Destination Management Plan

for the Ballina Coast & Hinterland 2014 - 2020

ballina
shire council

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for the Ballina Coast & Hinterland 2014 - 2020

EXECUTIVE SUMMARY

This Destination Management Plan (DMP) for Ballina Shire has been prepared following: guidelines set out in the 2012 NSW Government Industry Action Plan; the completion of the North Coast DMP in June 2013; and, the introduction of the Regional Visitor Economy Fund (RVEF).

The RVEF is a funding mechanism, setting out a process for Local Government Authorities (LGAs) and other organisations to apply for tourism-related funds that:

(a) are strategic and in line with the LGA's destination management plan; and

(b) seek to double visitor expenditure by 2020.

A. Destination Analysis

Ballina Shire is located on the North Coast of NSW, 230 kilometres south of Brisbane and is bordered by Byron Shire to the north, Richmond Valley to the south, and Lismore City to the west. The Shire includes the towns and villages of Ballina (the main township), Alstonville, Wollongbar, Wardell and Lennox Head, and a number of hamlets and localities.

Ballina Shire has long been viewed as a scenic, quiet, relaxing and family-oriented beachside destination, positioned close to Byron Bay, being one of Australia's most iconic and popular visitor destinations. The Shire's unique selling points include its beaches, hinterland villages and landscapes, family-attractions, soft and hard recreational activities and its unspoiled, uncluttered, friendly and safe atmosphere. A wide range of affordable accommodation and airport and road infrastructure are also key assets.

In 2011, Ballina Shire's visitors were made up of 55% day-trippers, 42% domestic overnight visitors and 2.6% international overnight visitors. The majority of day-trippers are from South East Queensland and travel to area by private vehicle. The Shire Council's bi-annual visitor survey suggests that relaxation (28%), enjoying the beaches (24%), visiting friends and relatives (VFR – 12%), adventure (11%), food and wine (8%) and fishing (5%) are the most popular reasons for visiting.

Domestic visitor arrivals have fluctuated over the last decade. In 2011, the Shire attracted 358,000 domestic visitors, slightly more than it attracted in 2000. While the majority of overnight domestic visitors stay for two nights, the average length of stay is between 3 and 4 nights. Total domestic visitor nights in the Shire have also fluctuated over the last decade. Between 2000 and 2013 the overall trend has plateaued from around 1.2 million nights in 2012 to around 800,000 nights in 2013. The total average visitor spend from 2008 to 2011 was $149 million per annum.

B. Destination Direction

Access to Ballina Shire is steadily improving through major road upgrades and a growth in air-traffic to its Gateway Airport. Yet the Shire's position in domestic and international markets is unlikely to change significantly without additional substantive investment in key infrastructure. While investments such as a dedicated conference facility and a marina are part of the Shire's long-term plan, until they become a reality strategic insights into key consumer markets and changes in consumer patterns and preferences will likely underpin the successful branding, positioning and steady growth of Ballina Shire's tourism economy.

By positioning itself as an experience-focused destination, Ballina Shire's main assets – its unique

and special local experiences – can become activities that visitors seek out to increase their enjoyment and satisfaction while staying in the destination. Looking to the future, Ballina Shire will seek to benefit from a stronger promotional image that:

(a) highlights its unique distinguishing attractions and experiences;

(b) ensures Ballina Shire is positioned alongside its competitors as a destination in its own right.

Vision

To be recognised as a unique and appealing 'value for money' holiday destination.

Aim, Goals and Objectives

The aim of the Ballina Shire DMP is to double visitor expenditure from the 2008 to 2011 aggregate total annual spend of $149 million to $300 million by 2020. This will be achieved through two broad goals.

Goal one: strengthen the market position and visibility of the destination's full range of assets and attractions, especially to niche markets.

Goal two: strengthen the product base through business investment, improving interpretation and signage and encouraging recreational activity, events, festivals, community-markets.

The DMP identifies five key objectives as themes of work to achieve the goals and aim:

1. Strengthen management and coordination of the Shire's tourism sector;

2. Review and collectively develop the marketing of Ballina Shire tourism;

3. Promote product development; and,

4. Invest in infrastructure

5. Investment attraction (conferences, festivals and events)

C. Destination Requirements

Ballina Shire Council employs a number of people to oversee destination management and visitor services 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 Plan. Voluntary and in-kind support from stakeholders and community interest groups needs to be coordinated to carry the Shire'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 there are a number of actions without an identified financial means.

A range of risks have been identified, including internal and external factors that could impact on the delivery of the overall goal, being to double overnight visitor expenditure to the Ballina Shire. A number of strategies have been outlined to mitigate these factors.

1. INTRODUCTION

Ballina Shire Council, as a major provider of visitor services, has prepared this Destination Management Plan (DMP), following:

• guidelines set out in the 2012 NSW Government Industry Action Plan, which aims to double overnight visitor expenditure in NSW by 2020;

• the completion of the NSW North-Coast DMP in June 2013; and,

• the introduction of the Regional Visitor Economy Fund (RVEF).

The RVEF is a funding mechanism, setting out a process for Local Government Authorities (LGAs) to apply for tourism-related funds that: (a) are strategic and in line with the LGA's destination management plan; and, (b) align with Destination NSW's goal to double overnight visitor expenditure by 2020.

In 2013, as part of the process to develop its DMP

and apply for RVEF funds to support its branding and niche marketing activities, Ballina Shire Council initially develop a product audit to review the composition, size and extent of its visitor economy. Findings of this audit are referenced throughout this paper and a table summarising the collection of tourism assets and businesses that make up the Shire's visitor economy is included as **Attachment A.**

The process of drafting this edition of the DMP commenced in November 2013 and concluded in January 2014. This document should however be read as "work in progress" as additional specific inputs to strengthen and develop Ballina Shire's tourism vision and Destination Management Plan will be undertaken in 2014.

It should be noted that whilst Ballina Shire Council has initiated the process of developing a Ballina Shire DMP, implementation of the recommendations as a result of this DMP may or may not lie with Ballina Shire Council.

2. DESTINATION ANALYSIS

2.1 Key Destination Footprint

Ballina Shire is located on the North Coast of New South Wales, which is one of the fastest growing regions in Australia. The region is located 230 kilometres south of Brisbane and is bordered by Byron Shire to the north, Richmond Valley to the south, and Lismore City to the west.

Ballina Shire Council is aware that visitors do not see Local Government Area (LGA) boundaries, and it could reasonably be assumed that the destination's footprint may include at the least two other LGAs including

Byron Shire and Lismore City. For the purposes of this DMP, Ballina Shire LGA is the destination. 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 Figures 1 and 2 below). 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 young families seeking a coastal lifestyle.

Figure 1: Locality map of Ballina Shire

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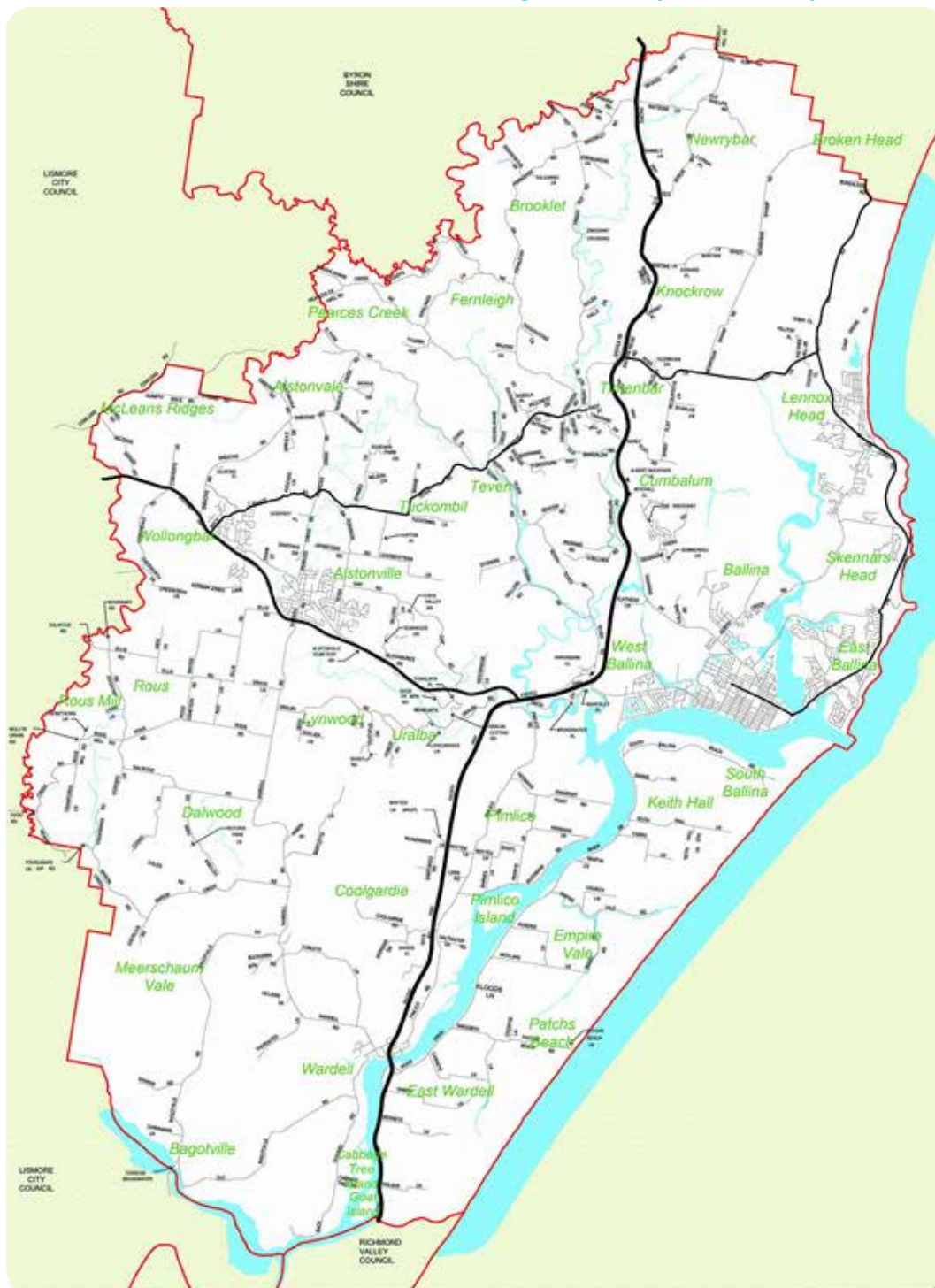# 2. destination analysis (cont')

Figure 2: Ballina Shire local boundary map including villages

2.2   Key Stakeholders

Tourism is a multi-faceted industry that embraces a wide variety of public and private sector stakeholders. Broad stakeholder and community consultation in the preparation of a 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 taken to engage a wide range of stakeholders in the development of this DMP. In addition to one-to-one meetings with specific stakeholders, a review of stakeholder-related reports and documentation was undertaken. Consultation was also achieved through two workshops. Ballina Shire stakeholders were bought together firstly in May 2013 to discuss local assets and tourism planning needs for the regional North-Coast DMP. An additional workshop was convened on 10th December 2013, which focused solely on the Ballina Shire's DMP. Inputs were also gathered from a stakeholder survey distributed online in December 2013 by Ballina Shire Council to over 500 stakeholders of the Shire's tourism economy. A copy of the survey instrument is included as Attachment B.

Information gathered through the survey, stakeholder workshops and background reports is cited throughout this document. It is noted however, that of the 500 survey requests sent out, only thirteen responses were received and only four stakeholders attended the December workshop. While the timing of these consultation exercises in the run up to the Christmas and summer holiday period may have contributed to low levels of engagement, a reasonable conclusion from this consultation process is that greater efforts are needed – on the part of all stakeholders – to build greater local buy-in and ownership of the Shire's DMP. Without such ownership the task of doubling overnight expenditure by 2020 will be considerably harder to achieve.

Table 1 identifies key stakeholders in Ballina Shire's tourism economy together with their level of engagement in the formulation of this DMP. The table embraces public and private sector representatives from across the Shire and includes key businesses listed in the Attachment A, the Product Audit.

Table 1: Key stakeholders

ORGANISATION	KEY CONTACT	CONTRIBUTION TO PLAN
Ballina Chamber of Commerce & Industry	Nadia Eliott-Burgess	Attended regional consultation meeting, reviewed draft of the regional DMP. Contributed community input through member stakeholder consultation.
Alstonville Wollongbar Chamber of Commerce	Peter Meehan	Reviewed draft of the regional DMP. Contributed community input through member stakeholder consultation.
North Coast Destination Network	Belinda Novicky	Attended regional consultation meeting, reviewed draft of the regional DMP. Contributed community input through member stakeholder consultation.
Ramada Hotel and Suites Ballina Byron	Karen Whiteford / Vivien Stotter	Contributed community input through member stakeholder consultation.
Ballina Beach Resort	Alan Chamberlain	Contributed community input through member stakeholder consultation.
Community Event Organisers	Kim Potter	Reviewed draft DMP
Macadamia Castle	Tony Gliding	Contributed community input through member stakeholder consultation.

Table 1: Key stakeholders (con't)

ORGANISATION	KEY CONTACT	CONTRIBUTION TO PLAN
Summerland House Farm	Brett Lacey / Lisa Murphy	Contributed community input through member stakeholder consultation.
Ballina Byron Gateway Airport	Neil Weatherson	Contributed community input through member stakeholder consultation.
Ballina Navel and Maritime Museum	Dot Anderson / Clem McMahon	Contributed community input through member stakeholder consultation.

2.3   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 Table 2.

Table 1: Key background documentation

ORGANISATION	STRATEGIES/PLANS/RESEARCH
Ballina Visitor Information Centre	Results of Ballina Visitor Centre Survey 2013; VIC visitation data; In house accommodation, attraction and activity brochures
Ballina Shire Council	Community Strategic Plan (2013-2023); 2013/2014 – 2016/17 Delivery Program and Operational Plan; Community survey results, Ballina Local Environmental Plan, Ballina Shire Growth Management Strategy (2012), Ballina Strategic Tourism Plan (2002); 2013/2014 Fees & Charges; 2013/2014 Budget; Asset Management Strategy 2012;
Tourism Research Australia	National and International Visitor Surveys
Destination NSW	Destination Management Planning Fact Sheet, Regional and Local Snap Shots; The Legendary Pacific Coast Touring Guide;
Aurora Research	Regional Visitor Services Strategy (2012), Visitor Centre Accreditation Manual
North Coast Destination Network	North Coast of NSW Destination Management Planning Process (June 2013)
NSW Government	Final Report of the Visitor Economy Taskforce: A Plan to Double Overnight Visitor Expenditure to NSW by 2020 (2012); Visitor Economy Industry Action Plan (The NSW Government Response to the Final Report of the Visitor Economy Taskforce) (2012);
Ballina Byron Gateway Airport	Business Plan 2012/13
Australian Government Department of Resources, Energy and Tourism / Tourism Australia	The Guide to Best Practice Destination Management; Destination Management Platform Matrix; Tourism Relevance Checklist

A number of research gaps were identified during the development of the DMP. Firstly, visitor arrivals, length of stay and level of spend data is two years old, and is compiled through an aggregate of data from the three to four years prior to that (data provided in Section 2.6 below). Secondly, no data was available profiling the level of visitation of key attractions (public and private) in the Shire. Thirdly, the Ballina Shire DMP would have benefited from Tourism Research Australia's Destination Profiles, but such work has yet to be undertaken in this destination. The Visitor Economy Product Audit work undertaken during the Plan's preparation also highlighted the lack of readily available data profiling tourism-related businesses especially in the accommodation and retail sectors. This gap is especially significant in the informal holiday accommodation sector, where a significant yet unknown percentage of holiday rentals are offered in private homes.

2.4   Key Assets and Market Position

Ballina Shire has long been viewed as a beautiful, quiet, relaxing and family-oriented beachside and hinterland destination close to Byron Bay, one of Australia's most iconic and popular visitor destinations.

Figure 3 depicts stakeholder responses to the DMP's December survey question, "How would you describe Ballina Shire to friends who have never visited?" with the largest text denoting the most common responses.

Figure 3: Visual representation of stakeholder responses to the question "How would you describe Ballina to friends who have never visited?"

Figure 3 suggests stakeholder perceptions are consistent with the established view of the Shire's market position with key assets including its scenic beauty, sleepy atmosphere and family-targeted activities – yet it also suggests that Ballina Shire might position itself as being apart from the hustle and bustle of Byron.

Against these strengths, stakeholder consultations suggest the Shire has yet to establish a clear, unique and memorable selling proposition or brand. This is partly due to the various regional and sub-regional tourism area classifications, including The Legendary Pacific Coast, the Northern Rivers Region, Ballina Coast and Hinterland, the Rainbow Region and the Summerland Coast. It is also due to the destination marketing itself as being in "close proximity to Byron, without being Byron". With Byron attracting some negative publicity related to traffic congestion and infrastructure issues, as well as alcohol issues and growth of the low-end backpacker market, there is an opportunity for Ballina Shire to benefit from a stronger promotional image.

Focusing further on branding and market position, the December survey asked respondents to comment upon Ballina Shire's branding strategy. 69 per cent of responses feel it is not clear how the Shire has positioned itself in the market, especially against competitors. While the Shire may be lacking a clear and cohesive branding strategy, it is fair to say the Shire has maintained a relaxed, unspoiled, uncluttered, friendly and safe atmosphere which makes visitors feel welcome and at home. The Product Audit also confirms the destination offers a variety of scenic nature-based coastal attractions that are complemented by activity-based family attractions, hard and soft recreational products and hinterland village and farming landscapes. Affordable accommodation, good local infrastructure and ease of access are also key assets of the Shire.

In an assessment of target markets to aim for, research undertaken by Tourism Australia demonstrates that 'experiential travellers' are the most significant and desirable visitors for North Coast NSW, including Ballina Shire. This is chiefly because experiential travellers (or "experience seekers") are considered to be high yielding visitors from a variety of demographic sectors that are often educated and seeking authentic, active experiences to contrast their daily lives. The

North Coast offers a range of adventure and nature-based tourism attractions, food, wine and arts as well as cultural experiences and beach lifestyles. Hence the destination is considered to be a 'good fit' for the experiential traveller and Ballina Shire will position itself as an easy access 'home away from home' for travellers looking for active but relaxing, comfortable but fun holidays. By positioning itself as an experience-focused destination, Ballina Shire's main assets are its unique and special local experiences – activities that visitors seek out to tick off their "Must Do in Ballina Shire" list, that increase visitor enjoyment and satisfaction while staying in the destination.

Through marketing Ballina's unique experiences, visitors should arrive with a list of things to do that are unique to the area, and leave with a strong collection of memories they remember and share with others via word-of-mouth and internet-based recommendations and referrals:

"Oh, you're going to Ballina? Make sure you....!"

Table 3 below groups Ballina's main assets and describes their appeal. The table is an aggregate list of assets reflecting the views of stakeholder consultations.

Table 3: Ballina's key assets

PRODUCT/SERVICE/ ATTRACTION	DESCRIPTION	CONSUMER APPEAL
Local beaches	Ballina's many beaches offer plenty of opportunities for relaxation, fun, quality family time and escape. Activities include swimming, surfing, walking, exploring rock pools and fishing, with various operators organising activities such as beach horse riding safaris and surf lessons.	Free way to enjoy Ballina's beautiful natural assets and famous surf. Great for family, nature-based and recreational consumer markets.

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2.4   Key Assets and Market Position (cont')

Table 3: Ballina's key assets (cont')

PRODUCT/SERVICE/ ATTRACTION	DESCRIPTION	CONSUMER APPEAL
Family attractions	Macadamia Castle, Summerland House Farm, Amaze'n'Place, Thursday Plantation and various other purpose-built attractions in the Ballina Shire offer family-oriented activities and opportunities to sample and purchase locally grown produce such as macadamia nuts, avocadoes, coffee and tea tree products.	Easily accessible family activity for a day/ a few hours, featuring entertainment, educational, retail and food and beverage elements.
Ballina's icons	Ballina is not only famous for its "Big Prawn"; 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 ship models 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.	The Big Prawn is synonymous with Ballina and serves as a "must take" visitor photo. The Ballina Naval and Maritime Museum is an accessible and interesting historical learning experience for family, educational and special-interest markets.
Hinterland & villages (Alstonville, Wollongbar, Wardell, etc.)	Explore the scenic beauty and surrounding townships of Ballina Shire by driving along Tourist Route 30 and stopping in different spots along the way	The windy country roads offer more than just scenery: Stop for fresh locally grown produce, family attractions, refreshments in one of the hinterland townships or a stroll through the art galleries and shops.
Fresh air & nature-based recreation	Ballina Shire offers many activities for those who love exploring and enjoying the outdoors, including coastal 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.	Ballina Shire offers pristine coast and country, a fantastic climate and a relaxed, safe atmosphere. These create the perfect setting for those who want to escape from the hassles of everyday life and get back to nature.
Local events	Experience the uniqueness that is Ballina Prawn Festival, or visit a country music festival, surf-competition or one of the region's many sporting events.	From the annual Prawn Festival and Alstonville Show to country music concerts, surfing and skate boarding competitions and food and wine events, Ballina's event calendar offers something for everybody, and gives visitors a taste of Ballina's community spirit.

Table continued overpage

Table 3: Ballina's key assets (cont')

PRODUCT/SERVICE/ ATTRACTION	DESCRIPTION	CONSUMER APPEAL
Get a bird's eye view	Discover Ballina from a new angle: hang-glide or paraglide off Pat Morton Lookout, Lennox Head or fly over the Shire in a chartered aeroplane.	Flying over the Shire offers a unique experience for both adventure seekers (hang-gliding and paragliding) and those less adventurous (charter-planes & microlites).
Weekend markets and shopping	A number of produce, art and craft markets are held in the Ballina Shire throughout the year. There is also a range of quality boutique and major retail shopping outlets.	Visitors have the opportunity to experience the Shire's 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 for viewing and sale.	The region is well-known for being artistic and creative. Local artists display their work at the Northern Rivers Community Gallery and visitors can enjoy morning tea at the Ballina Gallery Café as well as viewing and purchasing local artwork.
Dining & cafés	Enjoy local cuisine and Ballina's growing café culture – from fish and chips by the beach in Lennox to a five star restaurant meal.	Ballina Shire's many dining options provide visitors of all demographics with a great way to enjoy local produce.

While Table 3 presents Ballina's assets in no particular order, stakeholder feedback from the December survey ranked Ballina's top five assets as being:

(1) Events (e.g. Prawn Festival)

(2) Attractions (e.g. Macadamia Castle)

(3) Hinterland

(4) Big Prawn / Ballina Naval and Maritime Museum / local markets

(5) Whale watching / coastal pathways.

This ranking also aligned with stakeholder feedback from the May and December 2013 workshops. During the latter meeting participants discussed the need to develop a signature event for the destination, focus on marketing to families and set Ballina apart from Byron Bay by highlighting its own distinct attracting factors. The potential of developing indigenous tourism experiences, expanding Ballina Shire Council's current signage projects, improving coach tour services and making more use of the river was also recognised.

Stakeholder consultations also suggested the Shire has a number of asset gaps, and that improvements are needed in terms of: interpretation of many indigenous

2.4   Key Assets and Market Position (cont')

resources; a signature festival/event; an extended coastal pathway; a marina; a dedicated conference facility; a swimming pool upgrade with improved slides; alternative family attractions; stronger interpretation of touring drives; more accommodation options; and increased commitment to expanding a "Sunday café society".

It is recognised that Ballina Shire Council has some ownership on the abovementioned product gaps list. There are however a number product asset gaps that may need solutions from the private sector or from state and federal government departments.

While access to Ballina Shire is being steadily improved through major road upgrades and a growth in air-

traffic to the Ballina Byron Gateway Airport, the Shire's position in the domestic and international markets is unlikely to change significantly without additional substantive investment in key infrastructure. While investments such as a dedicated conference facility and a marina are part of the Shire's long-term plan, until they become a reality incremental growth through strategic insights into key consumer markets and changes in consumer patterns and preferences will likely underpin the successful branding and positioning of Ballina Shire's tourism industry.

2.4.1 Unique selling proposition

Based upon the above review, Ballina Shire's unique selling propositions include its geography, natural assets, family attractions and cultural / recreational activities combined with its unspoiled, uncluttered, friendly and safe atmosphere.

With its wide range of accommodation to meet all standards and tastes, the destination offers excellent value for money.

Looking ahead to distinguish and promote these unique qualities, investment is needed to:

• collectively promote the destination's full range of assets and attractions, especially to niche markets;

• strengthen the product base through, for example, beautification of the built environment and improved interpretation and signage;

• build the Shire's range of festivals, recreational events, community-markets and establish a signature event; and,

• refresh and renew family-oriented products to ensure they maintain their market position as high-quality, value for money attractions.

Table 4 presents an adapted excerpt of Ballina Shire's submission to the NSW Tourism Awards, which also highlights the Shire's unique and distinguishing factors.

Table 4: Excerpt from submission into NSW Tourism Awards

POINT OF DIFFERENCE	TARGET MARKET	HOW WE PROMOTE IT
Value for money destination	Families Older households	Use of imagery on all communications. Use of value for money captions. Promote offers in the passport through social media and consumer e-newsletter
Great access to the coast and hinterland	Families Young singles Older households Outdoor enthusiasts	Destination name, imagery on all communications. Develop content and scenic drives incorporating both landscape features.
Safe and natural environment with an abundance of open space for hard and soft recreation and adventure pursuits	Families Young singles Older households Outdoor enthusiasts	Destination name, imagery on all communications. Supporting and promoting recreational events.
Provide visitors with free information and booking services for accommodation and tours	Families Young singles Older households Outdoor enthusiasts	Communicated through visitor guide, website, radio interviews and dining guide
Sell locally made produce distinctive to the region (e.g. coffee, Macadamia nuts, honey, preserves)	All markets	Promoted through call to action on publications and centre staff are able to communicate this with visitors upon arrival to the Ballina VIC. Supporting and promoting local markets and festivals.

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

(a) highlight Ballina Shire's unique distinguishing attractions and experiences;

(b) ensure the Shire is positioned alongside its competitors as a destination in its own right.

2.5   Key Imagery and Footage

Ballina Shire Council has provided funds to undertake photo shoots of Ballina Coast and Hinterland over a number of years. These high-resolution images are key assets and highlight some of the destination's "must do" experiences. The images are used in current marketing material (such as the Ballina Coast and Hinterland brochure distributed at VICs), and provide a usable visual aid to help market Ballina's Top 10 Experiences.

There are however gaps in this imagery as the diversity of key experiences and the niche markets they appeal to are not fully embraced (e.g. cycle-paths, adventure activities, Las Balsas raft). Updates are also needed, as in the case of the refurbished Big Prawn and the newly installed coastal interpretative trail - Historic Ballina Waterfront. Moreover, not all images are used by key marketing partners such as Destination NSW.

Through Destination NSW's Regional Partnerships Funding Program, Council has also produced a 30 second television commercial which includes the call to action of Ballina Visitor Information Centre: to "discover Ballina…before everyone else does."

The commercial, produced through a Chamber of Commerce and Council funding partnership, features some of Ballina's key visitor spots (beaches, hinterland and lakes), and specifically targets young adults and young families. Conversely it has been criticised for failing to show images of the over 40's and for descriptions of Ballina being "just minutes from Byron," as well as "vibrant, colourful, and creative" with "fabulous shopping" and "sparkling entertainment." Critics suggest such descriptions are a little vague and misleading and fail to align with other main drawcards of the destination including it being a relaxed, affordable, unspoiled, soft and hard recreational destination.

While these criticisms may to some extent be valid, the commercial demonstrates what can be achieved through funding partnerships between key stakeholders and Council will continue to facilitate and encourage additional stakeholder partnerships to better advertise and market the total destination and its unique and distinguishing products and services.

The May and December 2013 stakeholder consultations also confirmed that Ballina's tourism industry recognises the need to set short and medium-term marketing goals, collaborate in promotional activities, and investigate funding options to better finance the marketing drive. Opportunities to leverage Ballina's close proximity to Byron Bay and the Gold Coast have also been discussed, as has the idea to make use of and engage with the 2018 Commonwealth Games.

2.6   Key Source Markets and Consumer Segments

2.6.1   Current Visitors

According to Tourism Research Australia and annual research undertaken by Council, the proportion of visitors to Ballina Shire is broken into the following percentages.

• 55% day-trippers
• 42% domestic overnight visitors
• 2.6% international overnight visitors,

As depicted in Table 5, the Shire's day-trippers are predominately from the Northern Rivers region, and travel by private vehicle. Day trippers from South East QLD also travel by private vehicle given that there is limited public transport between Ballina and South East QLD. There is no detailed data to ascertain if these day-trippers come direct to the destination, or are en-route to somewhere else.

Council's annual visitor survey suggests that most visitors come to the Shire for relaxation (28%) and to enjoy the beach (24%). These activities are followed by visiting friends and relatives (VFR) (12%), adventure (11%), food and wine (8%) and fishing (5%).

The majority of overnight domestic visitors arrive by private vehicle (82%), with the remainder travelling by air (13%) or rented vehicle (1.4%).

Table 5: Excerpt from submission into NSW Tourism Awards

SOURCE MARKET	CONSUMER SEGMENT	REASON FOR VISIT
Northern Rivers NSW	Day trippers – Families / Older households / Outdoor enthusiasts	Eating out, VFR, Shopping, Beach, Water-based activities
South East QLD	Families / Older households / Outdoor enthusiasts	Holiday, VFR, Beach, Water-based activities
Regional NSW	Families / Older households / Outdoor enthusiasts	Holiday, VFR, Beach, Water-based activities
Sydney	Families / Older households / Outdoor enthusiasts	Holiday, VFR, Beach, Water-based activities

Focusing upon visitor spend and length of stay, Table 6 sets the average spend per night of visitors to the Shire, while Figure 4 depicts the average length of stay.

Table 6: Average expenditure of Ballina Shire visitors:

SOURCE MARKET	CONSUMER SEGMENT	AVERAGE SPEND PER VISITOR	BALLINA SHIRE AVERAGE SPEND PER NIGHT	NORTH COAST AVERAGE SPEND PER NIGHT
Day Trippers	Families / Older households (Northern NSW)	$98	NA	NA
Domestic Overnight Visitors	Families / Older households (South East QLD, Regional NSW, Sydney)	$407	$128	$147
International	Families / Older households (UK and New Zealand)	$481	$68	$57

Figure 4: Average length of stay
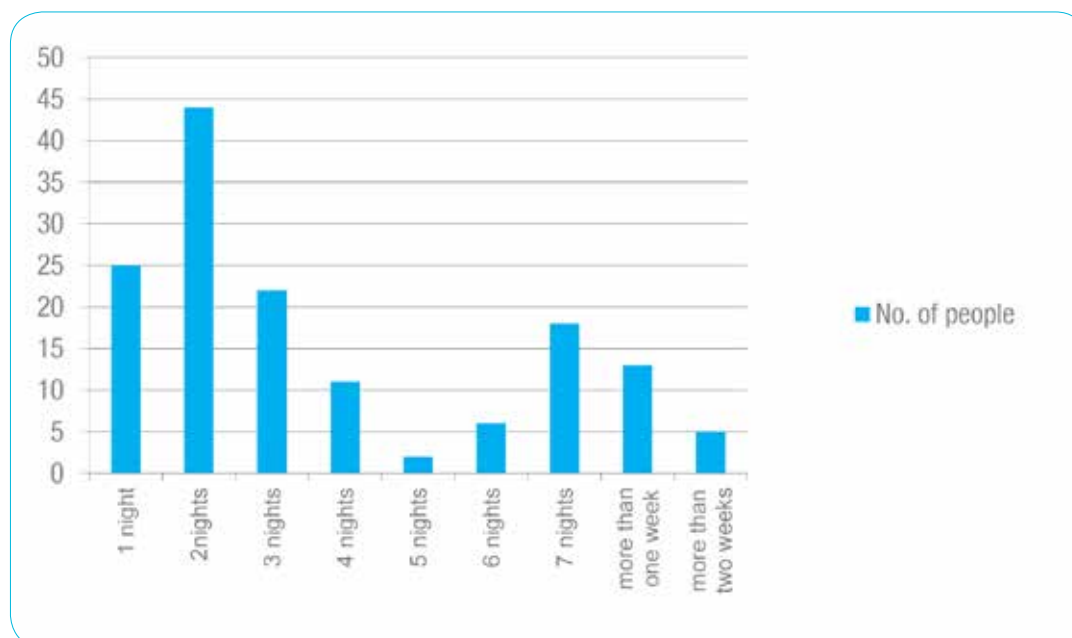
*Source: Ballina Visitor Information Centre - Annual Survey November 2013*

Stakeholders consulted during the December workshop and survey noted the potential of more special events, more targeted marketing, an increased number of flights from the Ballina/Byron Gateway Airport and more prominent road signage to further grow Ballina Shire's (visitor) economy.

2.6.2 Demand

As illustrated in Figure 5, domestic visitor arrivals to Ballina Shire have fluctuated over the last decade, with highs in 2000, 2004 and 2011 – and lows in 2005 and 2009. International visitor arrivals have grown and largely plateaued over the same period, albeit in much lower numbers. While uncertainty surrounding the global financial crisis is likely responsible for the fall in both domestic and international visitors in 2009, arrivals have been growing steadily in recent years to a high of 358,000 domestic visitors and 16,000 international visitors in 2011. By way of contrast Byron Shire received 887,000 domestic and 151,000 international visitors in 2011. This might suggest there is an opportunity to design and deploy tactical marketing strategies to attract greater visitor numbers to Ballina Shire.

Data gathered over the same period also suggests that the average length of stay for the domestic and international markets has fluctuated over the same period. Figure 6 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 7 nights in 2011 and particularly in 2012 where average stay was 15.1 nights. Whereas the average length of stay of domestic visitors has more or less plateaued at around 3-4 nights, which is largely consistent with the 2013 data depicted in Figure 4.

Figure 5: Visitor numbers to Ballina Shire 2000 - 2013
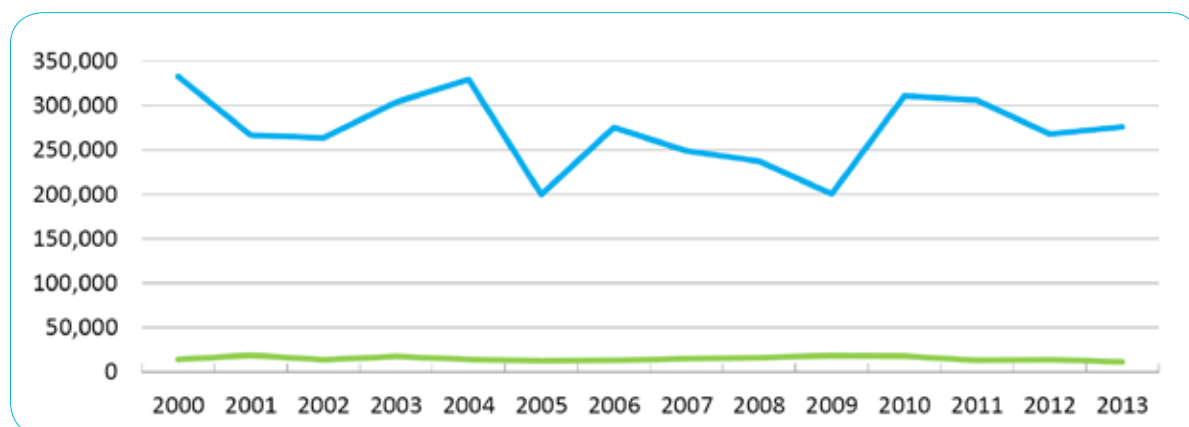
Source: Tourism Research Australia

Figure 6: Average length of stay of visitors in Ballina Shire 2000 - 2013
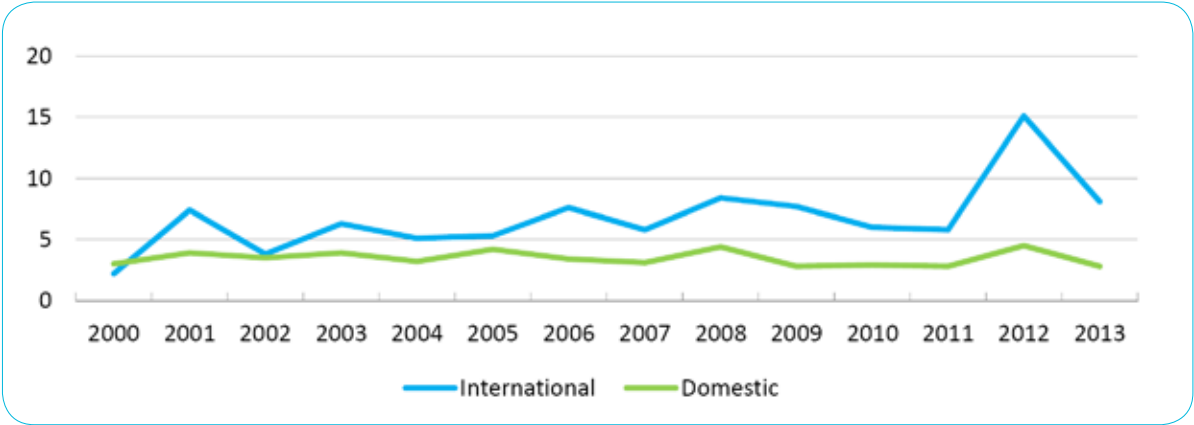
Source: Tourism Research Australia

Figure 7 combines these data sets and depicts the total visitor nights spent in Ballina Shire for the years 2000 to 2013. The data suggests the Shire's total domestic visitor nights all but halved from a high of 1.17 million visitor nights in 2003, to around 600,000 visitor nights in 2009. Total numbers have recovered since this low to a new all time high in 2012 to 1.2 million visitor nights. Total visitor nights of the international market have remained largely constant at around 100,000 –

150,000 nights per year, with the exception of 2012, where a new high of 208,189 visitor nights were achieved. By way of contrast total domestic visitor nights in neighbouring Byron Shire for 2011 were around 2.8 million. Once again, this suggests there may be opportunities to design and deploy tactical to marketing strategies to attract greater visitor numbers to Ballina Shire. The starting point for such strategies is in-depth market research.

Figure 7: Visitor numbers to Ballina Shire 2000 - 2013
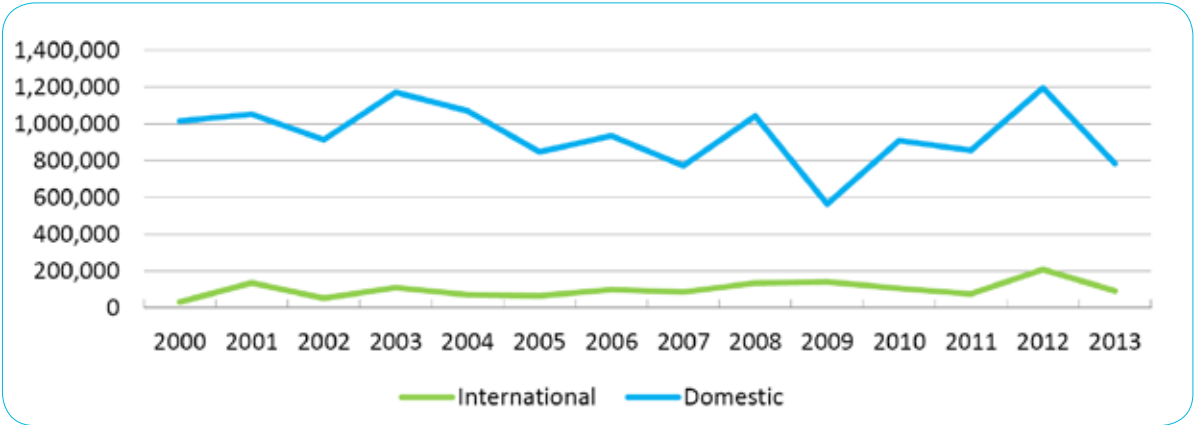
Source: Tourism Research Australia

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2.6.3 Growth potential

Ballina Byron Gateway Airport
According to the Ballina Byron Gateway Airport's Business Plan 2012/2013, the airport is enjoying a growth period in business. Passenger numbers have increased incrementally since the airport's opening, from 17,000 passengers in 1987 to 328,000 in 2012. 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, passenger numbers are expected to increase with further additional services and flight routes, especially as these become more affordable. It should be noted the strengthening of the Melbourne market, and the additional services that have been provided via Jetstar.

The airport is also considering the introduction of services to cater for local fly in-fly out (FIFO) workers living in the region, which would further increase traffic flow through the airport. Competition with Lismore/Gold Coast/Brisbane airports will however continue.

Ballina Bypass
A further development with the potential to increase visitor numbers to the Ballina Shire is the completion of the Ballina Bypass Project. This major road improvement is expected to increase traffic volume in the Ballina Shire over the next 25 years, with 45.5%, 80.5% and 97.9% increases predicted for 2018, 2028 and 2038 respectively.

Two planned additional construction projects, a new service centre and a bulky goods retail development, will contribute to this increased traffic flow. Imperative to garnering more visitation from the Ballina Bypass will be the effective use of directional and informative signage for potential visitors.

Grey Nomad Travellers
Figures from the Australian Bureau of Statistics (ABS) suggest that the number of 'grey nomads' travelling around Australia via campervan or motor home is on the increase, with a 20.8% rise in the number of campervans registered in Australia between 2008 and 2013. While grey nomads and the recreational vehicle market in general offer some potential to grow overall visitor numbers to the region, they may also pose challenges particularly in the areas of low cost/free camping, accessibility infrastructure (including parking) at destinations, attractions and the need for medical services.

2.7   Key Infrastructure

As illustrated in Table 7, the Shire's key tourism-related infrastructure includes the Ballina Byron Gateway Airport, the highway and other roads, the Ballina Visitor Information Centre, Big Prawn and upgrades to the coastal pathway. Stakeholder workshops also identified the new Ballina Surf Club and cafe, coast guard tower and café, Northern Rivers Community Art Gallery and cafe, Ballina Naval and Maritime Museum, signage and proposed sporting events centre as key infrastructure assets.

Table 7: Key tourism-related infrastructure

PRODUCT/SERVICE	DESCRIPTION	WHY IT IS KEY
Ballina Byron Gateway Airport	Provides 52 flights a week to three destinations (Newcastle, Sydney, Melbourne) from three airlines	350,000 passengers each year, expect to increase to 500,000 by 2015
Good highway access	Ballina is directly accessible via the Pacific Highway to the north and south	Majority of visitors arrive by car
Bypassed Roads	Ballina and Alstonville recently bypassed which allows these towns and villages to become destinations in their own right	Provides access for self drive markets particularly from South East QLD
Boating access points	Multiple access points for a variety of water craft to enter and exit the Shire's river network	Allows access for greater water-based recreation
Ballina Visitor Information Centre	Provides booking and information service 364 days a year	Provides call to action and ROI for all marketing campaigns. Service 60,000 enquires per annum
Big Prawn	Novelty icon	Connection is synonymous with Ballina
Ballina Surf Club	New surf club with conference / meeting facilities	Location: overlooking Lighthouse Beach, East Ballina
Shared Coastal Pathway	Connect Ballina to Lennox Head via coastal walkway	13 kilometres of scenic walk & cycle way along coastal escarpment
Numerous accommodation options and holiday parks	Wide variety of accommodation from camping to quality hotels	Provides options that cater for all budgets

Table continued overpage

Table 7: Key tourism-related infrastructure (cont')

PRODUCT/SERVICE	DESCRIPTION	WHY IT IS KEY
Swimming pools	Ballina and Alstonville 50m pools & Ballina's water slides	Popular with tourists
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.	Lennox Point has been identified as a top ten surfing spot in Australia and is a dedicated National Surfing Reserve

Drawing together issues surrounding tourism-related infrastructure and service operations, there are gaps in these areas that need to be addressed to attract greater visitor numbers, particularly "experience seekers". This issue is however a "chicken and egg" predicament, as the destination may not currently provide or attract enough visitation and visitor spending to ensure the financial viability of these operations. The gaps include, for example:

• river-based developments and attractions including house-boats and kayaks for hire;
• commercial tour operators offering walk-in sales and experiences to visitors, e.g. whale watching, hinterland village tours etc.;
• options for visitors to experience indigenous and cultural heritage in more informative, entertaining and active ways;
• extension of the cycle path / foot-bridge to the south-side of the Richmond River and introduction cycling/ mountain-biking events; and,
• a dedicated conference facility, marina and purpose built water-park.

Stakeholder feedback also identified numerous infrastructure gaps and opportunities, including transport networks within the region, motor cycle infrastructure, large group parking, improved welcome signage and entrance signage upgrades, bike racks and lockers at the beach and family parks near cafés and outdoor fitness infrastructure.

2.8   Key Communication Channels

Table 8 outlines the main communication channels utilised by Council to promote the Shire to current and potential visitor markets. The table does not illustrate the many communication channels used by the Shire's tourism businesses and, due to resource constraints, detailed research has yet to be undertaken to determine the return on investment achieved through these channels.

Table 8: Key communication channels used by Ballina Shire Council

CHANNEL TYPE	COVERAGE OF DESTINATIONS ASSETS	PROFILE OF THIS CHANNEL	ADVANTAGES	DISADVANTAGES
Visitor Guide	Close to 80% of assets	Print 70,000 which lasts 18 months	Brand awareness / enforcement, ability to showcase everything in one document	Static content, outdates quickly, expensive
Discoverballina.com	Close to 90% of assets showcased via this channel	35,000 visitors 2012/13	When searching 'Ballina' on Google the website ranks number one.	Maintaining currency in the content, maintaining ranking on Google searches
Facebook and Twitter	20% assets (hard to measure)	630 Facebook likes 143 Twitter followers	Efficient way to communicate, cost effective	Time / resource hungry, instant in nature
Email Direct Marketing	30%	1,000 email addresses in consumer database	Efficient way to communicate cost effective, directly communicating with consumers who want more information.	Hard to measure the effectiveness or conversion
Travel Shows	20%	5,000 people attending the exhibit	Interaction with consumers, potential to motivate others to travel	Resource hungry, not an efficient way of delivering a consumer message
Television commercials	40%	Toowoomba and Tamworth markets	Brand awareness, mass audience	Hard to measure the effectiveness or conversion
Visitor Information Centre	100%	Service 60,000 visitors per annum	Interactive communication, opportunity to tell a story, up-sell, motivate and visitor dispersal, conversion	Resource intensive

3. DESTINATION DIRECTION
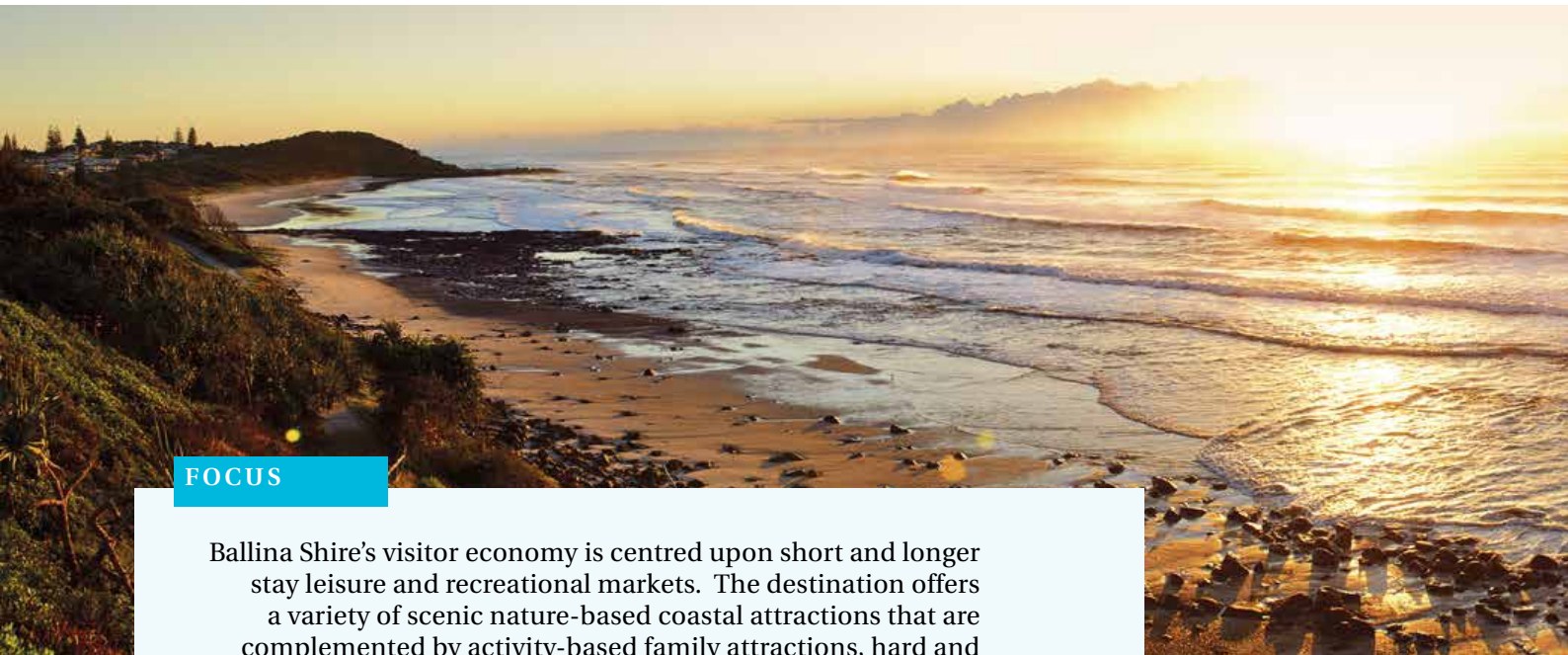
FOCUS

Ballina Shire's visitor economy is centred upon short and longer stay leisure and recreational markets. 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 farming landscapes.

VISION

To be recognised as a unique and appealing 'value for money' holiday destination .

MISSION

To promote and grow a sustainable local visitor economy for the benefit of residents and visitors by raising awareness and attraction to our natural, cultural, historic and physical assets.

Aim, Goals and Objectives

The aim of the Ballina Shire DMP is to double visitor expenditure from the 2008 to 2011 average aggregate total annual spend of $149 million to $300 million by 2020. This will be achieved through three broad goals.

Goal one: strengthen the market position and visibility of the destination's full range of assets and attractions, especially to niche markets.

Goal two: strengthen the product base through business investment, improved interpretation and signage, and encourage recreational and cultural activity, events, festivals and community-markets.

Five key objectives are identified as themes of work to achieve the goals, aim and mission:

1.   Strengthen management and coordination of the Shire's tourism sector;
2.   Review and collectively develop the marketing of Ballina Shire tourism;
3.   Promote product development; and,
4.   Invest in infrastructure
5.   Investment attraction (conferences, festivals and events).

Activities to achieve these five objectives are listed in the following pages.

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Key objective one: strengthen the management and coordination of the Shire's tourism sector.

Although Ballina Shire's tourism industry is a significant component of the Shire's overall economy, it is a relatively small industry composed of a wide diversity of micro, small and medium sized businesses and is lacking in terms of large investments. The small-scale of the tourism-business economy, 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.

To advance the collective interests of all stakeholders, actions are needed to: improve public and private sector dialogue and cooperation; promote community engagement in the sector; and, develop the industry knowledge and skills of managers and employees engaged in front-line services.

KEY OBJECTIVE ONE: *Strengthen the management and coordination of the Shire's tourism sector.*			
ACTIVITIES		**PRIORITY**	**RESPONSIBILITY**
1.1	Circulate this version of the DMP among a wide group of stakeholders and convene key informal and focus group meetings to elicit detailed feedback to further refine and develop the DMP, and encourage buy-in for its implementation	Short-term	Council
1.2	Tourism working group established with representation from public and private sectors and community groups, with at least six-monthly meetings to carry a working agenda, decisions and actions forward	Short-term	Council; Chambers of Commerce; community groups
1.3	Support collaboration and tourism-related partnerships between the public and private sectors and community-groups to advance specific agendas at the local, regional and state-levels	Ongoing	Council; Chambers of Commerce; community groups
1.4	Promote industry and service-oriented training for industry staff	Ongoing	Chambers of Commerce; individual businesses
1.5	Promote broad and inclusive community consultation as an integral component of the destination management process to ensure the tourism economy does not adversely effect community values	Ongoing	Council
1.6	Implement relevant actions of the Northern Rivers Visitor Services Strategy including utilisation of IT by the VIC and improving visitor information services at the Ballina Byron Gateway Airport	Ongoing	Council; VIC; Chambers of Commerce
1.7	Develop a series of articles in local newspapers to raise public awareness of issues related to managing and developing the Shire's tourism economy	Short-term	Council; local news media; Chambers of Commerce; special interest groups

Key objective two: review and collectively develop the marketing of Ballina Shire tourism.

The growth of the Shire's tourism economy is critically linked to effective marketing and promotion, especially in terms of reaching out to strategic and niche markets. While the majority of the Shire's tourism businesses understandably focus their marketing budgets on promoting their individual enterprises, Council lacks a sizable budget to promote the destination as a whole.

To position and promote the destination regionally and nationally, Council (a) competes for top-up funding through Destination NSW channels, and (b) works with local stakeholders to achieve marketing win-wins through partnership action and combining budgets and resources. To strengthen the marketing effort actions are needed to: build the image bank of the Shire's photo-library; promote the Shire to strategic markets; research the full range of the destination's top selling and most popular products and services; and, consult with stakeholders to develop a branding strategy together with media and marketing campaigns.

KEY OBJECTIVE TWO: Review and collectively develop the marketing of Ballina Shire tourism.			
ACTIVITIES		PRIORITY	RESPONSIBILITY
2.1	Collaborate and work with neighbouring LGAs, regional, state and national tourism campaigns such as the Legendary Pacific Coast	Ongoing	Council; chambers of commerce
2.2	Produce and centrally store imagery of unique selling propositions currently missing from portfolio (Las Balsas, cycle-tracks, festivals & events, kite-surfing, paragliding, kayaking)	Ongoing	Council; individual businesses
2.3	Develop media and marketing campaigns, including niche-market interventions for: • grey nomads • sports & activity clubs and associations	Long-term Short-term	Council; chambers of commerce; individual businesses; sports & activity clubs
2.4	Develop marketing campaign to Melbourne source markets to coincide with extra airline capacity to Ballina	Short-term	Council; chambers of commerce; Airport
2.5	Encourage businesses & operators to participate in annual tourism awards programmes	Ongoing	Council; chambers of commerce
2.6	Weekly updates of Ballina VIC's Facebook page and Twitter account including local product & event news feeds	Ongoing	VIC
2.7	Loyalty rewards programme reviewed and refreshed (and included in Melbourne marketing campaign)	Short-term	Council; chambers of commerce; VIC
2.8	Produce an annual audit of most popular products sold through Ballina VIC	Short-term & ongoing	VIC; Council
2.9	Develop a branding strategy through wide consultation	Medium-term	Council; chambers of commerce

Key objective three: promote product development

Ballina Shire's tourism economy is steadily expanding and efforts will be made to diversify the product base as well as improve the quality of the product offering through a variety of measures. Product diversity allows visitors to combine, for example, relaxation, recreation, family-fun and adventure activities to suit varying levels of spending in a single visit.

Growing demand for product diversity correlates with heightened visitor expectations and competition between destinations to attract visitors. Actions included under this objective focus upon: developing signage and interpretation themes; promoting festivals and markets; establishing a signature event; and, undertaking research to assess visitor behaviour and attitudes towards the product offering.

KEY OBJECTIVE THREE: *Promote product development*			
ACTIVITIES		PRIORITY	RESPONSIBILITY
3.1	Develop interpretation themes/trails (indigenous culture, hinterland drives, coastal & river history) & research opportunities to develop audio-tours for download	Ongoing	Council; VIC; special interest groups
3.2	Work with special interest groups to develop indigenous tours and products (organise talks on indigenous tourism, research opportunities for product development through, for example, volunteer tourism)	Medium-term	TAFE; Council; special interest groups
3.3	Improve directional signage	Ongoing	Council
3.4	Review and improve the relevance of the annual visitor survey	Short-term	Council; VIC
3.5	Review and bi-annually update the Visitor Economy Product Audit	Medium-term	Council; VIC
3.6	Develop a Ballina Shire outdoor activity booklet listing "all you need to know" to access local walks, cycle-rides, mountain-bike trails, kayak routes, fishing spots, surf spots, etc. and local events to promote these activities	Medium-term	Council; local clubs; special interest groups
3.7	Work with partners to investigate the opportunities of the Casino to Murwillumbah Rail Trail corridor. Opportunities for "Rail Trail" product development and associated linkages.	Medium-term	Council; local clubs; special interest groups
3.8	Work with Arts Northern Rivers to develop cultural tourism opportunities: • Review and progress recommended actions from the Regional Strategy for the future sustainability of the Museums of the Northern Rivers • Support the development of creative industries incubators and affordable workspaces, particularly creative and entrepreneurial development of Indigenous artists	Medium-term	Council; local museums; special interest groups; Arts Northern Rivers

Key objective four: invest in infrastructure

Recognising that tourism depends upon quality infrastructure to attract both visitors and investors, Ballina Shire Council will continue to invest in infrastructure to increase the attractiveness of the destination. Major ongoing investments including the Ballina Bypass and up-grades to the Ballina Byron Gateway Airport will guarantee increased visitation to the Shire.

Other significant recent investments include the Ballina Surf Club and the re-development of Ballina's River Street. These investments will be complemented by additional investments in other projects and actions, including: establishing a visitor information centre in Lennox Head; the completion of the coastal/cycle path; and, the installation of bike-racks and lockers at the Shire's most popular patrolled beaches.

KEY OBJECTIVE FOUR: Invest in infrastructure			
ACTIVITIES		PRIORITY	RESPONSIBILITY
4.1	Install bike-racks and lockers at patrolled beaches	Medium to long-term	Council
4.2	Establish a level 2/3 VIC in Lennox Head and Alstonville's Main Street	Medium-term	Council
4.3	Complete the Ballina to Lennox Head shared pathway	Medium to long-term	Council
4.4	Continue to liaise with the NSW Government on the development of a commercial marina for Ballina	Long-term	Council

Key objective five: investment attraction (conferences, festivals and events)

Short term growth of the visitor economy is critically linked to events as well as the hosting of sporting events and conferences. These events support the visitor economy by providing an economic boost in low or 'off peak' seasons, and are typically high yielding.

Ballina Shire Council supports events and festivals via the provision of an Events Support Officer to assist

event organisers with formal consent (if applicable), by providing a funding opportunity for community events (funding pool is between $50,000 - $90,000 per annum) and bidding for sporting events and conferences.

KEY OBJECTIVE FIVE: Investment attraction (conferences, festival and events)			
ACTIVITIES		PRIORITY	RESPONSIBILITY
5.1	Promote festivals, events (surfing, music, arts etc.) local markets and a signature event	Ongoing	Council; chambers of commerce; Visitor Information Centre; community event organisers
5.2	Continue to support and build the capacity of community event organisers	Ongoing	Council
5.3	Secure opportunities from the Commonwealth Games being held on the Gold Coast in 2018: • Sports Tourism, and • pre-post touring options	Medium term	Council
5.4	Continue to provide event organisers with opportunities to access Council funding via the Festival and Event Support Program and associated policy (current commitment of $95,000 in 2014/15)	Ongoing	Council

4. DESTINATION REQUIREMENTS

4.1   Human Resources

Ballina Shire Council employs a number of people to oversee destination management and visitor services on behalf of the destination. Specifically they include:

• Corporate Communications and Tourism Coordinator
• Team Leader - Visitor Services
• Visitor Services Officers x 2
• Events Support Officer.

These staffing levels are not sufficient to assume full responsibility to carry forward each and every action listed in the above tables. Voluntary and in-kind support from stakeholders and community interest groups needs to be coordinated to carry the Shire's 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.

4.2   Financial Resources

Ballina Shire Council has an allocated budget each year to undertake projects with respect to the visitor economy. The budget is approximately $100,000 with the key projects for 2013/14 year being the development of this Destination Management Plan, the production of a Visitor Guide and Dining Guide, interpretative signage project – Historic Ballina Waterfront, and the investigation of expanding visitor services into Lennox Head and Alstonville.

Table 9. Key actions and funding responsibility

ACTIVITIES	FUNDED	RESPONSIBILITY
Install bike-racks and lockers at patrolled beaches	unknown	Private enterprise; Council
Establish a level 2/3 VIC in Lennox Head and Alstonville's Main Street	partially	Council, Industry
Complete the Ballina to Lennox Head shared pathway	yes	Council, Federal Government
Continue to develop interpretation themes/trails (indigenous culture, hinterland drives, coastal & river history) & research opportunities to develop audio-tours for download	yes	Council, State Government, Special Interest Groups
Work with special interest groups to develop indigenous tours and products (organise talks on indigenous tourism, research opportunities for product development through, for example, volunteer tourism)	no	Council, Special Interest Groups
Promote festivals, events (surfing, kite-surfing, cycling, music, arts etc.) local markets and a signature event	NA	Council, VIC

Table continued next page

Table 9. Key actions and funding responsibility (cont')

ACTIVITIES	FUNDED	RESPONSIBILITY
Review and improve the relevance of the annual visitor survey	NA	Council, VIC
Review and bi-annually update the Visitor Economy Product Audit	NA	Council, VIC
Develop a Ballina Shire outdoor activity booklet listing "all you need to know" to access local walks, cycle-rides, mountain-bike trails, kayak routes, fishing spots, surf spots, etc. and local events to promote these activities	no	Council, VIC
Work with Arts Northern Rivers to develop cultural tourism opportunities.	no	Arts Northern Rivers, Council, Northern Rivers Community Gallery
Collaborate and work with neighbouring LGAs, regional, state and national tourism campaigns such as The Legendary Pacific Coast	yes	Council, VIC, NCDN
Produce and centrally store imagery of USPs currently missing from portfolio (Las Balsas, cycle-tracks, festivals & events, kite-surfing, paragliding, kayaking)	as needed	Council
Develop media and marketing campaigns, including niche-market interventions for: • grey nomads • sports & activity clubs and associations	yes	Council, Industry
Ballina Shire marketing campaign launched in Melbourne	pending funding	Council, VIC
Include 'grey nomads' in volunteer programs	pending funding	Council, VIC
Encourage businesses & operators to participate in annual tourism awards programmes	yes	Council, VIC
Weekly updates of Ballina VIC's Facebook page and Twitter account including local product & event news feeds	NA	Council
Produce an annual audit of most popular products sold through Ballina VIC	NA	Ballina VIC
Develop a branding strategy through wide consultation	no	Council, Industry
Circulate this version of the DMP among a wide group of stakeholders and convene key informal and focus group meetings to elicit detailed feedback to further refine and develop the DMP, and encourage buy-in for its implementation	NA	Council
Tourism working group established with representation from public and private sectors and community groups, with at least six-monthly meetings to carry a working agenda, decisions and actions forward	NA	Council, Industry
Support collaboration and tourism-related partnerships between the public and private sectors and community-groups to advance specific agendas at the local, regional and state-levels	NA	Council, Industry

Table 9. Key actions and funding responsibility (cont')

ACTIVITIES	FUNDED	RESPONSIBILITY
Promote training for VIC service staff	yes	Council, VIC
Promote industry and service-oriented training for industry staff including TAFE	no	Industry, Chambers of Commerce
Promote broad and inclusive community consultation as an integral component of the destination management process to ensure the tourism economy does not adversely effect community values	yes	Council
Implement relevant actions of the Northern Rivers Visitor Services Strategy including utilisation of technology by the VIC and improving visitor information services at the Ballina Byron Gateway Airport	yes	Council, VIC
Develop a series of articles in local newspapers to raise public awareness of issues related to managing and developing the Shire's tourism economy	yes	Council
Promote festivals, events (surfing, music, arts etc.) local markets and a signature event	yes	VIC, event organisers
Continue to support and build the capacity of community event organisers	yes	Council
Secure opportunities from the Commonwealth Games being held on the Gold Coast in 2018: for Sports Tourism, and pre-post touring options	NA	Council, NCDN, Trade and Investment NSW
Continue to provide event organisers with opportunities to access Council funding via the Festival and Event Support Program and associated policy (current commitment of $95,000 in 2014/15)	yes	Council

Table 10: Sources of revenue

A multi-pronged approach to revenue generation is the key to financial viability over the next few years. Existing income streams will be built upon, and new income streams identified and incorporated.

REVENUE STREAM	STRATEGIES
Council	Council allocation of approximately $100,000 to visitor economy projects, funds the visitor information centre and festival and event support program ($55,000)
Cooperative Campaign	Tourism industry operators pay to participate in campaigns
Destination NSW	Apply for contestable pool funding
Federal Funding	Explore other grant opportunities e.g. Tourism Industry RF, TQUAL,
Advertising income	Visitor Guide, Dining Guide advertising, website (discoverballina.com), Airport brochures

4.3   Key Risks

Table 11 presents a list of potential risks, which could impact Ballina Shire's visitor economy.

Table 11: Risks to Ballina Shire's tourism sector

RISK	LIKELIHOOD	IMPACT	STRATEGY
Climate change related weather events – flooding, sea level rise, biodiversity loss	Highly likely	Medium	Already have some documents in place to plan for sea level rise, incl: • NSW Government Climate Change Policy • NSW Sea Level Rise Policy 2009 • 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) Local Planning Strategies • Ballina LEP 2012 • Ballina Shire DCP 2012 • Climate Action Strategy
Environmental hazards – e.g. bush fires, pollution, coastal erosion, storms	Likely	Low	
Land use conflict – zoning, development, etc.	Neutral	Low	Recognised council procedures and protocols. Coordinated strategic planning.
Budget cuts to government funding for tourism-related programmes	Neutral	Low	A limited budget is currently available for tourism activities – cuts to this budget are unlikely to significantly affect tourism development.
Lack of niche / market-oriented advertising and promotion	Unlikely	Medium	Annual visitor surveys, at least annual meetings with tourism-related stakeholders to review and evaluate marketing and promotion actions and activities
High Australian Dollar / Economic downturn	Likely	Low	Focus on being a value for money family destination, with both paid and free attractions and activities.
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.
Lack of tourism product / Insufficient infrastructure	Neutral	Medium	Stay in tune with current market needs and wants & continue to invest in tourism-related infrastructure.

ATTACHMENT A: PRODUCT AUDIT SEPTEMBER 2013

ACCOMMODATION	ALSTONVILLE		BALLINA		LENNOX HEAD	
	NO.	ROOMS	NO.	ROOMS	NO.	ROOMS
Apartments			25	65	16	51
Apartments -serviced			3	53	2	54
Backpackers & hostels					1	4
Bed and Breakfasts	1	2	1	3		
Caravans, Cabins and Camping			10	119	2	13
Cottages	3	12				
Holiday Houses			25	76	14	136
Hotel			1	115		
Hotel - Boutique			2	38		
Motel	2	28	16	269	1	10
Resort			1	46		
Total	**6**	**42**	**84**	**784**	**35**	**268**
**TOTAL IN BALLINA SHIRE	ACCOMMODATION UNITS = 125	ROOMS = 1.094**					

ATTRACTIONS	ALSTONVILLE	BALLINA	LENNOX HEAD
Landmark		1	
Community Market	3	3	2
Family Theme Park	2	1	1
Gallery / Studio		2	
Museum	1	1	
Public / Nature Reserves	5	15	4
Surfing Reserves			1
Waterway reserves		2	1
Natural Attractions			
Beaches - patrolled		3	1
Beaches other		4	
Parks/Gardens	8	24	2
Lookouts			1
Waterways		2	
Self Guided Activity		2	
Water Park		1	

attachment a: product audit (cont')

ACTIVITY OPERATORS & TOURS	ALSTONVILLE	BALLINA	LENNOX HEAD
Air Activities		7	1
Aboriginal Tours		1	
Art Classes/Gallery	1	1	
Boat Hire		2	
Bus Tours		1	
Fishing		1	1
Horse Riding		1	
River Cruises		1	
Sport Coaching			1
Surfing		1	

COMMUNITY INFRASTRUCTURE, TRANSPORT & SERVICES	ALSTONVILLE	BALLINA	LENNOX HEAD
Celebrant	3	18	8
Church/Worship Centre	5	8	3
Dump Point	1	7	1
Fuel Station	2	3	1
Vehicle Hire		12	
Major Bank	1	6	1
Medical	3	10	1
Meet & Greet Service		1	
Transport - Air		3	1
Transport - Bus		2	
Transport - Taxi		1	
Visitor Information Centre		1	

attachment a: product audit (cont')

CONFERENCE & MEETING VENUES	ALSTONVILLE	BALLINA	LENNOX HEAD
Church/Camp			2
Sports Clubs		4	
Conference Centre/Space	1	3	1
Council Space		2	
Cruise		1	
Hotel/Motel		3	
Resort		5	
Restaurant	1	3	1
Society/Association Hall		1	

FESTIVALS & EVENTS	ALSTONVILLE	BALLINA	LENNOX HEAD
Agricultural	1		
Art/Craft	1	4	
Boat		1	
Community	1		
Film		1	
Food/Wine		1	
Fun Run/Walk	1	3	
Music		1	
Sport - Land		3	
Sport - Water		1	
Surf			2

attachment a: product audit (cont')

SPORTING FACILITIES	ALSTONVILLE	BALLINA	LENNOX HEAD
Athletics		1	
Softball		1	
Bowls	1	2	1
Cricket	2	2	2
Golf		2	
Gym/Fitness	1	1	
Horse Riding		1	1
Indoor Sports		1	
Netball		1	
Swimming Pool - Outdoor	1	1	
Swimming Pool - Indoor		1	1
Rugby/Soccer Fields	2	4	1
Sailing/Rowing		1	
Tennis	1	1	

HEALTH & WELL BEING	ALSTONVILLE	BALLINA	LENNOX HEAD
Beauty/Massage		3	5
Day Spa			2
Natural Medicine & Therapies	1	1	5
Personal Fitness/Gym	3	5	2
Yoga	1		5
Retreats		1	

attachment a: product audit (cont')

ENTERTAINMENT	ALSTONVILLE	BALLINA	LENNOX HEAD
Cinema		1	
Club		1	
Club - Sports	1	2	
Pub	2	5	1
Restaurant/Cafe		1	
Theatre		1	

RETAIL/FOOD & BEVERAGE	ALSTONVILLE	BALLINA	LENNOX HEAD
Bakery	2	6	1
Beer & Wine Store	1	8	2
Cafe/Bistro	4	27	7
Catering	1	2	2
Family Restaurant		6	
Fast Food Chain	1	7	1
Pub/Club	3	6	1
Restaurant - Serviced	1	8	7
Restaurant & Takeaway	3	13	4
Takeaway Only	6	16	4

attachment a: product audit (cont')

RETAIL	ALSTONVILLE	BALLINA	LENNOX HEAD
Arts & Crafts		9	1
Bicycle Sales/Service		4	
Department Store		4	
Fashion	1	22	6
Fishing	1	3	
Gifts & Toys	1	2	
Groceries	3	8	3
Hair & Beauty	6	25	7
Health & Wellbeing	1	4	1
Jewellery & Accessories		4	1
Sports & Leisure		10	5
Music/Video/Games		9	1
Newsagents/Stationery/Books	3	8	2
Outdoor		2	
Party Hire		2	
Souvenir/Collectibles	1	2	
Supermarket	1	6	1
Travel Services	3		3

ATTACHMENT B: STAKEHOLDER SURVEY

1. Please indicate which of the following experiences you would recommend to visitors in the region as a "must do"?
   a. Take a picture with the Big Prawn
   b. Visit an attraction (e.g. Macadamia Castle, Summerland House Farm, Thursday Plantation)
   c. Take a surf lesson
   d. Hang glide from Lennox Point
   e. Go fishing
   f. Take a beach horse ride
   g. Whale watch
   h. Swim at Ballina Memorial Pool
   i. Discover rock pools at Shelly or Boulder Beach
   j. Go kayaking on the river
   k. Take a scenic flight
   l. Go to the beach (swimming, reading, relaxing)
   m. Have a picnic
   n. Drive through hinterland villages (e.g. Alstonville, Tintenbar, Wardell)
   o. Explore the Ballina Naval and Maritime Museum
   p. Cycle along Ballina's coastal pathways
   q. Enjoy fish & chips on the beach at Lennox Head
   r. Visit the Northern Rivers Community Gallery
   s. Watch a movie at the Ballina Cinema
   t. Go ten pin bowling
   u. Attend an event (e.g. Ballina Coastal Country Music Festival, Ballina Prawn Festival)
   v. Visit a local produce market
   w. Visit a National Park
   x. Other, please specify

2. How would you describe the Ballina region to friends who have never visited?

3. In your opinion, what infrastructure is needed to grow the Ballina Shire visitor market?
   a. Improved road access
   b. Improved public transport
   c. Extended coastal pathways
   d. Upgraded swimming pools
   e. New water park
   f. Development of a marina
   g. More accommodation options
   h. Dedicated conference facility
   i. New attractions
   j. Other, please specify

4. What immediate actions should be undertaken to grow Ballina Shire's economy?
   a. More targeted marketing
   b. More special events
   c. More flights via Ballina Byron Gateway Airport
   d. Not sure
   e. Other (please specify)

5. There are approximately 650,000 visitors to the Ballina Shire every year. Where would you like to see the Shire's visitation by 2020?
   a. Same level
   b. More visitors
   c. Fewer visitors
   d. Why?

6. What should be done to increase the length of time visitors stay in the Ballina Shire?
   a. More restaurants
   b. More attractions
   c. More accommodation options
   d. Better packaged attractions (i.e. all day passes)
   e. More events
   f. Other (please specify)

7. In your opinion, what do you think are the key risks and threats to tourism in the region?
   a. Economic downturn
   b. High Australian Dollar
   c. Increase in prevalence of online bookings
   d. Natural disasters
   e. Growing competition
   f. Lack of tourism product
   g. Insufficient infrastructure
   h. Other (please specify)

8. In your opinion, what are the strengths, weaknesses, opportunities and threats to tourism in the Ballina Shire?
   a. Strengths
   b. Weaknesses
   c. Opportunities
   d. Threats

9. Which of the above do you see as a priority area to address in the development of tourism in the Ballina Shire?

10. Positioning a destination is about finding key assets and attributes that set it apart from its competitors and which can be branded in such as way that a clear lingering impression is left in the minds of visitors. Which of the following do you feel best describes Ballina shire's current branding strategy?
    a. I can see how the region has positioned itself and what sets it apart from competitors
    a. The region's positioning and branding is generally understood
    b. There is some confusion about the region's positioning and branding
    c. It is not clear how the region has positioned itself, especially against its competitors
    d. Other, please specify

11. What might be done to strengthen Ballina Shire's branding and market position?
    a. Focus on a key consumer group to target
    b. More resources for marketing
    c. Other (please specify)

12. How can we increase the level of visitor spend to achieve the goal set by Destination NSW to double overnight visitor expenditure to NSW by 2020?

13. Who are your key source markets and consumer segments?
    a. Families from NSW
    b. Families from QLD
    c. Families from VIC
    d. Grey Nomads from NSW (older couple, self drive, no kids)
    e. Grey Nomads from QLD (older couple, self drive, no kids)
    f. Grey Nomads from VIC (older couple, self drive, no kids)
    g. Couples from NSW
    h. Couples from QLD
    i. Couples from VIC
    j. Backpackers (international)
    k. Backpackers (Australian)
    l. Other international
    m. Other, please specify

14. What do you think can be done to grow these markets you've identified above?

15. Where would you like to see your business in the next five years (what are your business development priorities)?

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