NORTH COAST REGION

NEW SOUTH WALES

DRAFT TOURISM DEVELOPMENT STRATEGY

New South Wales: The Premier State
Creating more jobs and business opportunities

NORTH COAST REGION

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DRAFT TOURISM DEVELOPMENT STRATEGY

Prepared by:

TOURISM COMMISSION OF NEW SOUTH WALES

On behalf of:

NORTH COAST TOURISM DEVELOPMENT INTER-DEPARTMENTAL COMMITTEE

MAY 1987

MINISTER FOR SPORT AND RECREATION
MINISTER FOR RACING AND
MINISTER FOR TOURISM

NEW SOUTH WALES

FOREWORD

Tourism has become a major growth industry in this State. Over $8 billion is spent annually by tourists and 140,000 people are employed in tourism related jobs throughout N.S.W.

Through the release of the Tourism Development Strategy for the State, the Government has shown that it is highly committed to implementing policies and practices that will foster and encourage the development of this important industry for the benefit of all N.S.W. residents.

This North Coast Tourism Development Strategy is the first of a series of Development Strategies that are being prepared for priority tourism development areas in N.S.W.

The Strategy establishes a groundwork that will encourage the orderly development of tourism in the North Coast Region in an environmentally sensitive manner.

The Tourism Commission has a role to co-ordinate that development and will work with Government Authorities, Local Councils, developers, investors, community groups and residents to implement this Strategy.

I am most appreciative of the co-operation and support that has already been received in drafting this document and before it is finalised, I invite everyone interested to comment and make suggestions. This will ensure that the Strategy paves the way for a stronger tourism base that will provide further investment and employment opportunities within the Region.

Michael Cleary
MINISTER FOR TOURISM.

11th Floor, 139 Macquarie Street, Sydney 2000 Tel: (02) 27 3992

TOURISM COMMISSION OF
NEW SOUTH WALES

Our reference:

Your reference:

INVITATION TO COMMENT

The Draft Tourism Development Strategy for the North Coast Region is placed on public exhibition to allow everybody the opportunity to comment on the strategies that are being put forward to encourage and co-ordinate the growth of tourism ventures on the North Coast.

The period of exhibition will be six (6) weeks during which period any person or organisation is eligible to forward a written submission on any matter pertaining to the Plan.

Submissions should be forwarded to:

"North Coast TDS"
Tourism Commission of New South Wales
GPO Box 7050,
SYDNEY N.S.W. 2000

The closing date for submissions is 14th August, 1987.

C O N T E N T S

EXECUTIVE SUMMARY

The Draft North Coast Region Tourism Development Strategy was prepared by the Tourism Commission of New South Wales in association with the North Coast Tourism Development Inter-Departmental Committee. This Committee is chaired by the Tourism Commission and comprises representatives from the Department of Environment and Planning, the Office of State Department (Premier's Department) and the Department of Lands.

The broad aim of the Strategy is to provide a framework that will encourage the orderly development of tourism in an environmentally sensitive manner.

In 1985/86 The North Coast Region ranked second to the Sydney Region as a tourist destination, attracting some 2,976,000 overnight visits and 13,977,000 visitor nights. This generated income of $723.6 million for the local community and provided in the order of 14,600 jobs.

The major market attracted to the North Coast is the domestic family market, comprising low to middle income earners who generally stay in budget forms of accommodation, travel to the Region by car, visit mostly during school holiday periods and are not large spenders. The over-dependence on this market results in a very seasonal and volatile tourism industry.

The Region has the potential to further develop this market and to effectively penetrate new markets such as the high spending singles market, the adventure travel market and the international visitor market. To date, this has not been possible due largely to lack of appropriate tourism plant and infrastructure designed and operated to meet the needs of these specialist markets.

Considerable opportunity exists to diversify the range of tourism plant and infrastructure in the Region. The forms of new tourism development identified as desirable for the Region are those that:-

* Are purpose built (ie., targeted to specific market segments), and provide a quality product.

* Attract year round patronage, and as such provide sustained, not seasonal, income and employment for the local community.

* Encourage longer lengths of stay and higher daily visitor expenditure.

* Are of a scale sufficient to ensure professional management for incorporation in holiday packages and to support an effective marketing budget. A minimum of 50 units under one management is encouraged. Establishments of this scale generate the most employment per bed and generally maintain the highest standards.

* Provide a range of employment opportunities and are of a sufficient scale to support staff training and development.

* Minimize public sector investment in services and infrastructure.

* Are well designed and located.

* Involve as operators, organisations with established operations within Australia or overseas.

* Attract as development partners, proven players in the Australian tourism and travel industry, particularly the airlines.

* Encourage the simultaneous development of a range of complementary smaller scale operations, particularly within the major growth areas.

* Encourage destinations to develop a particular character and/or marketing appeal.

The types of developments to be encouraged include a range of resorts, holiday apartment complexes, hotels, hostels and agricultural and wilderness based operations.

Whilst encouraging tourism development, it must be emphasised that the Government does not wish to see Gold Coast style development in the Region. Whilst there is a place for high rise development in some areas, the emphasis of the Strategy is to provide low rise facilities designed to complement and enhance the Region's natural attributes.

The Tourism Development Strategy identifies four tourism Growth Centres:-

Tweed Heads - Kingscliff - Murwillumbah
Ballina - Byron Bay - Lismore
Coffs Harbour - Woolgoolga to Sawtell
Port Macquarie - Laurieton.

It is proposed to concentrate future tourism development in these Centres. Different development strategies are proposed for each of these Centres. For other areas within the Region the Strategy proposes that:-

* Inland towns and villages should continue to develop as day visitor areas, enroute and short stay destination areas, and conference/special event centres.

* The low-key sea-side holiday atmosphere of most smaller coastal villages should be preserved and enhanced.

* Commercial tourism operations should be established in and about areas of natural beauty such as rivers, dams and waterways, National Parks, Nature Reserves and State Forests. Care must be taken in siting and designing these developments.

* Agricultural establishments be utilised for farm tours and holidays.

In addition to identifying appropriate development forms and development areas, the Tourism Development Strategy also addresses the importance of providing flexible and complementary transport services which ensure that people are able to move effectively and efficiently to and throughout the Region. Considerable potential exists for developing the air, coach and rail markets and the Government is committed to the continued upgrading of the necessary infrastructure.

Whilst the Tourism Commission of New South Wales has primary responsibility for encouraging and co-ordinating tourism development, other State Government Departments and Local Councils have responsibilities in areas which directly affect tourism development. These areas include investment, public works, transport and management of natural resources.

Co-ordination within Government will be achieved by the Tourism Commission assisting other authorities to take into consideration the impact of their policies and activities on the tourism industry, and by encouraging them to make a positive contribution towards promoting growth where-ever possible. The Government is also committed to working with Local Councils and the Private Sector to encourage investment in appropriate forms of tourism development and the Strategy identifies areas for further liaison between the Government and these sectors.

While this Document is concerned primarily with encouraging investment in new tourism plant and infrastructure within the Region it is recognised that there is a need to co-ordinate existing operations, develop more product and combine these with effective marketing and promotion programmes. These matters are being addressed by the Tourism Commission in association with relevant organisations, as a separate exercise.

PART A

INTRODUCTION

1. INTRODUCTION

1.1 Content and Structure

This document is a draft statement of objectives and strategies designed to promote orderly growth in the tourism industry on the North Coast of New South Wales.

The document is structured in three parts:

Part A. deals with the planning framework and the economic significance of the Tourism Industry.

Part B. provides an overview of tourism on the North Coast and identifies opportunities to expand the industry.

Part C. sets out objectives and strategies in each of the following areas:

- Tourism Development

- Transport and Infrastructure

- Private and Public Sector Co-ordination

1.2 Planning Framework - Tourism Development Strategies and Plans

Tourism Development Strategy for New South Wales

In May 1987, the Premier and the Minister for Tourism jointly released the New South Wales Tourism Development Strategy. This Strategy was prepared for the State Development Council by the Tourism Task Force, a working group comprising senior executives from the tourism and hospitality industry.

The Strategy presents the Government's views on tourism issues, and details a range of specific initiatives for immediate implementation. The Strategy also identifies the priority areas for tourism development within the State.

The major initiatives relevant to the North Coast Region, adopted by the Government as part of the Strategy include:-

* Making Government owned land available for new tourism development, after due consideration has been given to environmental factors. The Government will also assist in site consolidation to facilitate the development of major tourism projects.

* Facilitating, planning and regulatory approvals for new tourism developments including:

  - Local governments being directed to notify the Department of Environment and Planning (DEP) of all tourism development applications received over $10 million in Sydney and $5 million outside of Sydney so that the DEP can monitor the progress of applications; and

  - The drafting of a State Environmental Planning Policy for Tourism.

* Providing appropriate infrastructure, on a cost sharing basis with the private sector to facilitate major tourism development.

* Improving infrastructure and facilities in Sydney, including a major Coach terminal, harbourside attractions etc., to consolidate its "gateway" status. This is considered critical to the further development of the State's tourism industry.

* Improved marketing of Sydney and New South Wales.

* Improved training and education facilities with TAFE colleges providing tourism management and training skills.

* Improving transport services including legislation that will facilitate more competitive air services in N.S.W., and progressive deregulation of intrastate bus and coach operations.

  As part of the implementation of the Strategy, the Tourism Commission has developed a comprehensive framework to co-ordinate the planning and development of tourism in the nominated priority areas. The North Coast is classified as a priority area for tourism development.

  The planning framework comprises:

  Regional Tourism Development Strategies
  Local Tourism Plans
  Site Management Plans

The content and direction of each of these are summarised as follows:

<u>Regional Tourism Development Strategy</u> (TDS)

Regional Tourism Development Strategies provide guidelines for co-ordinating public sector policy on tourism planning and development at a regional level; identify areas within a region suitable for tourism development; and, suggest broad strategies to promote growth.

Local Tourism Plan (LTP)

Local Tourism Plans are prepared for areas of high tourism development potential. They address local planning issues such as statutory and development controls, the adequacy of existing infrastructure, the scope for future investment, perceived market trends, etc. These Plans address supply-led potential, that is, the types of facilities and infrastructure that need to be provided to attract and service various market segments.

The Plans may include recommendations for enhancing the attractiveness of an area, through landscaping and appropriate design criteria and guidelines.

The Plans can also identify specific development sites and suggest management proposals specific to those sites.

Responsibility for preparing Local Tourism Plans will generally rest with Local Councils with the Tourism Commission providing advice.

Site Management Plan (SMP)

Site Management Plans contain the most detailed information about specific development sites. These Plans incorporate site specific recommendations including site appraisals and design and construction concepts and plans. Site Management Plans advance development concepts to the feasibility assessment stage. Responsibility for the preparation of these plans will generally rest with the landowner. Where necessary the Tourism Commission will provide advice.

1.3 Background to the Preparation of the North Coast Tourism Development Strategy

In 1985, the Minister for Tourism, with the support of the then Premier, established an Inter-Departmental Committee to examine the tourist development potential of the North Coast of New South Wales. This Committee is chaired by the Tourism Commission and comprises representatives from the Department of

Environment and Planning, Lands Department and the Premier's Department. The Committee was convened to advise how the Government may:

- Maximise the tourism potential of the Region;

- Encourage tourism projects of a high standard;

- Ensure that tourism development has minimal adverse environmental impacts;
- Maximise the benefits of tourism for residents and visitors; and
- Facilitate the development approval process for tourism developments.

The North Coast Tourism Development Discussion Paper was prepared by the Tourism Commission, with the assistance of the Tourism Development Inter-Departmental Committee, as the first step in the process of preparing a Tourism Development Strategy for the North Coast. This was released for public comment and the comments received were taken into consideration in drafting the Tourism Development Strategy.

1.4 Study Area

For the purposes of this North Coast Tourism Development Strategy, the North Coast Region corresponds to the North Coast Statistical Division rather than to the Holiday Coast Marketable Region. The study area comprises the following Local Government Areas:

Far North Coast

Tweed Shire
Byron Shire
Ballina Shire
Lismore City
Kyogle Shire
Casino Municipality
Richmond River Shire

Mid North Coast

Copmanhurst Shire
Maclean Shire
Grafton City
Nymboida Shire
Ulmarra Shire
Coffs Harbour Shire
Bellingen Shire
Nambucca Shire

Lower North Coast

Kempsey Shire
Hastings Shire
Greater City of Taree

Taree is included in the Study Area as it forms the southern gateway to the Region, and is a major stop-over point. As Taree functions as a gateway and service centre for the Hunter Region, the City will also be included in the Study Area for the Hunter Region Tourism Development Strategy.

2.0 ECONOMIC SIGNIFICANCE OF TOURISM

2.1 Economic Benefits of the Tourism Industry

Tourism has become a major industry of mass appeal and hence an important area of economic activity. It is one of the few industries that has sustained strong growth (5% per annum) through a marked recessionary period. In addition a number of important characteristics of tourism have led it to emerge as an industry that can make a significant contribution to alleviating high unemployment levels and facilitating structural changes in Australia's economy.

The NSW Government has recognised the significance of tourism as an important source of income, foreign exchange earnings and employment, and is targeting tourism as a priority industry in New South Wales.

The economic benefits of tourism can be classified as follows:

Expenditure Benefits

- It was estimated that in 1985/86 the tourism industry accounted for over 5 percent of Australia's Gross Domestic Product (GDP).
- In 1985/86 it generated estimated spending of $19.5 billion in Australia and $7.4 billion in NSW. The major proportion (69%) of this expenditure was attributable to domestic tourism.
- Nearly A$3 billion or 16 percent of the gross tourism expenditure in Australia is spent by overseas visitors. To highlight the significance of this in terms of income to Australia, in 1985, expenditure by overseas tourists totalled more than exports from the manufacture of metal, petroleum, meat and meat preparations.

Employment Benefits

In a study undertaken by the Bureau of Industry Economics (BIE) in 1981/82, tourism accounted for 5.2 percent of the workforce. In 1985/86 it was estimated that 400,000 full and part-time jobs were directly or indirectly sustained by tourism - 80 percent or 320,000 by domestic tourism, and 80,000 by international tourism. In terms of job creation, 35 overseas visitors or 250 domestic visitors generated one job in 1984/85.

Not only is tourism important in terms of the number of jobs it creates but also in terms of the types of employment it creates.

- Tourism is labour intensive and has the potential to employ groups who may be vulnerable to unemployment such as youths, unskilled workers, women and Aborigines.

- Tourism enterprises can employ part-time and casual workers across a range of job skills, thus creating opportunities for people unable to undertake full-time employment and those retrenched from other jobs.

Industrial Benefits

- Tourism is a decentralised industry with substantial development occurring in non-urban areas and regions where other economic activities are faltering.

- In addition tourism also encourages entrepreneurial activity in that it does not rely on a small number of large operators to operate effectively. There are many small, locally owned businesses operating in the accommodation, transport, attraction and restaurant sectors.

- Tourism plant has a relatively low dependence on imports both for construction and operation.

Investment and Development Benefits

- Tourism is an investment generator, in hotels, infrastructure, visitor facilities, consequently providing direct and indirect benefits of investment in construction.

- The potential exists to bring on line a wide range of tourism products which are competitive both domestically and internationally.

Environmental Benefits

- Tourism utilises natural focal points of attraction, and has the potential to help fund the conservation of heritage, natural resources and scenery.

- Tourism sells the same products over and over again - hotel beds, airline seats etc., and therefore consumes relatively fewer resources than industries producing physical or tangible goods.

Social Benefits

- Tourism results in the provision of a greater variety of goods and services than would otherwise be available within the Region.

- It also results in an increased heterogenity of the Region's population, providing the opportunity for increased social contact and awareness.

Following on from the above, the NSW Government recognises the significant benefits of tourism and is therefore ensuring that its policies and practices are aimed to encourage the private sector to develop the industry to its full potential.

2.2 Costs of Tourism

While growth in tourism will make a major positive contribution to the Regional and National economies, it has the potential to generate costs for the Local Community if growth is not properly planned and co-ordinated. These costs may include:-

* environmental degradation;
* increased congestion (e.g. traffic);
* increased competition between residents and visitors for goods and services;
* increased costs to the Public Sector resulting from providing and maintaining visitor facilities and infrastructure.

The Government is committed to encouraging tourism development in a manner and form that will provide optimal benefits to the community while minimising costs.

2.3 Visitation - Australia and New South Wales

2.3.1 Domestic Tourism

Domestic tourism is much more significant in total volume and economic impact than overseas tourism, generating about 84 percent of Australia's annual tourism expenditure and approximately 80 percent of tourism employment.

Since 1972 domestic tourism has increased significantly from 26 million trips to 45 million trips in 1985/86.

In 1985/86 New South Wales received 35.4 percent (or 18.9 million) of domestic visits undertaken in Australia and 33.3 percent (or 69.1 million) of domestic visitor nights spent by Australian residents during the same period.

The following Table shows that of the various States, New South Wales received the largest proportion of visitation.

Table 1. Visitation Patterns 1985/86.

	Trips[1]		Visits[2]		Nights[3]	
States Visited	('000)	%	('000)	%	('000)	%
New South Wales	15,852	35.1	18,930	35.4	69,085	33.3
Australian Capital Territory	999	2.2	1,138	2.1	4,119	2.0
Victoria	10,000	25.1	11,150	20.0	37.854	18.2
Queensland	8,863	19.6	10,619	19.9	48,660	23.4
South Australia	3,541	7.8	4,232	7.9	16,290	7.8
Western Australia	4,356	9.6	5,065	9.5	21,917	10.5
Tasmania	1,219	2.7	1,704	3.2	6,288	3.0
Northern Territory	307	0.7	558	1.0	3,270	1.6
Not Stated	65	0.1	35	0.1	272	0.1
	45,206	100.0	53,431	100.0	207,755	100.0

Source: Domestic Tourism Monitor - 1985/86

1. A trip is a measure of the journeys taken to main destinations, which is the locality where most nights were spent.

2. A visit is a component of a trip and refers to a stay of one or more nights at any locality en route to the main destination, at the main destination and at any locality along the itinerary.

3. Nights refers to the number of nights spent in all forms of accommodation (i.e. commercial and private) whilst on a journey away from home.

New South Wales' share of the domestic tourism market has been declining. In 1980/81 NSW received 35.3 percent of all domestic visitor nights but by 1985/86 the State's share had slipped to 33.3 percent. Current trends points to a further decline in New South Wales's share of domestic tourism.

To overcome this decline New South Wales has adopted strategies that will encourage more people to see their own State. These include protecting the New South Wales Market, which is the largest in Australia and aggressively attracting visitors from inter-state to experience the variety that the State offers.

2.3.2 International Tourism

The World Tourism Organisation estimates that tourist arrivals world-wide in 1986 were 340 million, with international tourists spending close to US$115 billion a year. On this scale, Australia enjoys less than 1 percent of the world international tourism market. With the recent upsurge in overseas interest in Australia, the potential for growth in overseas tourism is obvious.

Australia's Competitiveness

Australia's competitiveness as a destination for overseas visitors has been enhanced by a number of factors:

- The devaluation of the Australian dollar:
- Major developments in Australia's tourism infrastructure;
- General improvements in the standard of services; and
- The perception of this country as a politically stable and safe place to visit.

It is these latter attributes that are critical in the permanent acceptance of Australia as a significant holiday destination.

Tourism Projections

The Australian Tourist Commission (ATC) has estimated that by 1988, given that the current economic climate continues and the abovementioned circumstances prevail, Australia can expect to receive 1,775,000 international visitor arrivals. However, with vigorous promotion, a target of two million visitors from overseas could be achieved by the Bicentennial year.

New South Wales in the Context of the Australian Market

Australia received 1,263,496 overseas visitors during 1985/86, generating some 35.4 million visitor nights. This represented a 19% increase in visits and a 23% increase in visitor nights over 1984/85. Of this New South Wales received 922,354 visits (73%) and 2,029,000 nights (34%).

The majority of visitors to New South Wales spent most of their time in Sydney. Only 7% of nights were spent in NSW country areas.

Table 2. International Visitors Received by Each State (1985/86)

Main Destination State	Visits	Percent Share[1]
New South Wales	922,354	73
Victoria	467,494	37
Queensland	404,319	32
South Australia	138,985	11
Western Australia	151,620	12
Tasmania	37,905	2
Northern Territory	88,445	7
Australian Capital Territory	151,610	12
TOTAL AUSTRALIA	1,263,498	

Source: Australian Tourist Commission, International Visitors Survey.

Australian Bureau of Statistics, Survey of Overseas Arrivals and Departures.

1. The percent share column reflects the number of international visitors to a particular destination as a percentage of all international visitors to Australia. For example, in 1985/86, 73% of all international visitors came to Sydney, New South Wales.

Origin of Visitors to Australia

In 1985/86, New Zealand and the United States of America were the major international market segments accounting for 22.5% and 17.3% respectively of the 1,253,498 international visitors to Australia. Other major markets include the United Kingdom (12.7%) and Japan (10.1%).

Whilst international visitor arrivals from all countries increased during the year ending June 1986, the strongest growth occurred in the USA and Japanese markets, with the number of USA visitors increasing by 30.2% and Japanese visitors by 28.2%. During this period the NZ market grew by 23.0%, while the Asian (excluding Japan) and European Markets grew by 13.6% and 13.5% respectively.

While 73% of international visitors to Australia visit NSW, this percentage varies considerably between markets. 93% of Japanese Visitors to Australia visit NSW. The corresponding figures for the USA, New Zealand and UK markets are 84%, 64% and 73% respectively.

3. MARKET TRENDS

As outlined in Chapter 2, Tourism is one of the major growth industries in Australia and New South Wales. Both the domestic and international markets have experienced strong growth rates, and it is expected that this will continue into the future. The keys to continued growth are providing appropriate tourism plant and infrastructure, and undertaking effective marketing and promotion. Both these factors are dependent on understanding and satisfying market demands.

3.1 Domestic Market Dynamics

In 1984, the Tourism Commission contributed to a nation-wide market research study - "The Customer Connection - Travel '84", undertaken by Product Development International (The Banks Group). The objective of the Study was to provide an attitudinal and behavioural segmentation of the Australian market for travel and leisure products. The results of the Study are summarized below.

3.1.1 Trends

The Customer Connection showed that there has been a substantial shift in the attitudes of domestic travellers. The main trends are:

* Visitors are no longer seeking to "acquire" destinations but rather to "experience" destinations. Visitors are now seeking experiences, participation, individualism, adventure and challenge, rather than passive sight seeing.

* There is a growing tendency for the market to polarise towards up-market quality facilities, services and products and to price oriented products. Purchase of middle-of-the-road compromise facilities, services and products are declining.

* Increasing demand for well designed speciality products e.g., adventure holidays.

* A growing independence and individuality in the Australian consumer's choice of holiday destinations and holiday products.

3.1.2 Market Segments

The study showed that the domestic traveller can be divided into six distinct major attitudinal groups:

- The New Enthusiasts (16%)
- The Big Spenders (18%)
- The Anti-Tourists (18%)
- The Stay-at-Home Tourists (11%)
- The New Indulgers (14%)
- The Dedicated Aussies (22%)

The main characteristics of, and the optional products for each of these groups are summarized as follows.

New Enthusiasts

Characteristics

Inexperienced, young travellers looking for experience, variety and challenge. They wish to be at the centre of activity, and seek a wide range of experiences.

Products

Ideally, this market segment will choose a travel/leisure product that offers maximum utilisation of experience. A single destination, with a wide range of aspirationally attractive options is an ideal product. The study indicated that this segment is attracted to a wide variety of holiday products ranging from resorts to intensely physical products such as horse riding, white water rafting and trekking. This segment was identified as an increasing market.

Big Spenders

Characteristics

Tend to be older, passive and non-physical with "old establishment" values. They are conformists, and do not enjoy difference, change or challenge. This group prefers to stay with the mainstream of tourist activity - they seek planned holidays, group tours and five star accommodation. They are uncompromising on the question of personal comfort and are willing to pay for the best. Big Spenders are a declining market.

Products

Ideal products need to be established, safe, have a proven track record and be predictable. Genuine luxury needs to be combined with excellent service and high status. Resorts and international standard hotels are optimum products.

Anti-tourists

Characteristics

The Anti-tourists seek independence ie., "do-it-yourself" holidays. This is a strong growth segment. They like diversity, newness and challenge and seek a range of contrasting experiences. They avoid organised tours, group travel and the major tourist destinations.

Products

Ideal products are those that provide "discovery", and include trekking, camping, "drive-your-self tours" to 'out-of-the-way' destinations. They will visit a resort if it is "unique" and offers genuine contact with the environment and/or the local culture.

Stay-at-Home Tourists

Characteristics

The Stay-at-Home Tourists are security minded, dependent and physically passive. Their holiday mentality, is the same as their day-to-day mentality. They seek planned holidays in a familiar environment. This is a static market.

Products

Essentially down-market products including coach tours, caravan parks, rented holiday cottages, apartments, and motels.

The New Indulgers

Characteristics

The New Indulgers seek the very best in facilities and experiences and are more than willing to pay for it. For this market segment, superb service in a new or different environment is the key to success. This is a growing, lucrative market.

Products

New Indulgers offer the greatest opportunity for premium priced travel and leisure products. Ideal products include small, exclusive, luxury resorts, exotic resorts, and physical activities that are undertaken in comfort (e.g., 4WD Safaries in air conditioned, luxury vehicles).

Dedicated Aussies

Characteristics

The Dedicated Aussie is described as the ultimate domestic traveller - pragmatic, independent and self reliant. They seek holidays in Australia that will provide "local flavour" and physical activities. The reliance is on self-drive and self organised holidays. This segment is typically at the lower end of the spending spectrum, and is a relatively static market

Products

Domestic products that offer local colour and local history.

Accommodation products include camping, caravans, cabins and holiday homes/apartments. Fly-drive packages are also well received.

3.2 International Market Dynamics

Traditionally, Australia has attracted international visitors in the 50 + age group, who have exhibited a preference for organised group tour travel.

While this market is continuing to increase, Australia has recently been "discovered" by the youth market, and this market is exhibiting strong growth. In contrast to the older travellers, this market prefers "Free Independent Travel" (FIT), and seeks facilities and experiences that are uniquely Australian.

The other major growth markets are the Japanese Honeymooners, and Japanese Women in the 18-25 year age bracket.

3.3 Market Implications

The main implications of the emerging market trends on designing new tourism products and facilities are:-

* The need to diversify the tourism infrastructure and product base to appeal to each of major markets.
* The need to identify a market and to design facilities and products that will appeal to that target market. Compromise facilities and products that try to appeal to everyone will not satisfy market needs.
* The need to emphasise "experiences" in designing holiday packages and products. These experiences could range from ultimate luxury in an international standard resort hotel to wilderness experiences such as white water rafting.

PART B

TOURISM OVERVIEW - NORTH COAST

4. TOURISM OVERVIEW - NORTH COAST

4.1 Visitation Patterns

4.1.1 Domestic

Visits and Visitor Nights

The North Coast Region rates second to the Sydney Region in terms of popularity as a visitor destination. In 1985/86 the Region attracted 2,976,000 overnight visits resulting in 13,977,000 visitor nights. These figures represent 15.7% and 20.2%, respectively, of total visits to and nights spent in N.S.W.

The distribution of visits and nights within the Region is summarised in Table 3.

Table 3. Visits and Visitor Nights - 1985/86.

		Lower North Coast	Mid North Coast	Far North Coast	Total
Visits	- No.	1,227,000	823,000	926,000	2,976,000
	- %	41.2	27.7	31.1	100.0
Nights	- No.	6,149,000	3,962,000	3,866,000	13,977,000
	- %	44.0	28.4	27.6	100.0

Source: Domestic Tourism Monitor.

Within the Region, the major destination areas are given in Table 4.

Table 4. Major Destination Areas - 1985/86.

	Estimates	
	Visits	Visitor Nights
Hasting Shire	682,650	3,420,759
Coffs Harbour	541,200	2,605,336
Tweed Shire	344,472	1,438,170
Taree City	268,550	1,345,704
Ballina Shire	236,130	985,843

Source: The Local Government Area Estimates, Tourism Commission of NSW.

Appendix 1 provides an estimate of Domestic Visits, Visitor Nights and Visitor spending by Local Government Area for 1985/86.

Growth Rates

During the period 1984/85 to 1985/86 the Region experienced a 4.2% growth in visits and a 8.6% growth in visitor nights.

This is significantly higher than the State average of 1.85% growth in visits and a 2.2% growth in nights. However the growth was unevenly distributed with the Lower North Coast experiencing very strong growth in visits (12.6%) and nights (22.6%), while the Far North Coast experienced a decrease in both visits and nights.

The Lower North Coast also experienced a growth in the average length of stay from 4.6 nights to 5.0 nights. This growth in visitors to the Lower North Coast is considered to be largely attributable to the increase in quality accommodation and the introduction of air-accommodation packages. The growth rates are summarised in Table 5.

Table 5. Growth Rates 1984/85 to 1985/86. (%)

	Lower North Coast	Mid North Coast	Far North Coast	Total Region	NSW
Visits	12.6	3.6	-4.6	4.2	1.8
Nights	22.6	3.8	-4.3	8.6	2.2

Source: Domestic Tourism Monitor.

Market Segments

The major market segment is the domestic family visitor. These visitors are generally low-middle income earners, who seek budget forms of accommodation e.g., caravan parks, holiday flats, staying with friends and relatives. This segment mainly visits the area during the school holidays.

Other market segments include:-

* Retirees - This segment tends to visit the Region outside the school holiday periods. The Victorian market is particularly strong during the winter months when the Victorians are seeking a warmer climate.

* Young Singles - Travel to the Region by this segment is generally undertaken during the warmer months, ie., November through to March.

* Specialist interest groups - such as the Victorian Lawn Bowls market, and ocean and estuarine fishermen.

* Conference and meeting market - This is a very small market segment, due mainly to the limited range of facilities available.

* Day visitors from the Gold Coast and surrounding Regions.

Origin of Visitors

NSW is the major source of visitors for the Lower and Mid North Coast, while the Far North Coast draws predominantly from Queensland. As shown in Table 6, the Mid North Coast Region, although located midway between Sydney and Brisbane, is not effectively tapping the Queensland market.

Table 6. Origin of Visitors 1985/86 (% Visits).

Region of Origin	Lower North Coast	Mid North Coast	Far North Coast	NSW
Sydney	54.3	33.8	17.7	40.2
NSW Country	33.3	41.3	23.1	30.0
Total NSW	87.6	75.1	40.8	71.0
Brisbane	3.0	9.0	35.3	5.0
Queensland Country	3.7	6.3	17.4	3.8
Total Queensland	6.7	15.3	52.7	8.4
Victoria	3.2	5.1	3.3	11.5
A.C.T.	1.4	2.0	1.9	5.7
Other Interstate	1.1	2.4	1.5	3.3
Total Interstate	12.4	24.9	59.2	29.0

Source: Domestic Tourism Monitor
Total Visits = 2,976,000

Purpose of Visit

Holidays/Pleasure was the main purpose of visits to the North Coast Region. The Conference/Seminar figures are below the State average, and reflect the lack of specialist conference and meeting facilities in the Region.

Table 7 Purpose of Visit 1985/86 (%)

Purpose of Visit	Lower North Coast	Mid North Coast	Far North Coast	NSW
Pleasure/Holiday	58.5	59.4	60.7	46.9
Visiting Friends & Relatives	26.0	19.4	23.3	27.2
Personal Reasons	6.3	2.0	4.0	5.5
Working Holiday	0.9	1.6	1.2	1.1
Education/School	0.8	1.3	0.3	1.6
Business	4.0	10.6	8.6	12.2
Conference/Seminar	0.5	0.1	0.5	1.5
Other	7.5	4.8	0.8	1.7
Total	100.0	100.0	100.0	100.0

Source: Domestic Tourism Monitor
Total Visits = 2,976,00

Length of Stay

In 1985/86 the average length of stay varied from 4.2 nights on the Upper North Coast, to 4.8 nights on the Mid North Coast and 5.0 nights on the Lower North Coast. These figures are higher than the State average of 3.6 nights, and reflect the school holiday market.

Seasonality

Visitation to the Region is highly seasonal with the peak periods corresponding to the school holidays. The Far North Coast experiences less seasonal fluctuation than the Mid and Lower North Coast. This difference would seem to reflect a difference in the perceived climatic conditions during winter.

Table 8. Month of Visit 1985/86 (%).

	Lower North Coast	Mid North Coast	Far North Coast	NSW
July	4.8	5.8	5.5	6.7
August	6.8	7.0	7.6	6.7
September	9.5	8.2	10.0	10.4
October	5.5	10.7	6.7	8.6
November	5.4	6.5	3.9	6.8
December	9.6	10.5	9.1	8.9
January	19.4	19.3	13.4	14.4
February	5.8	5.2	9.7	6.0
March	8.8	8.4	9.5	8.4
April	6.6	6.8	9.1	8.2
May	9.1	6.0	7.9	7.4
June	8.6	5.5	7.7	7.4
	100.0	100.0	100.0	100.0

Source: Domestic Tourism Monitor.
Total Visits = 2,976,000.

The change to a four-term school year is expected to modify the seasonal visitation pattern.

Accommodation

The majority of visitors to the Region stay with friends and relatives, in caravan parks or in rented flats and houses. These tend to be low cost forms of accommodation which do not generate significant income or employment for the local community. Table 9 summarises accommodation usage.

Table 9. Accommodation Used (% of Nights).

	Lower North Coast	Mid North Coast	Far North Coast	NSW
Friends & Relatives	34.7	34.4	40.7	47.2
Caravan Park/ Camping Ground	29.0	26.8	25.3	16.6
Rented Flat/House	14.3	8.2	11.6	6.5
Own holiday flat/ house	7.1	4.2	2.3	3.7
Hotel/Motel	9.1	15.9	13.2	16.2
Guesthouse/ Private Hotel	0.9	2.7	0.5	1.5
Hostel	0.1	1.1	1.2	0.8
Other	4.8	6.7	5.2	7.5
Total	100.0	100.0	100.0	100.0

Source: Domestic Tourism Monitor
Total Nights = 13,977,000

Mode of Transport

The majority of visitors to the Region in 1985/86 travelled by private vehicle. Rail and Coach were the next most popular forms of transport.

Table 10. Mode of Transport 1985/86 (% of Visits)

	Lower North Coast	Mid North Coast	Far North Coast	NSW Average
Private Vehicle	90.5	81.7	84.3	77.5
Bus/Coach	2.8	3.5	5.3	5.3
Rail	2.1	5.5	3.2	6.0
Air	2.2	3.4	3.2	6.4
Other	2.4	6.1	3.8	4.8
Total	100.0	100.0	100.0	100.0

Source: Domestic Tourism Monitor
Total Visits. 2,976,000

4.1.2 International Visitors

Of the 1,263,498 international visitors to Australia in 1985/86, only 92,235 (7.3%) visited the North Coast Region. There visitors spent 550,000 nights in the Region. In contrast, the Gold Coast Region attracted 216,058 (17.1%) international visitors who spent 970,100 nights. The low number of international travellers visiting the North Coast Region is largely attributable to:-

- Lack of international standard accommodation;
- Lack of packages and products designed for international visitors, particularly air based packages;
- Lack of awareness of the attractions of the Region;
- Short length of stay in Australia; and
- Distance from an international airport and the cost of domestic air travel to the Region.

4.2 Employment and Income

In 1985/86 it is estimated that overnight visitors to the Region spent in the order of $723.6 million. This generated an estimated 14,600 full-time equivalent positions.

Appendix 1 provides an estimate of expenditure and employment by domestic visitors in each Local Government area.

4.3 Tourism Plant and Infrastructure

4.3.1 Accommodation

Tourist accommodation in the Region is characterised by :-

* A concentration of accommodation in coastal towns and villages.

* A heavy orientation towards low cost accommodation - ie., caravan parks, camping grounds, motels, unserviced holiday flats, and houses of friends and relatives. This form of accommodation caters mainly for low-middle income earners, particularly the family groups.

* Motel accommodation being largely oriented to commercial and transit traffic and located mainly along the major highway routes in the larger urban centres. Motel establishments are generally small (less than 40 rooms), with limited facilities. Few are suitable for inclusion in package tours because they cannot accommodate a coach-load of visitors, do not provide quality services and facilities, will not accept 'forward block' bookings and do not have the economies of scale to market effectively.

* Quality resort accommodation (4 diamond rating) is limited to a few establishments in the Port Macquarie and Coffs Harbour areas. There are no major resorts on the Far North Coast.

* There is no five star accommodation in the Region.

* Marked seasonal fluctuations in occupancy levels. These levels vary according to the type of accommodation. In general, the quality resorts and the larger motels experience relatively high occupancy rates on a year-round basis. In contrast, the low cost accommodation establishments, particularly the caravan parks, experience marked seasonal fluctuations, with the peak occupancy levels corresponding to the summer school holiday period.

4.3.2 Attractions

The North Coast Region offers a diverse set of natural attractions which have the capacity to draw substantial visitor volumes.

The attractions of the Region include:-

Natural Resources:-

The natural resources form the major attraction base of the Region. These attractions include:-

. Spectacular coastal and inland scenery.

- Favourable climate providing an ideal year round living environment.
- Extensive beach and waterway areas suitable for family recreation including fishing, surfing, boating etc.
- Extensive hinterland areas containing a variety of agricultural activities, mountain ranges, and river environments.
- National Parks and State Forests, including the Rainforests included on the World Heritage List.

Man-made Attractions

These developed mainly in the major tourist activity areas and include:-

- Theme parks
- Waterslides/aquatic centres
- Sporting facilities including tennis, squash, golf
- Historic attractions including museums, buildings, sites
- Arts and crafts galleries/markets
- Special events/festivals

Visitor Service Facilities

- Restaurants/tea rooms
- Speciality shops
- Tours
- Information centres

At present many of the attractions, particularly in the hinterland area, are under utilized. This is due mainly to poor access, lack of facilities (particularly accommodation), poor linkage with the main destination areas, insufficient information on the attraction, and lack of marketing and promotion.

4.3.3 Transport

The Region is served by road, rail, bus and air transportation services, with road transport being the most popular transport mode used by visitors.

During peak periods the road access to the Region is inadequate, with the poor quality of sections of the Pacific Highway being a major constraint. The internal road system also limits the degree to which hinterland attractions can be effectively linked with the main coastal destination areas.

Rail and bus services provide regular passenger transport to both Sydney and Brisbane. The progressive deregulation of the interstate coach licencing restrictions is resulting in an increase in the popularity of this mode of travel.

The major airports in the Region for tourism are Port Macquarie, Coffs Harbour, Ballina and Coolangatta. The remaining airports in the Region cater mainly for business traffic and for local residents.

4.4 Investment and Development

4.4.1 Trends

Broadly, the main trends in the Region are:-

* There are few high quality 'total destination' resort complexes on the North Coast even though it is an area of great natural amenity. The absence of a major jet airport is cited as a possible explanation, but this does not account for the lack of such facilities closer to Coolangatta.

* Much of the tourism development on the North Coast has occurred in an unco-ordinated fashion in response to highly localised market factors. Individual Councils have been responsible for approving a mix of development forms without the benefit of a clear regional strategy.

* A variety of tourism development projects have been proposed for the Region (especially the coastal areas), however very few have proceeded to the building stage. These include sites that have been specifically zoned to permit tourism development.

* There is strong pressure for residential subdivision in areas of high suitability for tourism. Similarly, sub-division of vacant land adjoining small coastal villages often down-grades their tourism potential.

* Amongst developers presently operating in the Region there is a strong preference for small scale developments located mainly on the coast.

4.4.2 Development Activity[1]

As outlined in the preceding Section, there is a marked lack of investment in major tourism projects in the Region.

In May 1987, only three tourism projects, with a total value of $4.65 million were under construction within the Region. A further fifteen projects with an estimated value of $47.3 million have received development approval. Development applications have been lodged for another seven projects with an estimated value of $14 million. In addition there are a number of agricultural and sporting projects either under construction or proposed for the Region that may have tourism potential.

Development activity is concentrated in the Mid and Lower North Coast areas with the majority of development occurring in Coffs

Harbour and Port Macquarie. 70.6% of investment in projects either under construction or with development approval is occurring in the Mid North Coast. The corresponding figures for Lower North Coast and the Far North Coast are 24.9% and 5.0% respectively[2].

Of the projects for which development applications have been lodged, the only major projects are the Charlesworth Bay and Anuka Beach Resorts at Coffs Harbour and the Byron Bay Beach Resort Cabin Development.

In addition to these projects a number of other major developments are at the concept feasibility stage. These include the Coffs Harbour Jetty redevelopment, Ocean Shores resort and the Pacific Pines resort near Ballina.

The remainder of the projects currently under construction or proposed for the Region are generally of a small scale (less than 30 units), and include motels, caravan parks and cabins.

The factors accounting for the lack of major tourism development and investment in the Region include:-

* Lack of sufficient population base to support a good range of services.

* Lack of supporting infrastructure critical to tourism development.

* Lack of available prime tourism development sites.

* Lack of locally based support industries required for large scale tourism development.

* A view within the industry that it is difficult to gain development approval for major tourism projects within the Region. This view has largely arisen from the following factors:-

  - The expressed "anti-development sentiment" amongst some of the North Coast Community who perceive tourism developments as a threat to their lifestyle and environment and thus object to development.

  - The inability of Council's and Government to quickly determine rezoning and development applications because of lack of information provided by the proponent.

  - The 'unique' nature of projects for which there are no comparable precedents to be used in the evaluation process.

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1. Estimates only that are based on information provided by Local Councils.
2. These figures exclude agricultural and sporting facilities.

5. FUTURE DIRECTIONS

5.1 Pattern for Tourism

The desired pattern of tourism for the North Coast is one that:-

* is diversified, producing a range of products that will attract market groups not currently patronising the Region;
* is less seasonal and volatile;
* leads to increased lengths of stay;
* leads to higher levels of visitor expenditure;
* generates higher levels of sustained income and employment for the Region;
* has greater sensitivity to the environment in providing purpose built tourist facilities;
* is unlike the Gold Coast in design and concept as this market is already catered for and the development style is not appropriate for the North Coast.

5.2 Market Segments

Opportunities exist for further developing the following markets:-

* South East Queensland domestic family market.
* Queensland & Victorian "club" markets.
* Young singles market, particularly the "new indulgees" and the "anti-tourists".
* International market, targeting the packtour market, the Japanese honeymoon market, and the "backpacking" market.
* Conference & business market.
* Special interest market.

The ability to tap these markets is dependent on the provision of appropriate plant and infrastructure coupled with effective packaging and marketing.

5.3 Development Forms

The types of development forms considered desirable are those that are designed in sympathy with the environment and that are of a sufficient scale that will attract year round patronage and provide sustained income and employment. Appropriate development forms for the Region are discussed in detail in Section 7.1.

The Government does not wish to see Gold Coast style development in New South Wales. Whilst there is a place for high rise development in some areas the emphasis should be on providing low rise facilities designed to complement and enhance the Region's natural attributes.

PART C.

NORTH COAST TOURISM DEVELOPMENT STRATEGY.

6. AIM AND OBJECTIVES

6.1 Aim

The aim of the North Coast Tourism Development Strategy is to provide a framework that will encourage the orderly development of tourism in an environmentally sensitive manner through:

- Increasing the utilisation of existing products;
- Expanding the product base in order to create overseas markets;
- Increasing the range and quality of consumer experiences available;
- Improving the transport links between visitor source areas and North Coast destinations; and
- Encouraging the effective marketing of specific products and the Region generally.

6.2 Purpose and Function

It is intended that the Tourism Development Strategy will:

1. Make Public Authorities, investors and developers aware of the economic potential of new tourism development in the Region.
2. Encourage the establishment of planning mechanisms such as Local Tourism Plans, Urban Development Strategies and Development Control Plans that will encourage substantial capital investment and growth in tourism, in an environmentally sensitive manner.
3. Enhance co-operation and understanding between regulatory authorities and the private sector.
4. Promote the better utilisation of Crown and private land in prime locations for tourism where appropriate.
5. Encourage new and innovative forms of investment in tourism projects, particularly those involving partnerships between local developers and operators and large city based financiers.
6. Provide direction to Government on the allocation of Government resources for roads, airports and public works within the Region, including setting aside land for future use as may be required.
7. Ensure that in areas of high scenic and environmental attractions, an adequate supply of suitable land is set aside for sympathetic commercial tourism development.

8. Encourage the use of design guidelines and technical solutions to environmental problems so as to afford the highest possible level of protection to the natural environment.

6.3 Planning and Development Objectives

To increase the range and quality of consumer experiences available on the North Coast, it is necessary to:-

1. Encourage the establishment of a range of development forms offering different leisure and hospitality activities.

2. Increase access to, and appreciation of places of natural attraction, particularly in areas of public open space, by encouraging the development of on-site hospitality services. These may vary from restaurants overlooking the sea, to luxury cabanas in a rainforest setting.

3. Encourage the expansion, upgrading and diversification of existing tourism plant.

4. Identify potential tourism development areas with outstanding environmental and aesthetic qualities and formulate strategies that will encourage and facilitate the development of tourism product.

5. Prevent the degradation of prime tourism areas it may be necessary to restrict competing or conflicting forms of development in some cases, for example, to prevent over-urbanisation of coastal villages, or to retain the historic character of a built environment.

6. Encourage re-development of prime sites including the consolidation of smaller allotments and the conversion of landuse from residential and other uses to tourism.

7. Make a number of prime sites available for different forms of tourism development. To attract the development of a $30m destination resort, for example, it may be necessary to have a number of possible sites on offer. A wide range of choice helps avoid unnecessary escalation in land values and allows entrepreneurs more flexibility in targeting their market.

8. Ensure that tourism development that relies heavily on any natural attraction be constructed in a manner and form that is sympathetic to the environment and optimises the interface between the natural attraction and the resultant human experience.

7. DEVELOPMENT STRATEGY

7.1 Development Forms

As discussed in Section 4.3.1, the existing accommodation base is dominated by caravan parks, camping grounds and small motels. In order to increase the market penetration of the Region it is necessary to expand the range of tourism plant and infrastructure. To achieve this priority should be given to development proposals that:-

* Are purpose built (ie., targeted to specific market segments), and provide a quality product. Encouragement should be given to operations that specialise in unique or unusual experiences.

* Attract year round patronage, and as such provide sustained, not seasonal, income and employment for the local community.

* Encourage longer lengths of stay and higher daily visitor expenditure.

* Are of a scale sufficient to ensure professional management, incorporation in holiday packages and to support an effective marketing budget. A minimum of 50 units under one management is encouraged. Establishments of this scale generate the most employment per bed and generally maintain the highest standards.

* Provide a range of employment opportunities and are of a sufficient scale to support staff training and development.

* Minimize public sector investment in services and infrastructure.

* Are well designed and located.

* Involve as operators, organisations with established operations within Australia or overseas.

* Attract as development partners, proven players in the Australian tourism and travel industry, particularly the airlines.

* Encourage the simultaneous development of a range of complementary smaller scale operations, particularly within the major growth areas.

* Encourage destinations to develop a particular character and/or marketing appeal.

The types of development to be encouraged include:-

Resort Style Developments

Resort style development is seen as a desirable means of increasing overall visitation rates, especially during off-season periods, and providing sustained income and employment. Because resorts facilitate packaging they also stimulate the further development of air, coach and rail transport sectors.

Resorts are characterised by a multiplicity of attractions with a particular emphasis on spontaneous, experiential activities, and a high level of services, including large scale total destination resorts, eg., Club Mediterranee, exclusive up-market resorts, family style resorts eg., Nautilus, and wilderness resorts eg., Binna Burra Lodge.

Resort development should be encouraged in the following locations:-

- Within or adjacent to existing urban areas - on a scale and intensity appropriate to the character and amenity of that area. Resorts in these locations should be design-integrated with the surrounding urban area, with facilities e.g. tennis courts, being accessible to the public, at least in part.

- Pioneer projects located in the path of projected urban development (as identified in Urban Development Strategies), and capable of forming the catalyst for further development. These types of projects could include mixed tourist - residential - commercial complexes or specialty projects such as major tourist attractions. Factors to be taken into consideration include infrastructure, facilities and services, and the appropriate mix of land uses eg., tourism facilities - residential - commercial and sporting.

- In undeveloped areas - "total destination resorts", providing a high level of services for the exclusive use of patrons. Given the very limited level of interaction that would be experienced between the visitor and the host population, it may be preferable to locate some types of resorts in more remote (undeveloped) areas rather than alienate land within or adjacent to existing urban areas, or within projected urban growth paths.

- Within or adjacent to natural attractions, such as National Parks, State Recreation Areas, State Forests and Government Reserves. Resort design and management must be in harmony with the environment.

Hotels

The development of large (100 + rooms) three, four and five star hotels should be encouraged in the major population centres, particularly Tweed Heads, Coffs Harbour, Port Macquarie and Ballina. Conference and meeting facilities should be encouraged as part of these developments. Potential also exists for the development of "Club Hotels" whereby Licenced Club facilities are integrated with hotel accommodation.

Holiday Apartments

Particularly, good quality, medium cost low-rise apartments and townhouses.

This type of accommodation should be concentrated in existing towns of high permanent residency rather than in holiday villages or remote areas.

The design of the building should be compatible with surrounding environment. The scale and intensity shoud reflect the provision of services in the area. High-rise could be considered in some localities, such as Tweed Heads, Coffs Harbour and Port Macquarie where it already exists.

Preference should be given to new holiday apartment developments that are large scale (50 plus units) and have a full-time on-site manager.

Motels

The supply of small family operated motels is sufficient to meet demands, therefore emphasis should be placed on larger scale motels providing 50+ units, with professional management. Incorporation of meeting facilities to accommodate small groups should be encouraged.

Hostels

Hostels providing quality accommodation at a budget price, and targeting to the young singles "back packer" market. Encouragement should be given to providing a chain of hostels in the Region that are linked by coach and/or rail transport.

Farm Accommodation

Emphasis should be on providing quality facilities in association with farm activities. Types of accommodation to be encouraged include "bed & breakfast" establishments, guesthouses, lodges and cabins.

Cabins

Cabin complexes providing quality accommodation at a budget price.

Caravan Parks

It is considered that on the whole there is a sufficient supply of caravan parks within the Region to cater for demand. Therefore the Strategy is not advocating the development of new tourist parks at this point in time. Instead emphasis should be placed on upgrading existing caravan parks, particularly through landscaping, providing additional facilities and, where appropriate, providing cabins on-site. The introduction of legislation permitting people to reside permanently in caravan parks may result in the loss of tourist accommodation and this situation needs to be monitored closely.

7.2 Tourism Development Areas

Broadly, the Tourism Development Strategy for the North Coast Region is:-

1. Concentrate major tourism development in four growth areas:-

   (i) Tweed Heads - Kingscliff - Murwillumbah
   (ii) Ballina - Byron Bay - Lismore
   (iii) Coffs Harbour - Woolgoolga to Sawtell
   (iv) Port Macquarie - Laurieton

   Different development strategies are proposed for each of these four areas as outlined in Section 7.3.

2. Outside these areas:

   * The historical and intrinsically rural character of most inland towns and villages should be preserved and enhanced.

   * Inland towns should continue to develop as day visitor areas, enroute and short stay destination areas, and conference/special event centres.

   * It is desirable to preserve and enhance the low-key sea-side holiday atmosphere of most smaller coastal villages.

   * Commercial tourism operations should be established in and about areas of natural beauty such as rivers, dams and waterways, National Parks, Nature Reserves and State Forests. Care must be taken in siting and designing these developments.

   * The potential exists for increased use of agricultural holdings for farm tours and holidays.

3. Access to and within the Region must be improved by upgrading and expanding road, air, rail and coach services.

7.3 Major Growth Centres

Tourism development on the North Coast should be promoted in four major Growth Centres:-

Tweed Heads - Kingscliff - Murwillumbah
Ballina - Byron Bay - Lismore
Coffs Harbour - Woolgoolga to Sawtell
Port Macquarie - Laurieton

These Centres offer the best potential for developing a range of quality tourism services on an all-year round basis. The advantages of these Centres over other Centres in the Region are:-

1. The Growth Centres are already established as the major holiday destination areas.

2. The Growth Centres have well developed road and service infrastructure to support an increased tourist population.

3. Proximity to jet airports, at Coolangatta and Coffs Harbour and airports at Ballina and Port Macquarie.

4. These Centres have a base population capable of supporting hospitality services of a high standard.

Each of these Centres have different existing and potential markets and therefore require different development strategies.

Strategies

These general strategies apply to the four Growth Centres:-

1. Encourage Local Councils to prepare Local Tourism Plans for key localities within each Growth Centre. These Plans should:-

   - Assess existing tourist facilities.

   - Assess the potential for tourism development in each area with reference to existing and possible market trends.

   - Assess the general amenity of the area and recommend beautification and other works for key tourism areas.

   - Assess the adequacy of existing roads and mass transport connections with the area.

- Identify potential tourism development sites in public and private ownership, and suggest appropriate forms of development.

- Assess the adequacy of existing infrastructure to cater for the proposed developments, including water, sewerage, telephone, power and roads.

- Provide appropriate design criteria and development guidelines for the town.

- Provide strategies for:-

  (i) the orderly development of the potential tourism development sites identified; and

  (ii) implementing the recommendations made for improving visitor facilities, upgrading infrastructure and enhancing the general amenity of the area.

As a matter of priority Local Tourism Plans should be prepared for the areas of:-

Tweed Heads to Kingscliff
Byron Bay
Ballina
Coffs Harbour
Port Macquarie - Laurieton - Camden Haven

2. Evaluate the tourism development potential of sites identified in Local Tourism Plans. Prepare Site Management Plans for the prime development sites. These Plans should embody site specific recommendations incorporating site appraisals, design and construction concepts and plans. The Site Management Plans should establish the feasibility of development prior to seeking of development approval.

Issues to be addressed by the Government to facilitate tourism development in each Growth Centre are discussed below.

Tweed Heads - Kingscliff Growth Centre.

The Tweed Heads - Kingscliff area abuts the Gold Coast - Australia's most popular coastal holiday destination area. It has ready access to the Coolangatta Jet Airport and to the attractions and entertainment facilities of the Gold Coast and Tweed Valley Hinterland. The area is also extremely well positioned to effectively tap the South East Queensland and Brisbane markets and has the population base to support a wide range of visitor services and facilities.

Within the area there is a need to locate and evaluate suitable sites for the development of:-

- Major total destination resorts utilising existing air services to Coolangatta. These resorts should be capable of building on the international and domestic market to the Gold Coast and capitalising on the extensive range of facilities already existing on the Gold Coast. A minimum target of 300 rooms in one or two operations would be desirable in the short-term.

- Self-contained resorts providing quality budget style accommodation targeted to the domestic family market.

- Resort hotels and club hotels.

- Holiday apartment complexes providing a minimum of 50 rooms under in-situ management.

These forms of development will assist the area to penetrate the South East Queensland, international and upper and middle income domestic visitor markets by providing different, e.g. low-rise family resort complexes, but complementary facilities to the Gold Coast.

Ballina - Byron Bay - Lismore Growth Centre

(i) Byron Bay

Byron Bay is an extremely popular holiday destination area, that has received wide recognition for being the easterly-most point of mainland Australia, for its superb surfing beaches and for its distinctive character and lifestyle. The area is well served by both rail and coach transport and has ready access to Ballina Airport.

In further developing tourism in the town and surrounding area consideration must be given to:-

* Encouraging the establishment of development which is sympathetic to the existing low-rise resort character of Byron Bay, including:-

    - small exclusive resorts focused on the beach, and set in natural environments where possible;

    - larger scale, open-style resorts offering public recreation and entertainment facilities;

    - quality hostel accommodation targeted to the international and domestic "singles" and "backpacker" markets; and

    - family style resorts, offering a range of recreational facilities and accommodation at reasonable prices.

* Continuing works to enhance the resort character and function of the town centre, such as creation of a pedestrian mall in Jonson Street.

* Tourism development forms that are compatible with the coastal erosion hazard zone. This would facilitate the development of a number of prime tourism sites which lie within the Erosion Zone.

* The landscaping of the entrance roads to the town and controlling development along these roads.

* Improving utility services particularly sewerage.

* Integrating the town and the hinterland.

(ii) Ballina

Ballina has considerable tourism development potential. The area offers the advantages of Ballina Airport, the availability of a number of prime development sites, highway location, accessibility to the Brisbane and South East Queensland markets, extensive range of coastal and hinterland attractions and a high level of utility services and infrastructure. In order to facilitate tourism development the following issues need to be addressed.

* There is potential in the short term to bring on-line, 300-600 resort style accommodation units to enable the development of integrated air - accommodation packages. Appropriate forms of development include:-

  - total destination resorts
  - holiday apartment complexes
  - resort hotels

* Other forms of accommodation and facilities to be encouraged in Ballina include:-

  - club hotels (licensed club facilities integrated with accommodation).

  - coach-linked budget style accommodation.

  - marina facilities.

  - charter fishing.

* The upgrading of Ballina Airport to jet standard is important to the development of tourism in this Growth Centre. The Airport is currently licenced to F27 for daytime flights. The provision of direct air services between Ballina and major gateways, e.g. Sydney and Melbourne must also be provided. The services should be upgraded to a higher

standard as soon as possible and direct flights encouraged from other major regional and interstate centres. The provision of navigational aids to allow evening flights should also be considered. (see Section 8.5)

* Enhancing the amenity of the Ballina shopping centre through landscaping and associated improvement works.

* Re-orientating the focus of the town on the River and beaches. At present the town is oriented mainly to the Pacific Highway.

* Landscaping and further provision of amenities, e.g. barbeques, areas behind the main beach, Lighthouse Beach.

(iii) Lismore

Lismore is a major regional centre that provides a source of demand for the coastal areas, and a day trip destination area. The City provides a range of goods and services including licensed clubs, restaurants and speciality shops. Lismore also attracts people to the area through its educational facilities, and is well located to provide access to the mountain range and rainforest areas. To increase tourism to the City there is a need to:-

* Provide good road links between Lismore and the Coast particularly the Byron Bay via Bangalow and Ballina via Alstonville roads.

* Increase day visitation to Lismore by promoting clubs, restaurants, specialty shops and services.

* Build on the convention and business traveller market.

* Build on the image of Lismore as the provincial centre of the Far North Coast, with festivals and other activities.

Coffs Harbour Growth Centre

Coffs Harbour is a major tourist destination area, providing a range of tourist facilities as well as extensive retail and commercial facilities. The recent development of quality facilities such as the Pelican Beach, Nautilus, Sanctuary and Boambee Bay Resorts have greatly contributed to enhancing the attractiveness of the town. The town is readily accessible by road, rail and air, and has adequate utility services to accommodate further growth. Although the town is located mid-way between Brisbane and Sydney, it does not effectively tap either market.

The key to further developing a strong tourism industry in the town rests with:-

* The redevelopment of the Coffs Harbour Jetty area as the main focal point of tourism activity; and

* The complementary development of total destination resorts including sites immediately north of Coffs Harbour township.

* Discouraging urban sprawl along the coastline.

* Establishing a time-frame for further upgrading Coffs Harbour Airport.

* Encouraging the complimentary and simultaneous development of:

  - managed resort hotels/holiday apartment complexes of all standards,

  - budget family style resorts, and

  - coach-linked hostels and backpacker accommodation within the existing urban area.

* Discouraging the over production of small residential flat buildings ('gun barrell' flats), motels, and caravan parks.

* Increasing the market penetration of Coffs Harbour, particularly into the Queensland market by encouraging the development of new package holidays and tour holidays utilising existing plant and infrastructure.

* Developing additional marina and associated shore based facilities at the harbour.

Coffs Harbour Jetty

The redevelopment of the Coffs Harbour Jetty area is being co-ordinated by the Public Works Department, and every effort should be made to attract a high standard of tourism development along the water front area.

The Coffs Harbour Jetty has significant tourism development potential. The site has:

* frontage to the protected harbour waters and direct access to two surfing beaches;

* large tracts of Government owned land that are prime for redevelopment;

* existing tourist attractions in the harbour, including the jetty (an old wooden pier), the Fisherman's Co-operative, yacht marina, sea-walls and Mutton Bird Island;

* immediate access by road, rail and air; and

* a proliferation of restaurant developments.

The Government is committed to attracting a comprehensive range of tourist and recreation facilities that will capitalise on the unique aspect and location of the site, and enhance Coffs Harbour as a tourist destination.

Port Macquarie - Laurieton Growth Centre

The Port Macquarie - Laurieton area offers a range of tourist accommodation and services, good road and air access, and a variety of coastal and hinterland attractions. It is the most popular holiday area on the North Coast. The town draws mainly family groups and retired couples. Victorian visitors are becoming an increasingly important market segment.

To facilitate further tourism development in the area consideration must be given to:

* Encouraging the development of:-

  - Club Hotel in Port Macquarie incorporating hotel accommodation integrated with licensed club and retail facilities;

  - Family style resorts;

  - Serviced apartment complexes; and

  - Resort Hotel.

* The style of development must be in keeping with the surrounding environment, for example, high rise buildings would not be suitable for the Laurieton area.

* Investigating the potential for tourism development on the North Shore of the mouth of the Hastings River.

* The feasibility of upgrading or relocating Port Macquarie airport.

* Upgrading boating facilities at Camden Haven, Laurieton and the Hastings River.

* The possibility of making land available for water-side marine, hotel and commercial facilities adjacent to the harbour at Camden Haven and Laurieton.

* The possibility of establishing a low to medium priced family style resort at the southern entrance to the Camden Haven River.

7.4 Potential Tourist Towns

Outside the nominated tourism Growth Centres, there are a number of townships such as Nambucca Heads, Yamba and Bellingen which have the potential to develop into tourist towns. Tourist towns offer a range of entertainment and hospitality services of a standard usually associated with major towns or single resort complexes. They are characterised by small, inter-dependent businesses.

Services in these towns include accommodation, restaurants, entertainment, shopping and tours.

The development of a tourist town economy in Nambucca Heads, Yamba, Bellingen and other centres will require the development and implementation of a long-term tourism plan for each centre. This will include identifying an appropriate theme or style for the town and implementing controls that will ensure that development is in accordance with this theme. It will also require co-operative marketing.

Objective

To encourage the development of towns such as Nambucca Heads, Yamba and Bellingen as Tourist Towns.

Strategy

1. To encourage Local Councils to prepare Local Tourism Plans for these towns. The Local Tourism Plan would identify potential tourism development sites and forms, and provide recommendations and management proposals for co-ordinating tourism development in each town.

2. Encourage the development of:-

   - serviced apartment complexes
   - family style resorts
   - guesthouses
   - lodges and bunk house style accomodation.

3. Develop a theme for the towns and promote good urban design and landscaping in line with the theme.

4. Encourage the establishment of speciality shops, services and tours that provide attraction and are responsive to tourist needs.

5. Develop and promote special events such as carnivals and festivals.

7.5 Coastal Holiday Villages

Coastal holiday villages such as Iluka and Cresent Head, are an historical form of development on the North Coast, and are of primary importance for tourism during peak holiday periods. They are characterised by camping grounds, caravan parks and budget accommodation close to beaches and rivers. Generally only basic services are available.

During off-season periods these villages revert to their primary use as fishing villages, retirement centres or dormitory suburbs.

Objectives

1. To preserve the inherent attractiveness of coastal holiday villages.

2. To preserve the capability of holiday villages to service a high transient population during part of the year.

Strategy

1. Promote the development of transient landuses such as holiday cabins, caravan parks, and camping grounds in preference to permanent residential accommodation within or adjacent to existing holiday villages.

2. Discourage the development of "gun barrell" flats i.e., small two and three storey box-shaped flat buildings on small allotments.

3. Limit permanent occupation of caravan parks and budget accommodation establishments. While it is recognised that permanent residents are necessary in some instances to maintain the economic viability of establishments in the off season, controls must be adopted to ensure that sufficient accommodation is available for visitors during the peak season.

4. Restrict ribbon development along access roads and the coast and river areas.

5. Encourage the preparation of Development Control Plans for each village. These Plans should enhance the character of the village by promoting good urban design and landscaping.

7.6 Major Inland Service Centres

While the major inland service centres are not primary tourist destination areas they make a significant contribution to the tourist fabric of the Region. These centres are:-

* En-route stop-over points.

* Day visitation areas.

* Short stay destination areas with visitors attracted by special events, or using the centre as a launching point to visit other areas.

* Gateways to the Region. Taree, is the southern gateway while Grafton and Casino are major gateways from the New England Region.

The centres are also potential sources of local demand for new tourism products.

Objective

1. To increase the level of visitation to the inland centres.

Strategy

1. Upgrade existing visitor facilities and provide additional facilities to cater for visitor needs.

2. Strengthen the links between coastal destination areas and hinterland towns by:-

   - developing scenic drives and tourist routes which link the inland centres with coastal hinterland attractions.

   - improving signposting;

   - increasing marketing and promotion, especially aimed at coastal visitors during peak holiday periods;

   - developing and promoting river boat connections;

3. Develop and promote special events e.g. carnivals, festivals and sporting events aimed at attracting the day tripper and special interest markets.

4. Encourage the development of a town theme and adopt appropriate urban design guidelines to enhance and consolidate this theme.

5. Encourage the preservation and restoration of historic buildings, streetscapes, etc.

7.7 Inland Towns and Villages

Many of the inland towns and villages form significant components of the attraction base of the Region. Bangalow, Wauchope and Nimbin are excellent examples.

Objective

To encourage the development of the inland towns and villages as day visitation areas without detracting from their inherent attractiveness and appeal.

Strategy

* Enhance the "character" of the town/village through appropriate urban design controls.
* Implement landscaping projects along entrance routes and at key tourist areas.
* Encourage the development of retail outlets that provide an attraction and are responsive to tourist needs, e.g. art and craft shops, coffee shops, and restaurants.
* Co-ordinate retail trading hours to coincide with periods of peak tourism demand.
* Improve signposting both to and within the town/ village.
* Improve packaging and marketing of the town/village at the major destination areas within the Region.
* Develop tourist circuit routes between the coast and the hinterland.
* Develop facilities to cater for special interest groups.

7.8 Hinterland Rivers, Dams and Waterways

The North Coast rivers, dams and waterways are under-utilised for tourism purposes. These resources have the potential to provide a variety of land and shore-based tourism activities including houseboat activities, fishing, charter vessels and white water rafting. There is also scope for the development of resort complexes, and other accommodation forms oriented to river usage.

Objective

To increase the tourism use of the North Coast rivers, dams and waterways.

Strategy

To achieve this objective the Tourism Commission will work with relevant authorities to:-

1. Identify and investigate tourism and recreational opportunities provided by these waterways.

   Specific opportunities include:-

   - Development of river boat services between the inland service centres and the coastal holiday villages.
   - Development of commercial facilities to cater for visitor use of these waterways, e.g. marinas, accommodation, restaurants and house-boats.
   - Development of activities, packages e.g. white water rafting expeditions, charter fishing and boating operations.

2. Liaise with relevant Government Departments to bring these opportunities on-line.

7.9 National Parks, State Recreation Areas, State Forests and Crown Reserves.

National Parks, State Recreation Areas, State Forests and Crown Reserves form a very significant but greatly under-utilised tourism and recreation resource within the Region. At present visitor facilities are oriented towards passive day use recreation, with limited camping and cabin facilities provided in some areas.

Potential exists for the development of a range of commercial and non-commercial tourist facilities, in or adjacent to, some of these Parks, Reserves and Forests including accommodation complexes of a specialist or retreat nature such as Binna Burra Lodge and specialist tours e.g., horse riding. These products must be designed, constructed and managed in a manner that protects the natural environment, and does not compromise other legitimate land uses.

Objective

To encourage the development of a range of tourism facilities in and adjacent to National Parks, State Recreation Areas, State Forests and Crown Reserves, which are in harmony with the environment and do not compromise other legitimate uses of the land.

Strategy

1. Identify and investigate commercial tourism development opportunities in and adjacent to these areas.

2. Encourage the development of tourism facilities which will maximise the tourism potential of these areas without unduly compromising other legitimate land uses. Any development should be constructed in a manner and form which ensures the preservation of rare and endangered species, is sympathetic to the environment, and optimises the interface between the natural attraction and the resultant human experience.

3. Encourage the preparation of Plans of Management for key visitor areas. These plans should provide for a range of visitor facilities including commercially viable operations, where appropriate.

4. Ensure that consideration is given to the tourism development potential of land, as part of the decision making process involved in determining whether land should be transferred to the National Parks and Wildlife Service or the Forestry Commission.

5. Encourage the upgrading of access roads to key locations and the linking of these locations with tourist drives.

6. Encourage the packaging, marketing and promotion of these resources.

7.10 Agriculture and Fisheries

The diverse agricultural and fishing industries provide the opportunity to pursue a variety of tourism related activities ranging from major agricultural/fisheries theme parks to farm holidays. Potential exists to attract both domestic and international tourists to enjoy the Region's agricultural and fisheries attractions, especially during off-peak periods. The agricultural landscape is also an important scenic attraction and should be preserved where possible.

Objectives

1. To capitalise on the Region's diverse range of agricultural and fishery resources.

2. To protect the scenic resource afforded by agricultural activities.

Strategy

1. Encourage the preservation of scenically attractive rural areas particularly adjacent to major tourist routes, tourist

attractions and tourist destination areas. This will include limiting road frontage subdivision and ribbon development in non-urban areas and ensuring that new buildings enhance the prevailing rural character.

2. Encourage the development of quality tourist facilities and products in association with agricultural and fishery activities. Activities to be encouraged include:-

- Agricultural Theme parks
- Agricultural and Fisheries tours
- Farm Holidays
- Bed and Breakfast Establishments
- Charter fishing

3. Liaise with the Department of Agriculture and agricultural community to encourage public access and visitation to agricultural research establishments and to agricultural enterprises of a specialist or unusual nature such as prawn farms, macadamia nut plantations and tea plantations. Issues to be addressed include opening hours, visitor facilities, inclusion in package tours and marketing.

8. TRANSPORT STRATEGY

The need for a flexible and complementary transport service and infrastructure is a necessary ingredient in the development of tourism. A system that is able to move people effectively and efficiently in and around the Region will support and encourage the development of tourism.

8.1 Objectives

The objectives of this Transport Strategy are:-

1. To identify feasible means of improving access to and throughout the Region; and

2. To enable Transport and related Authorities to develop and initiate programmes that will assist the tourism industry on the North Coast.

8.2 Roads

Given that 80 per cent of all domestic tourists travel by car and a further 5 per cent by coach, the establishment of a good road network is essential to the development of tourism.

The State Government recently released a "Roads 2000" Programme that outlines plans for road development in N.S.W. to the end of the century. In formulating this Programme the Government has been mindful of the needs of the Tourism Industry and major roadworks for key destination areas such as the North Coast, are planned.

Improvements to the road system are the responsibility of the Department of Main Roads and the Local Councils. At present long delays and slow traffic movements are commonly experienced on the Pacific Highway during peak periods. This detracts from the holiday experience and creates an incentive for visitors to find other holiday destinations. Funds have been allocated from the "Roads 2000" Programme to enable the continued upgrading of this route.

In addition good urban planning is required to prevent increases in travelling time and to prevent ribbon development along tourism routes.

Strategy

The Tourism Commission will work closely with relevant Authorities to:-

1. Encourage the continued up... ing of the Pacific Highway. This is the most important rism route in the Region. Particular attention should be given to by-passing towns and villages, and reducing bottle-necks.

2. Encourage the development of other routes of importance to tourism such as:-

    - <u>Link roads</u> connecting the Highway to the Coast at Tweed, Byron Bay, Yamba, Port Macquarie (northern route) and Laurieton.

    - <u>Scenic routes</u> such as the Murwillumbah/Kyogle, Nimbin/Lismore, Urunga/Bellingen/Dorrigo roads.

    - Important <u>coastal roads</u>, e.g. the Tweed Coast road from Chinderah to Mooball, Byron Bay to Ballina, Port Macquarie via Laurieton.

    - <u>Roads to National Park</u> and State Forests e.g. Mount Warning, Minyon Falls/Rummery Park.

3. Develop circuit tourist routes.

4. Improve signposting.

5. Develop roads to major attractions.

6. Improve roadside facilities.

7. Encourage the landscaping of entrance routes to towns, villages and major destinations.

8. Encourage the control of development along scenic routes, coastal roads, link roads and highways.

8.3 <u>Coach and Bus Services</u>

It is considered that an efficient, flexible, direct and frequent intrastate coach transport network is a major factor required to boost tourism on the North Coast.

At present, coaches are an under-utilised mode of transport in the Region. This is largely due to the intrastate licensing provisions of the State Transport (Co-ordination) Act, 1931. These provisions have restricted the right of coach operators to pick-up and set-down passengers at will. These provisions have been to the the detriment of tourism preventing the development of a wider network of short-haul intrastate coach services and related products such as coach-linked accommodation chains.

Consequently, the growth of both international and domestic tourism has been inhibited as visitors have restricted opportunities available for moving freely around the State under competitive fare structures.

In November, 1986, the Government relaxed restrictions to allow expanded coach services on the North Coast corridor for a trial period as part of an overall review of long-distance bus licensing in N.S.W.

Coaches are permitted under the trial deregulation to pick-up and set-down along the corridor (basically the Pacific Highway) with a minimum journey of 160 km permitted. Journeys also operate to and from Sydney for people north of the Hunter River.

To date, the trial arrangements appear to be well accepted by the travelling public and the Premier, in releasing the Tourism Development Strategy, announced that the Government will continue to de-regulate coach licencing in N.S.W.

Strategy

The Tourism Commission will:-

1. Liaise with the Ministry of Transport to seek the permanent relaxation of Intrastate Coach Licencing Regulations to enable the development of short-haul coach travel within the Region.

2. Encourage the development of inclusive Fully Independent Travel (FIT) packages based on short-haul coach transport.

3. Encourage the development of charter coach package tours.

4. Encourage the development of multi-modal transport packages e.g. fly/coach.

5. Encourage the establishment of integrated coach transport/accommodation developments.

8.4 Rail

The State Rail Authority (SRA) is progressively upgrading rail services to the North Coast. The introduction of the daylight XPT and coach services has improved the services available. Old stock is currently being phased out and will be replaced by High Performance Trains (HPT) which will enable improved on-board hospitality services. As part of the improvement programme the rail reservation system, which currently limits forward bookings to one month ahead, is being upgraded to make it comparable with the airline system.

The SRA has also introduced a series of NSW and interstate package holidays which include a range of North Coast products. There is potential for additional products to be included in the SRA packages.

Strategy

The Tourism Commission will liaise with the State Rail Authority to:-

1. Encourage the continued upgrading of rail services to the Region that are targeted to visitor needs. Consideration will be given to:-

   - departure times
   - arrival times
   - frequency of service
   - speed and standard of service
   - co-ordination with other transport services
   - additional services during peak periods
   - availability of back-up services.

2. Encourage increased packaging of North Coast rail tours.

3. Encourage the development of multi-modal transport packages (e.g. Rail/Drive, Coach/Rail).

4. Encourage the development of improved booking services.

5. Encourage the development of tourist accommodation and other facilities such as restaurants and kiosks on/or adjacent to State Rail Authority lands.

6. Encourage the development of coach and rail interchange facilities.

8.5 Aviation

The development of an air based and hospitality industry in both N.S.W. and the North Coast Region is in its infancy and the potential for selling travel holidays by air remains largely unexplored.

Within the Region the most important airports for tourism development are:-

Coolangatta
Ballina
Coffs Harbour
Port Macquarie

These airports service the major Growth Centres and priority should be given for their upgrading and maintenance.

Other airports such as Casino, Grafton, Kempsey and Taree are located too far inland to effectively service the Tourism Growth Centres.

To improve air services and develop air products for the Region the following issues need to be addressed:-

* The importance of jet airports to facilitate major tourism development. Major destination areas and resorts need to be located within close proximity (ie. maximum of 45 minutes drive) to the airport.

* The linking of the major destination areas by efficient jet air services to the major visitor generating regions of Sydney and Brisbane. Efficient air services should be coupled with the development of resort-style facilities and holiday packaging.

* Matching air services with development. A chicken and egg problem exists in relation to new development. The traditional view is that provision can be made to expand air services in response to demand. However, in many instances demand cannot be generated without the additional air service. The successful results of parallel development of tourism resorts and air services is evidenced in Queensland, for example Hamilton Island.

* A similar approach needs to be taken in upgrading the key airports on the North Coast. Tourism developers and operators need to be assured that a mechanism exists for integrated developments of this kind, and that the process of gaining approval for new services or upgrading existing facilities in conjunction with major developments will not be a drawn out and tedious process.

* Encouraging the airlines to invest in development. This will ensure that good air services at competitive prices are provided and promoted.

<u>Strategy</u>

To encourage improved air services and the development of air packages the Tourism Commission will liaise with the relevant authorities and airline companies on the following:-

1. The upgrading and licencing of Ballina airport to jet standard. This is seen as a critical factor in stimulating major tourism development activity in the Ballina-Byron-Lismore Growth Centre.

2. The allocation of resources for the continued operation and upgrading of Coolangatta, Ballina and Coffs Harbour airports.

3. The feasibility of relocating Port Macquarie airport and developing the new airport to jet standard.

4. The provision of air services from North Queensland, Melbourne and New South Wales regional country centres e.g. Newcastle and Albury, to the major destination areas.

5. Increased intra-regional and short-haul air services, e.g. Sydney/Port Macquarie/Coffs Harbour/Ballina/Brisbane.

6. The potential for airline participation in resort development on an equity/partnership basis.

7. The development of inclusive air tour packages such as fly-accommodation and fly-drive packages.

9. CO-ORDINATION STRATEGY

9.1 Co-ordination within Government

The responsibility for implementing the North Coast Tourism Development Strategy rests largely with the four agencies comprising the Inter-Departmental Committee (IDC).

Of these agencies, the Tourism Commission has the primary responsibility for co-ordinating tourism development, the Department of Environment and Planning is responsible for providing a planning climate that will facilitate appropriate foms of tourism development, the Office of State Development (Premier's Department) is responsible for co-ordinating major projects, while the Crown Lands Department is responsible for managing the Crown Estate including making land available for tourism development.

In addition to the IDC members, most other State Government Authorities have responsibilities in areas which directly affect tourism development. These areas include investment, public works, transport and management of natural resources. The role that these Authorities have in implementing the Strategy has been discussed in preceding sections of this document.

To facilitate development the Government has also established the New South Wales Investment Corporation as its vehicle for promoting economic growth, through the establishment of commercially viable enterprises, including tourism enterprises. The Corporation will play a role in identifying tourism development and opportunities, venture structuring and project financing.

Co-ordination within Government can be achieved by the Tourism Commission assisting other Authorities to take into consideration the impact of their policies and activities on the tourism industry, and to encourage them to make a positive contribution towards promoting growth were-ever possible.

9.2 Local Government Authorities

Local Government Authorities play a major role in the tourism development process. Broadly, these Authorities are responsible for:

- planning;
- development control;
- providing basic infrastructure and utility services; and
- providing and maintaining visitor facilities.

The role of Local Councils in facilitating tourism development in the Region is:-

1. Liaising with Public Authorities, local communities and the public sector to encourage and promote tourism development in line with the North Coast Tourism Development Strategy.

2. Working with the Tourism Commission to prepare Local Tourism Plans that identify potential development opportunities and provide guidelines for tourism development. As part of this process, assist with the identification of potential tourism development sites and appropriate forms of development.

3. Developing planning controls and policies that will facilitate the establishment of commercially viable tourism enterprises.

4. Ensuring that development proposals are of a high standard.

5. Encourage the establishment of new tourism plant and infrastructure by providing assistance and positive advice to developers.

6. Encouraging the enhancement of local area by the improvement and development of:-

   - Access to attractions.

   - Quality visitor facilities and amenities such as picnic areas, rest areas, public toilets, parks and reserves, and boat ramps.

   - The appearance of towns, villages and attractions.

   - The appearance of major entrance roads and at the main points of visitor activity through landscaping and tree planting.

   - The appearance of shop-fronts, advertising structures etc.

   - Effective signposting to towns, villages and attractions, services and scenic routes.

9.3 <u>Private Sector - Tourism Developers, Investors and Operators</u>

The State Government is willing to assist the Private Sector to establish appropriate forms of tourism development in the Region.

The types of development that the Government is encouraging are discussed in Chapter 7.

The type of advice and assistance that will be provided include:-

1. Identifying tourism development opportunities, and bringing these opportunities to the attention of the market place;

2. Providing advice on the suitability of specific sites, project design and feasibility;

3. Providing advice and assistance with obtaining planning and licencing approvals and co-ordinating input from other Government Departments; and

4. Introducing potential project participants i.e. the developers, investors and operators.

5. Providing letters of support where appropriate, to accompany planning and financial applications.

6. Encouraging proven tourism operators to expand their present operations - both in scale and range (ie. horizontal and vertical integration).

APPENDIX 1

ESTIMATE OF VISITS, VISITOR NIGHTS, SPENDING AND EMPLOYMENT BY LOCAL GOVERNMENT AREA - 1985/86.

LOWER AND MID NORTH COAST.

	Visits	Visitor Nights	(2) Spending ($000)	(3) Employment
Coffs Harbour S.	541,200	2,605,336	130,300	2,400
Grafton C.	151,700	730,284	36,500	680
Hastings S.	682,650	3,420,759	171,000	3,200
Kempsey S.	157,850	790,986	39,600	740
Maclean S.	82,000	394,748	19,700	370
Nambucca S.	118,900	572,384	28,600	540
Taree, Gtr. C.	268,550	1,345,704	67,300	1,260
Others (1.)	47,150	250,799	12,500	230
TOTAL	2,050,000	10,111,000	505,550	9,420

1. Local Government Areas for which ABS statistics are not published:

   Belligen S.
   Copmanhurst S.
   Nymboida S.
   Ulmarra S.

2. Based on BIE expenditure estimate: $50 per visitor night.

3. Based on BIE estimate of $53,900 to generate one full-time equivalent position.

ESTIMATE OF VISIT, VISITOR NIGHTS, SPENDING AND EMPLOYMENT BY LOCAL GOVERNMENT AREA - 1985/86.

FAR NORTH COAST

Local Government Area	Visits	Visitor Nights	(2) Spending ($000)	(3) Employment
Ballina S.	236,130	985,843	49,300	920
Byron	142,604	595,371	29,800	560
Casino M.	43,522	181,704	9,100	170
Lismore C.	137,048	572,175	28,600	540
Tweeds S.	344,472	1,438,170	71,900	1,350
Others (1.)	22,224	92,737	4,600	90
TOTAL	926,000	3,866,000	193,300	

1. Local Government areas for which ABS statistics are not published:
   Kyogle S.
   Richmond River S.

2. Based on BIE expenditure estimate: $50 per visitor night.

3. Based on BIE estimate of $53,900 to generate one full-time equivalent position.