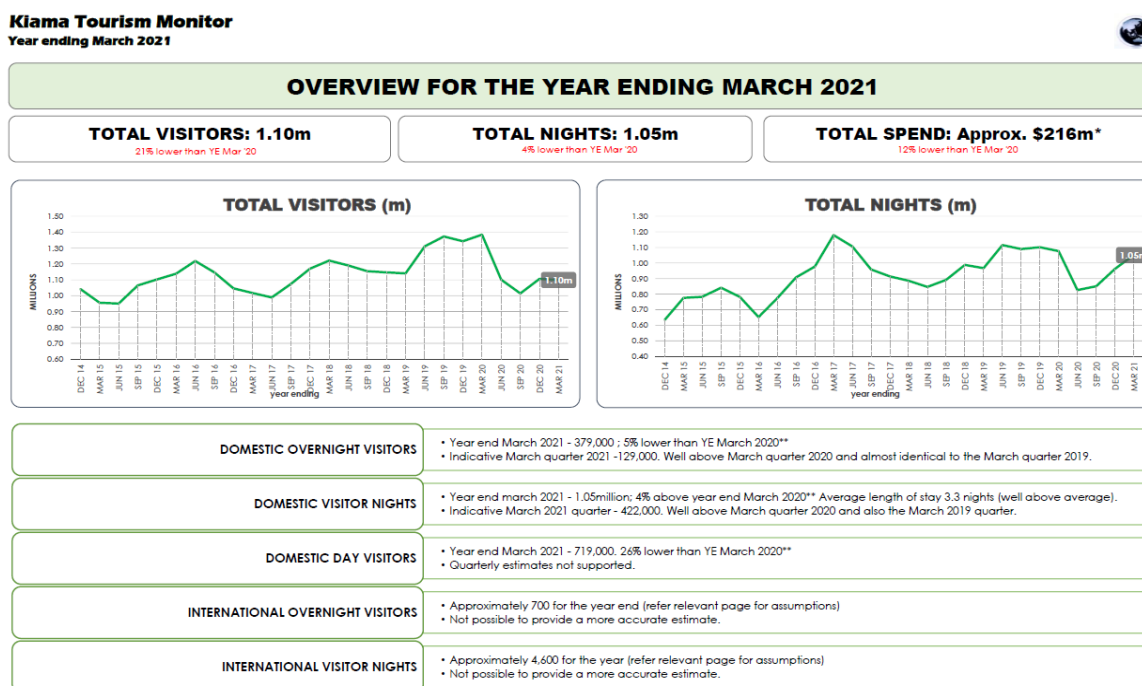


Figure 2: Kiama Tourism Monitor – Year ending March



## 8.0 Issues and trends

Kiama is well positioned to meet many of the anticipated post COVID-19 market trends and consumer behaviour changes, setting the destination up for continued growth. The reality is the majority if not all of the Plan’s 3 year term will be within the COVID-19 recovery period.

KPMG in their report Beyond COVID-19: Rise of domestic travel and tourism in Australia and echoed throughout the research from Destination NSW, that there are a number of trends and emerging trends that have been documented below. These have been incorporated into the revised Kiama Tourism & Events Strategic Plan and Action Plan, offering new opportunities as well as some barriers to the way we used to do business.

## 8.1 Regional travel

A higher percentage of people opting to travel regionally and stay close to home. During the pandemic, there has been a shift from international and interstate to local markets. Speed and timing of recovery is uncertain, with markets likely to recover at varying paces. As international travel restarts, it is likely that there will be a flattening/dip in domestic overnight trip volumes.

## 8.2 Safety and hygiene

What used to mark the hallmark of a fulfilling holiday, such as visiting tourist hotspots, enjoying dinner at a bistro brimming with locals, or wandering through a bustling market, are now situations that incite fear and anxiety for many.

Post-COVID pandemic consumer trends such as seeking reassurance on safety and hygiene and cleanliness, with socially distanced seating, and less inclination towards mass tourism and crowded places whilst fulfilling the desire for escape and open space.

Less group travel, more free independent travel (FIT) as people shy away from travelling with strangers. Similarly, travel itineraries and road trips will be planned focusing more on remote locations and outdoor niches, such as walking, birding and biking tours, where travellers are less likely to come into contact with others.

The promotion of safe health practices is not only beneficial for the desirability and health of travellers, it is also for the good of the community, and their support of the industry.

## 8.3 Growth of automation, digitisation, contactless transactions and technology such virtual reality and augmented reality

Importance for travellers to stay connected as they travel, due to the critical need to stay informed and up to date with the latest health and travel guidelines.

Digital technology will continue to advance, facilitating all stages of the customer journey and experience, e.g., search, booking, payments, augmented reality, real time translations etc.

Mobiles will continue to be the preference of travellers throughout their customer journey, as will be social media. Mobile optimisation of the customer experience as well as optimising visitor attractions and accelerated digitalisation is key, including a higher use of automation, contactless payments and services, virtual and augmented experiences, and real-time information provision.

## 8.4 Sustainable travel – eco travel

Heightened consumer expectations on sustainable travel destinations and experiences due to a greater awareness of climate change and adverse impacts of tourism. Research by Booking.com reveals that 72% of tourists believe that people need to take action now and make sustainable travel choices in order to save the planet and preserve it for future generations.

A continued demand for nature-based tourism and adventure experiences is expected.

## 8.5 Experiential travel - local experience and authenticity

More and more travellers will search for immersive, authentic, educational, and having a once-in-a-lifetime experience or gaining an emotional connection with cultures and nature.

Harris Group did a study that revealed that 72% of millennials prefer spending more money on unique experiences rather than on material things.

## 8.6 Personalisation and custom options.

Digital and mobile technology have empowered visitors to take more control of their travel experiences and increased their expectations. As a result, the expectation of personalised and tailor made experiences is likely to grow.



According to Think with Google, 57% of travellers believe that companies should personalise their buying experience and base it on their behaviours, personal preferences, and past choices.

Inclusive and accessible tourism – travellers are expecting more and will no longer put up with experiences that fail in this area.

### 8.7 Wellness travel

These are travellers looking for an enriching experience with the primary purpose of achieving, promoting, or maintaining the best health and sense of well-being and balance in life. The requirement for healthy and organic food is high on their agenda.

### 8.8 Transformative travel (holidaying with a purpose)

This is a new tourism trend that's quickly gaining popularity. Transformative travel is about not just traveling for leisure but also aiming to make a difference in both the lives of others and oneself.

It is predicted that volunteering, conservation, and the like will play a bigger part in travel and destination choice.

Booking.com shares that 68% of global travellers would consider participating in cultural exchanges to learn a new skill, followed by a volunteering trip (54%) and international work placements (52%).

Based on this trend, tour operators can focus on offering unique and purposeful activities along with their usual products and services.

### 8.9 Caravanning and camping

The desire for authentic experiences will drive demand for exploring destinations on caravanning and camping holidays.

### 8.10 Food and Drink

Local produce and food and drink experiences will continue to play a role in destination choice, as a central part of the travel experience, and this space will become crowded.

### 8.11 Multigenerational travel

The trend in multigenerational travel will continue, as families use their holiday time to bond and create memories together, and this will influence the type of customer experience they are looking for.

## 9.0 Stakeholder engagement and communications

Key issues and opportunities arising from consultation

### 9.1 Tourism vision for Kiama

Consensus from feedback is that the sentiment behind the vision in the current tourism and events plan is supported. A minor refresh to reflect the COVID-19 recovery period as well as promoting the involvement in our social fabric through visitor engagement was suggested and added to the existing vision.

### 9.2 Opportunities

- Food Bowl - opportunities to do more with local produce.

- Adventure/ nature-based – cycling and walking. Kiama is well placed to capitalise. Prioritising connections to the regional trail network. (Easier said than done on the escarpment, so may need to be aspirational).
- Its aspirational given the complexity – but the harbour revitalisation would make a big difference.
- Night-time economy – what more can be done to encourage businesses, residents and visitors out after dark? Suggestions we made on permitting/regulations which encourage outdoor dining.
- Kiama has undelivered potential as a high quality 'boutique' destination.

### 9.3 Events

- General theme from consultation focused on making it easier for events – permits, facilitation, support for volunteers.

### 9.4 Covid-recovery

- An issue as the whole 3-year period will be in the covid recovery time. Even though Kiama has been impacted less than some areas – business resilience is a topic that may need to feature. It may not be a council-delivered task but providing support to businesses may be an issue to namecheck.

### 9.5 Positioning/Brand/Marketing

- No significant changes to overall positioning, branding, and marketing were supported.
- Some questions about how the region works together where its mutually beneficial were raised.
- COVID-19 related themes and emerging trends were discussed.

### 9.6 Partnerships

- Destination NSW are moving away from destination marketing/regional campaigns - can the south coast Local Government Areas do more by working collectively where there is consensus on marketing?
- We need to work in partnership with neighbouring areas where there is clear mutual benefit – initiatives such as Grand Pacific Drive continue to offer potential.

### 9.7 Accommodation

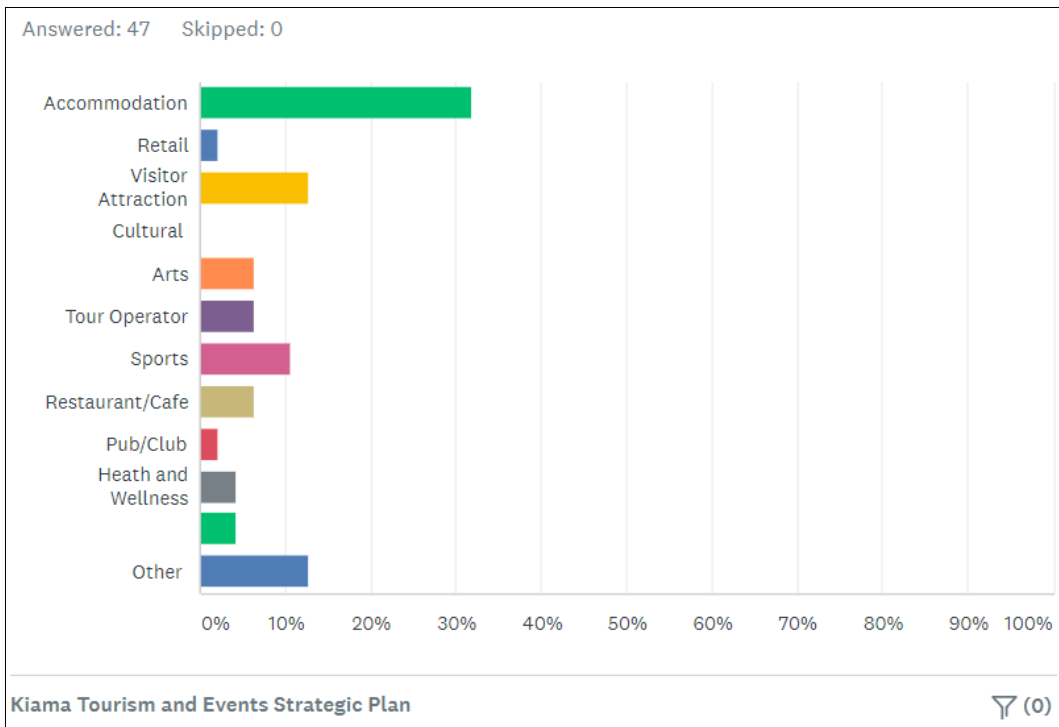
- Support should be maintained for appropriately located sharing accommodation. A proactive approach may be needed to help attract new hotel accommodation in terms of site identification
- Support for short term holiday letting should remain a priority due to the number and general success of the model, given our lack of traditional key rooms.

### 9.8 Target markets

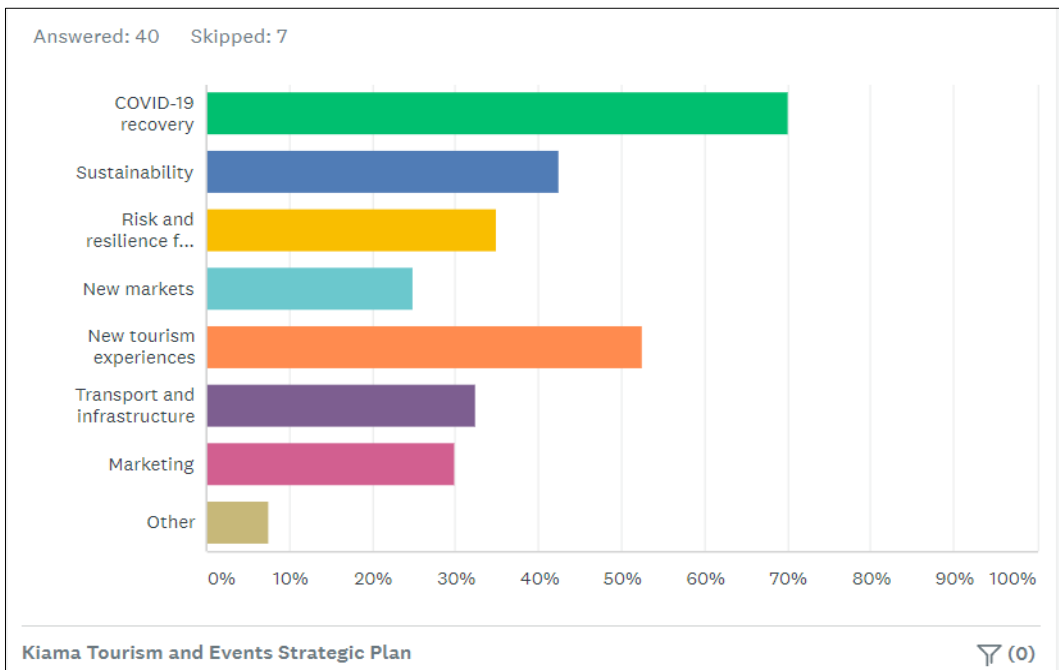
- Growing population and post-covid appeal means day visitor demand/pressure in peaks is likely to grow:
  - Visitor management challenges
  - How to we raise spend by day visitors?

## 10.0 Summary of results from industry survey

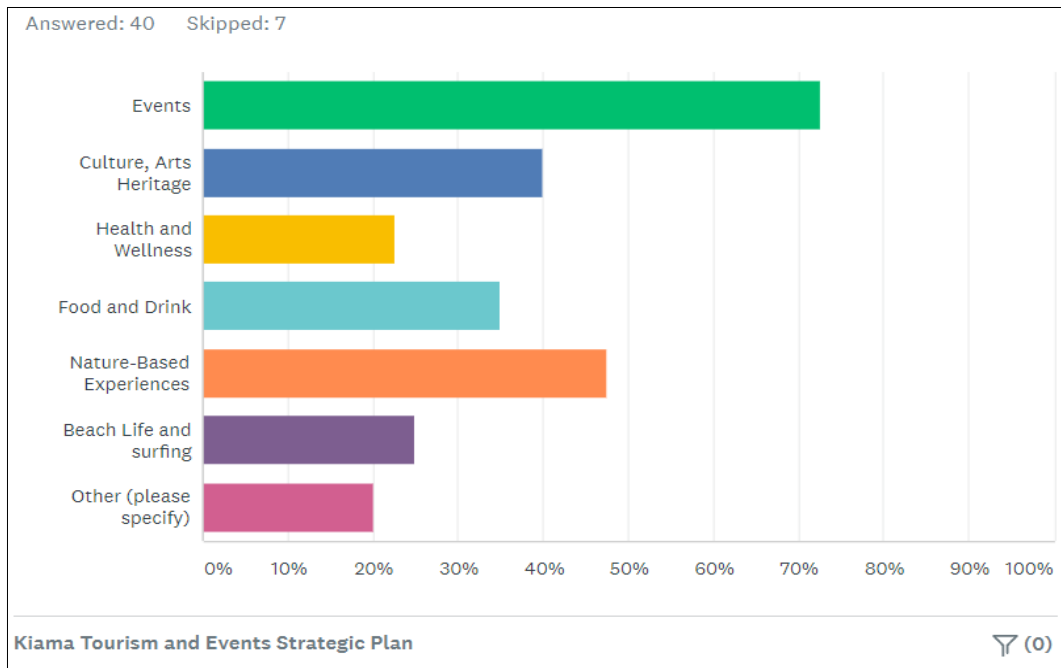
Which category best suits your business?



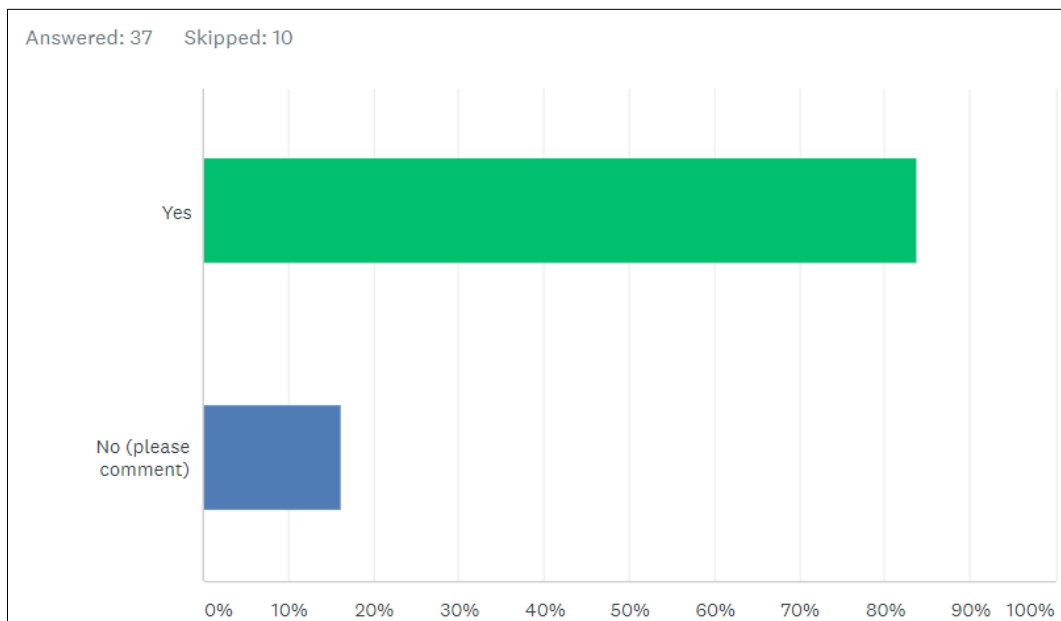
What issues do you think are important to consider in the new Kiama Tourism and events plan?



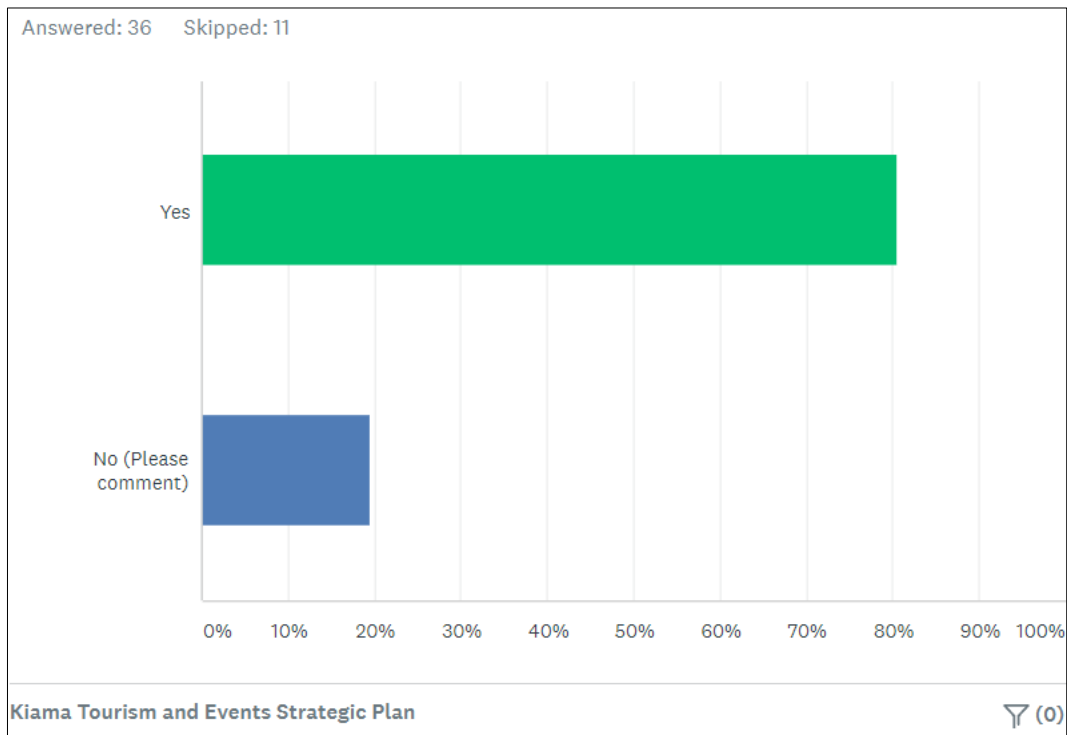
Which one of the following areas do you think offers the best potential to grow the value of tourism in the Kiama area?



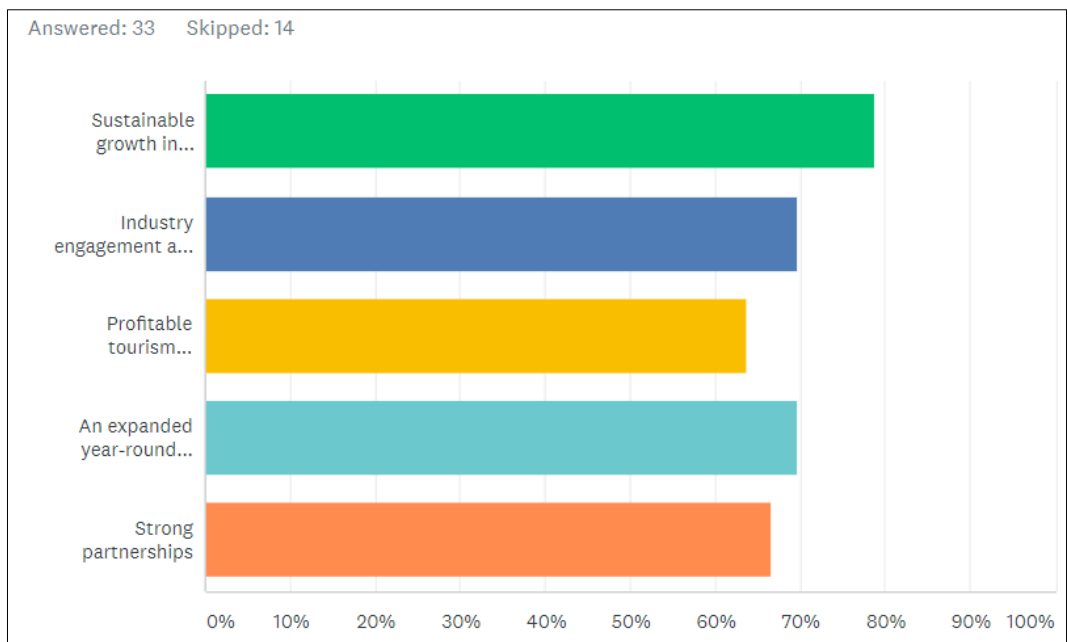
The Vision in the current Tourism and Events Plan is “Kiama will welcome and inspire visitors year round to experience our distinctive natural landscapes, relaxed lifestyle, arts, culture and events” Does this Vision still remain relevant for the next 3 year period?



The purpose in the current Tourism and Events Plan is “Achieving economic and social benefits for our municipality by sustainably growing tourism and events.” Does this Vision remain relevant for the next 3 year period?

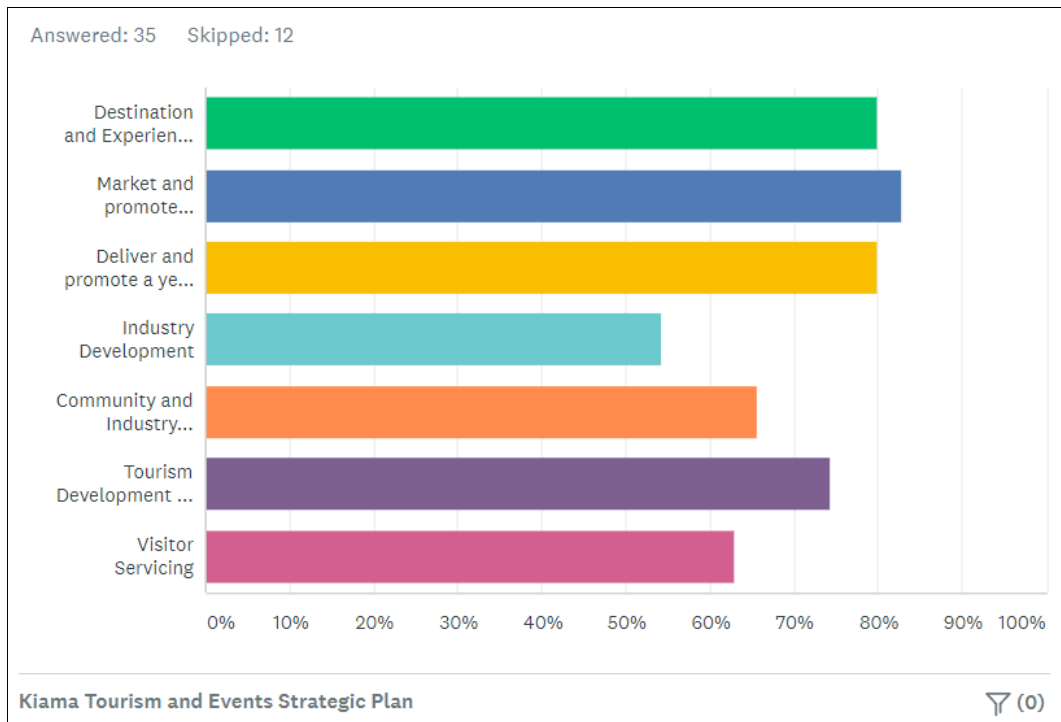


Do the following measures remain relevant for the next 3-year period?





Do the following strategic themes for the Tourism and Events Plan remain relevant for the next 3-year period?



## Kiama Tourism and Events Strategic Plan

### 1. Introduction

Destination Kiama has commenced the process of reviewing and updating the Tourism and Events Strategic Plan 2018 - 2021. This current Tourism and Events Strategic Plan can be found [here](#)

Despite the huge challenges that bushfires, and the more current COVID-19 pandemic has created for our communities and businesses, the Kiama LGA's tourism industry has made great progress during this period. The fundamentals of Kiama's appeal to visitors remains strong, with many of these what safety conscious travellers are aspiring to, which provides us a strong basis for recovery.

Your input is central in shaping the direction of our new Tourism and Events Strategy, for the next three years (until 2024). To this end, we invite you to complete the attached survey.

No identifiable data from this survey will be included in reports or publications, with information being analysed and collated in anonymised form only.

There are 13 questions to this full survey.

We understand that some people may be incredibly time poor. If this is the case, we would appreciate you completing the first four questions as a minimum.

Destination Kiama would like to thank you for providing your insights in shaping preparation of the new Tourism and Events Plan.

## Kiama Tourism and Events Strategic Plan

### 2. Part 1: About Your Business

#### 1. Which category best suits your business?

- Accommodation
- Retail
- Visitor Attraction
- Cultural
- Arts
- Tour Operator
- Other
- Sports
- Restaurant/Cafe
- Pub/Club
- Heath and Wellness
- Government/Industry Group

## Kiama Tourism and Events Strategic Plan

### 3. Part 2 - Issues Impacting Kiama's Visitor Economy Over the Next 3-Year Period

2. What issues do you think are important to consider in the new Kiama tourism and events plan? Please select all that apply.

- |   |   |
|---|---|
| <input type="checkbox"/> COVID-19 recovery                  | <input type="checkbox"/> New tourism experiences      |
| <input type="checkbox"/> Sustainability                     | <input type="checkbox"/> Transport and infrastructure |
| <input type="checkbox"/> Risk and resilience for businesses | <input type="checkbox"/> Marketing                    |
| <input type="checkbox"/> New markets                        |   |
| <input type="checkbox"/> Other                              |   |

3. What are the top three issues that will impact YOUR business in the next 3-year period?

- 1
- 2
- 3

4. Which one of the following areas do you think offers the best potential to grow the value of tourism in the Kiama area? Please tick all options you think apply

- |   |   |
|---|---|
| <input type="checkbox"/> Events                 | <input type="checkbox"/> Food and Drink           |
| <input type="checkbox"/> Culture, Arts Heritage | <input type="checkbox"/> Nature-Based Experiences |
| <input type="checkbox"/> Health and Wellness    | <input type="checkbox"/> Beach Life and surfing   |
| <input type="checkbox"/> Other (please specify) |   |

## Kiama Tourism and Events Strategic Plan

### 4. Part 3: Vision, Purpose and Objectives

5. The Vision in the current Tourism and Events Plan is *"Kiama will welcome and inspire visitors year round to experience our distinctive natural landscapes, relaxed lifestyle, arts, culture and events"* Does this Vision remain relevant for the next 3 year period?

- Yes
- No (please comment)

6. The Purpose in the current Tourism and Events Plan is *"Achieving economic and social benefits for our municipality by sustainably growing tourism and events"* Does this purpose remain relevant for the next 3 year period?

- Yes
- No (Please comment)

7. The Objectives in the current Tourism and Events Plan are *"1. Attract visitors to Kiama, generating overnight visitor expenditure (OVE) on a sustainable basis 2. Identify and embrace opportunities to grow overnight visitor expenditure 3. Build awareness of the importance and value of the visitor economy 4. Provide a framework for the co-ordination of key stakeholders and resources needed to deliver the plan"*

Do these Objectives remain relevant for the next 3 year period?

- Yes
- No (Please comment)



## Kiama Tourism and Events Strategic Plan

### 5. Part 4: Measures of Success in the Tourism and Events Plan

8. Do the following measures of success remain relevant for the next 3-year period? Please select all that apply

- Sustainable growth in overnight visitor expenditure (OVE)
- Industry engagement and support
- Profitable tourism enterprises
- An expanded year-round events calendar
- Strong partnerships

If No to any of the above, please comment

9. Are there any new measures of success that should be included in the new *Tourism and Events Plan*?

11. Please rank the current seven themes of the Strategic Framework from most important to least important.  
(With 1 being the most important and 7 being the least important)



Destination and Experience Development



Market and promote visitation to the Kiama Area



Deliver and promote a year round events strategy



Industry Development



Community and Industry Engagement



Tourism Development and Strategic Partnerships



Visitor Servicing

12. Are there any new thematic areas that you feel should be included in the new *Tourism and Events Plan*?

13. Which of the following themes do you think offers potential to further grow the value of tourism to the Kiama area? Please select all that apply.

Events

nightlife/ night-time visitor economy

Adventure (including cycling and walking)

Health and wellness

Heritage (including Indigenous heritage)

Nature-based tourism

Arts and culture

Beach life and surfing

food and drink (including farmgate)

Other (please specify)

## 11.0 Review history

The Kiama Tourism and Event Strategy (2018-2021) was reviewed July - November 2021. Public exhibition took place from 22 March to 22 April 2022.

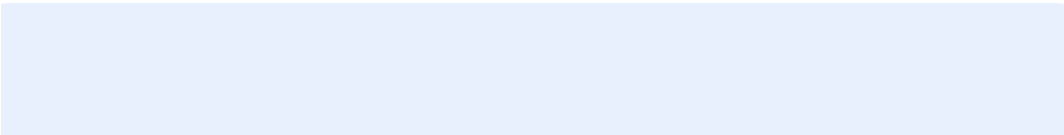
The next review date for this document is 1 July 2026. Any amendments to this document must be by way of Council resolution.

Council reserves the right to review or vary this document and associated processes at any time if required.

## 12.0 Document control

Date reviewed	Date adopted	Amendment
22 April 2022	28 June 2022	6.0 <i>The Destination Kiama Tourism Opportunities Plan which was developed in 2018 involved a high level of industry and stakeholder consultation and input.</i> Modified from: <i>The Destination Kiama Tourism Opportunities Plan which was developed in 2018 involved a high level of community and stakeholder consultation and input.</i>
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Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

## 13.0 Signature

<b>Name:</b> Jane Stroud   Chief Executive Officer	<b>Date:</b> 8 July 2022
Signature:	

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Office hours

Our Administration Building located at  
11 Manning Street Kiama is open 8.45 am to 4.15 pm  
Monday to Friday (excluding public holidays)

