



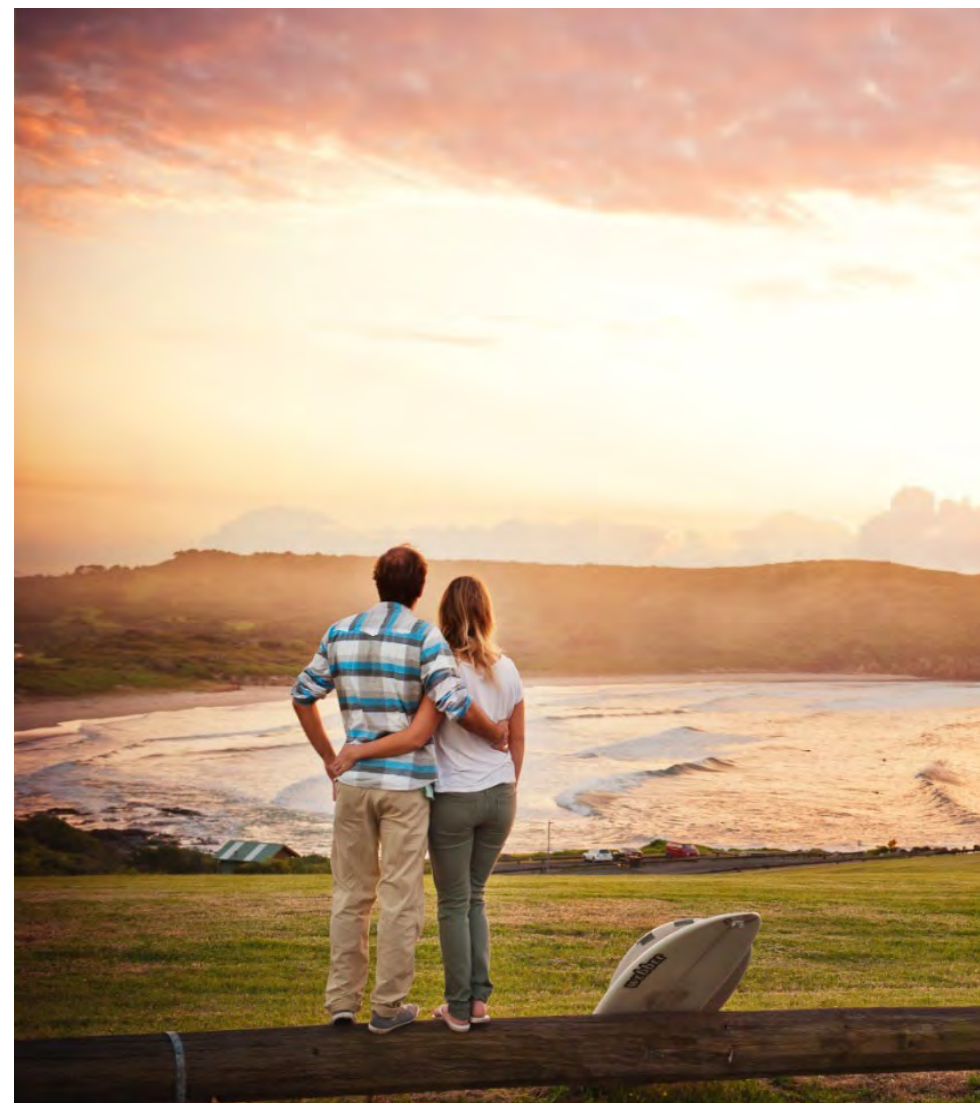
SHELLHARBOUR CITY

Destination Management Plan 2018 - 2022



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Shellharbour City Destination Management Plan

A joint initiative of:

Tourism Shellharbour and Shellharbour City Council



DMP prepared by:

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Shellharbour Airport, The Links Golf Course Shell Cove, parks and reserves, walking paths and cycleways, recreation and sporting facilities, marine infrastructure, picnic facilities and other amenities. Council also funds and supports a range of events and activities that attract visitors to the City.

Tourism Shellharbour and Shellharbour City Council are working together to prepare and implement the Destination Management Plan for Shellharbour City.

1.2 Destination Management

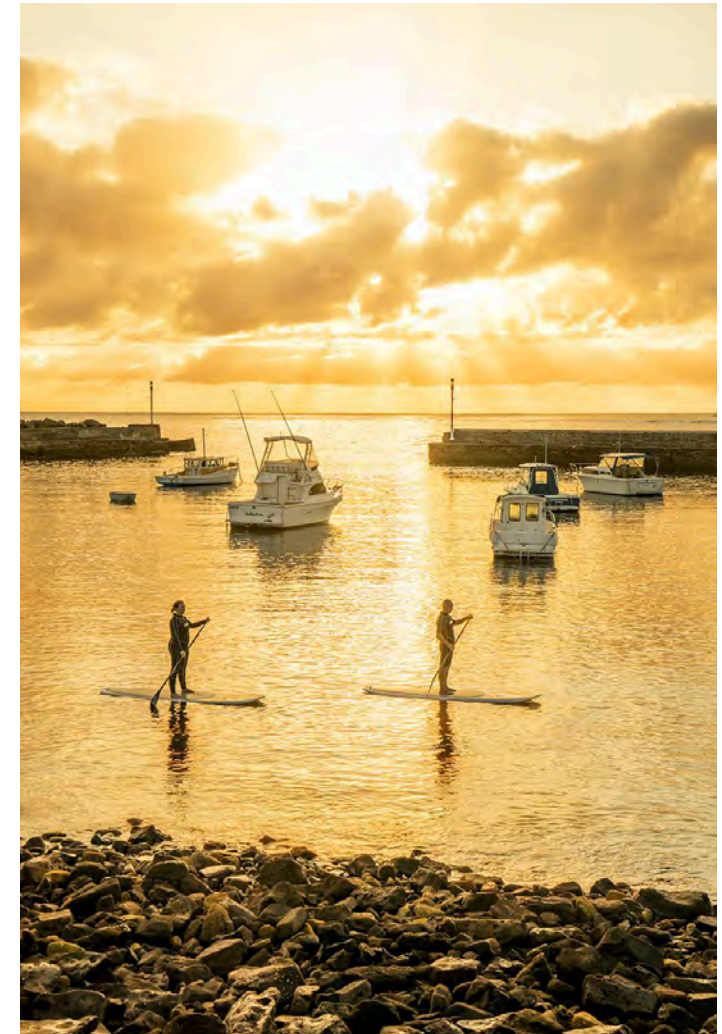
Destination management introduces a 'holistic' approach to the development, management and marketing of tourist destinations. The approach requires that all tiers of Government, the tourism industry and business and community leaders work together to develop and manage destinations to ensure that tourism adds value to the economy and social fabric of the area, is sustainable into the future, is resilient to external shocks and is responsive to changes in both the marketplace and competitive environment. It involves formulating a strong vision for the future of the destination and putting in place the framework and resources to 'deliver' this vision.

Destination Management Plans (DMPs) are one of the tools introduced by the Federal and State Government, to identify the product and infrastructure needed to support and facilitate growth in visitation and to set the directions and priorities. A DMP is a pre-requisite to accessing the Regional Tourism Fund and will assist in accessing a range of Federal and State Government grant programs.

1.3 Purpose of the Shellharbour City Destination Management Plan (DMP)

The purpose of the Shellharbour City DMP is to provide the direction and framework for taking City's visitor economy forward over the next five years. The primary goal of this Plan is to increase visitor expenditure within the City, with resultant economic and social benefits for the local community. To achieve this, the Plan focuses on:

- Identifying opportunities to strengthen and grow the City's market base to deliver visitation year-round.
- Understanding the needs and expectations of visitors and ensuring that the infrastructure, facilities and services are in place within the City to meet these.
- Encouraging and facilitating the development of the City's tourist attractions, activities, experiences, accommodation and events.
- Setting the directions for marketing and promoting the City.
- Identifying priorities to ensure the most effective use of limited funds and resources.



Shellharbour Harbour: Tourism Shellharbour

1.4 Outcomes being Sought

The main outcomes being sought from the Shellharbour DMP are:

- A growing visitor economy that is economically, socially and environmentally sustainable.
- Higher profile and increased awareness of Shellharbour City.
- Further development of quality attractions, experiences and activities for both visitors and local residents.
- The ability to effectively leverage emerging tourism opportunities.

1.5 Ownership

Ownership of the Shellharbour Destination Management Plan is vested in Tourism Shellharbour with the Plan available for use by Shellharbour City Council and Tourism Shellharbour members.

1.6 Implementation

The DMP is the starting point for driving growth in the visitor economy within Shellharbour City. It will however take time, resources and commitment to implement the strategies and actions incorporated in this Plan.

It is important to note that responsibility for product and infrastructure development will rest primarily with Shellharbour City Council, Government Agencies and the private sector. Working with Council and the tourism industry, Tourism Shellharbour will be responsible for market and industry development, delivery of visitor information services and marketing and promotion.

Growing and sustaining the visitor economy requires a strong partnership between Tourism Shellharbour and Shellharbour City Council; strategic relationships with surrounding LGAs; regional tourism organisations and Government agencies; and support from the local community, tourism and business operators.

Several of projects and actions in this Plan that are ‘aspirational’ and are well beyond Council’s financial capacity to implement in their entirety at this time. These projects are however, included in-case funding opportunities arise in the future. The fact that the projects have been identified and documented as important for the development of the local and/or regional visitor economy, should assist in securing funding.

To be effective, the DMP must be a living document that is constantly evolving. The recommended actions need to be implemented and the results evaluated. Periodically the DMP will need to be revised, building on what has been achieved, so that Shellharbour City can continue to move forward.



1.7 Abbreviations Used in this Plan

ABS	Australian Bureau of Statistics
DMP	Destination Management Plan
DPI	NSW Department of Primary Industries
DNSW	Destination NSW
DSSS	Destination Sydney Surrounds South
LGA	Local Government Area
MTB	Mountain Bike
NPWS	National Parks & Wildlife Service
RMS	Roads & Maritime Services
RV	Recreational Vehicle (e.g. motorhome, campervan)
RPT	Regular Public Transport (air services)
SCA	State Conservation Area
SCC	Shellharbour City Council
TRA	Tourism Research Australia
VEAP	Visitor Economy Action Plan
VFR	Visiting Friends and Relatives
VIC	Visitor Information Centre



Macquarie Pass National Park: Tourism Shellharbour

2. STRATEGIC CONTEXT

The Shellharbour City Destination Management Plan (DMP) has been prepared within the framework set by Federal and State Government policies for the development and management of tourism destinations. It is also consistent with Regional planning and development strategies, and with the directions and strategic directions of the Shellharbour City Community Strategic Plan.

2.1 Australian Government - National Long Term Tourism Strategy

The National Long Term Tourism Strategy for Australia recognises that the future of tourism is dependent on providing 'compelling and sustainable experiences' to consumers; and that for Australia to move up the international tourism value chain and to remain competitive, requires 'innovation, continuous improvement and renewal' of products, experiences and infrastructure. To facilitate this, the Commonwealth Government, in conjunction with the State Tourism Agencies is advocating for integrated planning, development and management of tourism destinations, with localities encouraged to prepare and adopt Destination Management Plans (DMPs).

2.2 NSW Government – Visitor Economy Action Plan

Building the visitor economy is a key priority of the NSW Government, with the visitor economy recognised as having the potential to drive growth in State's economy. In 2010-11, the NSW Government set a target for the Visitor Economy to double overnight visitor expenditure to NSW by 2020. The Visitor Economy Action Plan sets the vision and framework for achieving the growth target, with destination management being part of the approach adopted.



Rock Platform Shellharbour: JRA

Vision for the 2020 NSW Visitor Economy

By 2020, NSW will have a high-performance visitor economy that has doubled its contribution to the State's economy as measured by overnight visitor expenditure (in nominal terms).

NSW will be established as the premier destination for visitors from key priority target markets and market segments, including holiday/leisure, business, business event, education, employment, backpacker, and 'visiting friends and relatives' (VFR) visitors.

The best of the State will be showcased through appealing, authentic and high-quality visitor experiences. The 2020 visitor economy will be characterised by a culture of innovation, entrepreneurship and industry leadership. Businesses in the visitor economy will contribute strongly to NSW's economic, social and cultural strengths.

Destination Management Plans will provide clear frameworks to guide Government support at all levels and industry investment to deliver experiences that match and exceed visitor expectations and provide growth.

NSW will be a State that welcomes visitors and celebrates the NSW experience, reflecting civic pride in the State and its success.

2.3 Illawarra Shoalhaven Regional Plan

The NSW's State Government's vision for the Illawarra Shoalhaven Region is:

'A sustainable future and a resilient community, capable of adapting to changing economic, social and environmental circumstances'.

Key elements of the Vision include:

- Providing access to a range of lifestyle choices and connectedness to the Region's stunning landscapes and biodiversity.
- Building a strong and diversified economy that generates high-quality jobs.
- A strong network of centres delivering quality facilities and services.
- Developing sustainable, inclusive residential communities.
- Providing the infrastructure needed to support economic and residential growth.

The Plan identifies tourism as a priority growth sector, recognising that assets such as the Illawarra Escarpment, the Shellharbour Airport, The Waterfront, Shell Cove, the Wollongong Entertainment Centre, Lake Illawarra, and Jervis Bay can drive growth opportunities in the tourism industry through trails and experiences, marine-based tourism, and events-based visitation.

Strategic directions in this Plan that will help to drive growth of Shellharbour City's visitor economy include:

- Growing the Shellharbour City Centre.
- Continued development of the Shellharbour Airport, including fostering growth of the tourism aviation sector.
- Developing a stronger marine-based tourism sector, with the Shell Cove Harbour and Waterfront being the key driver.
- Investing in sport and recreational infrastructure.
- Securing the 'health' of Lake Illawarra.



Lake Illawarra Art Trail: JRA

2.4 Regional Development Australia Illawarra – Illawarra Regional Plan 2013-2020

Regional Development Australia Illawarra (RDAI) vision for the Illawarra Region is for **‘a prosperous, vibrant and equitable region seizing its opportunities together’**, with the focus being on working with stakeholders to achieve a **‘a diversified, productive and innovative economy’**.

Tourism, Arts & Culture is one of RDAI’s six priorities, with the tourism focus being on:

- Cooperative activities.
- Accessing the Asian market – capitalising on opportunities and removing barriers.
- Leveraging events.
- Capitalising on assets to build product.

2.5 Destination Sydney Surrounds South Destination Management Plan

Destination Sydney Surrounds South is currently preparing a DMP for the Destination Network Region. The DMP Discussion Paper sets the 2022 vision for the region as: **‘Be the #1 overnight short break destination for our target Sydney residents and visitors’**, with the key target markets identified as:

- Convert the 200km radius couples, families and young singles for short-breaks
- Leveraging international growth markets to Sydney into overnight stays
- The ‘travel for a purpose’ drive market – nature-lovers, cruise, weddings, events and culture

Some of the initiatives being considered by the Destination Network include increasing industry investment in marketing, driving investment in accommodation, and supporting the development of new agri-tourism and nature-based experiences.

2.6 Marine Tourism Strategy for Southern NSW

The Illawarra Shoalhaven Joint Organisation of Councils in conjunction with the Department of Premier and Cabinet are preparing a Marine Tourism Strategy for the NSW South Coast. The Strategy is looking at opportunities to grow marine tourism and the product and infrastructure development needed to encourage and support growth.



Shellharbour Village: Tourism Shellharbour

2.7 Shellharbour City Community Strategic Plan

The Shellharbour City Community Strategic Plan 2013-2023, articulates the vision, directions and framework for coordinating development, investment and service delivery within the City. Council is building a vibrant, dynamic, liveable city, that protects and promotes its natural environment and has a strong local economy. One of Council's core objectives is for the City to **'welcome, engage and attracts visitors'**.

Key strategies to grow the City's visitor economy include:

- Establishing the Shell Cove Boat Harbour as a lifestyle and boating destination providing development, tourism and community opportunities.
- Marketing Shellharbour City as a tourist destination of choice.
- Supporting a dynamic, responsive and sustainable local tourism industry.

Council's objectives and strategies in relation to encouraging and supporting creative opportunities, events and activities; ensuring that the City is safe and friendly; providing a diversity of accessible recreation opportunities and facilities; protecting the City's natural environment and celebrating its lifestyle, culture and heritage; and providing quality infrastructure, assets and facilities; provide a strong platform for growing and managing the City's visitor economy.

Shellharbour City – 2030

In 2030 Shellharbour City is a dynamic city that values and celebrates the unique diversity of our people, places and environment. We are a connected and safe community, working together to create a safe, sustainable future that provides opportunities for all to achieve their potential.



Shellharbour Harbour: Tourism Shellharbour

3. OUR DESTINATION

3.1 Shellharbour City

Shellharbour City is a vibrant, dynamic coastal city located approximately 100 kilometres south of Sydney. The City is part of the Illawarra Region of NSW and forms the northern gateway to the NSW South Coast. The City shares boundaries with Wollongong City to the north, the Municipality of Kiama to the south and Wingecarribee Shire to the west. The traditional custodians of the land are the Wodi Wodi tribe of the Thurawal Aboriginal people.

Shellharbour City covers an area of approximately 154 square kilometres, extending from Lake Illawarra and the Macquarie Rivulet in the north, through to the Knights Hill ridge and Minnamurra River in the south and from the coastline, west to the Illawarra Escarpment. The eastern and central parts of the City are highly urbanised, while the southern and western parts of the City are primarily rural, flanked by native forests on the steeper slopes of the Illawarra Escarpment. The coastline, Lake Illawarra, rural areas and the surrounding escarpment are dominant features of the Shellharbour landscape and form part of the City's appeal and attraction base.

Shellharbour City is highly accessible. The City sits at the junction of three significant routes, the Princes Highway (Sydney-Melbourne Coastal Touring Route) which is a national highway connecting Sydney and Melbourne via the east coast of Australia; the Illawarra Highway which is a significant east-west route linking the coast and the Southern Highlands of NSW and providing access to the Illawarra Region from the Hume Highway; and Grand Pacific Drive, a high profile coastal touring route through Sydney's Royal National Park, along the Illawarra coast to the Shoalhaven River. Via the Illawarra Rail Line, the City has rail services to Sydney and Wollongong to the north and to Kiama and Nowra- Bomaderry to the south.

Regular passenger air services operate from Shellharbour Airport to Melbourne and Brisbane, with the City also having ready access to Sydney Airport and to the Western Sydney Airport, which is under construction at Badgerys Creek. The City is also accessible by boat. It is located just south of the cruise ship facilities at Port Kembla, and with the opening of the City's Shell Cove Harbour and Marina in 2020, will provide a safe harbour and destination for touring boats.

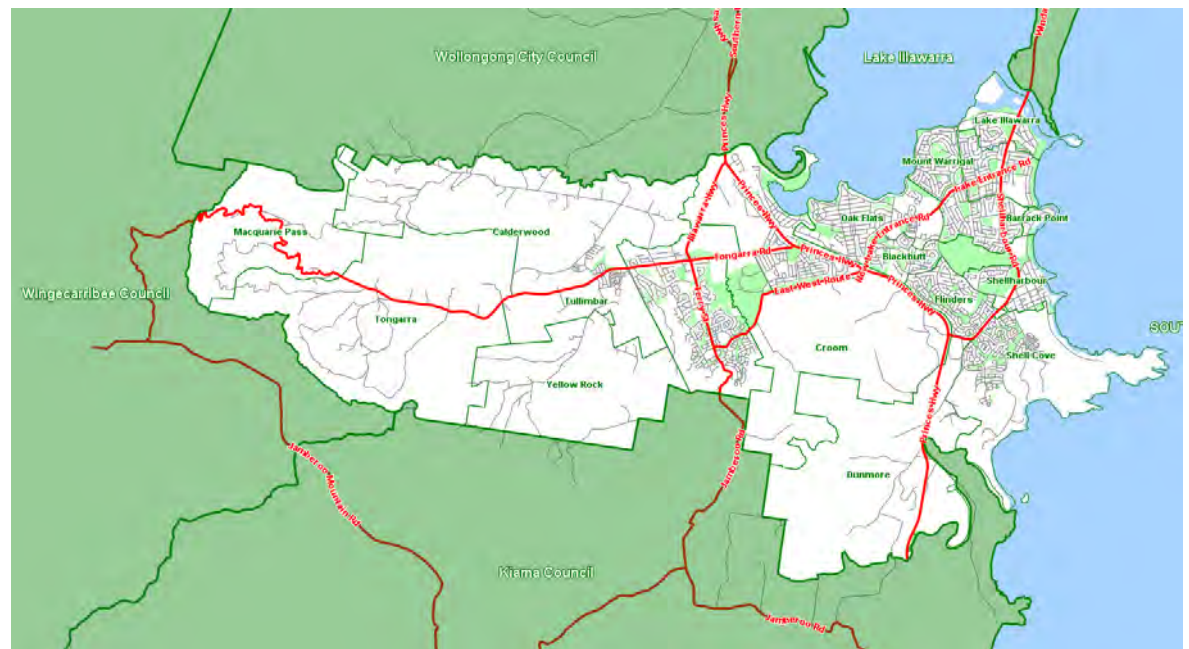


Figure 3.1 Shellharbour City

Source: Shellharbour City Council



Declared a city in 1996, Shellharbour is one of the 'youngest' and fastest growing cities in NSW. Over the past two decades, the City has made the transition from a small, rural municipality to a thriving coastal city. At the 2016 Census, Shellharbour City had a population of 68,460 people (7.6% higher than the population in 2011)⁴. The population of the City is forecast to increase to 81,100 by 2026 and to 90,500 by 2036.⁵

Shellharbour City Centre is the administrative, retail and commercial centre of the LGA, and is a nominated regional centre, within the Illawarra Region. The City Centre overlooks Lake Illawarra with views west to the escarpment. The new Civic Centre includes a major cultural precinct (Council Administrative Centre, City Library and Museum Auditorium and City Square), Stocklands Shellharbour which is the largest shopping mall in the Illawarra Region, a 'high street' and a bulky goods retail precinct. The Hospital and TAFE are located on the edge of the City Centre.

Within the City, town centres are located at Warilla Grove in the northeast and at Albion Park to the west. There are six local centres – Shellharbour Village, Shell Cove and Warilla in the east of City, and Oak Flats and Albion Park Rail in the centre, and Tullimbar in the west. Shellharbour Village and Albion Park are the oldest settlements in the City, with heritage buildings being part of the character of these towns. Shellharbour Village is very popular with both residents and visitors.

The main growth areas are Shell Cove along the coastal edge of the City and the Tullimbar – Calderwood Valley area to the west and north west of Albion Park. The final stages of Shell Cove, which are due for completion in 2025, includes the Harbour and Marina; a waterfront tourism, recreation and dining precinct; shopping centre; hotel; regional playground; business park and 1,556 dwellings. For nautical tourism, the Shell Cove Harbour and Marina are of State significance.

The City is well endowed with a diverse range of visitor attractions and activities, quality sporting facilities, a network of cycles ways and walking trails, good marine infrastructure and a diversity of dining, retail and entertainment options. The City is very popular for beach activities, surfing, boating and fishing, cycling and shopping. Shellharbour hosts a variety of events including Wings Over the Illawarra, Kids Fest Shellharbour, Shellharbour City Festival of Sport, Sculptures at Killalea, and Ride Around the Lake.

The City has a relatively small, diverse accommodation sector incorporating motels, hotel-motels, caravan parks, camping areas, dormitory accommodation, guesthouse, B&Bs, and holiday houses and apartments. It also has a range of venues suitable for conferences, meetings, functions, exhibitions and events, including large conference and entertainment facilities at the Shellharbour Club and Warilla Bowls and Recreation Club, and boutique facilities at the historic Ravensthorpe Guesthouse.



Shellharbour Beachside Holiday Park: Tourism Shellharbour

⁴ Australian Bureau of Statistics. Population Census 2011 and 2016 (Quickstats).

⁵ Planning and Environment NSW 2016 New South Wales State and Local Government Area Population and Household Projections, and Implied Dwelling Requirements

3.2 Economic Contribution of the Visitor Economy

In 2016, Tourism Research Australia estimated that visitors to Shellharbour City spent in the order of \$75million within the City, with day trippers spending \$41million, overnight domestic visitors spending \$30million and international overnight visitors, \$3million¹. 505 businesses are directly involved in servicing visitors to the City¹, with visitor economy directly supporting 602 jobs¹.

The Visitor Economy extends across most industry sectors and is not a separate category in the industry classification standards. In providing economic data for Shellharbour City, REMPLAN has endeavoured to identify the economic contribution of the visitor economy. REMPLAN¹ estimates that the total output (Gross Revenue) generated by the visitor economy in Shellharbour City in 2015/16 was \$105.828 million, with the visitor economy accounting for 2.7% of the City's total output. The value-add from the visitor economy was \$52.85million (2.64% of the City's total value add), with wages and salaries paid to people employed in the visitor economy, estimated at \$33.045million.

Visitors bring 'new' dollars into the City's economy with these 'new' dollars having a multiplier effect, filtering through to most sectors.



Dining out Shellharbour: Tourism Shellharbour

Figure 3.2 Movement of the Tourism Dollar through the Economy



Lake Illawarra:: Tourism Shellharbour

3.3 Regional Context

For tourism, Shellharbour City is intrinsically linked to the surrounding LGAs and to the NSW South Coast. Proximity to and accessibility from Sydney is a key attribute.

Destination Sydney Surrounds South (DSSS)

For tourism, Shellharbour City is part of the 'Sydney Surrounds South' Destination Network. The Network incorporates Wollongong, Shellharbour, Kiama, Shoalhaven, Wingecarribee and Wollondilly Local Government Areas. Shellharbour City is centrally located within the Network, with Wollongong City to the north, Kiama Municipality and Shoalhaven City to the south, Wingecarribee Shire (marketed as the Southern Highlands) to the west and Wollondilly Shire to the north west.

The Princes Highway, Grand Pacific Drive and South Coast railway line link the four coastal LGAs, with the Illawarra Highway, through Shellharbour City, being the primary link and touring route between the Southern Highlands and the Coast. Secondary links include Jamberoo Mountain Road between the Southern Highlands and Kiama LGA, and Moss Vale Road between the Southern Highlands and Kangaroo Valley in Shoalhaven LGA. Locally, the Illawarra Highway – Jamberoo Road, links the western areas of Shellharbour and Kiama LGAs and provides access to Jamberoo Action Park, Minnamurra Rainforest and the Illawarra Fly. At the northern end of the Region, Picton Road links the Hume Highway in Wollondilly Shire to the Princes Highway in Wollongong City. Picton Road provides a direct link between the South Western Sydney growth sector and the Illawarra Coast.

Wollongong, Kiama, the Southern Highlands, Wollondilly and the northern part of the Shoalhaven (Berry, Kangaroo Valley, Nowra and Shoalhaven Heads) are all within an hour's drive of Shellharbour, with the central (Jervis Bay area) and southern (Ulladulla to Bawley Point) areas of Shoalhaven City, being a further 20 minutes and 50-75 minutes' drive, respectively. Shellharbour's central location positions it as both an ideal base for visitors to explore the region and for the City to attract day trips from residents of, and visitors to, the surrounding LGAs.

Wollongong, with a population of 203,630 at the 2016 Census⁶, is the fourth largest regional city in Australia. The City has a strong industrial base focused on Port Kembla, and is home to the University of Wollongong. Tourism-wise, the City is a very popular day-trip destination, known primarily for its coastal suburbs and escarpment views. The City's higher profile attractions and activities include Sea Cliff Bridge on Grand Pacific Drive, Sky Dive the Beach, Wollongong Harbour, beaches and headlands, Nan Tien Temple and the Botanic Gardens. Sea Cliff Bridge and Sky Dive the Beach have high profiles in both the domestic and international markets. Wollongong City has a concentration of accommodation with over 1,500 rooms, apartments and caravan park cabins, and several major sporting and entertainment venues. The focus for tourism in the City is the on developing new products and experiences, including leveraging the Illawarra escarpment for a range of outdoor and adventure-based activities; building the cruise ship market into Port Kembla; the promotion of the Grand Pacific Drive (which capitalises on Sea Cliff Bridge); and attracting larger conferences, meetings, sporting and entertainment events.

Kiama LGA to the south is a well-known tourist destination, popular for day trips, short breaks and holidays. Kiama has a concentration of caravan parks and holiday homes and apartments. The main attractions include the Kiama Blowhole, which has recognition both nationally and internationally, its beaches, spectacular coastal and rural scenery, Jamberoo Action Park, the Minnamurra Rainforest Centre, the Illawarra Fly Tree Top Walk and the Kiama Coast Walk.

⁶ Australian Bureau of Statistics Population Census 2016

Further south, Shoalhaven City offers pristine beaches, lakes and estuaries; the Shoalhaven River; historic rural towns and villages (including Berry, Kangaroo Valley and Milton); Jervis Bay and its whale and dolphin cruises; coastal and escarpment national parks and forests; and local seafood, produce and an emerging wine industry. The Shoalhaven attracts the most overnight visitors on the NSW South Coast.

To the west, the Southern Highlands is known for its tablelands scenery and climate (4 distinct seasons), historic towns and villages, local produce, food and wine and its escarpment national parks, lookouts and waterfalls. Wollondilly Shire has the well-known Trainworx Museum and Thirlmere Lakes National Park and is popular for its farm gates and 'pick-your-own' orchards.

Shellharbour City brings to the Destination Network, a number of significant attractions and assets, including:

- Killalea Reserve, which incorporates the Region's only dedicated National Surfing Reserve and hosts one of the largest and most popular monthly markets in the Region.
- Bass Point Reserve, recognised as one of Australia's top sites for scuba diving.
- Shellharbour Airport, the only airport in the Region that provides RPT⁷air services and has a concentration of aviation tourism businesses including the HARS Aviation Museum and the take-off base for Sky Dive the Beach.
- Greenvalleys Mountain Bike Park, a privately operated downhill MTB park and event venue.
- Stockland Shellharbour, the largest shopping mall in the region, with its catchment incorporating Kiama, Wollongong and Wingecarribee LGAs and the northern part of the Shoalhaven.

When open in 2019, Shell Cove Harbour and Marina will provide a high profile focal point for nautical and marine tourism for the Destination Network as well for the broader Sydney Region and the NSW South Coast. The adjoining Waterfront Precinct, with its visitor accommodation, eateries, and entertainment and recreation facilities is expected to become a high-profile destination for both the day trip and short-breaks markets.



Shellharbour Airport – HARS Museum

⁷ RPT – Regular Public Transport (scheduled air services)

The NSW South Coast

For tourism marketing, Shellharbour is part of the NSW South Coast. The South Coast incorporates five LGAs, extending from Shellharbour, south through Kiama, Shoalhaven, Eurobodalla and Bega Valley Shires to the Victorian border. Shellharbour City is the northern 'gateway' to the NSW South Coast – the first location where the Princes Highway meets the coast and travellers see the ocean, rolling green hills and forested escarpment which are an integral part of the South Coast landscape and strongly associated with the region.

The South Coast is marketed as 'Unspoilt' – a coastal getaway with clean water, fresh air, untouched wilderness, beautiful beaches, and abundant wildlife with a diverse range of experiences. The five-year 'Unspoilt' marketing campaign has significantly raised awareness and enhanced perceptions of the South Coast, including Shellharbour, as a destination. Shellharbour shares with the South Coast Region stunning scenery, beautiful beaches with pristine waters, rolling green hills backed by forested ranges, historic villages and fresh local produce. Killalea Reserve and Bass Point have featured strongly in the marketing campaign, used as locations for showcasing the City's beaches, cycling, walking, snorkelling and diving experiences.



Unspoilt Campaign Images – Bass Point (top) and The Farm at Killalea Reserve: Tourism Shellharbour

Proximity to Sydney

Shellharbour City is highly accessible to the Sydney market. The City is located approximately 100 kilometres south of the Sydney CBD, 85 kilometres from Sydney Airport and less than 70 kilometres from Sydney's southern and south-western suburbs. The Princes Highway provides a direct link between Shellharbour and Sydney, with the Highway being the main route for travellers heading south from Sydney to the Illawarra and South Coast Regions. Via Picton and Appin Roads, Shellharbour is readily accessible to South West Sydney. South West Sydney is a major growth corridor, with the population of the Region forecast to increase by 69.3% from 508,750 people in 2016 to 861,270 people in 2036 (352,520 additional people)⁸. The Picton Road - Hume Motorway link is part of the motorway – highway orbital road network around Sydney, with the links to the M7 providing access to Western Sydney Airport, which is due to open in 2025, and to Sydney's western and northwestern suburbs, which are also major population growth areas.

3.4 Outlook

There are a number of significant projects both regionally and in Sydney that will have create opportunities for Shellharbour City. Key projects include:

- **Urban development within the Illawarra Region** - The Illawarra Region is a nominated growth area. From 2016 to 2036, the population of the Illawarra is forecast to increase by 55,950 people (18.3% increase) of which 21,350 people will live in Shellharbour City. Growth will be concentrated west of Lake Illawarra in the Tullimbar, Calderwood Valley, West Dapto, Haywards Bay and Tallawarra areas. There will also be an additional 3,000+ people in the Shell Cove Waterfront Precinct. Population growth provides opportunities to grow the regional day trip, VFR and business and other event markets. It will also exert significant pressure on the City's natural assets.
- **Shell Cove Waterfront Precinct** – the opening of the harbour, marina, waterfront precinct and hotel (progressively between 2019 and 2025), will add a new dimension to the tourism products, experiences and infrastructure available in the City, providing opportunities to develop nautical and marine tourism, and build domestic and international day trip and overnight visitation to the City (see Section 9.1).
- **Albion Park Rail By-Pass** – Construction of the Albion Park By-Pass is planned to commence in 2019, with the M1 Motorway (Princes Highway) to be extended from Yallah to Oak Flats. From the north, Highway travellers will be entering Shellharbour City via farmland rather than the Albion Park Rail urban area. The farmland provides an attractive 'green' corridor, and a glimpse of the rural areas that are characteristic of the South Coast. These views need to be protected and capitalised upon. There may also be potential to increase the visibility of Shellharbour Airport and HARS to passing travellers. The re-routing of the Highway will also create opportunities to significantly improve the presentation of the Albion Park Rail area and Airport Precinct.
- **Further development of cruise ship facilities.** Growth in the cruise ship market into Port Kembla is providing opportunities for including Shellharbour attractions, activities and experiences in the excursion packages offered to cruise ship passengers. With the development of Shell Cove Marina, there is also opportunity to provide tender services to cruise ships.

⁸ Planning and Environment NSW 2016 New South Wales State and Local Government Area Population and Household Projections, and Implied Dwelling Requirements

- **Population Growth – Sydney Region.** The population of Sydney is just over 5 million people, with the population forecast to grow by 37.2% to 6.42 million people by 2036. Shellharbour has traditionally drawn visitors from the southern and eastern suburbs of Sydney. The trend in this area is to increased density, with the development of medium and high-rise apartments. High-rise apartment development is concentrated around railway stations, with a focus being on encouraging people to use public transport. In addition to increasing the size of the potential market for Shellharbour, it also provides opportunities to encourage people to visit Shellharbour by rail. A significant proportion of Sydney's growth is occurring in the South West Sydney growth corridor (Liverpool, Campbelltown, Camden and Wollondilly LGAs), further opening up this market for Shellharbour and the Illawarra / South Coast Regions.

- **Motorway and access road improvements** – The proposed extension of the M1 Princes Motorway from Waterfall to Alexandria, the planned upgrades of Picton and Appin Roads, the completion of the central Sydney orbital road network (M7 – Pacific Motorway and West Connex links) and the proposed outer Sydney orbital road network, will increase the accessibility between most regions of Sydney and the Illawarra / South Coast Region.

- **Western Sydney Airport, Badgerys Creek** – Stage 1 of the Western Sydney Airport at Badgerys Creek is due to open in 2025-26. The Airport is expected to handle around 5 million passengers per annum when it first opens, increasing to 10 million per annum within 5 years. By 2035 passenger number are forecast to reach 37 million, which will trigger the development of a second runway. By 2063, passenger numbers are forecast to reach 82 million per annum. The Airport has the potential to generate significant visitation to the Sydney Surrounds South Destination Network area. Strategies need to be put in place to capitalise on these opportunities.

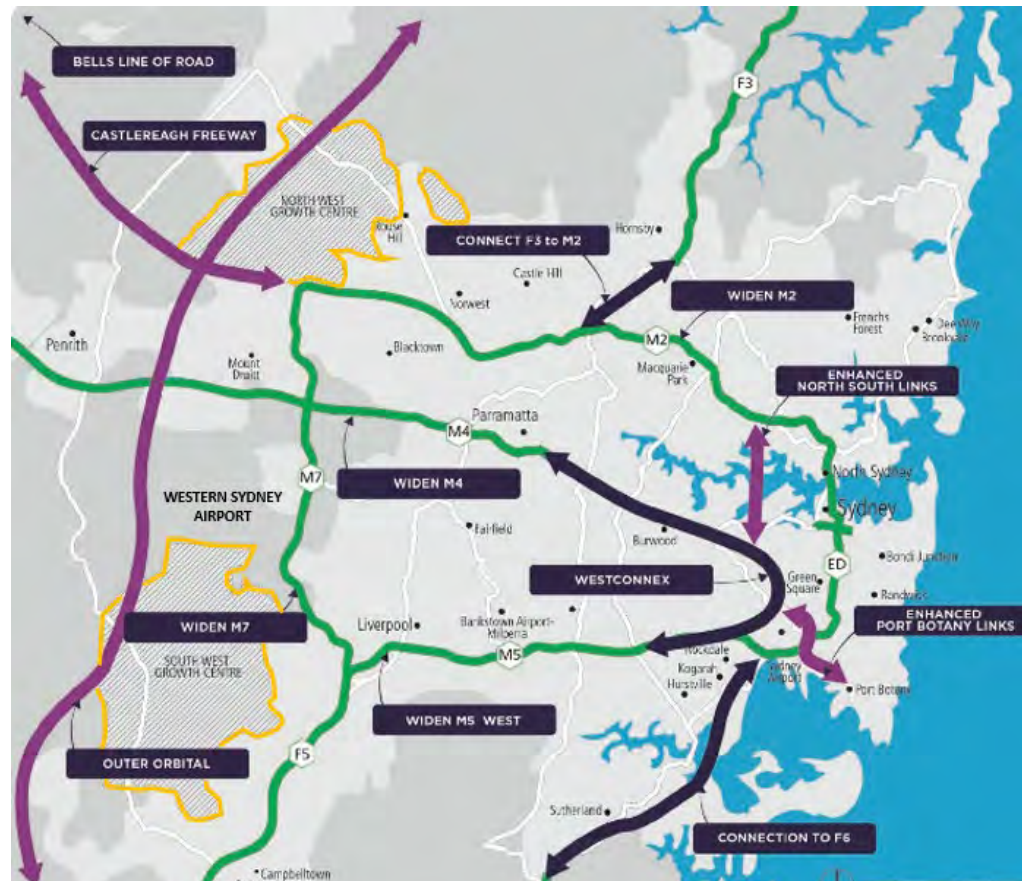


Figure 3.3 Proposed Motorway Improvements and Growth Centres - Sydney

- **Canberra International Airport** – In 2016, Canberra Airport was opened for international flights. Currently, Singapore Airlines are operating four flights per week between Canberra and Singapore and four flights per week to Wellington, New Zealand. Qatar Airlines has announced flights from Doha to Canberra commencing in 2018. Canberra Airport is also endeavouring to secure other services from Cathay Pacific, Air New Zealand and low cost Asian carriers. The increase in international passenger numbers into the ACT will provide opportunities for the Sydney Surrounds South Destination Network area and the NSW South Coast.

4. SHELLHARBOUR CITY'S BRAND AND PROMISE

Shellharbour City is part of, and strongly aligned with, the NSW South Coast. The City is positioned and marketed as 'Shellharbour – Unspoilt South Coast, NSW', with the marketing leveraging the key themes of the South Coast's creative proposition.

Creative Proposition: 'unspoilt' South Coast

Marvel at the unspoilt beauty that surrounds you, from the clear blue waters and squeaky white sand beaches to the breathtaking landscapes and mouth-watering fresh produce. Come, enjoy, experience all the wonders of the South Coast and immerse yourself in the unspoilt.

Research undertaken by Destination NSW into how Sydney and Canberra residents perceive the South Coast as a destination for holidays and short breaks, found that respondents associated the South Coast with the terms 'relaxing', 'beautiful', 'beaches', 'natural', 'fun', 'close', 'unspoilt', 'quiet' and 'friendly'. Shellharbour City 'delivers' on each of these perceptions.

Shellharbour City has been in a period of transition, moving from a small, 'sleepy', coastal municipality to a vibrant, contemporary coastal city. Residents are passionate about the City's stunning setting, natural environment and quality lifestyle. This is reflected in the value proposition that Shellharbour City offers visitors:



- **A location that is perfectly positioned** on the NSW South Coast – an hour from Sydney and 2.5 hours from the ACT.
- **A beautiful environment** – stunning coastline; pristine, uncrowded beaches; an underwater world; sparkling lake; rolling lush green hills, surrounded by the majestic Illawarra escarpment with its dramatic cliffs, timbered ridges, rainforest gullies, waterfalls and cascades.
- **Choices** – a playground with a ‘dash of daring’ – from enjoying the great outdoors (swimming, surfing, fishing, boating, snorkelling, diving, bushwalking, golfing, cycling and mountain biking); to wing-walking, roller skating, go-karting, sky diving or taking to the skies in a gyrocopter or a fighter jet; to retail therapy, vibrant markets and great entertainment.
- **Fresh local produce and award-winning dining options** – with a choice of ocean and country views.
- **An invitation to celebrate** – a diversity of events and festivals.

The opening of the Shell Cove Harbour, Marina and Waterfront Precinct will add another dimension to the City’s ‘offer’ – sophisticated coastal living; completing the City’s transition.



Lake Illawarra (top) Bushrangers Bay, Bass Point (bottom left): The Cascades Macquarie Pass National Park (bottom right): Tourism Shellharbour

5. ASSETS & CHALLENGES

5.1 Our Strengths & Assets

Shellharbour City has a number of significant strengths and strategic assets, which underpin the tourism sector and provide opportunities for growth. These include:

Strength	Assets to Work With	Potential Opportunities
Location and accessibility	<ul style="list-style-type: none"> Centrally located within the Destination Sydney Surrounds South Region, with more than 375,000 people residing within an hour's drive of the City⁹. Proximity / ready access from Shellharbour to high profile and other attractions and activities in the surrounding region. Proximity to Sydney (5 million people), with direct highway and main road links and train services. Junction of three main routes – the Princes Highway (Sydney-Melbourne Coastal touring route), Grand Pacific Drive and the Illawarra Highway. Ready access to Sydney Airport and the proposed Western Sydney Airport. Within a few hours sailing / boating time from Sydney, the Shoalhaven and Jervis Bay. Proximity to the cruise ship facilities at Port Kembla. 	<ul style="list-style-type: none"> Opportunities to build a number of markets: <ul style="list-style-type: none"> Sydney and regional residents - day-trippers and short breaks; business events; and event attendees. The southwestern and western suburbs in particular are potentially large markets for Shellharbour. University of Wollongong students and their VFR visitors. Day trips from people holidaying in surrounding LGAs. International markets – day trips, tour groups, and self-drive tourists. Nautical and marine tourism markets. Cruise ship day trip markets. Opportunities to leverage the high-profile attractions and activities available in the surrounding region as part of the City's positioning, and product and experience base.
Shellharbour Airport and the Aviation Tourism cluster	<ul style="list-style-type: none"> RPT services to Melbourne and Brisbane. HARS Museum – one of the largest collection of historic aircraft in Australia, high profile planes + wing walk experience. Concentration of aviation tourism operators providing a range of adventure tourism experiences. Wings over the Illawarra event. 	<ul style="list-style-type: none"> Opportunities to package with the Airport's RPT service to target the Brisbane and Melbourne markets. Further development of HARS (realisation of the HARS masterplan) and other activities (e.g. Australian Aviation memorial) within the Airport precinct. Leveraging the meeting and function facilities at HARS to build the business events and social functions markets. Packaging of HARS and scenic flights for the cruise ship market. Growth of aviation / adventure-based tourism. Permitting permanent and/or temporary drop zones for Skydive the Beach within the Shellharbour City LGA. Linking of the Airport / HARS to Albion Park Railway Station. Development of accommodation within close proximity to the Airport.

⁹ Includes residents of Shellharbour City

Strength	Assets to Work With	Potential Opportunities
Shell Cove Harbour, Marina and Waterfront Precinct	<ul style="list-style-type: none"> • Harbour, marina, boat stack, boat servicing, boat ramp. • Waterfront dining, entertainment and recreation precinct. • Quality visitor accommodation with meeting facilities. 	<ul style="list-style-type: none"> • Opportunities for new air-based events. <p>Shell Cove will provide a safe harbour and services for cruising vessels, as well as boat mooring and storage facilities for both commercial charter boats and the recreation boating / fishing markets. It will also provide quality accommodation and meeting facilities, enabling Shellharbour to cater for international travellers and high yield visitors including business travellers. Opportunities include:</p> <ul style="list-style-type: none"> • Grow nautical / marine tourism focussing on the recreational boating and fishing markets and the cruising vessel markets. • Build commercial marine activities – charter fishing, scuba diving, dolphin and whale watching, glass bottom boats (to explore the reefs off Bass Point), boat and other watercraft hire. • Grow the day trip, short-breaks and business events markets out of Sydney and the surrounding region. • Utilise the harbour and waterfront areas for events, festivals and entertainment. • Develop strategic relationships with sailing, fishing and cruising clubs in Sydney and along the NSW coastline, and explore opportunities for races and other events (ending at Shell Cove). • Establish strong pedestrian and cycle links to Shell Harbour Village, Bass Point and Killalea Reserve – focal point for the coastal cycleway / walking track. • Provide tender services to cruise ships • Possible ferry services from Sydney
Significant natural assets – nature, outdoors and soft adventure activities	Killalea Reserve: <ul style="list-style-type: none"> • Stunning coastal scenery. • The Farm – National Surfing Reserve – currently the only one on the NSW South Coast and Mystics – high profile surfing beach. • Access to the Minnamurra River. • Good visitor facilities – accommodation, café, picnic facilities. • Education centre. • Walking tracks. • Access to space for large outdoor events. • The Farm monthly markets – one of the largest and most popular markets on the South Coast. • Has featured in a number of films and television commercials 	<ul style="list-style-type: none"> • Increase and diversify the accommodation available. • Continue to develop walking tracks and explore the feasibility of developing cycling and/or MTB tracks. • Explore options to link Killalea Reserve and Bass Point via a headland-walking track. • Grow the education, weddings and functions markets. • Position and promote Killalea as a location for surfing, surf-related and land-based events. • Establish a drop-zone for Sky Dive the Beach.
	Bass Point <ul style="list-style-type: none"> • Stunning setting, views, littoral rainforest. • Protected bays and beaches. • Recognised dive location – 10 sites. 	<ul style="list-style-type: none"> • Explore joint management options with Killalea Reserve. • Upgrade the Reserve to improve access and provide quality visitor facilities and experiences.

Strength	Assets to Work With	Potential Opportunities
	<ul style="list-style-type: none"> Aboriginal and marine heritage. Surrounding reefs – dive sites. Hanson Quarry and jetty. 	<ul style="list-style-type: none"> Improved interpretation of the heritage, culture and the natural and marine environment. Provide a viewing platform and interpret the quarry / hard rock aggregate industry. Link to the coastal cycleway. Investigate potential uses for the Jetty, including the possibility of catering for small, boutique cruise ships. Explore opportunities to diversify the dive experience – e.g. offshore wreck, underwater sculpture park. Grow the dive market.
	Macquarie Pass National Park <ul style="list-style-type: none"> Walking trails Jump Rock Waterfalls Rainforest 	<ul style="list-style-type: none"> Capitalise on the popularity of Jump Rock as an attraction – develop a walking trail to improve access. Work with surrounding Councils / Destination Network to develop position and promote ‘great walks of the Illawarra Escarpment’. Develop a scenic rim walk along the Illawarra Escarpment. Cross promotion of National Parks within the Destination Network area.
	Beaches	<ul style="list-style-type: none"> Events and activities.
	Lake Illawarra <ul style="list-style-type: none"> Lake - waterbody Walking and cycling tracks Foreshore reserves – picnic facilities Lake Islands and bird habitat areas Art trail Proximity to Oak Flats and Albion Park Rail Stations 	<ul style="list-style-type: none"> Complete the Lake Illawarra (round-the-Lake) walking and cycling trail. Improve marine infrastructure (jetties, boat ramps etc.). Provide walking tracks and interpretation of Picnic Island. Progressively expand the playground facilities. Expand and activate the art trail. Concessions – coffee carts / food wagons at strategic locations; boat, canoe hire, bicycle hire. Events on the lake and along the foreshore.
	<ul style="list-style-type: none"> Windang Island 	<ul style="list-style-type: none"> Walking trails and interpretation. A focal point for the coastal and round-the-lake cycle ways. Guided walks.
	<ul style="list-style-type: none"> Blackbutt Reserve & Myimbarr Wetlands 	<ul style="list-style-type: none"> Improved visitor facilities, interpretation and connecting trails. Develop a regional nature-based adventure playground. Events and activities.
Quality and diversity of retail experiences	<ul style="list-style-type: none"> Stockland Shellharbour Shellharbour Village Shell Cove Waterfront Precinct (future) Markets 	<ul style="list-style-type: none"> Explore opportunities to leverage the marketing and promotion undertaken by Stockland and the Shell Cove Waterfront.
Quality sporting facilities, localities and venues	<ul style="list-style-type: none"> Croom Road Sporting Complex Myimbarr Sports Complex 	<ul style="list-style-type: none"> Sports Tourism – generating visitation through sporting, recreation and community events, camps, clinics, etc. and leveraging these activities.

Strength	Assets to Work With	Potential Opportunities
suitable for sporting events	<ul style="list-style-type: none"> • The Links and Calderwood Valley Golf Courses • Green Valley Mountain Bike Park • Cycleway network • Lawn Bowls • Beaches, Lakes, Minnamurra River 	<ul style="list-style-type: none"> • Golf tourism – recreational, competitive, corporate and charity events.
Very safe, family friendly environment	<ul style="list-style-type: none"> • Proximity to Sydney – no long road trip. • Highly affordable. • Family friendly accommodation, dining options etc. • Natural assets – low cost outdoor / soft adventure activities. providing opportunities for families to ‘connect.’ • Concentration of activities – BMX track, skate parks, cycleways, playgrounds, go karting, play maze, mini golf, Light Railway, roller skating, ten pin bowling, cinemas, surfing lessons, stand-up paddle boarding, boat and canoe hire etc. • Proximity to high profile attractions in the surrounding region – e.g. Jamberoo Action Park, Illawarra Fly, Minnamurra Rainforest. 	<ul style="list-style-type: none"> • Positioning of Shellharbour as a family friendly destination. • Marketing into South Western and Western Sydney – growth areas with a high proportion of young families. • Packaging family friendly activities into a ‘passport / discount’ booklet for distribution at sporting events.



Fishing – Lake Illawarra: Tourism Shellharbour



The Links Shell Cove: The Links Shell Cove

5.2 Issues & Challenges facing the City

Addressing challenges and removing barriers is fundamental to delivering sustained growth in the visitor economy.

Issue	Challenges for Shellharbour City and Tourism Shellharbour
Development pressures and funding and resource constraints within Council	<ul style="list-style-type: none"> Competing priorities for limited funds and resources, with the need to provide facilities and services and upgrade and extend infrastructure for the City's rapidly growing population as well as provide funds and resources to improve / increase the capacity of existing facilities and effectively market and promote the City to attract investment, workers, new residents and visitors.
Limited funds and resources within Tourism Shellharbour to undertake market development and to capitalise on emerging marketing and promotional opportunities.	<ul style="list-style-type: none"> Leveraging the digital space – this requires investment in new promotional tools (e.g. video clips) and a full-time dedicated position to undertake digital marketing. Benefitting from the Destination Network - Shellharbour is the smallest 'player' in the Network. Without the funds to contribute to product and market development initiatives and cooperative marketing, it is likely that the Network activities will be driven by Wollongong, Shoalhaven and the Southern Highlands, which have very significant tourism budgets. Capitalising effectively on the opportunities arising from emerging markets, and the new facilities and services being developed in the City and surrounding LGAs, including Shell Cove.
Raising awareness of Shellharbour City as holiday destination / changing perceptions	<ul style="list-style-type: none"> Shellharbour City has a lower level of recognition in the Sydney and ACT markets as a destination for holidays and short-breaks, than surrounding LGAs. 'Urban sprawl' presentation of the Shellharbour area when viewed from the Princes Highway, is not a positive impression for travellers Completing the transition from a small coastal municipality to a vibrant coastal city – the completion of Shell Cove will assist with this.
Capitalising effectively on Shell Cove Harbour, Marina and Waterfront	<ul style="list-style-type: none"> To maximise benefits, the Shell Cove Harbour precinct will require ongoing place management, activation, and marketing and promotion. Once Frasers Property have delivered the project, Council will need to 'drive' the precinct to maximise benefit. This will require significant (and on-going) funds and resources.
Ongoing sustainability of the Shellharbour Airport and the RPT services.	<ul style="list-style-type: none"> Developing a coordinated and strategic approach to marketing and promoting the Airport, RPT services and the tourism aviation business and providing the funds and resources to implement the strategy.
Limited accommodation – accommodation capacity constraints / dated accommodation	<ul style="list-style-type: none"> Growing visitation, events etc. without having the accommodation available for visitors. Attracting investment in new accommodation, including attracting a 'branded' property. Encouraging hotel/motel properties to upgrade / redevelop. Expanding the Shellharbour Beachside Holiday Park. Capitalising on peak demand periods – flexible options for temporary accommodation.
Attractions within the City need investment to achieve their full potential	<p>Addressing access and capacity constraints at Killalea Reserve:</p> <ul style="list-style-type: none"> The Park is attracting over 600,000 visitors pa. The current Park access is via residential streets through Shell Cove, with the route being convoluted and traffic volumes at peak time exceeding the capacity of the streets. A new access road is required. The accommodation at Killalea needs to be expanded to meet demand and cater for visitors year-round. Providing infrastructure and facilities to meet growing demand and deliver quality events. <p>Significantly improving the presentation of Bass Point Reserve – poor condition of the access road and some of the parking areas, signage needs updating and replacing, weed infestation.</p>

Issue	Challenges for Shellharbour City and Tourism Shellharbour
	<ul style="list-style-type: none"> • Bass Point Reserve has the potential to be one of the ‘jewels’ of the Sydney Surrounds / South Coast Regions and needs to be upgraded to the same standard as the Shell Cove harbour and waterfront precinct. <p>Improving access and facilities to and around Lake Illawarra – Windang Island</p> <ul style="list-style-type: none"> • Completing the Lake Illawarra cycleway and establishing the links between the cycleway and the railway stations, shopping centres, Shellharbour City Centre etc. • Improving marine infrastructure to provide access to the Lake • Providing additional visitor facilities and infrastructure, including effective directional and interpretive signage. <p>Macquarie Pass National Park – addressing issues with signage both directional and interpretive as well as access to Jump Rock.</p> <p>HARS - Assisting HARS to access the land and funding needed to implement their masterplan.</p>
<p>Connectivity – within the City and to adjoining LGAs.</p>	<p>Establishing strong links between the City’s visitor destinations, attractions and facilities including:</p> <ul style="list-style-type: none"> • Connecting the walkways and cycle ways in the coastal precinct from Warilla to Dunmore via Shellharbour Village, Shell Cove, Bass Point Reserve and Killalea Reserve. • Completing the Lake Illawarra cycleway and establishing the links between the Lake / cycleway and the railway stations, shopping centres, and Shellharbour City Centre. • Linking Shellharbour Airport to Albion Park Railway Station and to the Lake Illawarra Cycleway. • Cycleway cross-city link – from the coast via Myimbarr and Blackbutt Reserves to the City Centre and Lake. • Road and cycleway links from the new urban areas at Tullimbar and Calderwood Valley to the City Centre, with the cycleways connecting into the Lake and coastal cycleway network. • Providing bike racks and facilities for cyclists at key locations throughout the City. • On-going upgrading of the Illawarra Highway (Macquarie Pass). • Securing improved rail services to Sydney and access to South Western Sydney via the introduction of passenger services on the Maldon – Dumbarton line.



Stack Island, Killalea Reserve: JRA

VISITATION & MARKETS



6. VISITATION

Tourism Research Australia (TRA) and Destination NSW (DNSW) publishes visitation statistics for the South Coast Region and for selected LGAs. The South Coast Region includes Wollongong, Shellharbour, Kiama, Shoalhaven, Eurobodalla and Bega Valley Shires, with the regional statistics available for the Year End June 2017. Data for the Illawarra and South Coast sub-regions is available for the Year End March 2016. The LGA Visitor Profiles, are available for Year End December 2016.

6.1 Visitation to the NSW South Coast¹⁰

The South Coast Region of NSW extends from the Royal National Park, on the southern fringe of the Sydney Metropolitan Area, south along the coastline to the NSW-Victorian border, a distance of over 500km. The Region is bordered to the west by the rugged, forested slopes and sheer cliffs of the escarpment – an almost continuous strip of National Parks, wilderness and State Conservation Areas. The Region is known for its spectacular coastal and rural scenery, uncrowded beaches, pristine waterways, National Parks, prolific marine and wildlife, and relaxed, enviable lifestyle¹¹. Visitation within the region is concentrated in the coastal towns and villages. The region is linked by the Princes Highway, which is promoted as the Sydney-Melbourne Coastal Touring Route.

In Year End June 2017, the South Coast Region (9.785 million visitors) was the fourth most visited region in NSW ranking behind Sydney (32.9 million visitors), the North Coast (12.481 million visitors) and the Hunter (10.19 million visitors). The North Coast followed by the South Coast were the most popular regions for the domestic overnight market, while the North Coast and the Hunter attracted more international overnight visitors and day trippers than the South Coast.

In the Year End June 2017, the South Coast Region attracted 3.7 million domestic and 174,000 international visitors who stayed one of more nights in the Region and 5.911 million day trippers. From YE June 2016 to 2017, the number of domestic overnight visitors increased by 6.4% with the number of international visitors increasing by 30.5%. These growth rates exceeded the visitation growth rates to regional NSW (4.6% domestic and 13.2% international). Domestic visitors spent 11.4 million nights in the Region, up 1.8% on 2016, while international visitors spent 2.8 million nights, up 19.2% on 2016. The strong growth in overnight visitation to the Region is largely attributable to the 'Unspoilt South Coast' marketing campaign.

Domestic Overnight Visitors

- In Year End June 2017, domestic overnight visitors spent nearly \$1.8 billion in the Region, up 24.6% on Year End June 2016. The average spend per night was \$155, up by 22.5% on Year End June 2016.
- The main reasons for visiting the South Coast Region were for a holiday (56.7%), to visit friends and relatives (32.8%), followed by business (6.1%) and other (10.7%). From 2016 to 2017, the number of holidaymakers increased by 3.3%, with the number of VFR and business travellers growing by 10.6% and 22.6% respectively.

¹⁰ Visitation statistics in this section are taken from Destination NSW Regional Profiles, YE June 2017

¹¹ South Coast Destination Management Plan, 2013-2020.

- Holiday travellers accounted for 62.9% of the nights spent in the Region, with these travellers staying on average 3.42 nights. VFR travellers accounted for 28.7% of nights and stayed on average 2.7 nights. Business and other travellers accounted for 5.2% and 2.9% of nights, respectively, with business travellers staying on average 2.63 nights and other travellers, 1.86 nights.
- 73.5% of visitors to the Region were from NSW, with 12.0% from the ACT and 9.1% from Victoria. 44.5% of visitor came from Sydney, with 29.0% coming from Regional NSW. From 2016 to 2017, the number of visitors from Sydney and Victoria increased by 14.3% and 12.9% respectively, while the number of visitors from Regional NSW and the ACT fell by 0.6% and 2.4% respectively. Sydney visitors have a higher propensity to stay in the northern half of the region, while visitors from the ACT and Victoria favour the southern LGAs.
- Visitors from Sydney (41.0% of total nights) spent the most nights in the Region, followed by visitors from Regional NSW (27.7%), Victoria (13.2%) and the ACT (10.7%). From 2016 to 2017, the number of nights spent by visitors from Sydney increased by 22.3%, while nights spent by visitors from other source markets declined (Regional NSW - down 8.1%, Victoria - down 12.1%, and ACT – down 18.8%).
- Victorians had the longest average length of stay in the Region (4.47 nights) followed by visitors from Regional NSW (2.94 nights), Sydney (2.84 nights) and the ACT (2.75 nights).
- The main activities undertaken while in the Region were dining out (61.3%), going to the beach (53.2%) and visiting friends and relatives (44.4%).
- The main age groups of visitors to the Region were 15-29 years (22.2%), 50-59 years (19.0%) and 40-49 years (18.5%).
- The majority of visitors were travelling as adult couples (34.0%) and with friends and relatives (24.6%). Families groups accounted for 20.5% of visitors, with 18.0% of visitors travelling alone.
- Visitor nights were primarily spent in the home of friends and relatives (33.0% of nights), followed by caravan park / commercial camping ground (20.1%) and rented house or apartment (16.3%).

Domestic Day Visitors

- In Year End June 2017, the South Coast Region attracted 5.911 million day visitors, down 16.4% on Year End June 2016.
- Domestic day visitors spent on average \$101 per visit, injecting \$595 million into the Regional economy.
- 59.0% of day trips were for holiday and leisure purposes, 26.4% to visit friends and relatives (VFR) and 6.0% for business. From 2016 to 2017 the number of holiday-leisure, VFR and business travellers to the Region declined by 13.5%, 13.0% and 31.9% respectively.



- The main activity undertaken in Region was dining out (53.2%), visiting friends and relatives (30.1%), going to the beach (28.6%), sight-seeing (21.6%), and shopping for pleasure (20.0%).

International Overnight Visitors

- In Year End June 2017, the South Coast Region attracted 174,000 international visitors with these visitors spending 2.752 million nights in the Region (average stay of 15.8 nights). The number of visits and nights spent were up 30.5% and 19.4% respectively, on YE June 2016.
- International visitors spent on average \$99 per night in the Region, injecting \$272 million into the local economy. The average spend per night was 29.4% higher than in 2016.
- 67.1% of international visitors were holiday and leisure travellers, with 22.0% visiting friends and relatives and 5.5% travelling for education.
- The main source markets were the United Kingdom (15.9%), United States (10.2%), and Mainland China (9.8%).
- 42.1% of nights were spent in rented houses and apartments, and 23.7% with friends and relatives.
- International visitors were primarily aged 15-29 years (32.0%), 50-59 years (18.5%) and 60-69 years (16.9%).

Due to the proximity to Sydney, the Illawarra and northern Shoalhaven attract a significant number of day visits, including tour groups, independent travellers and the VFR market, from international visitors staying in Sydney. Information on the size and value of the international day-tripper market is not collected.

Visitation to the Illawarra and South Coast Sub-Regions

Within the South Coast Region, there is a significant variation in visitation patterns between the Illawarra (Wollongong, Shellharbour, and Kiama) and South Coast (Shoalhaven, Eurobodalla, Bega Valley) sub-regions. Based on the data for Year End March 2016:

- The South Coast sub-region is the primary destination for domestic overnight visitors, attracting 72.5% of visitors and 78.3% of visitor nights. In contrast, the Illawarra sub-region was the primary destination for day-trippers, accounting for 60.8% of day trips to the Region. The South Coast sub-region attracted marginally more international visitors (53.6%) than the Illawarra (46.4%); however, the length of stay in the Illawarra is significantly longer, with the Illawarra attracting 78.5% of the Region's international visitor nights.
- Sydney is the main source market for both sub-regions, with 48.3% of visitors to the Illawarra coming from Sydney and 39.1% of visitors to the South Coast sub-region. Just over a million Sydney-siders travelled through the Illawarra to the South Coast sub-region. 30.9% of visitors to the South Coast sub-region were from interstate, primarily from ACT (17.2%) and Victoria (10.0%). In contrast, only 17.9% of visitors to the Illawarra were from interstate, with visitors from Victoria (7.2%) and Queensland (6.0%) outnumber visitors from the ACT (4.7%).

- The South Coast sub-region was more far popular with overnight domestic and international holidaymakers, attracting 81.1% and 62.4% respectively of holidaymakers staying on the NSW South Coast. The Illawarra Region has higher proportions of domestic overnight VFR (42.7%) and business travellers (12.5%) and more business travellers in total than the South Coast sub-region.
- The Illawarra was far more popular for day trips, reflecting its proximity to Sydney. The Illawarra attracted 58.8% of the holiday-leisure day trips made to the South Coast Region, 65.7% of VFR trips and 71.9% of business trips.
- Overnight domestic visitors to the South Coast sub-region had a higher propensity to visit the beach (57.3%) than visitors to the Illawarra sub-region (39.1%). In contrast, day visitors to the Illawarra (30.3%) had a higher propensity to visit the beach than day visitors to the South Coast sub-region (26.7%).

Implications and Opportunities for Shellharbour City

- Sydney is the main source of domestic overnight and day visitors to the South Coast region and Illawarra sub-region. Each year, are over 1 million Sydneysiders pass through Shellharbour City on-route to destinations further south.
- The Illawarra sub-region has a large VFR market, providing the opportunity to put in place local and regional promotions to encourage residents to show their visitors around Shellharbour City. The resident host significantly influences what their visitors see and do while in the area. The challenge lies in educating and motivating the host community.
- The South Coast Region is seeing strong growth in the number of overnight domestic and international visitors. Accommodation capacity constraints are limiting Shellharbour City's ability to capitalise effectively on this growth.
- While domestic visitors remain the primary market for the South Coast region and the Illawarra sub-region, the number of international visitors staying overnight in the Region is increasing. The number of international visitors undertaking day trips to the Region, particularly to the Illawarra and the Jervis Bay area, is also increasing.
- Visitors from Mainland China are a growth market for the South Coast Region, with Mainland China now the Region's third largest international market.
- Dining out, going to the beach, sight-seeing and shopping for pleasure are the main activities undertaken by both overnight visitors and day trippers. These activities need to continue to feature in Shellharbour's information and promotional collateral.

Table 6.1 Comparison of Visitation Illawarra and South Coast Sub-Regions, YE March 2016

	Number of Visitors / Nights			As % of Total South Coast Region		Market Mix - % of Sub-Region / Region		
	Illawarra Sub-Region	South Coast Sub-Region	South Coast Region	Illawarra Sub-Region	South Coast Sub-Region	Illawarra Sub-Region	South Coast Sub-Region	South Coast Region
Domestic Overnight Visitors	974,000	2,571,000	3,545,000	27.5%	72.5%			
International Overnight Visitors	69,700	80,600	150,300	46.4%	53.6%			
Domestic Day Trippers	4,124,000	2,658,000	6,782,000	60.8%	39.2%			
Total Visitors	5,167,700	5,309,600	10,477,300	49.3%	50.7%			
Domestic Visitor Nights	2,655,000	9,560,000	12,215,000	21.7%	78.3%			
International Visitor Nights	2,029,000	555,100	2,584,100	78.5%	21.5%			
Total Visitor Nights	4,684,000	10,115,100	14,799,100	31.7%	68.3%			
Origin of Domestic Overnight Visitors								
Regional NSW	298,044	737,096	1,035,140	28.8%	71.2%	30.6%	28.7%	29.2%
Sydney	470,442	1,004,278	1,474,720	31.9%	68.1%	48.3%	39.1%	41.6%
Victoria	70,128	256,012	326,140	21.5%	78.5%	7.2%	10.0%	9.2%
Queensland	58,440	93,995	152,435	38.3%	61.7%	6.0%	3.7%	4.3%
ACT	45,778	443,432	489,210	9.4%	90.6%	4.7%	17.2%	13.8%
Purpose of Visit – Domestic Overnight Visitors								
Holiday – Leisure	402,262	1,724,738	2,127,000	18.9%	81.1%	41.3%	67.1%	60.0%
Visiting Friends & Relatives	415,898	629,877	1,045,775	39.8%	60.2%	42.7%	24.5%	29.5%
Business	121,750	87,405	209,155	58.2%	41.8%	12.5%	3.4%	5.9%
Other	34,090	82,895	116,985	29.1%	70.9%	3.5%	3.2%	3.3%
Purpose of Visitor – Domestic Day Trippers								
Holiday – Leisure	2,222,836	1,554,738	3,777,574	58.8%	41.2%	53.9%	58.5%	55.7%
Visiting Friends & Relatives	1,154,720	601,818	1,756,538	65.7%	34.3%	28.0%	22.6%	25.9%
Business	346,416	135,106	481,522	71.9%	28.1%	8.4%	5.1%	7.1%
Other	400,028	366,338	766,366	52.2%	47.8%	9.7%	13.8%	11.3%
Purpose of Visit – International Overnight Visitors								
Holiday – Leisure	35,129	58,358	93,487	37.6%	62.4%	50.4%	72.4%	62.2%
Visiting Friends & Relatives	21,886	18,846	40,731	53.7%	46.3%	31.4%	23.4%	27.1%
Education	8,294	1,926	10,220	81.2%	18.8%	11.9%	2.4%	6.8%
Business / Other	4,391	1,471	5,862	74.9%	25.1%	6.3%	1.8%	3.9%
Propensity to Visit the Beach								
Overnight Domestic Visitors	380,834	1,473,201	1,854,035	20.5%	79.5%	39.1%	57.3%	52.3%
Domestic Day Trippers	1,249,572	710,426	1,959,998	63.8%	36.2%	30.3%	26.7%	28.9%

Source: Destination NSW Regional Profiles – Illawarra and South Coast Sub-Regions and South Coast Region. YE March 2016



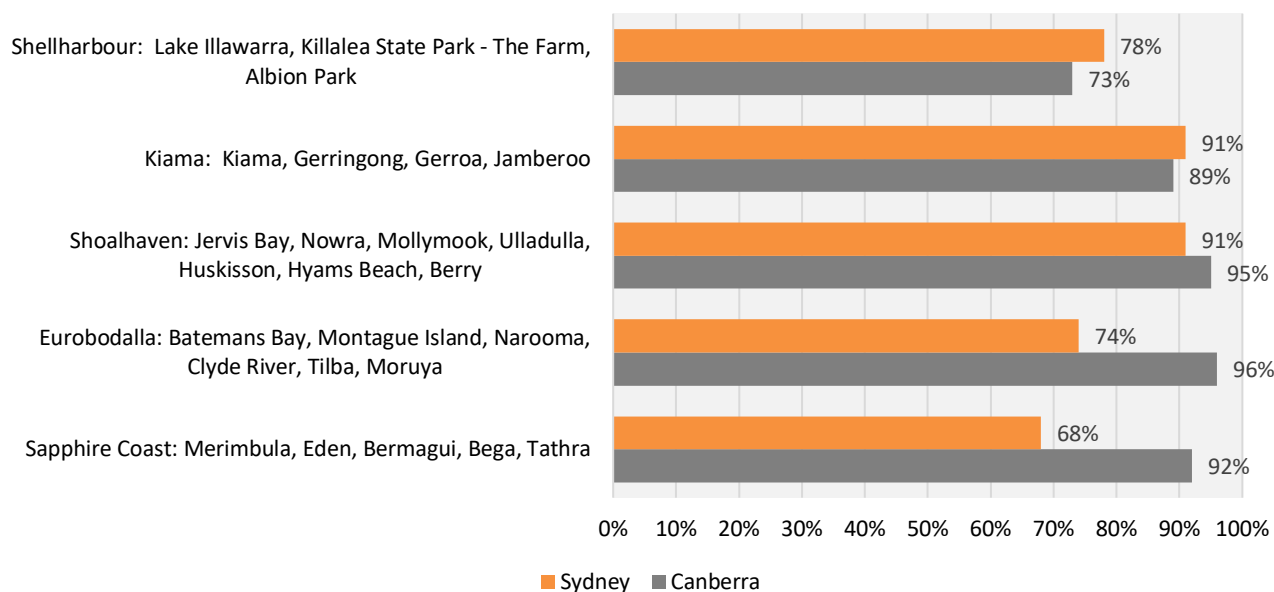
Shellharbour: Tourism Shellharbour

6.2 Market-place Awareness of South Coast Localities and Destinations

As part of the research for the South Coast 'Unspoilt' marketing campaign, Destination NSW surveyed people in Sydney and Canberra¹² to explore the level of awareness of localities with the South Coast Region as potential holiday and short break destinations. Wollongong was not included in the research.

The Shoalhaven and Kiama areas had high levels of recognition in both the Sydney and Canberra markets. Shellharbour ranked third in the Sydney market, with the City having a higher level of recognition than the Eurobodalla and Sapphire Coast (Bega Valley areas). The Eurobodalla and Sapphire Coast areas had the highest level of recognition in the Canberra market, with Shellharbour having the lowest level of recognition in this market.

Figure 6.1 Recognition of Key Localities in the Sydney and ACT Markets



Illawarra Light Railway Museum: Tourism Shellharbour

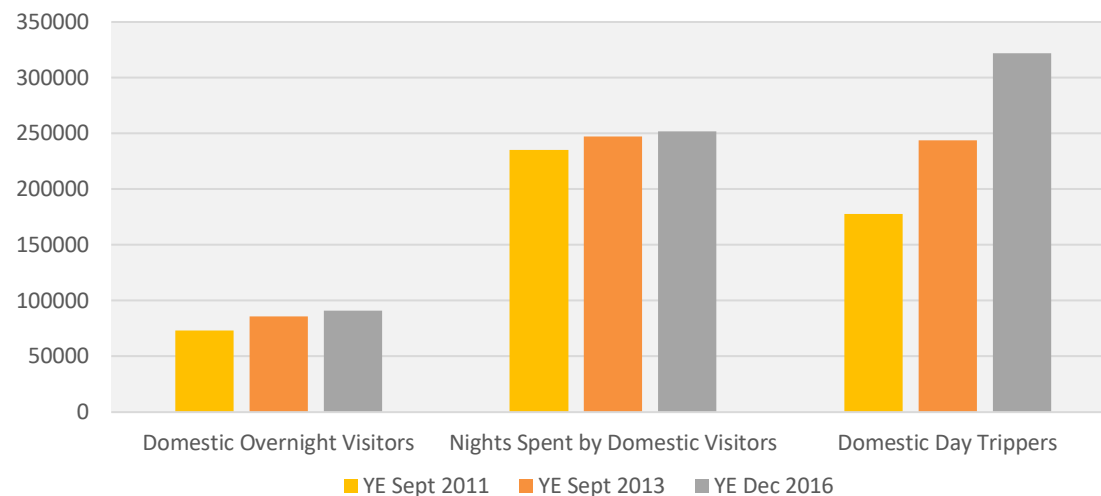
¹² Destination NSW Sydney 503 surveys, Canberra 508 Surveys

6.3 Visitation to Shellharbour City¹³

Visitation statistics for Shellharbour City are published by Tourism Research Australia, with these based on a four-year rolling average. Profiles are available for Year End September 2011, Year End September 2013 and Year End December 2016.

In Year End December 2016, Shellharbour City attracted an estimated 415,000 visitors, of whom 91,000 were domestic overnight visitors, 2,000 were international overnight visitors and 322,000 were day-trippers. Domestic overnight visitors spent an estimated 252,000 nights in the City (average length of stay of 3.18 nights), with international visitors spending 66,000 nights in the City¹⁴. Domestic visitation to the City has increased since 2011, with the number of domestic overnight visitors up 24.7%, the nights spent in the City up by 7.2% and day visitation up by 80.9%.

Figure 6.2 Change in Domestic Overnight and Day Trip Visits to, and Nights Spent in, Shellharbour City 2011-2016



Coastal Cycleway Warilla: Tourism Shellharbour

In 2016, 39.6% of overnight visitors and 50.9% of day-trippers were holiday – leisure travellers, while 50.7% of domestic overnight visitors and 35.4% of day-trippers were visiting friends and relatives. 38.5% of overnight visitors were travelling as adult couples. From the 2013 Shellharbour City Profile, 50% of domestic overnight visitors came from Sydney, with 37% coming from Regional NSW and 13% from interstate. Sydney was also the primary source of day visitors (54%), followed by the South Coast Region 36%, and other localities (10%).

¹³ Statistics in this section are taken from the Tourism Research Australia Local Government Area Profile 2016 – Shellharbour City

¹⁴ Due to small sample sizes the data relating to International visitors is indicative only.

Within the Sydney Surrounds South Destination Network area, Shoalhaven City is the most popular destination for domestic overnight visitors, with Wollongong being the most popular for domestic day visitors. By comparison, visitation to Shellharbour City appears low. The visitation figures should however be regarded as indicative, and may significantly under-estimate the visitation to Shellharbour City. Most Sydney-siders visiting the South Coast Region (excluding visitors who went to Wollongong only) will have passed through Shellharbour City. Similarly, visitors travelling between the Coast to the Southern Highlands via the Illawarra Highway also pass through Shellharbour City. Travellers may have also visited Shellharbour in conjunction with visiting Wollongong or Kiama and only nominate Wollongong or Kiama in their survey response. Due to accommodation capacity constraints in Shellharbour, visitors spending most of their time within Shellharbour City (e.g. for events, business etc.) but staying in accommodation in adjoining LGAs, are not recorded as a visitor to Shellharbour. The Region, including Shellharbour, also attracts a significant number of day trips from international visitors staying in Sydney, with data not available on the number of these day-trippers.

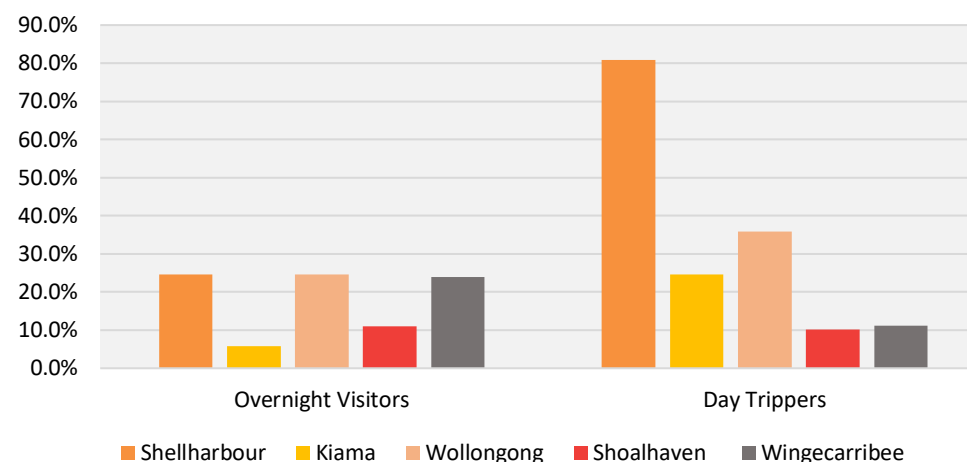
From Year End September 2011 to Year End December 2016, Shellharbour City has experienced the highest percentage increase in domestic overnight and day visitors within the Destination Network area.

Table 6.2 Estimated Number of Domestic Overnight Visitors, Day Trippers and Visitor Nights, by LGA, Destination Sydney Surrounds South

LGA	YE Sept 2011	YE Sept 2013	YE Dec 2016	% change 2011-2016
Domestic Overnight Visitors – Number of Visitors				
Shellharbour	73,000	86,000	91,000	24.7%
Kiama	259,000	270,000	274,000	5.8%
Wollongong	522,000	587,000	650,000	24.5%
Shoalhaven	1,080,000	1,052,000	1,198,000	10.9%
Wingecarribee	314,000	346,000	389,000	23.9%
Nights Spent by Domestic Visitors				
Shellharbour	235,000	247,000	252,000	7.2%
Kiama	730,000	795,000	750,000	2.7%
Wollongong	1,326,000	1,368,000	1,523,000	14.9%
Shoalhaven	5,656,000	3,761,000	3,880,000	-31.4%
Wingecarribee	779,000	807,000	842,000	8.1%
Domestic Day Visitors – Number of Visitors				
Shellharbour	178,000	244,000	322,000	80.9%
Kiama	628,000	698,000	782,000	24.5%
Wollongong	2,145,000	2,394,000	2,914,000	35.9%
Shoalhaven	1,279,000	1,314,000	1,409,000	10.2%
Wingecarribee	910,000	991,000	1,012,000	11.2%

Source: Tourism Research Australia (2016) and Destination NSW (2011 / 2013) LGA Visitor Profiles

Figure 6.3 Increase (%) in Visitation by LGA, YE Sept 2011 to YE Dec 2016



Shellharbour City attracts a diversity of markets.

Primary	Secondary & Minor	Special Interest & Activities
People visiting friends & relatives (VFR) Local and regional residents (mainly day trippers) Families with younger children Touring caravaners, campervans & RVs Touring by car – international and domestic Highway Travellers – Passing through the City Sporting and other event attendees	Corporate / business & work related – including business events Day trips from visitors staying in surrounding LGAs School and university excursions University of Wollongong students + their VFR Touring by motorcycle / motorcycle groups Car Clubs Probus Groups / walking clubs / social groups Coach tour groups Retirement home / disability services excursions Playgroups Weddings	Cyclists Mountain bikers Anglers – beach, shore and boat / Clubs & individuals Scuba Divers – clubs, learn-to-dive groups & individuals Boating enthusiasts – trailable boats Golfers Bowlers (Warilla Bowls Club) Bushwalkers / walking groups Canyoners (Macquarie Pass National Park) Bird Watchers Aviation enthusiasts / Air Force cadets (HARS) Sky-divers Learn-to-fly Recreational Flyers – clubs, social groups, individuals



Sand Sculpture: shellharbourkids.com.au



Illawarra Highway, Macquarie Pass: Tourism Shellharbour

7. MARKET OPPORTUNITIES

7.1 Direction

Key / Priority Markets

With the attractions, activities, infrastructure and resources available in the City, the markets that offer the best opportunities for growing the visitor economy are:

- Youth markets – domestic and international, including students from the University of Wollongong and Universities in Sydney – day trips and short break
- Family market - holiday, short breaks and day trips
- Couples and groups of friends - short breaks and day trip markets
- Drive based touring market – including the caravan and RV segments of this market
- Regional market, focusing on the day trip and VFR markets

Supporting Markets

Allied to these, there are also opportunities to build:

- Activity-based / special interest markets – cycling, mountain biking, nautical and marine
- Business events
- Sports tourism
- International visitors
- Accessible tourism
- Cruise ship visitors



Greenvalleys Mountain Bike Park: GV MTB Park

7.2 Market Segments

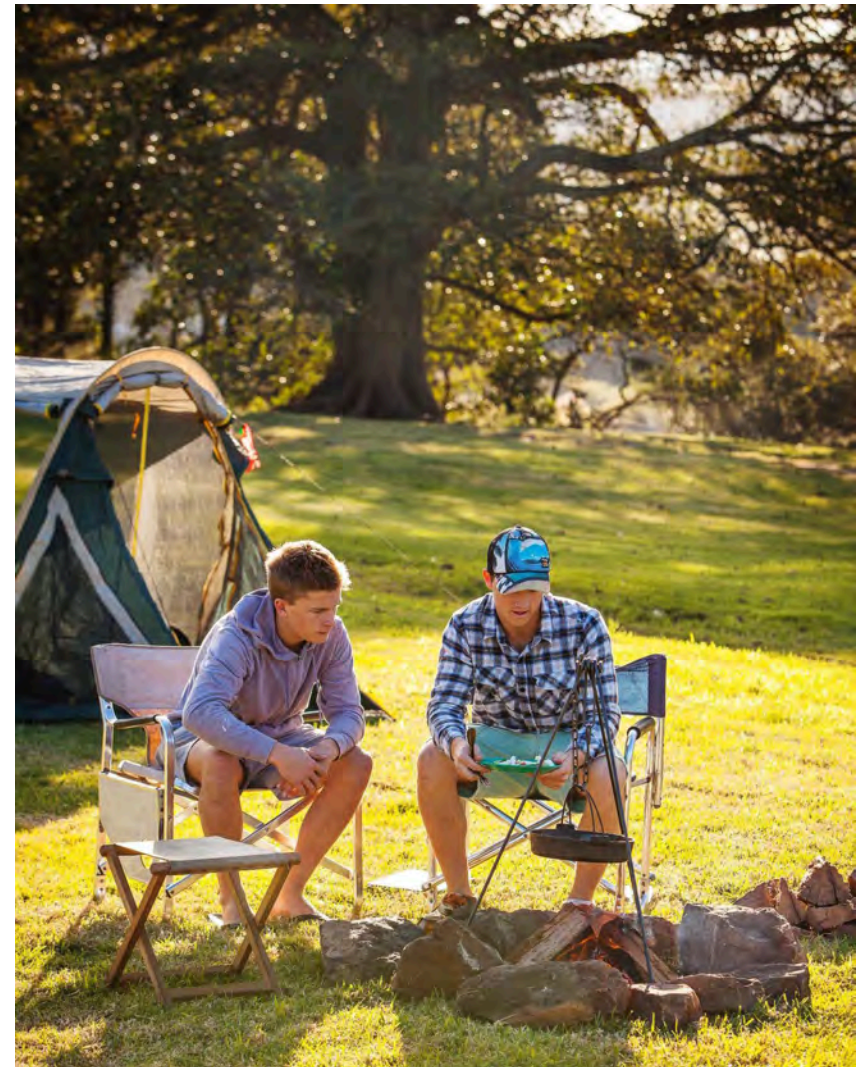
Youth Market¹⁵

The youth market is the fastest growing visitor market. The youth market refers to people aged 15-29 years, and includes Gen Y and Gen Z, often referred to collectively as the 'Millennials'. Both the international and domestic youth markets are strong. The Youth Market accounts for 33% (1.3 million visitors) of international visitors to NSW, with the market divided into travel for education, working holidays and holiday – leisure which includes VFR. The main source markets are Mainland China, United Kingdom, USA, New Zealand and Germany.

Domestically, the youth market takes around 6.5 million trips per annum in NSW. The most visited destinations are Sydney, the NSW North Coast and the NSW South Coast. 73% of trips made to the South Coast are day trips, with 27% staying one or more nights in the Region. In selecting destinations, the youth market seeks out experiences, particularly those that are unique, immersive, challenging and/or contribute to personal knowledge and development. The youth market is sophisticated and reasonably wealthy, with value-for-money more important than price. Young people primarily take inspiration from word of mouth recommendations (67%), from social media postings by friends and family (60%) and user generated content (45%).

Shellharbour's Offer:

- Proximity to Sydney / Sydney and Wollongong Universities – ease of access by road, rail and cycle.
- Beaches, including The Farm / Coastal road trip.
- Diverse range of soft and hard adventure activities – sky diving, scenic flights, cycling, mountain-biking, scuba diving, surfing, SUP, kayaking, canyoning etc.
- Proximity to attractions in the surrounding region.
- Pubs, Clubs, entertainment, dining options.
- Suitable accommodation – camping, dormitory, pub, cabins, holiday lets.
- Youth market tour operators coming to and through the City.



Camping, Killalea Reserve: Tourism Shellharbour

¹⁵ Information in this section taken from the Destination NSW Webinar on the Youth Market and from TNS Domestic 2016.

Family Market

The family market is comprised predominately of Generation X. Work-life balance is a priority with Xers. Research undertaken by TNS Australia, found that domestic travel fulfils a key role in busy family lives by offering a chance for families to reconnect, recharge and have a break from normal routine. A domestic holiday is often a weekend break or a short break (2 to 4 days) providing an opportunity for families to relax and to open lines of communication between adults and children without time pressures. They are often a mix of planned and spontaneous trips, spread across the calendar to provide milestones to look forward to, and are often undertaken for social reasons such as visiting family and friends.

Research has also identified 'nostalgia' as an intangible motivator of travel, with parents wanting their children to experience the holidays that they experienced as a child. Nostalgia often underlays the family 'road trip' with road trips perceived as providing a perfect opportunity for families to bond as a family unit. In selecting destinations, key considerations are localities that are relatively close to home (few hour's travel) and are 'relaxed' and 'easy' in beautiful surroundings.

Trends in this market include:

- Multi-generational travel and travel with groups of families.
- A focus on experiences – outdoor and adventure, cultural, dining.
- Digital detox – putting aside or limiting use of digital devices / screens.
- Food is a core part of the experience – shopping at farmers markets, farm gated and local provedores; 'pick/catch -your-own' activities; dining out; campfire / BBQ cooking.
- Off-peak and shoulder period travel to take advantage of 'deals'.

Shellharbour's Offer:

- Close to home - proximity to Sydney / Canberra.
- Laid-back destination, with a beautiful setting.
- Outdoors and adventure-based activities that families can do together – have fun and reconnect. Beaches / surfing, exploring the rock platforms and islands, cycling, canoeing, bushwalking, snorkelling etc.
- Opportunities for 'treats' – Jamberoo Action Park, go karting, play maze, mini golf, BMX etc.
- Indoor activities for inclement weather.
- Can deliver the 'nostalgia' – the family sea-side holiday.
- Local produce – from the markets, seafood outlets, catch your own prawns / fish.
- Family friendly accommodation – camping, cabins, holiday rental properties, including large properties suitable for intergenerational / multiple families.



Killalea Reserve: Tourism Shellharbour



Roller Skating, Oak Flats Roller Skating Rink: Tourism Shellharbour



Fishing, Lake Illawarra: Tourism Shellharbour

Couples and Groups of Friends

This market cuts across all age groups, and includes couples, groups of couples and groups of friends, meeting up to socialise, catch-up and have fun. The Youth Market and Gen X are more likely to meet up on a weekend or take a long-weekend, while older (baby-boomer) groups tend to meet up mid-week. Activities vary, with some groups just looking to get together in an attractive location, while others are looking to do things together (e.g. fish, cycle, mountain bike, golf, bush-walk etc.). Opportunities for socialising and dining together are an important consideration in selecting destinations. Value-for-money tends to be more important than price, with this market often willing to 'splurge'. The Shell Cove Waterfront Precinct and Shellharbour Village are likely to appeal strongly to this market.

Over 55's market – including drive-based touring

The Over 55's market is at, or approaching, retirement age. The market has a strong sense of freedom and a desire to travel, with lifestyle being the focus. This market is being described as 'recycled back-packers'. It is healthy and active, with people involved in sport and recreation - cycling, jogging, swimming, golfing and visiting the gym. This market is seeking new places, different lifestyles, soft-adventure and new experiences. The most appealing experiences are nature and outdoors based (56%); touring by car – sightseeing (51%); relaxation, health and indulgence (43%); and food and wine (35%), with this market seeking out local produce and patronising restaurants and contemporary eateries.

In addition to being fit and active, this market is knowledgeable, sophisticated and demanding. Travellers are generally prepared to spend to achieve what they want. They are more interested in value for money than in the lowest price and have no hesitation in paying 'top dollar' for something that they really desire. They expect quality customer service and are intolerant of poor service.

Shellharbour's Offer:

- Close to home - proximity to Sydney / Canberra.
- Beautiful setting – with visitors able to do as much or as little as they want.
- Range of indoor and outdoor activities across all price points.
- Pubs, clubs and dining options suitable for socialising.
- Shell Cove Waterfront Precinct / Shellharbour Village.
- Accommodation options suitable for both couples and groups.
- Quality / unique experiences and accommodation for those looking to 'celebrate' and/or to indulge or treat themselves.

Shellharbour's Offer:

- Variety of outdoor, nature-based and soft adventure experiences.
- Coastal laid-back lifestyle.
- Sydney Melbourne Coastal Touring Route / Grand Pacific Drive
- Sight-seeing / scenic driving / day trips – Jamberoo Valley, Southern Highlands, Shoalhaven
- The opportunity to relax, get healthy – to walk, jog, cycle, play golf.
- The sophistication of the Waterfront Precinct
- Local produce, dining options, licensed clubs and pubs.

Trends in this market include:

- Increasing demand for soft adventure and recreational activities – seeking a variety of activities and experiences on each trip.
- Growth in the number of ‘learning’ visitors – visitors wanting to come away with new knowledge and/or skills.
- Recognition that the journey is part of the experience.
- ‘Slow movement’ – travel slowly and immersion in the locale.
- A desire to feel like a local – to be welcomed by locals and treated like a visiting friend rather than a tourist.
- The freedom to interact - the ability to strike up a conversation and make themselves at home.



Kayaking : Tourism Shellharbour

Regional Market

Within the Region there are a number of key sectors:

- Young families – often with a large mortgage and limited disposable income but looking for ways to ‘live the lifestyle’ that they have purchased.
- Older demographic – people at or approaching retirement. Many of the City’s long-term residents are likely to have been working class.
- Sea and tree changers – people who have relocated to the area for lifestyle.
- University of Wollongong students – domestic and international.

These markets are primarily going to be day-trippers and event attendees and are in a position to bring and/or recommend Shellharbour City to their visiting friends and relatives. They are also a large potential market for the ‘purchase’ of City experiences for family and friends. Stockland Shellharbour, Shellharbour Village, Killalea Reserve and The Farm markets and Bass Point are significant attractions for the Regional market. The Regional market will also be drawn to Shell Cove Waterfront. There is opportunity to market the City’s attractions and activities to new residents to the area and to put in place ‘incentive’ and ‘loyalty’ style programs to encourage residents to ‘explore their own back yard’ and to showcase the area to their friends and relatives.

There is also opportunity to target social groups within the Region – Probus, walking and cycling clubs, play groups, disability service providers, retirement / nursing home excursions, seniors groups, school excursions, sporting clubs etc.

Shellharbour’s Offer:

- Close to home – easy to access by car, train, cycle.
- Affordable – a cost effective, enjoyable day out.
- Safe, uncrowded beaches, easy access and parking, no parking meters.
- Stocklands Shellharbour – ample, free parking.
- Shell Cove Waterfront and Shellharbour Village.
- Child and pet friendly city – walking and cycling trails, parks and playgrounds, BMX track, skateboard parks, safe beaches.
- Events, festivals, markets.
- Accessible attractions and activities suitable for groups and people with mobility limitations.
- Experiences (that can be gifted) – aviation and marine experiences, Wing Walks, golf, high tea at Ravensthorpe, dining and shopping vouchers etc

Special Interest and Activity Based Markets

Shellharbour City has a range of assets and activities that can be leveraged to grow special interest and activity-based markets. These markets can generally be targeted cost-effectively on-line through specialist websites, blogs and social media. Special interest and activity-based markets can be used to build visitation in shoulder and off-peak periods.

The opening of Shell Cove Harbour and Marina will provide the opportunity to build nautical and marine based tourism, with a coordinated approach to market development and marketing and promotion is required to realise the potential. There is also opportunity to work with activity providers, the Destination Network and/or adjoining LGAs to build a number of these markets.

Shellharbour City offers:

Nautical - Touring vessels, Boating Enthusiasts: Shell Cove Marina; boat servicing; boat storage; moorings off Killalea; Shellharbour Village, Kiama and Wollongong Harbours; stunning coastline; Minnamurra River; Lake Illawarra;

Fishing: Lake, beach, rock, reef and deep-sea fishing; fishing charters; Game fishing tournaments; marine infrastructure – boat ramps, Shell Cove Marina.

Scuba Diving: Bass Point – nationally recognised; 10 dive sites – reefs, wrecks, caves; shore and boat-based opportunities; dive operators, etc.

Surfing: The Farm – National Surfing Reserve; Killalea Reserve; 5 beaches + well-known surf breaks; surfing lessons and tours; surf culture and lifestyle.

Canoeing, Kayaking, Stand-Up Paddleboard, Kite Surfing: Ocean, Lake Illawarra; Minnamurra River; Lessons, tours and equipment hire.

Powered Water Sports – Water skiing, Wakeboarding, Jet Skiing: Lake Illawarra

Golf: The Links and Calderwood Valley Golf Courses, plus proximity to courses in Wollongong, Kiama and Southern Highlands.

Cycling: Coastal cycleway; Lake Illawarra cycleway; IBUG routes; bike friendly cafes; bike hire; BMX track.

Mountain Biking: Greenvalleys Mountain Bike Park – Downhill / Gravity Tracks and Pump Track.

Aviation Enthusiasts: HARS; Aviation tour operators; Learn to Fly.

Bushwalkers: Macquarie Pass National Park; Killalea Reserve; Bass Point

Canyoning: Macquarie Pass National Park & SCA



Windang Island Surf Break: Wannasurf.com



Croom Rd BMX: BMX NSW

Business Events

Shellharbour City has a small business events market, with the City primarily attracting locally and regionally generated conferences and meetings. Limited accommodation has been a significant barrier to attracting this market. The proposed Hotel and conference facilities at Shell Cove and Calderwood Valley Golf Resorts will provide quality facilities that can be used to 'launch' the City as a destination for business events. The availability of RPT air services, the entry of HARS into the market (quality, state of the art meeting rooms, unique function spaces, wing walks), the new Shellharbour City Auditorium, refurbished conference facilities at the Shellharbour Club, combined with existing venues and facilities including boutique facilities at Ravensthorpe, will strengthen the City's competitiveness as a business events destination.

The large business parks being developed in the South Western and Western Sydney growth sectors, including the Western Sydney Airport Precinct, provide market opportunities for Shellharbour, independently and potentially in conjunction with Kiama and/or Wollongong City.

Sports Tourism

Shellharbour has a range of localities, venues and facilities that have the capacity to host regional, State and in some cases, National and International events, with the City having successfully hosted major events in a multitude of sports. The sports tourism market can be extremely lucrative, injecting significant dollars into the host community.

The market has become highly competitive with an increasing number of localities investing significantly in quality sporting facilities, including large indoor sports centres, in order to attract events. Some Council's also have budgets to 'buy' events, providing sponsorship and other financial support to secure the business. Sports in which Shellharbour City has strong competitive advantages include:

- Lawn and carpet bowls, with the bowls facilities at Warilla Bowls and Recreation Club being of international standard.

Shellharbour City offers:

- **Attractive setting – 'incentive' location.**
- **Central location within the Illawarra Region, proximity to Sydney and the emerging business parks in South Western and Western Sydney - ease of access and parking.**
- **RPT air services – access from Melbourne and Brisbane**
- **Shell Cove Waterfront Hotel and Conference facilities + Waterfront – opportunity to combine business events with lifestyle, nautical and marine activities.**
- **Calderwood Valley Resort – accommodation, meeting facilities, golf.**
- **HARS – state-of-the art meeting facilities, unique function spaces, team building activities – including the Wing Walk.**
- **Diversity of conference, meeting, function and exhibition spaces at various price points.**
- **A range of attractions and activities suitable for pre and post conference**



International Standard Indoor Bowling Greens: Warilla Bowls & Recreation Club

- Greenvalleys Mountain Bike Park – downhill and pump tracks for mountain bike events.
- Surf events – surfing, surf life-saving and iron man events.
- Croome Sporting Complex - includes fields for soccer, cricket, rugby league and athletics, plus synthetic hockey fields, equestrian facilities, tennis courts and a BMX Track.

The Shell Cove Harbour and Marina will provide opportunities for game fishing, ocean sailing and other nautical and marine related events. The event potential of Lake Illawarra is under-developed.

International Tourism

The significance of the international tourism market for Shellharbour City is difficult to gauge. Tourism Research Australia estimates that the City attracts around 2,000-3,000 international visitors who stay one or more nights in the LGA. The South Coast Region attracts an estimated 150,300 international overnight visitors, with just less than half (46.4%, 69,700) staying in the Illawarra Region, primarily in Wollongong City. Given Shellharbour's proximity to Sydney and the marketing that has occurred internationally for Grand Pacific Drive and the Sydney – Melbourne Coastal Touring Route, it is likely that the City and surrounding areas, are attracting a significant number of day trips from International visitors staying in Sydney. While Shellharbour City can offer experiences that are sought by International visitors, very little of its produce is 'export ready' and suitable accommodation has been lacking. The Shell Cove Waterfront will help to address this, with international standard accommodation and the potential for 'export ready' marine products and experiences (e.g. whale and dolphin watching cruises). The Calderwood Valley Resort could also be marketed to international visitors.

In 2016/17, NSW attracted just over 4 million international visitors, up 9.9% on 2015/16¹⁶. The main source markets are Mainland China (714,000 visitors), followed by the USA (442,000) and New Zealand (424,000). 50.9% of international visitors to Australia visit NSW, with 93.5% of these visitors, visiting Sydney. While international visitors represent only 11.7% of total overnight visitors in NSW, international travellers account for 48.8% of nights spent in NSW and 37.0% of expenditure by overnight visitors to NSW.

Over the next decade, Tourism Research Australia¹⁷ forecasts that the number of international visitors to Australia will increase by 75% to over 15 million visitors. This equates to an average growth rate of 5.8% per annum. Five source markets, China, New Zealand, United States, United Kingdom and Singapore are expected to account for 62% of the additional visitors in 2026/27. Visitation from China is forecast to grow at 11.9% per annum over the next decade, with strong growth also forecast for the Indian market (8.7% pa), USA (5.4% pa), Japan (3.9% pa) and Hong Kong (3.8%pa).

Shellharbour City needs to be in the international market place. The most cost-effective way of achieving this is through cooperative marketing through the South Coast 'Unspoilt' campaign partners, and participation in touring route promotional initiatives. If well executed, both Sydney to Melbourne Coastal touring and Grand Pacific Drive, have the potential to bring international visitors into and through the City. There is also potential to leverage rail services to encourage international visitors to explore the City.



Game Fishing: Shellharbour Game Fishing Club



Lake Illawarra Cycleway: Reddall Reserve: JRA

¹⁶ Information in this paragraph taken from Destination NSW Travel to NSW YE June 2017 and Travel to Sydney YE June 2017.

¹⁷ Tourism Research Australian Forecasts 2017

Accessible Tourism

Accessible tourism is broadly defined as the ongoing endeavour to ensure tourist destinations, products and services are accessible to all people, regardless of their physical limitations, disabilities or age. The introduction of the NSW Disability Inclusion Act (2014) and the NSW Disability Inclusion Plan (2015) seeks to ensure that people with a disability have to right to full and effective participation in society. The introduction of the National Disability Insurance Scheme (NDIS) has provided scheme participants with greater opportunity for travel and participation in activities.

Research undertaken by Destination NSW¹⁸ has found that 18% of the population of NSW (1.4 million people) have some form of disability. In the March Quarter, 2017, people with disabilities made 1.2 million overnight visits in NSW, generating 4.6 million visitor nights. Sydney was the most popular destination (32% of trips), followed by followed by the North Coast (16% of trips and the South Coast (14.5% of trips).

A number of the attractions and facilities in Shellharbour City are fully accessible, with the Shell Cove Waterfront Precinct also fully accessible. Council is progressively implementing its Disability Access and Inclusion Plan 2017 – 2021, which will result in improved access to public areas and venues, more facilities for people with disabilities and improved access to events. As such, there are likely to be potential opportunities to target the accessible tourism market.

Cruise Ship Passengers

Cruising is one of the fastest growing tourism sectors. In Australia more than 1.3 million people per annum, undertake a cruise (5.3% of the population)¹⁹. Sydney is the most population destination for cruise ships, attracting over 300 ships per year (~ 500,000 passengers). Sydney Harbour has significant capacity constraints, which is impacting on the growth of the sector. Port Kembla Harbour is being promoted as a supplementary port to take some of the pressure off Sydney. At present Port Kembla is attracting around 3-4 cruise ships per annum with these ships bringing around 7,000-10,000 visitors into the Illawarra Region. Several attractions in Shellharbour City, including HARS Museum and Shellharbour Village, have been included in the shore-based tour programs offered to cruise ship passengers. Visitation and opportunities will increase as the number of cruise ships visiting Port Kembla increases. The Shell Cove Waterfront Precinct will be an attraction for the cruise ship market. The Shell Cove Harbour facilities may also provide opportunities for boutique cruise vessels to moor off Bass Point and transfer passengers by tender to Shell Cove.

¹⁸ Destination NSW Domestic Overnight Visitation to NSW by People with Disabilities

¹⁹ Tourism Research Australia (2016) Australian Cruising Market

Shellharbour City offers:

- Accommodation with accessible rooms.
- Shared coastal and lakeside pathways suitable for wheelchairs and mobility aids.
- Beach wheelchairs at Shellharbour, Warilla and South Shellharbour beaches and access ramps at Warilla Beach and Little Lake.
- HARS Museum.
- Shell Cove Waterfront Precinct – will be fully accessible.
- Accessible shopping – Stocklands Shellharbour
- Accessible railway stations and bus stops.
- Accessible public toilets.
- Oak Flats Heated Pool – chairlift / access steps.



Cruise Liner visiting Port Kembla: ABC.net.au

DESTINATION DEVELOPMENT – PRODUCTS, INFRASTRUCTURE & SERVICES



8. PRODUCT BASE – ATTRACTIONS, ACTIVITIES, EXPERIENCES

The attraction and activity base and the experiences provided, form the backbone of the visitor economy. Attractions and activities have a major influence on trip behaviour, providing a reason to visit the City as well as influencing length of stay, dispersal patterns throughout the City, and money spent.

8.1 Attractions, Activities and Experiences

Shellharbour City is well endowed with a diverse range of visitor attractions and activities, quality sporting facilities, a network of cycleways and walking trails, good marine infrastructure and a diversity of dining, retail and entertainment options. The attractions and activities available in the City are summarised in Table 8.1.

Within the City, there are several strong attraction and activity ‘clusters’, notably:

- Coastal precinct and nature-based attractions – Killalea Reserve, Bass Point, Shell Cove Waterfront Precinct, Shellharbour Village, beaches, headlands and rock platforms, Lake Illawarra and Windang Island, and Macquarie Pass National Park, plus a range of marine based tourism operators. The City’s coastal landscape and natural attractions are highly consistent with the South Coast ‘unspoilt’ branding, with the operators providing opportunities to experience the marine environment.
- Aviation attractions and experiences – with HARS Museum and Sky Dive the Beach being high profile activities, while the scenic flights provide a different perspective of the stunning coastline and escarpment as well as ‘soft adventure’ activities.
- Cycling, with the Coastal and Lake Illawarra cycleways, a national standard BMX track and the Greenvalleys MTB Park.
- A diversity of free and commercial indoor and outdoor activities, ideal for the family market, providing the opportunity to have fun and ‘connect’.

8.2 Events

Shellharbour City has a diverse program of festivals and events, with something on most months. The majority of the events are community focused and celebrate the City’s lifestyle and cultural diversity. These events are ideal for building the regional and VFR markets and raising awareness and generating publicity locally and regionally. Events such as the Great Illawarra Walk, Ride Around the Lake and the Shellharbour Ocean Swim showcase the City and broader region’s natural assets and outdoor lifestyle, while Kids Fest, Child’s Play, Dog’s Day Out and Million Paws walk strengthen the ‘child / family friendly’ positioning of the City. The World Bowls Cup held at the Warilla Bowls and Recreation Club,

Shellharbour Beachside Holiday Park: Tourism Shellharbour

Activities in Shellharbour City

Surfing + beach
 Kite surfing
 Stand Up Paddle Boarding
 Canoe / kayaking
 Fishing / Prawnning
 Scuba Diving / Snorkelling
 Boating – Lake & Off Shore
 Sailing
 Water skiing, wakeboarding
 Jet skiing
 Cycling / BMX
 Mountain Biking
 Skateboarding
 Golf / Bowls / Tennis
 Learn to Fly / Scenic Flights
 Sky Diving
 Wing Walking
 Scenic walking / Bush walking
 Canyoning
 Camping
 Bird watching / wildlife
 viewing
 Picnicking / Scenic driving
 Shopping / dining
 High Teas
 Theatre / Cinema
 Go karting
 Learn to ride - Motorbikes
 Roller skating
 Mini golf / laser tag
 Train rides

brings international visitors into the City. Shellharbour City also has a number of events that are or have the potential to be high profile signature events for the City and the broader region – Wings over the Illawarra, Sculptures at Killalea, The Farm Markets, the Illawarra Mountain Bike Festival and SkidFest. Shell Cove Marina will provide the opportunity to grow the Shell Harbour Game Fishing Tournament and develop or attract a range of fishing, boating and sailing events. Greenvalleys Mountain Bike Park is already proving popular for events, with the Park having the potential to attract national and international events.

Table 8.1 Attractions and Activities – Shellharbour City

Beaches, Waterways, National Parks & Reserves	Arts, Culture, Heritage, Shopping, Entertainment	Aviation Activities & Experiences	Marine Activities & Experiences	Tours, Equipment Hire, Commercial & Other Activities
Shellharbour City				
<ul style="list-style-type: none"> Stunning coastal scenery 10 beaches, 11 well known surf breaks Shellharbour historic harbour and ocean pool. Lake Illawarra, Minnamurra River, Macquarie Rivulet – waterfalls and cascades. Rainforest, Eucalypt Forests, wetlands Coastal and Lake Illawarra Cycleways / Shared pathways <p>Killalea Reserve: The Farm (National Surf Reserve, Mystics Beach, Minnamurra River, Lagoon, forest walks.</p> <p>Bass Point: Rocky shorelines, sandy bays, aquatic reserve, 10 dive sites - one of Australia's best dive destinations, 6 shipwrecks, Aboriginal heritage, rainforest.</p> <p>Lake Illawarra & Windang Island: Lake, Windang Island, Lake Island, Lake Illawarra cycleway, art trail, foreshore reserves, picnic facilities and playgrounds.</p> <p>Macquarie Pass National Park: Rainforest, waterfalls, cascades and rock pools, walking trails, Jump Rock</p> <p>Blackbutt Reserve: Forests, picnic areas, playgrounds, walks and cycleway</p> <p>Myimbarr Community Park: wetlands and bird habitat</p>	<p>Museums:</p> <ul style="list-style-type: none"> HARS Museum: 40+ historical aircraft, 747 Wing Walk, guided tours, café. Illawarra Light Railway Tongarra Museum <p>Art / Galleries:</p> <ul style="list-style-type: none"> Shellharbour Village Exhibition Space Dee Kramer Photographic Gallery Illawarra Art Trail <p>Heritage Walks:</p> <ul style="list-style-type: none"> Shellharbour Village & Albion Park Bass Point – Aboriginal Cultural Walk <p>Retail Therapy:</p> <ul style="list-style-type: none"> Shellharbour Village: historic seaside village, eateries, boutiques, lifestyle shops. Stockland's Shellharbour: largest shopping centre on the South Coast. Local markets: gourmet produce, arts and crafts <p>Entertainment:</p> <ul style="list-style-type: none"> Pubs and Clubs Roo Theatre Cinemas <p>Other:</p> <ul style="list-style-type: none"> Ravensthorpe – historic house, high teas 	<ul style="list-style-type: none"> Adrenaline-pumping experiences Scenic and joy flights Learn to Fly <ul style="list-style-type: none"> HARS Sky Dive the Beach Gyrocopter Illawarra Touchdown Helicopters Top Gun Australia – L9 Fighter Jet Sydney Microlight Centre Southern Bi-Plane Adventures NSW Air Fly Illawarra 	<ul style="list-style-type: none"> Shellharbour Charter Fishing Shellharbour Scuba Centre Pines Surfing AST Surf School JDP Surf Canoe & Kayak Adventures Lake Illawarra Boat Hire Stand-up Paddle Boarding 	<p>Cycle:</p> <ul style="list-style-type: none"> Coastal & Lake Illawarra Cycleways Greenvalleys MTB Park & Skills Clinics Croome Rd BMX complex PCYC learn-to-ride area South Coast Bike Hire Simple Cycles – Cycle Hire <p>Golf:</p> <ul style="list-style-type: none"> The Links Shellharbour Calderwood Valley <p>Bowls:</p> <ul style="list-style-type: none"> Warilla Recreation & Bowling Club Albion Park Bowling Club <p>Indoors:</p> <ul style="list-style-type: none"> C1 Speed – Go-Karting & Laser Tag Shellharbour Ten Pin Bowling AMF Illawarra Strike Zone Oak Flats Roller Skating Playmaze for Kids <p>Other</p> <ul style="list-style-type: none"> Corset Motorcycle School Eagle Rock Adventures – Canyoning Skate Parks

8.3 Sydney Surrounds South Destination Network Area

The Sydney Surround South Destination Network Area has a diversity of attractions and activities, most of which are readily accessed from Shellharbour City. Key strengths of the Network Area are the stunning coastline, with beautiful beaches and rocky headlands; the coastal, escarpment and tablelands national parks with the gorges, waterfalls and rainforest having strong appeal; and the lifestyle promises – coastal and country living and the aspirational experiences that align with this.

To the south, Kiama LGA has four high profile attractions – the Kiama Blowhole, Jamberoo Action Park, Minnamurra Rainforest Centre and the Illawarra Fly, each of which are highly accessible to Shellharbour LGA. The Kiama Coast Walk compliments the walks available in Shellharbour City, with Minnamurra Rainforest Centre, the escarpment waterfalls and National Parks having synergies with Macquarie Pass National Park. Kiama has very few entertainment-based activities (e.g. go karting, roller-skating) or activities for inclement weather, with the activities in Shellharbour City ideally positioned to fill this gap.

To the north, the Sea Cliff Bridge north of Wollongong is probably the City's most recognised attraction, with North Beach – Wollongong Harbour precinct and the Nan Tien Temple also having strong market place recognition. Wollongong and Shellharbour Cities also share Lake Illawarra, with the full potential of the Lake yet to be realised.

Table 8.2 Attractions and Activities – Sydney Surrounds South Destination Network Area

Beaches, Waterways, National Parks & Reserves	Arts, Culture, Heritage, Shopping, Entertainment	Aviation Activities & Experiences	Marine Activities & Experiences	Tours, Equipment Hire, Commercial & Other Activities
Wollongong				
<ul style="list-style-type: none"> Royal National Park (part) Dharawal National Park Beaches, ocean pools Lake Illawarra Wollongong & Pt Kembla Harbours Sea Cliff Bridge – Grand Pacific Drive Illawarra Escarpment – lookouts, walking trails, cafes etc. Botanic Gardens 	<ul style="list-style-type: none"> Nan Tien Temple Science Centre & Planetarium Early Start Discovery Space Australian Motorlife Museum Wollongong Art Galley Illawarra Performing Arts Centre Warren Keelan Gallery Shopping malls, markets 	<ul style="list-style-type: none"> Hang gliding, Bald Hill Sky Dive the Beach 	<ul style="list-style-type: none"> Fishing Charters Surf schools Scuba Diving Boat Hire - Windang 	<ul style="list-style-type: none"> Australia's Industry World – Industry Tours Golf courses Illawarra Golf – driving range & Mini-golf Awesome Drive Outdoor Go Karting Hangdog Climbing Gym Hangtime Trampoline Park Just Cruisin' Motorcycle Tours Revolution Laser Arena Symbio Wildlife Park
Kiama				
<ul style="list-style-type: none"> Beaches (8), Lagoons, Ocean Baths Kiama Harbour Cathedral Rocks, Bombo Headland Minnamurra River Kiama Blowhole & Little Blow Hole Illawarra Fly Treetop Adventures Minnamurra Rainforest Centre Kiama Coast Walk 	<ul style="list-style-type: none"> Historic towns and villages Boutique & lifestyle shopping Markets Heritage Walks Food, wine, local produce Arts Trail 		<ul style="list-style-type: none"> Fishing Charters – Kiama Surf schools 	<ul style="list-style-type: none"> Jamberoo Action Park Golf Courses (3) Kiama Leisure Centre

Beaches, Waterways, National Parks & Reserves	Arts, Culture, Heritage, Shopping, Entertainment	Aviation Activities & Experiences	Marine Activities & Experiences	Tours, Equipment Hire, Commercial & Other Activities
<ul style="list-style-type: none"> Barren Grounds Nature Reserve 				
Shoalhaven				
<ul style="list-style-type: none"> Beaches (100+), estuaries, lagoons, lakes Shoalhaven River Jervis Bay / Booderee National Park Coastal & Escarpment National Parks Ulladulla Harbour 	<ul style="list-style-type: none"> Historic towns & villages Food, wine, breweries Local produce, markets, farm gates Historic Houses Shoalhaven Regional Gallery Commercial Galleries Bundanon Trust / Arthur Boyd Local museums Cooking Schools (5) Food tours Gardens 	<ul style="list-style-type: none"> Fleet Air Arm Museum 	<ul style="list-style-type: none"> Surf Schools (8+) Scuba Diving (3) Kite Schools (2) Stand-Up-Paddle-boarding tours & hire (6+) Whale, dolphin and seal watching cruises / River cruises (6) Canoe & kayak hire and tours. Fishing charters (12) Boat hire (9) Water skiing & wakeboarding hire / lessons (3) 	<ul style="list-style-type: none"> Galamban Aboriginal Experiences Trees Adventure Shoalhaven Zoo Climb Nowra Horse Riding (4) Ten Pin Bowling (2) Funland Ulladulla Bicycle hire and tours Ghost walks Flip Out Indoor karting Model railways (2) Paintball (2) Mini Golf (3) Golf
Southern Highlands				
<ul style="list-style-type: none"> Moreton, Budderoo, Bungonia & Nattai National Parks Fitzroy, Belmore & Carrington Falls Glow Worm Glen, Bundanoon Wombeyan Caves 	<ul style="list-style-type: none"> Historic towns and villages Bradman Centre, Bowral Food, wine, local produce Wine tours Art Galleries & Arts Studio Trail Gardens Museums 			<ul style="list-style-type: none"> Shotz Indoor Golf Golf (8 courses) Bicycle hire MTB Joadja Creek Heritage Tours Optimum Outdoor Adventures
Wollondilly				
<ul style="list-style-type: none"> Thirlmere Lakes & Nattai National Parks Warragamba, Cataract, Cordeaux, Nepean and Avon Dams 	<ul style="list-style-type: none"> Historic towns and villages Historic houses Heritage walks and tours Markets Farm Gates and Pick Your Own Orchards 	<ul style="list-style-type: none"> Sydney Skydiver Balloons Aloft 		<ul style="list-style-type: none"> Trainworks (Heritage Train Museum) Picton Karting MTB Mountain Bike Park & trails Farm tours & activities Bargo Dingo Sanctuary K-Ranch Horse Riding

8.4 Possible Additions to the Product Base

There are a number of projects mooted for the Shellharbour City and surrounding LGAs that will diversify and strengthen the product base and appeal of the area. The majority of the projects listed below are still at the concept / preliminary planning and assessment phase, with some likely to be dependent on securing significant funds to proceed.

Shellharbour City

- **The Waterfront Shell Cove** – The Waterfront Precinct includes a harbour, 270-berth marina, foreshore promenade, dining and entertainment precinct, 120 key hotel, tavern, shopping centre and 1,556 residential dwellings. (See Section 9.1). The Harbour is expected to open in 2020.
- **Civic Precinct - Shellharbour City Centre** – The Civic Centre precinct includes a performance space (350-seat auditorium), outdoor plaza with art works and water play area, and a local history museum. The Precinct will open in early 2018.
- **Living Garden** – The Living Garden project is proposed for a farming property at Tongarra, opposite the Greenvalleys Mountain Bike Park. The project is based on the UK River Cottage concept and includes the development of a market garden and orchard, farm gate outlet, kitchen café and boutique accommodation. A boutique cross-country MTB track through the property is also being considered. The property is looking to run cooking classes, food events and potentially markets. The project is at the concept stage.
- **Aboriginal Interpretative Centre – Shell Cove**

Kiama

- **Minnamurra Boardwalk** – 1.6km shared pathway linking the Coastal Cycleway at the Minnamurra River Bridge to the Gainsborough area. The route will run parallel to Riverside Drive. Four route options are being considered including a cantilevered pathway off the side of the road, an elevated pathway through the mangrove forests and an elevated over-water pathway. The Boardwalk has the potential to become one of the highlights on the Coastal Cycleway, with flow-on benefits to other localities along the route.
- **Kiama Arts Precinct** – developing Hindmarsh Park in the town centre into a vibrant arts precinct with public art installations; exhibition, studio and workshop spaces; and performance spaces.

Wollongong City

Destination Wollongong has in place a Destination Development Plan that identifies potential tourism projects for the City. The Plan divides the City into 8 tourism-planning precincts and identifies product development opportunities and potential projects within each precinct. These projects and their possible implications and opportunities for Shellharbour City are summarised in the following Table.

Table 8.3 Possible Tourism Development Projects – Wollongong City

Precinct	Projects	Implications and Opportunities for Shellharbour City
Helensburgh – Royal National Park	Royal National Park Eco Lodge	<ul style="list-style-type: none"> Golf resort: increased competition for Shellharbour courses; new product which could assist in raising the profile and awareness of the Region as a golf destination. Indigenous Village: raise awareness of Aboriginal heritage and culture in the Region; potentially a direct competitor to the proposed Aboriginal Interpretive Centre at Shell Cove.
	Maddens Plains Golf Resort	
	Indigenous Village	
Northern Beaches	Museum of Flight, Restaurant, Conference Facilities, Bald Hill	<ul style="list-style-type: none"> Museum: Cross-promotional opportunities with HARS and the aviation tourism experiences based at the Shellharbour Airport.
	Grand Pacific Way – walking and cycle trails	<ul style="list-style-type: none"> Part of the consolidation, positioning and marketing of the Coastal and Lake Illawarra Cycleways.
	Illawarra Escarpment Walk – Wollongong, Shellharbour and Kiama LGAs	<ul style="list-style-type: none"> Adds to the attraction and experience base of Shellharbour City and the surrounding region. Consideration needs to be given to how the walk can be leveraged to generate economic returns, and links between the walk and other attractions and towns and villages.
	Sky bridge – Mt Ousley – to provide access over the Princes Highway at Mt Ousley to the Escarpment	Nil
Coastal Beaches	Surf Camp at Wollongong Tourist Park	<ul style="list-style-type: none"> Potential to bring surfing groups, south to Shellharbour City – capitalising on the recognition of The Farm as a national surfing reserve.
Mt Keira	Mt Keira Adventure Playground – Gondola up the escarpment, MTB Park, Luge, Bird Sanctuary, bush walking, rock sports, Eco Lodge, restaurant and conference centre	<ul style="list-style-type: none"> Increase access to and raise the awareness and profile of the Illawarra escarpment, which can be leveraged to promote the escarpment National Parks in Shellharbour, Kiama and Wingecarribee LGAs. Accessible to visitors staying in Shellharbour LGA – another attraction. Additional mountain bike product – offering a different experience to Greenvalleys – possible opportunity for cross promotion or joint staging of events with multiple disciplines.
Wollongong City, Harbour and Blue Mile	Belmore Basin Marine Facility – ferry terminal, restaurant and roof top bar, VIC, art gallery / exhibition space	<ul style="list-style-type: none"> Marine facilities and a coastal ferry will contribute to growing nautical and marine tourism along the Illawarra - South Coast. Belmore Basin would provide a day trip destination for boats coming out of Shell Cove, and vice versa. The ferry would encourage dispersal of visitors along the coastline.
	Belmore Basin Coastal Ferry – sea link between Wollongong, Pt Kembla, Shellharbour / Shell Cove and Kiama Harbours	
	Wollongong Convention Centre – major convention facility	<ul style="list-style-type: none"> Possible demand for accommodation in Shellharbour City; opportunities for pre and post conference touring and conference social activities. HARS Museum – unique venue for conference functions.
	Piccadilly Transport Hub	Nil
	Bungee Jumping at Sublime Point	<ul style="list-style-type: none"> Additional adventure products and experiences, strengthening the positioning and perception of the Region as an adventure-based destination. Can be packaged with skydiving, scuba diving, canyoning, surfing and mountain biking for the domestic and international youth markets.
	Zip-line from the Southern Gateway Centre to Panorama House – over the edge of the escarpment	
Lake Illawarra	Commercialise the Port Kembla Surf Club – as a licensed club	Nil
	Arts Precinct and Cultural Centre, including Indigenous activities	<ul style="list-style-type: none"> Raise awareness of Aboriginal heritage and culture in the Region; potentially a direct competitor to the proposed Aboriginal Interpretive Centre at Shell Cove.
	Establish an events site for major outdoor events	<ul style="list-style-type: none"> Would help to activate and raise the profile of Lake Illawarra. Possible demand for accommodation properties in Shellharbour City.

Precinct	Projects	Implications and Opportunities for Shellharbour City
	King Street Wharf / Griffens Bay Lake Illawarra – integrated residential, tourism, recreation and boating development.	<ul style="list-style-type: none"> Will help to activate Lake Illawarra. Will encourage more boats on the Lake. Opportunities for Shellharbour to provide marine infrastructure and facilities along the southern shore to attract the boats launched at Griffens Bay. Provide a destination / focal point on both the Lake Illawarra and Coastal Cycleways.
Industry (Port Kembla / Cringila)	Cruise ship facilities at Pt Kembla plus marine tourism hub including a commercial whale – dolphin – seal watching operation	<ul style="list-style-type: none"> Opportunities to package Shellharbour attractions and activities for cruise ship passengers. Whale / dolphin watching – competition for businesses that may operate out of Shell Cove.
	Mountain Bike Park - Cringila	<ul style="list-style-type: none"> Adds to the MTB experiences in the area; raises the profile of the areas as a destination for mountain biking. Will possibly provide opportunities for MTB events, with flow-on benefits to Shellharbour City.
	Heritage Park, Industrial Interpretation Centre, Tours	
Rural Lands	Farm stays, rural retreats, eco lodges	
	Food trails and farmers markets	<ul style="list-style-type: none"> Additional food-based experiences – for the broader Destination Network Area.
	Festival sites	<ul style="list-style-type: none"> Possible flow-on benefits for accommodation operators.
	Bushwalking, horse riding, mountain-bike trails	<ul style="list-style-type: none"> Adds to the outdoor-soft adventure activities within the Region.

8.5 Opportunities for Regional Collaboration

There are synergies across and within the region, providing opportunities coordinated product development, marketing and promotion and for cross promotion between ‘like’ activities and experiences. These opportunities include:

- To complete the missing links in the Coastal and Lake Illawarra cycleways and shared pathways, connecting the routes, and then linking these, physically and through signage, to railway stations, and the towns and villages along the routes. This needs to be coupled with coordinating and cross-promoting cycling events, packaging cycling with accommodation and experiences, developing joint on-line and print-based information and marketing collateral, and marketing and promotion.
- Promoting the coastal, escarpment and highland National and State Parks – the waterfalls, rainforest experiences, swimming holes, bird and wildlife viewing, bush walking etc.



Coastal Cycleway, Lake Illawarra: Tourism Shellharbour

- Revamping and strengthening existing touring routes (Sydney – Melbourne Coastal Touring Route in conjunction with the South Coast LGAs, Grand Pacific Drive and State Touring Route 8) and developing a network of looped drives connecting the Southern Highlands and the Coast. As part of this, explore motorcycle-touring options, capitalising on the popularity of the Illawarra / Macquarie Pass for this market.
- Building nautical and marine tourism – encouraging boat movements between Wollongong, Shellharbour, Shell Cove, Kiama and Ulladulla Harbours, Jervis Bay, the Shoalhaven River and Lake Illawarra.
- Cross promotion of like activities, including:
 - HARS Museum with the Fleet Air Arm Museum and potentially the Museum of Flight.
 - Ballooning and hang-gliding with the skydiving and aviation tourism at Shellharbour Airport.
 - Trainworx at Thirlmere with the Illawarra Light Railway Museum.
 - Mountain biking – trails, parks and events.
 - Golf.



Illawarra Highway Macquarie: flimycar.com



Calderwood Valley: Facebook – Calderwood Golf Course



Sky Dive Beach: Madaboutsports.com



Game Fishing Shellharbour: Tourism Shellharbour



Mountain Biking: Tourism Shellharbour

9. REALISING THE POTENTIAL OF KEY ATTRACTIONS - PRIORITY PROJECTS

Product development in Shellharbour City needs to focus on realising the full potential of key attractions and localities:

- Shell Cove Harbour, Marina and Waterfront
- Shellharbour Village
- Killalea Reserve
- Bass Point Reserve
- Coastal Cycleway
- Lake Illawarra and Windang Island
- HARS Museum
- Greenvalleys Mountain Bike Park
- Macquarie Pass National Park and Macquarie Pass State Conservation Area

9.1 Shell Cove Harbour, Marina & Waterfront

One of the final stages of the Shell Cove development, the Waterfront Precinct, is under construction. The Shell Cove development is a joint venture between Shellharbour City Council and Frasers Property. Located between Shellharbour Village and Bass Point, The Waterfront Precinct incorporates:

- A new harbour and 270 berth marina.
- Boutique Hotel (120 keys) with conference and meeting facilities.
- Waterfront Tavern and dining precinct ('Eat Street')
- Landscaped promenade, boardwalk and reserves around the circumference of harbour for walking and cycling.
- Visitor Information Centre.
- Large harbourside adventure playground and kids' beach.
- Landscaped park with lakes and walking and cycling tracks.
- Town Centre with a large supermarket, specialty retail shops, community centre and library.
- 1,556 new dwellings – a mix of apartments, villas and houses.
- A boat ramp and marine service centre – located on the southern shore of the harbour with facilities including fuel, waste pump out, and a dry stack for boat storage.
- A business technology park – to be located along the foreshore to the south of the Waterfront Precinct.



Shell Cove Waterfront Precinct: frasersproperty.com



Figure 9.1 Masterplan: Shell Cove Harbour and Waterfront Precinct

The Harbour and Stage 1 of the Marina (100 berths) are due to open in February 2019, with the timing of Stages 2 (100 berths) and three (70 berths) dependent on demand. The Harbour will have a central pier for charter boat operators, with this being the base for whale and dolphin watching cruises, fishing and boat charter and scuba diving. It will also have a floating pontoon that can be used for hosting events on the Harbour.

Maxi Yachts will be able to get into the Harbour at high tide only and would rest on the bottom. The Harbour will be able to accommodate the smaller Defence Patrol boats (e.g. Armidale Class vessels). The Marina will offer both permanent and temporary moorings and have the capacity to take boats up to 30 metres in length. The dry stack facility will come on-line within 2-3 years and be able to store boats up to 12-14 metres in length. For touring vessels, Shell Cove can be accessed within a day from Port Stephens, Sydney, the harbours south to Bateman's Bay.

The hotel and town centre will progressively come on-line over the next 2-3 years. The hotel will provide 4.5 star standard accommodation, and conference and meeting facilities. All development is expected to be completed in 2025, at which stage Frasers Property will withdraw from the project, with responsibility for maintaining the public areas, park and reserves, place-making and marketing and promotion, transferred to Council.

The success of the Harbour and Town Centre precinct and the take-up of marina berths will depend in part on the level of activation and the effectiveness of the marketing and promotion undertaken. From 2018 to 2020, Frasers Property are employing a Place Manager to organise a program of events and activities and market and promote the precinct.



Shell Cove Waterfront Precinct - Artist's Impression: frasersproperty.com

Product and Market Development Opportunities

The Waterfront Precinct will be a 'game changer' for Shellharbour City, and the Sydney Surrounds South and South Coast Regions, providing opportunities to build:

- Nautical and marine tourism, including:
 - The touring yachts and motor-cruiser markets – long haul travellers.
 - Recreational boating and fishing markets – boats moored at the marina and stored in the dry stack, and trailable boats launched at the Harbour and other ramps in the surrounding area. Some of these boats will be looking for places to explore – Lake Illawarra, Kiama, and Wollongong etc.
 - Day visits from boats launched in the Wollongong, Kiama and Shoalhaven areas – coming to Shellharbour and Shell Cove to explore.
 - Specialist interest and marine based commercial activities - dolphin and whale watching, fishing and other charters, scuba diving, sea kayaking etc. There may also be opportunity for glass-bottom boats and/or other forms of under-water viewing vessels to explore the Bass Point marine environment), and for boat, canoe and stand-up paddleboard hire. Marine-based events – ocean-going sailing races; visiting motorboat and yacht clubs; fishing tournaments etc.
 - Boats coming into Shell Cove for repairs and servicing.

There may also be opportunity for small, boutique cruise boats to moor offshore and transfer passengers to the Harbour via tender boats. Building and sustaining the nautical and marine tourism markets will be dependent in part on:

- The quality of The Waterfront Precinct – a destination that people want to visit.
 - Providing fuel and other marine services.
 - Creating 'destinations' around Shell Cove for the recreational boating market to access, e.g. Kiama, Shellharbour and Wollongong Harbours, Minnamurra River, Killalea Reserve, Bass Point, Lake Illawarra and the off-shore islands.
 - A strong calendar of events that will bring boats into the Harbour.
 - Effective marketing and promotion.
- Event markets – the Harbour, promenade and adjoining parklands can be used to host a variety of events and activities.
 - Holiday and leisure markets – day trips, short-breaks and the holiday market. Working with the Airport's RPT operator, the Hotel and other accommodation providers and the charter boat operators, there may be opportunities to package into the Brisbane and Melbourne markets.
 - Local and regional residents and the VFR markets.
 - Business travel, including the conference and meeting markets.
 - Weddings and functions markets.



Shell Cove Waterfront Precinct: Frasersproperty.com

Investment Required

Investment required to effectively position and leverage the Harbour, Marina and The Waterfront Precinct as a nautical and marine hub and a visitor destination will include:

- On-going investment in place-making, events and destination marketing and promotion. This will require a coordinated approach with Council working with Shell Cove businesses.
- Development of infrastructure and facilities for the recreational boating market in the areas surrounding Shell Cove, including facilities in Lake Illawarra.
- Completing the pedestrian and cycleway linkages between The Waterfront Precinct and Bass Point, Killalea Reserve and the Coastal Cycleway at Dunmore to the south; Shellharbour Village, and from Shellharbour Village, north to Warilla and Lake Illawarra (to link with the Coastal Cycleway to Wollongong and the Lake Illawarra Cycleway); north west to the Myimbarr Community Garden, Blackbutt Reserve and Shellharbour City Centre; and west to Shellharbour Junction Railway Station.
- Upgrading and expanding visitor facilities and infrastructure at Shellharbour Village, Bass Point Reserve and Killalea Reserve to meet the growing demand from the local resident population and the significant increase in additional residents and visitors, which will be generated by the Waterfront Precinct and Calderwood Valley developments.

9.2 Shellharbour Village

Shellharbour Village is the main tourism precinct within the City. The Village has a concentration of accommodation, eateries and boutique and lifestyle shops. Key attractions and attributes include:

- Coastal scenery and setting – the harbour, foreshore and views of Bass Point to the south and Cowrie Island, Barrack Point and Windang Island to the north, with harbour and ocean views from the shopping centre.
- Character and scale of the main street (Addison Street) – a mix of heritage and contemporary buildings, and vibrant eateries and shops.
- Historic Ocean Beach Hotel - part of the setting and appeal of the Village.
- Historic harbour – with a sandy safe beach, moored boats, which add colour and movement and the rock breakwaters.
- Rock platform and foreshore reserve with picnic facilities and playground and shared pedestrian – cycleway.
- Surfing beaches to the north and south of village, plus the ocean pool.

The Shellharbour Beachside Holiday Park is one of the City's key assets.

The Shell Cove Waterfront Precinct has the potential to impact significantly on the Village. Visitors to the Waterfront Precinct are a potential market for Shellharbour Village, with events and boating activities creating demand for accommodation in the Village. On the downside, the dining and retail precinct along the Waterfront will compete with the Village shops and eateries.



Addison St Shellharbour Village: realestate.com

Strengthening the Village

Product differentiation, connectivity and visibility and accessibility, are keys to ensuring that Shellharbour Village remains a popular and viable destination. Factors to be considered include:

- Retaining and strengthening the heritage character, atmosphere and lifestyle of the Village – providing a different character and experience to the Shell Cove Waterfront Precinct.
- Iconic public art at the Harbour, for example a sculpture similar to the little mermaid in Copenhagen.
- Establishing strong pedestrian and cycle links, supported with effective signage, between the Waterfront Precinct and the Village to encourage movement between the two destinations. Both locations will need bicycle racks to encourage cyclists to stop and explore.
- Street scaping / activating the western end of Addison Street and the Addison Street – Shellharbour Drive intersection – to catch the attention of travellers and raise awareness.
- Directional signage to the Village from the Waterfront Precinct / Harbour Boulevard.
- Iconic images of Shellharbour Village as part of the display in the Waterfront Visitor Information Centre.

9.3 Killalea Reserve

Killalea Reserve is operated by the NSW Crown Holiday Park Trust. Located between Bass Point and the Minnamurra River, the Park has around 5 kilometres of coastline and a kilometre of river frontage and incorporates an area of 265 hectares. Attractions and facilities include:

- Spectacular coastal scenery.
- Two pristine surf beaches, The Farm, which is a dedicated National Surfing Reserve and Mystics, also rated as having one of the best surf breaks on the NSW South Coast.
- Minnamurra River – ideal for fishing, boating and swimming.
- Stack Island (known locally as Rangoon Island) – located just offshore, the Island is an endangered ecological community with nesting colonies of Shearwaters and Penguins.
- Lagoon with walking tracks and viewing areas – the Lagoon is a water-bird ‘hot-spot’.
- Pockets of rainforest and coastal forest.
- Accommodation – 53 unpowered campsites, a 40 bed bunk house, large camp kitchen and amenities.
- Kiosk – Café.



Killalea Reserve; Stateparks.nsw.gov.au

- Illawarra Education Centre, which provides a range of environmental and cultural programs for schools from the Illawarra, South Coast, Southern Tablelands and Sydney Regions.
- Walking tracks, viewing platforms and a gazebo. The viewing platforms and gazebo are popular for wedding ceremonies.
- Picnic and barbeque facilities.
- Canoe / kayak hire.
- Spaces suitable for large outdoor events.
- A couple of off-shore boat moorings at The Farm beach.

The Park is used by three surf schools, with Australian Surf Tours specialising in international visitors. The Park hosts a range of events including a weekly Park Run, monthly market, surfing competitions and the Sculptures at Killalea Festival, a 10 day event featuring around 60 sculptures, arts and cultural workshops and demonstrations, entertainment and food, beer and wine.

Killalea is one of the most visited localities in the City. In 2016/17, the Park recorded 283,000 vehicle entries, equating to over 600,000 vehicle-based visitors. Vehicle entries have increased by 121.1% over the past 5 years. Part of the growth in visitation is attributable to the publicity given to the Park through the 'Unspoilt South Coast' marketing campaign, with other drivers including the upgrading of the facilities and experiences offered, the growth in events held in the Park, and population growth within the City. Killalea has become a 'local' park for the residents of Shell Cove and Flinders, many of whom walk or cycle to the Park. The camping area is fully booked over the summer school holidays, on the October long weekend and at Easter, with very high occupancy (90+%) on most fine weekends during the warmer months and in the Spring and Autumn school holidays. Occupancy is low in winter, averaging around 15% on weekdays and 20% on weekends.

Access to Killalea is via local streets through the Shell Cove residential area. At peak times and during events, the traffic generated is exceeding the capacity of the local roads. Demand for accommodation and visitor facilities within the Park also exceeds supply. Visitation to the Park is going to continue to grow. Shell Cove Harbour, Marina and Waterfront Precinct are going to bring significantly more visitors into the Shell Cove area, with Killalea being one of attractions likely to be visited. The development of the Waterfront residential precinct (1,556 additional dwellings, 3000+ residents) and the Calderwood Valley (5,000 dwellings and an estimated 12,500 new residents) will also significantly increase local use of the Park.

The significant increase in boating activity generated by the Shell Cove Marina and boat stack, will increase demand for access to the moorings off The Farm Beach and may result in boats pulling up onto the beaches and along the Minnamurra River Foreshore and trying to access Stack Island.



Camping, Killalea Reserve: Stateparks.nsw.gov.au

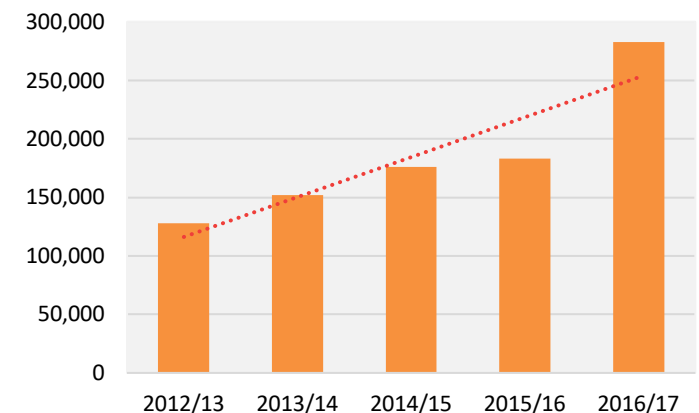


Figure 9.2 Growth in the number of vehicles visiting Killalea Reserve

Product Development Opportunities

- To expand and diversify the accommodation available, with options including self-contained cabins, glamping (permanent) tents, powered sites and additional unpowered sites. Cabin, permanent tent accommodation and powered sites would encourage overnight visitation year-round.
- Headland walking track linking the Park and Bass Point, possibly with part of the walk cantilevered over the cliff to provide a very strong 'wow' factor.
- To continue to grow the events held in the Park. The Park is planning a Food and Wine Festival and a Music and Surf Festival.
- Potential temporary or permanent drop zone for Skydive the Beach.
- To capitalise on the prolific birdlife, by providing bird watching hides and interpretation. There may also be opportunity to provide birdwatching boat trips around Stack Island.
- To provide more activities – for example, environmental walks, night spotting, Aboriginal heritage and cultural walks and activities, sea kayak tours, hire of electric bikes, whale watching during the whale season etc. Park Management is in discussions with the National Parks and Wildlife Service regarding the possibility of running Discovery Program activities in the Park.



Park Run – Killalea Reserve: Kiama Independent

Investment Required

Significant investment in facilities and infrastructure is needed to address existing access and capacity constraints, enable the Park to accommodate the likely growth in visitation and to realise opportunities. This investment includes:

- Construction of a new access road and Park entry point, with the preferred route being via Dunmore Road and Buckley Street, entering the Park near the camping ground.
- Development of additional accommodation including site preparation; road, water, sewer and power infrastructure and the purchase and fit out of cabins and/or glamping tents.
- Additional visitor facilities, including picnic and barbeque facilities, shade structures, new amenities and a new shower at The Farm.
- Walking and cycling trails, including the headland walk (Bass Point to Killalea), trails that are accessible for people with mobility issues, and external links to the Coastal Cycleway (Shellharbour and Dunmore links), Bass Point and the cycleway network that connects to Shellharbour Railway Station.
- Bird-hides, whale watching platforms / lookouts and interpretative signage.
- Power, water and amenities to event staging area.
- Additional moorings (subject to assessment) to cater for the expected increase in demand generated by the Shell Cove Harbour and Marina users.

- Weed management / eradication.

9.4 Bass Point Reserve

Bass Point is a 4 kilometre long prominent headland, located just south of Shellharbour Village, on the southern side of the entrance to Shell Cove Harbour. Bass Point is characterised by rocky shorelines with small sandy bays. The Bass Point Reserve is classified as an area of State Heritage Significance for both its Aboriginal and European heritage, and its natural and marine environments. There is evidence of more than 20,000 years of Aboriginal occupation of the area, with the Reserve being a rich archaeological site. Offshore, there are six known shipwrecks, the most prominent being the Cities Service Boston which was wrecked in 1943. There is a monument at the Reserve commemorating the four Australians who lost their life in rescuing the Boston crew.

Bass Point contains one of the few remaining remnants of coastal (littoral) rainforest, with the forest having some rare flora and fauna. The marine environment surrounding Bass Point is a pristine environment, which is ecologically diverse and home to rare and endangered marine life. Bushrangers Bay on the eastern end of the headland, is a dedicated Aquatic Reserve. Bass Point is recognised as one of Australia's top diving locations.

Attractions and facilities include:

- Stunning coastal scenery and littoral rainforest.
- Small embayment beaches – Bushrangers Bay, Maloney's Bay, Redsands and Beaky Bay.
- Bushrangers Bay Aquatic Reserve.
- Viewing platforms overlooking Bushrangers Bay and Maloney's Bay.
- Ten dive sites – Arch Cave, Beaky Bay, Blue Devil Cave, Canyon, Cities Services Boston wreck, Deco Reef, Gravel Loader (wharf), Gutter and Hole in the Wall, with these offering a variety of dive experiences – reefs, caves, wreck and underwork rock formations.
- Picnic area and visitor facilities near Beaky Bay.
- Bass Point Indigenous Cultural Walk – a small walk with interpretative signage, located adjacent to the picnic area.
- Cities Service Boston Memorial and interpretative signage, located to the east of the picnic area.
- Boat ramp, car park and toilet facilities near the entrance to the Reserve.
- Walking track along the northern edge of the peninsula and access tracks to Bushrangers and Maloney's Bays.



Bass Point: The Land

The Hanson Bass Point Quarry and wharf are located along the western edge of the Reserve, with the quarry visible from the Bass Point Tourist Road and the Maloney's Bay access road. The Quarry is a major producer of hard rock aggregate and gravel and has a license to operate until 2044. Tours of the Quarry are available by appointment. The Wharf is a prominent feature in the Shellharbour landscape and a popular dive site. Until recently, gravel was loaded onto ships and taken to Sydney; however, with changes in facilities in Sydney Harbour, gravel is now being transported by road.

Bass Point is very popular with both locals and visitors. The access road to Bass Point is being relocated as part of the Shell Cove Harbour development, with Bass Point to be linked to the Harbour. Pressure on the Reserve is increasing with this likely to be exacerbated with the opening of the Shell Cove Harbour and Marina and the development of the Waterfront precinct. Population growth within the City will also add to the pressure on the Reserve.

Shellharbour City Council manages the Reserve (approximately 50 hectares). While Council has been progressively upgrading visitor facilities, there is a need for significant investment to improve presentation and address environmental issues including weed infestation and erosion. The roads within the Reserve are not sealed, which is an issue for some travellers, particularly international travellers in rental cars and campervans as these vehicles are not allowed to be taken on unsealed roads. The signage at the entrance to, and within the Reserve is very dated and in poor condition. Parking is very limited, with the Reserve parked out during peak periods.

Product Development Opportunities

- Extend the walking tracks and link Bass Point and Killalea Reserve via an 'iconic' headland walk and to Shell Cove Harbour via a coastal foreshore walk.
- Improve the interpretation (through tours and activities, signage and digital applications), of the Aboriginal and European heritage of the Reserve, and the terrestrial and marine environment
- Provide a Quarry viewing area/s and information on the history of quarrying (commenced in the area in 1880) in the area (including the quarries on Windang Island and at Bombo), the quarrying process including environmental management, how the rock and gravel is used, and the 'hole' being created (40-60 metres below sea level).
- If the wharf is now surplus to the Quarry's requirements – explore opportunities to refit and use the wharf for other activities (e.g. as a docking point for small, boutique cruise ships).
- To build marine tourism (e.g. scuba diving; charter fishing; glass bottom boats; sea kayaking; whale, dolphin and birdwatching cruises) operating out of Shell Cove and leveraging the Bass Point marine environment.
- To further diversify the dive experience, possibly through the sinking of a vessel offshore to create a wreck dive site, or some form of underwater sculpture park / trail.



Jetty at Bass Point: JRA

Investment Required

Bass Point Reserve should be positioned as one of the City's and Region's iconic attractions – a reason for travellers to deviate off the Highway into Shellharbour – Shell Cove. The presentation of the Reserve and the visitor facilities available need to be of a very high standard, reflecting the significant environmental and cultural attributes for the Reserve and be in keeping with the standard of development in the Shell Cove Harbour and Waterfront Precinct and at Killalea Reserve. Investment required includes:

- Significantly improving the entry precinct – creating a strong sense of arrival and sense of place.
- Upgrading, and ideally sealing, the internal roads.
- Formalising and upgrading the parking area and facilities around the boat ramp, including addressing erosion issues.
- Providing water to the picnic area (pipeline extension).
- Replacing directional and interpretative signage throughout the Reserve.
- Upgrading and extending the walking tracks within the Reserve, including establishing a rainforest interpretative walk.
- Weed eradication and bushland regeneration.
- Linking the Reserve with the Coastal Walk / Cycleway to Shell Cove – Shellharbour and around the headland to link with Killalea Reserve.
- Providing additional parking between the Reserve and the Shell Cove Harbour, with visitors encouraged to access the Reserve by walking or cycling.
- Developing interpretative products and collateral (tours, print, signage, digital).
- Subject to availability and feasibility assessment, conversion of the wharf to a tourist attraction / facility.
- Construction of a Quarry viewing area and interpretative material.



Entry Sign – Bass Point: JRA

9.5 Coastal Cycleway

The Coastal Cycleway extends from Austinmer in the northern suburbs of Wollongong, south through Shellharbour LGA and Kiama to Kiama Heights. Most of the cycleway in Wollongong City is off-road, with a few small on-road sections in the Thirroul, Port Kembla and Windang areas. In Shellharbour LGA, the route branches at the southern end of Windang Bridge, with one route continuing south along the length of Shellharbour Road, through to its junction with the Princes Highway, and the other veering east to follow the coastline. The Shellharbour Road route is a commuter route with limited appeal for tourism and recreation.

The coastal route is a tourist route. It continues off-road to just north of Shellharbour Village, becoming on-road through the village, then off-road south of the village, terminating at South Shellharbour Beach. This route is being extended to link with the Shell Cove Waterfront Precinct. It also needs to be extended to Bass Point as part of the development of

the new Bass Point access road. South of Shell Cove Waterfront Precinct there is currently a mix of on and off-road cycleways, which link through the Shell Cove residential areas to Dunmore Road. There is also an on-road link to Killalea Reserve. The route is currently poorly defined in the Shellharbour Village – Shell Cove area, however this will be partly rectified when the Waterfront Precinct opens.

Continuing south, the cycleway is on-road along most of Dunmore Road, joining up with the Kiama Council cycleway at Dunmore. From Dunmore to the Minnamurra River Bridge, the cycleway is off-road, with section from Minnamurra through to Bombo being a mix of on and off-road pathways. The section from Bombo through Kiama to Kiama Heights is primarily off-road. Kiama Council is exploring options to provide a suspended cycleway along the Minnamurra River (through the wetlands) from the Minnamurra Bridge through to Gainsborough to link with the coastal cycleway and the cycleway along the Minnamurra River to Swamp Road in the Jamberoo District.

While the cycleway extends along a significant proportion of the Illawarra coastline, there is minimal co-ordination between the three Councils. Each Council produces a map for their section of the track, with the format of the Wollongong and Shellharbour maps being similar and Kiama Map varying significantly. Signage also varies along the route.

Product Development Opportunities

- To position and promote the route as a regional cycling route – with the route being named and branded, with coordinated information, signage and promotional collateral.
- To develop a scenic route around Shell Cove Harbour to Bass Point and linking around the headland to Killalea Reserve and extend south through the Park to follow the route of the proposed new access road, to link with the off-road cycleway at Dunmore.

Investment Required

- A regional approach is needed to provide a fully off-road route from Austinmer Station (or localities further north in Wollongong City) south to Kiama with investment required to complete the 'missing links', providing comprehensive wayfinding signage and producing comprehensive information and promotional collateral.

Within Shellharbour City, the investment required includes:

- An off-road coastal link from Shellharbour Surf Club to the Village with this extending south to link with the Waterfront Precinct, plus a link from Shellharbour Village along Addison Street to Shellharbour Road.
- A scenic route that links the Shell Cove Waterfront Precinct to Bass Point, around the headland to Killalea Reserve and through the Park to Dunmore.
- Completing the missing section of the off-road cycleway along Dunmore Road, with this linking to Shellharbour Junction Station.
- Providing off-road links between the Shellharbour Junction Station and the cycleway along Shellharbour Road, and the off-road cycleway through Shell Cove, which links Dunmore Road through to the Waterfront Precinct.
- Coordinated signage along the route.
- Bicycle racks at key attractions including near Windang Island, Shellharbour Village and in the Waterfront Precinct, as well as storage lockers in strategic locations.

9.6 Lake Illawarra & Windang Island

Lake Illawarra is a large shallow lake, located between Wollongong and Shellharbour Cities. The Lake has a surface area of 35.8 square kilometres and is approximately 9.5 kilometres long and up to 5.5 kilometres wide. The average depth is 2.1 metres, with a maximum depth of 3.7 metres. The entrance to the Lake is located at Windang, with the entrance being permanently open and navigable by small boats. Shellharbour City Council is responsible for the management of the southern shore of the Lake, from Windang Island – Pur Pur Point at the entrance, to Gerongar Point – The Macquarie Rivulet on the western shore, a distance of approximately 14 kilometres. Wollongong City Council manages the eastern, northern and western foreshore of the Lake, a distance of approximately 25 kilometres. There are four islands located within the entrance channel with Berageree, Picnic and Bevans Islands lying within Shellharbour LGA, with Cudgerie Island, being in Wollongong City LGA. A pedestrian bridge connects Picnic Island to the Lake foreshore, with Picnic Island having a network of informal walking tracks.

The Lake is popular for fishing, prawning, sailing and water sports (e.g. water skiing, jet skiing, paddle boarding, kite surfing). The water quality around the entrance is suitable for swimming with a protected swimming enclosure and sandy beach at Pur Pur Point. There are 13 boat ramps and a number of jetties and pontoons around the Lake. Sailing clubs are located at Warrawong and Berkeley on the northern foreshore and at Oak Flats on the southern foreshore. Boat hire is available in Windang on the northern side of the entrance.



Windang Island, looking west to Lake Illawarra: Tourism Shellharbour

Plans are in-place to develop an off-road, shared pedestrian-cycle way around the whole of the Lake foreshore (the Lake Illawarra Cycleway). The pathway is around two-thirds complete, with sections still to be constructed along the western and south-western shoreline. Completing the loop would provide a safe quality cycling experience for residents and visitors and would prove very popular for families and people of ages. It would also provide a 'circuit' for round-the-lake cycling, walking and running events. Strong links with the railway stations would encourage visitors to bring their bikes on the train and spend the day exploring the area, and to ride to the area on the Coastal Cycleway and return home by train.

Within Shellharbour City, the shared pathway extends from the Lake's entrance to Hennegar Bay at Oak Flats. There is minimal access to the foreshore between Hennegar Bay and Koona Bay, a distance of around 1.5km, with the cycleway bring on-road. A further off-road section has been developed at Koona Bay, with the section to Haywoods Bay being on-road. The cycleway links with the Coastal Cycleway at Reddall Reserve adjacent to the Windang

Bridge. Reddall Reserve (to the east of the Bridge) and Pelican View Reserve (to the west of the bridge) are very popular with local and regional residents and with visitors. Facilities include quality playgrounds, a café-kiosk, picnic and barbeque facilities, boat ramp and jetty, enclosed swimming area and amenities. Shellharbour City Council has established the Lake Illawarra Art Trail, a 3 kilometre long trail from Pelican View Reserve, west to Boonerah Point Reserve.

At the eastern end of the Reserve, there are walking tracks across the dunes to Windang Bay – Warilla Beach as well as a track along the southern breakwater. A sand spit connects this area to Windang Island, with access to the Island generally possible under most tidal conditions. Windang Island is popular for rock fishing and surfing. Council occasionally runs guided walks on the Island. The Island is not signposted from Pur Pur Reserve.

Product Development Opportunities

- Completing the round-the-Lake shared pathway should remain a priority for the region. Where private property extends to the shoreline, consideration should be given to an over-water boardwalk. The pathway needs to be linked to the Albion Park Railway Station and onto the HARS Museum at the Shellharbour Airport. Consideration should also be given to linking the pathway to Oak Flats Railway Station, and extending it west, possibly along the Macquarie Rivulet, to link with Albion Park and the new Calderwood Valley Estate.
- Capitalising on the 'appeal' of islands by positioning Windang and Picnic Island as 'highlights' / key features on the Lake Illawarra and Coastal cycleways.
- Developing a canoe / kayak / stand-up paddleboard trail around the islands in the entrance channel, and possibly at other locations. As part of the canoe trail, there may be potential to develop an interpretative walk on Bevan Island.
- Positioning the Lake as a destination for the smaller boats stored / launched at Shell Cove – a sheltered destination for a day out.
- Developing a program of events and activities – both on water and using the Lake Foreshore Reserves.
- Encourage commercial activities around the Lake – cafes / kiosks, food and coffee vans, bicycle hire (including electric bikes), watercraft hire, cruises, guided tours etc.
- Continue to build the Art Trail, focusing on large installations with a high visual impact.

Investment Required

- Construction of the missing sections of the Lake Illawarra cycleway. This may require some acquisition of land and/or overwater construction of the pathway.
- Shared pathways linking the Lake Illawarra pathway to Albion Park Railway Stations and onto HARS Museum, and potentially to Oak Flats Station and west to Albion Park and the Calderwood Valley.
- Street scaping (possibly including terracing / decking) of the small groups of shops on the corner of Mackenzie Avenue and Reddall Parade, with this area positioned as a 'refreshment' / coffee stop on the pathway.
- Improving the presentation (weed and litter removal) on Picnic Island, interpretative signage and a bicycle rack where cyclists can lock up their bikes adjacent to the bridge and explore the Island.
- Investigating (and if feasible developing) an interpretative walk on Bevan Island.
- Formalising the link between Pur Pur Reserve and Windang Island – directional and interpretative signage plus a bicycle rack.
- Better definition of the 'track heads' and access points.
- Improved directional and interpretative signage along the Lake Illawarra and Coastal cycleways, including replacing damaged and vandalised signs.

- Up-grading of the marine infrastructure (boat ramps, jetties etc.) to encourage boating on the Lake, including positioning the Lake as a destination for small boats launched at Shell Cove.
- Commissioning additional artworks to strengthen the Lake Illawarra Art Trail.
- Infrastructure (e.g. water and power outlets) to facilitate holding events around the Lake and along the foreshore.

9.7 HARS Museum

HARS Museum is located at the Shellharbour Airport, in Albion Park Rail. The Museum was established by the Historical Aircraft Restoration Society in 1979 to preserve Australia's aviation history. HARS is the largest Aviation Museum in NSW. The Society has built an 11,500m² hangar, which holds a collection of more than 40 historic aircraft, aircraft engines, cockpits and related memorabilia spanning over 75 years of Australian Aviation history. The collection includes the Catalina from the early period of Australian aviation, the Tiger Moth and other World War II era planes and a range of post war commercial and military planes including the 'Connie' – a Lockheed Super Constellation, F111 and Mirage fighter jets, the Canberra Bomber and Caribou transport planes. Recent acquisitions include a Boeing 747-438 jumbo jet, the 'City of Canberra' which is the only aircraft to have ever flown from London to Sydney non-stop (world distance record); an Orion that was used by the RAAF for marine patrols and coastal surveillance; and John Travolta's Boeing 707, which is currently being restored and is expected to be flown to Australia in August 2018, with John Travolta being part of the flight crew.

HARS offers a different experience to other Aviation Museums in Australia. In addition to the significance of its collection, the HARS Hangar is an active workshop. As such, visitors are escorted by trained guides, many of whom are ex-pilots and aircraft technicians. The Museum has monthly 'Tarmac Days' in which planes are put on display outside the hangar and are open to the general public, with visitors able to walk through the planes and sit in the cockpits. HARS participates in the annual 'Wings over the Illawarra' air show, with this being one of the premier events in the Illawarra Region. The Museum also offers extended (3-4 hour) tours of its 747, with visitors having access to the flight deck, luggage lockers and cabin and given detailed briefings by former pilots, cabin crew and technicians. HARS has recently introduced 'Wing Walks' along the wing of the 747. The 747 is available for functions, with HARS also having several function spaces and conference and meeting rooms within the Hangar available for hire.



HARS Museum, Shellharbour Airport: Tourism Shellharbour



HARS attracts around 40,000 visitors per annum, including coach tour and other groups and aviation enthusiasts from throughout Australia and overseas. These visitor numbers have been achieved through word-of-mouth recommendations, with numbers expected to increase significantly once HARS starts marketing and promoting the Museum and its activities.

Product Development - The Next Stages

HARS is continuing to grow, with a number of projects in the pipeline. These include:

- Australian Aviation Hall of Fame – HARS will become the home of the Aviation Hall of Fame, with a permanent display currently being established at the Museum.
- Relocating part of the HARS collection from storage facilities in Parkes, to the Historic Creamery Factory at Albion Park.
- Expanding the Museum to include a new hangar and display space to house the 707 and other aircraft. This is dependent on securing additional land and development funds.

Once all works are completed on site, HARS will start marketing and promoting the Museum, with this to include direct marketing to coach tour companies, Probus Clubs and other social groups, car clubs, Men's Sheds etc. The Museum will also be marketed as a unique venue for functions, conferences and meetings.

Related Opportunities

- The Illawarra Light Railway Museum, located at Tongarra on the western side of the airport, is exploring the possibility of extending their rail-line around the northern side of the Airport to link with HARS and run trains between the two venues. This would appeal strongly to the family market.
- There may be opportunity to establish an Australia Air Monument similar in concept to the Australian Railway Monument at Werris Creek. The Australia Railway Monument was built as a tribute to the rail industry and its employees. It includes six stainless steel figures (3 metres high) depicting various aspects of railway work and a wall of remembrance with over 2,400 names of workers killed on the railways since the 1850's. The Air Monument could be located adjacent to the proposed new Hangar or designed into the bushland along Hargraves Avenue.

Assistance and Support

Assistance and support that would enable HARS to reach its full potential includes:

- Support in securing land and funds for the extension of the Museum.
- Shared pathway between Albion Park Rail Station and HARS, plus a link between Albion Park Rail Station and the Lake Illawarra Cycleway.
- Directional signage to the Museum from the Princes and Illawarra Highways (including the proposed by-pass), Albion Park Rail Station and other strategic locations.
- Facilitating access to the Creamery.
- Billboard advertising – Princes Highway motorway corridor and possibly at Albion Park Rail Station.
- Marketing and promotional support, including assistance in building the business events and functions markets.

9.8 Greenvalleys Mountain Bike Park

Greenvalleys Mountain Bike is a commercially operated MTB Park, located at Tongarra, just east of the Macquarie Pass National Park. Greenvalleys is a boutique park open to members of the Greenvalleys MTB Club and to MTB riders who have membership and insurance through MTB Australia. International visitors can purchase temporary membership of MTB Australia to ride at the Park. Non-members are required to book and numbers are capped to ensure a quality experience. The Park is generally sold out 3 months in advance. More than 60% of riders come from outside of the Illawarra Region. Since opening, the Park has attracted riders from all States of Australia, New Zealand, Japan, USA, Philippines and France, as well as journalists from both National and Overseas MTB print and television media.

The Park is being progressively developed and currently offers:

- Network of downhill tracks rated from easy through to extreme, and catering for both 'speed' and 'style' riders.
- Pump track.
- Mini-bus and bike transport to the top of the mountain.
- Amenities and picnic facilities.

Hire bikes are available from Simply Cycles, located in Shellharbour City Centre and Summit Cycles.

Further tracks, a skills park and a chairlift are being developed, with the operator also looking to provide a primitive campsite. There is also proposal to establish cross-country trails as part of the development of the family farming property across the road from the Park (see Section 8.4).

The Park hosts a range of skills clinics, demonstration days and MTB events. The Park is one of the largest providers of mountain bike skills programs in Australia. It has an Australian Institute of Sport accredited coach who delivers the coaching skills program and is also a trail guide, and five accredited professional mountain bike instructors. Bike manufacturers are also using the Park to test bikes and run demonstration days for both the industry (bicycle shop and MTB media) and mountain bikers.

Events have included the Illawarra MTB Festival (340 registered riders and over 1,500 spectators), the East Coast MTB Titles, Skid Fest and rounds of the Red Ass Downhill Enduro Series and the Superflow Fox Roller Coasters. The Park has been approached to host a Crankworx World Tour Event. Crankworx is the largest and highest profile MTB festival in the world.



Greenvalleys Mountain Bike Park: GV MTB Park

Opportunities

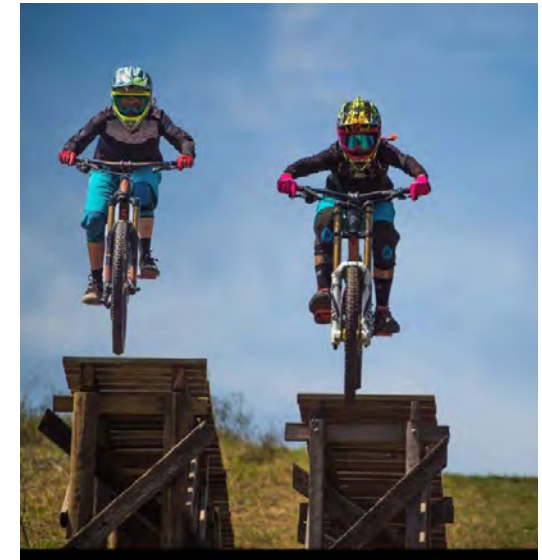
- Continuing development of tracks, activities and facilities (as proposed by the operator) to increase the capacity of the Park.
- To strengthen and consolidate the Park's emerging position as a premier venue for downhill and extreme MTB events within NSW / Australia.
- Packaging with RPT service – targeting interstate mountain bikers.
- Packaging and cross promotion with other adventure-based activities in the region – canyoning, sky diving, sea kayaking etc.
- To introduce school sports programs and skills camps, and potentially host regional, State and National school championships.
- To provide a primitive campsite and other accommodation – either onsite or close by.
- To use of the Park as a staging area for road-based cycling and possibly other events. Macquarie Pass would be an ideal location for hill climbs and ultra-cycling and running events, with the potential to run an iconic cycling event using the Illawarra Highway – Jamberoo Mountain Road – Jamberoo Road.

There are also opportunities for Shellharbour Tourism, Council and potentially DNSW to:

- Leverage the national and international MTB media interest in the Park and the coverage of events to generate publicity for Shellharbour City and the surrounding region.
- Work with event organisers to promote the City's accommodation, attractions, facilities and services to event competitors and spectators.

Assistance and Support

- The Park has the potential to attract high profile national and international MTB events. The Park is likely to need assistance managing spectator numbers and event traffic, including options to provide off-site parking and shuttle-bus access.
- Assistance in accessing grant programs, bidding for events and co-ordinating event publicity.
- Addressing traffic / capacity issues on the Illawarra Highway to improve access and egress to the Park and to the proposed Living Garden development opposite the Park.



Greenvalleys MTB Park – Jumps (top) – World Tour (bottom): GV MTB Park

9.9 Macquarie Pass National Park and The Macquarie Pass State Conservation Area

Macquarie Pass National Park is located on and below the escarpment on the western edge of the City. The Park has an area of 1064 hectares, with most of the area below the escarpment being rainforest. The Park incorporates some of the headwaters tributaries of the Macquarie Rivulet and has three large waterfalls, cascades and a series of deep rockpools. Visitor facilities include a picnic area at the bottom of Macquarie Pass and two walking tracks – the Cascades Walk and the Clover Hill Trail. The Cascades Walk is an easy 2-kilometre walk through rainforest to Cascade Falls. The Clover Hill Trail is a 6-kilometre walk, partly along an old logging trail to Rainbow Falls. One of the most popular attractions within the Park is a series of cascades and waterholes known locally a ‘Jump Rock’. There is no formal trail to Jump Rock, requiring visitors to follow the creek line, with people frequently getting lost and/or injured. While Jump Rock is not promoted by NPWS or Tourism Shellharbour, the area has attracted a lot of coverage on social media and is attracting an increasing number of visitors. Eagle Rock Adventures occasionally runs canyoning activities within the Park.

The Macquarie Pass State Conservation Area (SCA) is located to the east of the National Park on the drainage divide between the Macquarie Rivulet and the Minnamurra River. The SCA has an area of 80 hectares and incorporates parts of the upper reaches of Tongarra Creek, Tongarra Falls and part of the historic Tongarra Colliery. Private land separates the National Park and the SCA. The SCA is surrounded by private properties, including land held by Illawarra Local Aboriginal Land Council, with no public road access to the area. The SCA attracts some canyioners who access the area via the creek line.

Opportunities

- To construct a walking trail to Jump Rock. This would facilitate access to a popular attraction, improve safety and minimise environmental damage. This would require an amendment to the Plan of Management for the Park.
- To promote the canyoning as one of the adventure-based activities available within the City. There may also be opportunity to package canyoning with other local activities, such as mountain-biking at Greenvalleys MTB Park, sky diving, sea kayaking etc.
- Longer term, there may be opportunities to access the Macquarie Pass State Conservation Area. The SCA is located close to the Greenvalleys MTB Park and there may be opportunity for a mountain bike and/or walking trail through the area.
- There is a long-standing proposal to establish a ‘scenic rim’ style walk around the edge of the escarpment, with the walk passing through the National Park and the SCA.

Investment Required

- Construction of a walking track from the Illawarra Highway entry point through to Jump Rock and erection of directional, interpretative and safety signage.



Jump Rock Macquarie National Park: Red Balloon.com

10. ACCOMMODATION

10.1 Existing Supply

Shellharbour City has a small accommodation sector, incorporating:

- Two motels – Shellharbour Village Motel (22 rooms) and Shellharbour Resort (31 rooms).
- Three hotel-motels – Lakeview at Oak Flats (25 rooms), The Oaks at Albion Park Rail (14 rooms) and the Warilla Hotel (six rooms). These properties are budget to mid-range in standard.
- Cabins – Warilla Bowls and Recreation Club (19 cabins + 4 two-bedroom units).
- Boutique Guesthouse – 3 rooms + cottage
- Three B&Bs / homestays
- Three caravan parks – Shellharbour Beachside, Lake Windemere and Surfrider. The Shellharbour Beachside Holiday Park offers a mix of self-contained cottages and cabins, beach huts (no ensuites) and powered and unpowered sites. The Surfrider and Lake Windemere Caravan Parks have a small number of cabins and powered and unpowered tourist sites available, with most of these Parks occupied by permanent residents and long-term holiday vans.
- Camping area (unpowered sites) – Killalea Reserve
- Dormitory accommodation – 40 beds, Killalea Reserve
- Holiday rental accommodation (houses, and apartments) – there are 29 properties listed with Tourism Shellharbour, 40 on Homeaway (formerly Stayz), and 25 on AirBnB, with most of the properties listed on two or more sites. Some of these properties move in and out of the short stay lettings market.
- Individual rooms for short-term use, with 11 properties listed on AirBnB.

The limited supply of accommodation, particularly quality accommodation (4-5 star), is a major constraint to growing overnight visitation to Shellharbour City. Travellers looking for 4-5 star accommodation tend to stay in Kiama or Wollongong rather than in Shellharbour. The change in management and improvements to the Shellharbour Beachside Holiday Park has resulted in the Park achieving high occupancy rates, with demand significantly exceeding supply during peak periods. The demand for camping areas in Killalea Reserve also exceeds supply in peak periods.



10.2 Possible Additions to Supply

There are several accommodation projects mooted for the City that will help to address the chronic shortage of accommodation and facilitate market development and diversification, particularly at the 'top end' of the market. Projects include:

- **Calderwood Valley Golf Resort** (88 keys) - The project includes the development of 44 three and four bedroom villas providing 64 keys, 24 hotel studio rooms, plus a large club house with restaurant and bar areas overlooking the golf course. The clubhouse is designed with the flexibility to sub-divide the space to create a meeting or function room. The Golf Resort development provides the opportunity to grow the recreational, corporate and event golf markets, as well as business events and social functions (e.g. weddings).

Availability of RPT air services at Shellharbour Airport provides the opportunity to offer fly-stay-play packages into the Melbourne and Brisbane markets. There is also opportunity to work with surrounding courses to offer stay and play (multiple courses) packages. The Resort will also help to meet the demand for accommodation from the VFR market generated by the residential development in the Calderwood Valley – West Dapto area, and also help to meet demand generated from sporting events at the Croom Road Sports Complex and the Greenvalleys Mountain Bike Park. The project has development approval.



Calderwood Valley Golf Resort – Artist's Impression: ASG Group Ltd.

- **The Waterfront Shell Cove Hotel** – Located on the harbour foreshore in the Waterfront Precinct, the hotel will be 4-4.5 star in standard and provide 120 keys, plus conference and meeting facilities. The project is at the detailed planning stage, with the Hotel likely to come on-line in 2020 – 2021. In addition to servicing the marina, the hotel will prove popular with the short-breaks and leisure markets, business travellers, and international travellers. It will also attract business events and the functions (including weddings) market and service the VFR market. The large retirement village being developed at Shell Cove is likely to be a significant generator of VFR travel. There will also be opportunity for the hotel to work with the Links Golf Course and marine tourism operators to develop 'play and stay' packages.
- **The Shellharbour Club** – The Shellharbour Club has adopted a 20-year masterplan for the Club's site. The Masterplan includes the development of a hotel adjacent to and linked with the Club. The hotel is a medium to longer-term project for the Club.

10.3 Opportunities

While the proposed hotel, resort and service apartment development will address the shortage of accommodation at the top end of the market, there is also a need for additional accommodation for the holiday and leisure markets, the touring RV market and budget to mid-market accommodation for the events, VFR and youth markets. Opportunities include:

*Ravensthorpe Guesthouse and Restaurant (top): High Tea Society.
Camping at Shellharbour (bottom): caravan-camping.com.au*

- **Killalea Reserve** – To increase the accommodation available, providing accommodation suitable for year-round use. Consideration should be given to expanding the camping area and providing a mix of powered and non-powered sites, self-contained cabins, permanent tents, and possibly a lodge.
- **The Links Golf Course** – Land has been allocated for the development of accommodation adjacent to the Golf Club. While this is mooted as a long term project, there may be an opportunity to install some self-contained cabins on the site to provide accommodation in the short to medium term. The cabins could be managed either by the Club or the Shellharbour Beachside Holiday Park.
- **Shellharbour Beachside Holiday Park** – the Park is operating at capacity during peak times, with demand significantly exceeding supply. The Shell Cove Waterfront Precinct and the dry stack boat storage facilities will increase demand for caravan, camping and cabin accommodation. Shellharbour City also needs additional caravan park accommodation to leverage the growing international and domestic touring caravan, RV and campervan markets. In other coastal destinations, Council's and Crown Lands have adopted flexible approaches to the use of coastal and local reserves for overflow camping during peak times. There are a number of parks and reserves along the City's coastline and in the Shellharbour – Barrack Point – Warilla areas that could potentially be used for overflow camping, with these areas managed by the Holiday Park.

There has also been land set aside at Shell Cove for the future development of a business park. In the short-term, there may be opportunity to utilise this land as a camping area, or possibly a caravan park, until the business park project is ready to proceed.

- **Shell Cove Boat Services Precinct / Dry Stack Storage Facility** – consideration should be given to including a small number of basic rooms within the Boat Services Precinct to cater for boat owners/ crew while boats are being serviced, and for use by people who have boats stored in the dry stack.
- **Warilla Bowls & Recreation Club** – the Club has long term plans to increase the number of cabins adjacent to the Club. Cabins are very popular with the family, drive touring / retire and sports tourism markets, with these markets also an ideal 'fit' with the Club.
- **Warilla Sports Club** – The Club has a large parcel of undeveloped land adjacent to the Club. This could be suitable for motel or cabin style development. In the short-term, the site would be ideal as a free or low-cost camping area for the RV market.
- **Greenvalleys Mountain Bike Park** – Provision of accommodation at, or close to the Park, would encourage Park patrons to stay overnight in the City. It would also service the Park's growing event market. Suitable forms of development could include a primitive camping area, self-contained cabins, demountable 'donga' style accommodation and permanent tents.
- **Living Garden** – Boutique accommodation is proposed as part of The Living Garden project at Tongarra. While the accommodation would primarily support the activities held in the Living Garden, at other times it would also prove popular with the short breaks, drive touring, VFR markets, mountain biking and bushwalking markets.

11. TRANSPORT & MARINE INFRASTRUCTURE

Improvements in the transport infrastructure are needed to facilitate and support growth in visitation and encourage visitors to move throughout the City. Given limited parking in the prime tourism precincts and the impact that congestion has on the visitor experience, consideration needs to be given to leveraging rail, walking and cycle infrastructure. Rail can also be used to bring international visitors staying in Sydney into the City and to target the increasing number of Sydney residents living in high-density apartments around railway stations. There is also a growing trend in parts of Sydney (particularly in the high-rise areas) to move away from car ownership and use public transport and services such as Uber, Car Next Door and Go Buggy.

11.1 Roads & Signage

The majority of visitors access the City by road, and as such the emphasis needs to be on providing a safe, positive drive experience, and engaging and communicating with travellers during their journey to raise awareness of the City's attractions and activities and encourage travellers to explore the City. Roads also form part of the City's attraction (e.g. scenic drives) and activity base (e.g. cycle tourism) and can be used to host events (e.g. marathons). Signage plays a very significant role in how the City presents. It also forms part of the visitor information services infrastructure and is a significant marketing and promotional tool. To be effective, the signage needs to be comprehensive and integrated at all levels.

Strategically Significant Roads

Strategically significant roads for accessing the City are:

- Princes Highway / Motorway – plus Picton and Appin Roads which link the Illawarra Region to South Western and Western Sydney and the proposed Western Sydney Airport.
- Illawarra Highway – Tongarra Road
- Shellharbour Road (Grand Pacific Drive)
- Terry Street – Jamberoo Road

Council needs to support and advocate for the proposed extension of the Princes Motorway (M1) from Waterfall to Alexandria, and the duplication of Picton Road.

Internally, key roads from a tourism perspective include:

- Shellharbour City Centre access roads – Lakes Entrance and Wattle Road
- Shellharbour Village – Barrack Point access roads – Addison Street (priority) and Wollongong, Beach and Junction Streets.
- Shell Cove access roads – Harbour and Cove Boulevards
- Bass Point access road
- Killalea Reserve access roads – Dunmore Road, Southern Cross Boulevard, Killalea Drive

- Lake Illawarra – Warilla Beach access roads – Osborne Parade, Reddall Parade, The Esplanade and The Boulevard; the connecting roads to the City Centre – Government and Madigan Roads; the connecting road to the Oak Flats shopping centre and railway station – Central Road; and, when the Lake Illawarra Cycleway is extended, the connecting road to Albion Park Station.
- Shellharbour Airport access roads – Airport Road and Hargraves and Boomerang Avenues.
- Calderwood Road – providing access to the Calderwood Valley Golf Course and Resort.

Priorities

Road Improvement Priorities

- Princes Highway bypass around Albion Park, with this supported by effective signage.
- Continued upgrading of the Illawarra Highway to improve safety. As part of this, improved and safer access to the Macquarie Pass National Park parking area and to the Greenvalleys Mountain Bike Park and the Living Garden (if it proceeds).
- New access road to Killalea Reserve.
- Upgrading and sealing the Bass Point Road.
- Good road links between the Calderwood Valley residential development and the Shellharbour City Centre.
- The proposed extension of the Princes Motorway (M1) into Sydney and the duplication of Picton Road.



Princes Highway north of Albion Park: Illawarra Mercury

Signage Priorities

- Update all directional signage to the Shell Cove Marina (in conjunction with the opening of the Harbour and shore-based infrastructure) and provide orientation signage in the Harbour precinct and directional signage to Shellharbour Village and Bass Point (for cars, cycling and walking).
- New directional, entry and interpretative signage at Bass Point.
- Directional signage from the Princes and Illawarra Highways to the Calderwood Valley Golf Course and new resort.
- Development and implementation of a coordinated signage strategy for Coastal and Lake Illawarra cycleways / shared pathways (joint Council project).
- Coordinated approach to signage on the City's internal cycleway network.
- Orientation signage ('you are here' map) and directional signage linking railway stations to cycling and walking routes and tourism precincts.
- Improved directional and interpretative signage for key attractions and localities – Lake Illawarra, Windang Island, Picnic Island and Blackbutt Reserve.
- Additional event signage – including temporary signage for events held at Green Valley Mountain Bike Park and Killalea Reserve.
- If Grand Pacific Drive is re-activated, improved route and directional signage to link the trunk route to key attractions and destinations,
- Effective gateway and directional signage on the Princes Highway bypass at Albion Park.

11.2 Rail

There is potential to use the rail service to build the day trip and overnight markets out of Sydney and the day trip market out of the Wollongong area and to grow the international markets, including targeting backpacker accommodation and activity nodes along the Eastern Suburbs rail corridor and around Central Station in Sydney. Rail can also be used to provide access to the Shellharbour Airport, Shell Cove Marina and the Lake Illawarra Cycleway, and to participate in events and activities held in the City. Pensioner discounts, Opal Card benefits (e.g. Weekly Travel Award) and the Funday Sunday promotional fares can also be leveraged to attract visitors to the City.

Priorities

- Advocate strongly for improvements in the number, speed and reliability of train services on the South Coast line.
- Support the introduction of passenger services on the Maldon-Dombarton and Moss Valley-Unanderra lines. This would provide access to the Southern Highlands and the South Western and Western Sydney growth areas.
- Integrating the City's railway stations with the shared pedestrian – cycle pathway networks. As part of this, exploring options for cycle hire (including electric bikes).
- Strengthening the link between Albion Park Rail Station and the Shellharbour Airport.
- Providing access between Shellharbour Junction Station and Shell Cove, Shellharbour Village, Killalea Reserve and Bass Point – improving public transport and/or encouraging the development of other services such as Uber.

11.3 Air Services / Shellharbour Airport

The Shellharbour Airport is a licensed airport, owned and operated by Shellharbour City Council. The Airport's catchment area extends south to Nowra, west to Bowral and north to the southern suburbs of Sydney. The Illawarra – Shoalhaven Regional Plan recognises the significance of the Airport for enhancing the region's connectivity, as a driver for economic growth and for aviation tourism. The recent introduction of RPT services to Melbourne and Brisbane provides opportunities for growing visitation to the Region.

Opportunities

- Leveraging the RPT services to provide short break packages for the interstate markets, attract business events and provide access to Shell Cove Waterfront Precinct, Calderwood Valley Golf Course Resort, the cruise ship facilities at Port Kembla and Greenvalleys Mountain Bike Park.

- Continuing to grow aviation tourism, encouraging new operators to establish at the Airport and supporting existing operators.
- Grow the recreation 'fly-in' market, targeting aero clubs.
- To continue to grow the Wings over Illawarra as a signature event for the City and the Illawarra / South Coast Region and explore opportunities for introducing new events.
- Expansion of HARS Museum (see Section 9.7).

Priorities

- Development of a passenger terminal to support the RPT services.
- Expansion of HARS.
- Provision of utility infrastructure to facilitate aviation-related development along the western side of the Airport.
- Strengthening the link between the Airport and Albion Park Railway Station.



Arrival of the Qantas 747 – Spirit of Canberra - HARS Museum: Illawarra Mercury

11.4 Cycleways

Cycleways are part of the attraction and activity base of the City. The City's topography, setting and 'compactness' lends itself to cycling for commuting, recreation and tourism. Part of the cycling infrastructure is in place. The focus needs to be on completing the missing 'links' in the cycleway network, linking the cycleways to railway stations and shopping centres, effective signage, and providing facilities (e.g. bike racks) to support cycling.

Priorities

- Completion of the Coastal Cycleway – regionally and locally, including an off-road route along the coast line in Shellharbour City, strong links between Shellharbour Village and the Shell Cove Waterfront Precinct with the route continuing south to link with the Kiama cycleway network at Dunmore. Links also need to be provide to Bass Point and Killalea Reserve.
- Completion of the Lake Illawarra Cycleway (around the Lake).
- Establishing cycleways in the Albion Park – Calderwood Valley area, with these linked into the Lake Illawarra Cycleway.
- Linking the Coastal and Lake Illawarra Cycleways to the railway stations, Shellharbour City Centre and to (and through) Blackbutt Reserve.
- Integrated directional and interpretive signage strategy for the cycleways.
- Provide facilities to support cycling (bicycle racks and lockers) in strategic locations.
- Availability of hire bikes at strategic locations such as railway stations, Shell Cove Waterfront Precinct, Shellharbour Village, Reddall Reserve and Killalea Reserve.

11.5 Marine Infrastructure

Shell Cove Harbour and Marina will be a ‘game changer’ for Shellharbour City and the Illawarra – South Coast region, driving growth in both nautical and marine tourism (see Section 9.1). Investment in marine infrastructure is needed to capitalise effectively on the opportunities that will arise.

Priorities

- Upgrading marine infrastructure in Lake Illawarra.
- Providing mooring buoys in strategic locations around Bass Point, Killalea Reserve, and possibly in the Minnamurra River and Lake Illawarra.
- Upgrading the area around the boat ramp at Bass Point
- Providing accessible fishing platforms – Lake Illawarra

The opportunity to use the Hanson Quarry Wharf for boutique cruise ships and/or other activities should be investigated.



Jetty on Lake Illawarra: Tourism Shellharbour



The Harbour at Shellharbour: JRA

12. VISITOR INFORMATION SERVICES

12.1 Importance of Information Services

Information services are integral in supporting visitation. Information services provide the communication link between the locality, the tourist trade and the visitor. These services support the City's marketing and promotion, are an important link between local businesses and visitors and, most importantly, make a visitor feel welcome and ensure that they are aware of the City's products and services. Information needs to be available and readily accessible from a range of touch points and devices at all stages in the path to purchase, during the journey and at the destination. Information services extend well beyond the visitor, with services provided to tourism and business operators, the travel trade, government agencies and tourism agencies, and local residents and organisations.

12.2 Sourcing Information

Web and digital technology has and is continuing to change the way in which consumer's access and share information, select destinations and products, and book travel. Travellers now have access to an exponentially increasing range of information sources through an expanding number of touch points. To remain competitive, Shellharbour City needs to continue to expand its multiple channel use (traditional and online), to communicate targeted messages to consumers at each stage of the decision-making process.

Mobile devices (smart phones and tablets) have replaced computers as the starting point to search for inspiration for travel. Travellers are using multiple devices (referred to as 'cross platform') to research travel, with 89% of searches started on one device (frequently a smart phone and/or tablet) and completed on another. Most of the searches undertaken on mobile devices are 'micro minute' - short searches while people are waiting around (e.g. at the bus stop, on the train, in a cafe etc.) with searchers primarily looking for 'inspiration'. At this stage, there is a very a high propensity to view images, short videos (You Tube) and deals and offers.

87% of people are now travelling with one or more mobile devices (78% with smartphones, 42% with tablets and 26% with laptops/notebooks). Amongst those travelling with mobile devices, nearly three-quarters (71%) used them to navigate, source travel information, and/or to make bookings during their stay. VICs (42%) and word-of-mouth referrals are leading sources of information while in-region.

Videos have become one of the most important promotional tools. Destination videos are primarily used during the 'Dreaming' stage when travellers are searching for ideas and destinations. 85% of travel-related searches on YouTube focus on destinations, attractions, points of interest and general travel ideas²⁰. Product videos are more likely to be viewed during the planning stage when travellers are comparing products and prices.

Travellers watch a mix of user generated content and professionally-made video clips. 58% of leisure travellers and 64% of business travellers advised that watching on-line videos influenced their choice of destination and/or products (e.g. accommodation, activities, and tours) selected.

²⁰ Travel Content Takes off on YouTube www.thinkwithgoogle.com.au

User Generated Content (USG), both as a communication tool and to share travel experiences, continues to increase. User generated content is broadly defined as any content (text, images, videos) posted on the web that is not published by a brand. It includes content such as blogs, comments, posts, forums, reviews, podcasts, videos and images, posted via on-line services, social media and content sharing sites. UGC provides another source of information, from a user perspective, with potential travellers interested in what other travellers have to say about a destination.

Information Sources used in the Traveller's Path to Purchase and Journey

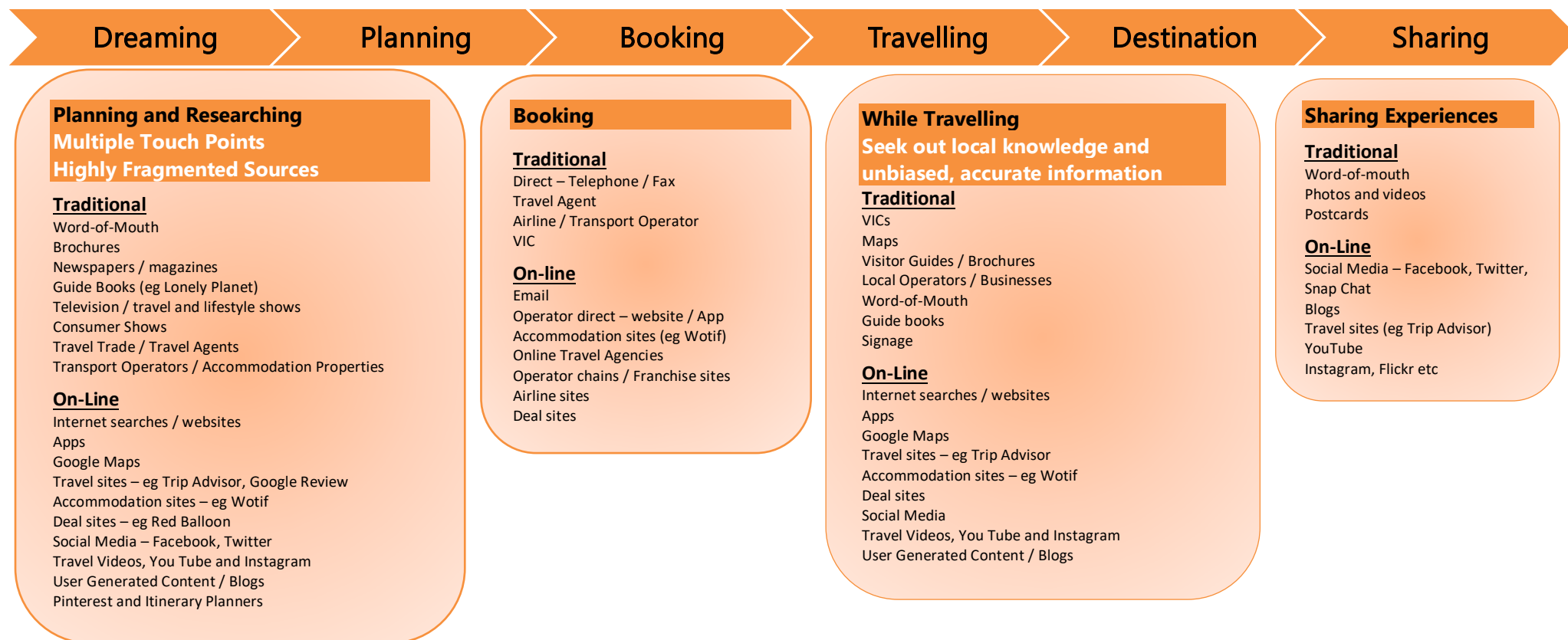
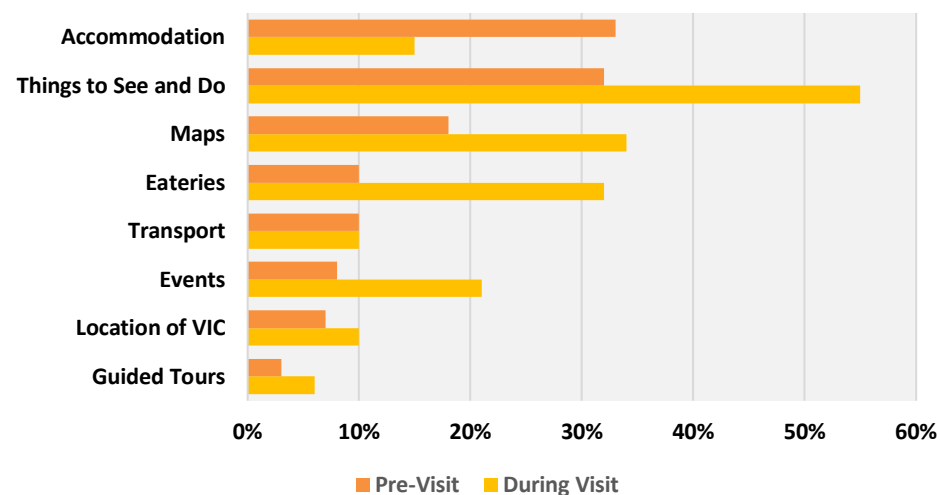


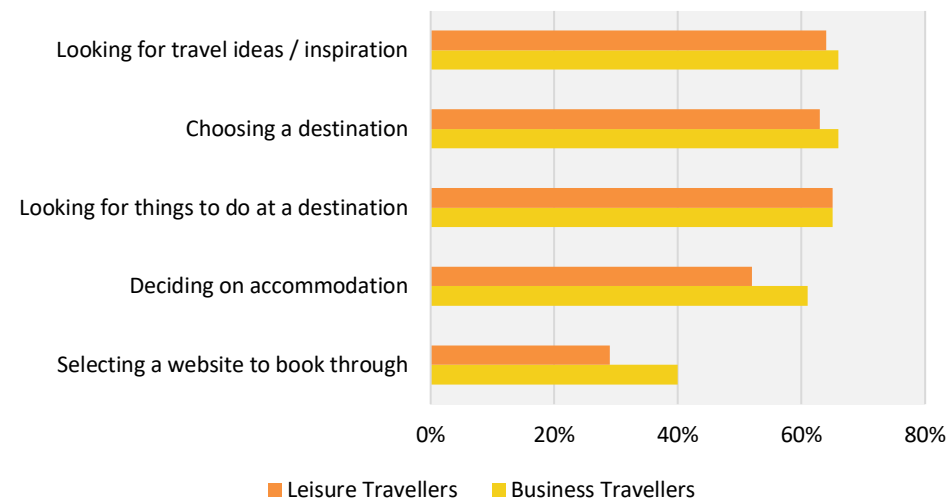


Figure 12.1 Type of Information Sourced – Pre and During Visit



Source: Tourism Research Australia – Visitor Information Servicing in NSW

Figure 12.2 Use of On-Line Travel Videos as a Source of Information



Source: Travel Content Takes off on YouTube www.thinkwithgoogle.com.au

12.3 Information Services in Shellharbour City

Information services in Shellharbour City are delivered by Tourism Shellharbour. Tourism Shellharbour operates a Level 1 Accredited Visitor Information Centre (VIC) in Shellharbour Village, produces the Shellharbour Visitors Guide and other information and promotional collateral, and is active in the on-line space through the 'visit Shellharbour' website and on Facebook, Twitter and Instagram. The City also has good content on a range of the visitnsw and other third party websites.

Tourism also has an internal and external regional tourism information board with visitors' guides and maps at the new temporary airport terminal building.

In its print and on-line information and promotional collateral Tourism Shellharbour is using high quality images that strongly reinforcing the brand values. To a limited extent, Tourism Shellharbour is using video clips, however the quality of these clips is not high, and not directly 'on brand'. While many of the City's tourism operators have websites, very few are effectively using video clips to communicate with the market.

To capitalise on the expected visitor numbers in the Shell Cove Waterfront Precinct, the VIC is to be relocated to the Waterfront Precinct. The proposed location is both highly visible and accessible. In addition to providing information services it is also proposed that the new VIC will be the ticketing office for marine activities (e.g. charter fishing, whale-watching cruises). It could also potentially be an outlet for bicycle hire and/or a charging point for electronic bikes. Ideally, the VIC should incorporate state-of-the-art digital image and video displays.

12.4 Priorities

- Invest in building and maintaining a quality video library combined with the ongoing 'refreshing' of still images.
- To work with tourism operators to encourage the continued upgrading of their websites including use of quality images and video clips, plus inclusion of links the Tourism Shellharbour website, event calendar and e.visitor guide.
- To expand the City's on-line presence focusing on harnessing social media, including user generated content, and increasing Shellharbour content on third party directories and websites. Tourism Shellharbour needs a digital strategy plus additional resources (full-time digital officer) to be effective in this space.
- To ensure that the proposed Shell Cove VIC is a contemporary, inspirational space that incorporates state-of-the-art digital image and video displays.
- To ensure that information remains available in Shellharbour Village through information directories, promoting the visitshellharbour website and possibly by encouraging local businesses to display and distribute the visitor guide. Event signage (What's on) should also be considered.
- To ensure that information is available in the new Shellharbour City Civic Precinct.



13. INDUSTRY DEVELOPMENT

The marketplace is evolving, and tourism and business operators need to keep abreast of changes. In particular, operators need to be responsive to changing needs and expectations, recognising that customers are becoming more sophisticated and demanding, and less tolerant of inferior customer service. Operators also need to be highly active in the digital space, with this space used to communicate, build relationships, market and promote, and 'make the sale'. To capitalise on the growing number of international visitors, operators need to be 'export ready' and have a strong understanding of cultural differences and requirements. As such, access to on-going information and training is fundamental to growing the City's visitor economy.

The development of the Shellharbour Waterfront Precinct and the Calderwood Valley Resort will generate demand for trained hospitality workers that can deliver 4.5 to 5 star service.

13.1 Industry Development Services in Shellharbour City

Both Tourism Shellharbour and Shellharbour City Council are active in delivering industry development opportunities. Industry training for tourism operators is a core function of Tourism Shellharbour, with activities including:

- Monthly newsletters keeping members up-to-date on activities and events in the City and on the latest statistics, industry news, training opportunities etc. Tourism Shellharbour actively promotes training workshops, webinars and on-line resources offered by Destination NSW, Tourism Australia, Council, RDA Illawarra and other organisations.
- Twice-yearly survey of members, seeking information on training and other requirements.
- Networking functions – facilitating the exchange of ideas and providing opportunities for relationship development and cross promotion.
- Training workshops and programs - Tourism Shellharbour endeavours to host a minimum of two free training workshops per year, with these tailored to industry needs (as identified in the member survey). Workshops have been held on business practices, customer service, marketing, the digital space etc.

The Sydney Surround South Destination Network is looking at industry training and development and is looking to introduce training opportunities across the region.

Shellharbour City Council, through its Economic Development Unit, is also active in business development. It has in place a Small Business Network which hosts regular networking functions and training workshops as well as an 'Economic Gardening Program' that provides business training and mentoring.

Vocational training opportunities for tourism – hospitality and allied activities such as retail are limited. There are no tourism, hospitality or retail courses listed for the Shellharbour TAFE. Wollongong and Nowra TAFEs both offer a limited range of hospitality, commercial cooking and event management courses. Most of the High Schools within the City offer Vocational training (VET) in hospitality.

13.2 Priorities

- Tourism Shellharbour needs to continue to focus on industry networking, training and development, with tourism businesses also encouraged to be part of Council's Small Business Network and the Economic Gardening Program.
- Training programs need to focus on customer service, website development and maintenance, digital (web and social media) communication and marketing and promotion, and understanding the growing international market, including becoming 'export ready'.
- With skill shortages endemic in the hospitality industry, there is need to assess the staffing requirements for the Shell Cove Waterfront Precinct businesses and Calderwood Valley Golf Resort and, if needed, explore with TAFE opportunities to deliver training services to address possibly labour shortages and/or skills gaps.



Hospitality Students Shellharbour Anglican College (top left): aisnsw.edu.au Coffee making, Pacino Café Shellharbour (bottom left): Facebook Café in Shellharbour (right): JRA



MARKETING & PROMOTION

Shellharbour Stand at the Sydney Caravan & Camping Show: Tourism Shellharbour

14. MARKETING AND PROMOTION

14.1 Marketing undertaken by Tourism Shellharbour

Destination marketing and promotion of Shellharbour City is coordinated by Tourism Shellharbour. Marketing and promotional activities include:

- Cooperative marketing as part of the South Coast 'Unspoilt' campaign. The campaign is a partnership between the five member Councils of the former South Coast Regional Tourism Organisation and Destination NSW. The campaign, which is in its 5th year, is built on the 'unspoilt' creative platform which leverages the stunning setting and lifestyle of the South Coast and nature-based and outdoor experiences. It features differentiated experiences in each LGA showcasing people actively enjoying experiences in the unspoilt environment of the NSW South Coast. The award-winning campaign has significantly built awareness of, and generated visitation to both Shellharbour City and the broader NSW South Coast Region. In 2016, the campaign resulted in 61,738 website visits for Shellharbour, 27,028 leads to tourism businesses in Shellharbour City and 412 direct accommodation bookings. The appeal of Shellharbour as a destination has increased from 44% to 64%.
- Co-operative activities with Destination NSW and other partners, leveraging opportunities as they arise.
- Producing and distributing information and promotional collateral and display materials, including the Shellharbour Visitors Guide, which is available in print and digital format.
- Building and maintaining a strong online presence, anchored by the 'visitshellharbour' website, with social media (Facebook, twitter and Instagram) used to communicate directly with potential visitors and drive consumers to the website and booking engine. Tourism Shellharbour also updates the Shellharbour products, experiences, events and business content on the State Tourism Data Warehouse / Get Connected database that underpins the Destination NSW - VisitNSW website.
- Showcasing and promoting Shellharbour City at key consumer shows and operating a 'pop-up' information stand at various events including Wings over Illawarra and for cruise ship passengers arriving into Port Kembla.
- Public relations marketing - endeavouring to generate media and industry exposure for the City – press releases and media interviews, capitalising on events and activities, etc.
- Feature articles and strategic advertising in key publications, including Lake Times/Advertiser, NRMA Open Road, South Coast Leisure Times, Let's Go Kids, Out & About with Kids, Wave Weekender, Cartoscope Sydney to Melbourne Holiday Guide and Cartoscope Illawarra Map
- Hosting familiarisation tours for journalists and social media 'influencers'.
- Supporting and sponsoring local events, including marketing and promoting these events both on-line and through the mainstream media channels.



14.2 Strategic Alliances

In product development and marketing and promoting the City, Tourism Shellharbour works with:

- Shellharbour City Council.
- Destination NSW.
- South Coast Councils (through the former South Coast RTO) – Kiama, Shoalhaven, Eurobodalla and Bega Valley LGAs.
- Sydney Surrounds South Destination Network and member Councils.
- Local community and business organisations and event organisers.

14.3 Marketing Considerations & Opportunities

To date, with the limited resources available, Tourism Shellharbour's marketing approach has been very sound, with Tourism Shellharbour seeking to maximise exposure through cooperative activities, public relations marketing and strategic advertising, and the use of on-line channels and social media.

While these activities need to continue, consideration also needs to be given to:

- Increasing on-line marketing activities. To be effective in this space, Tourism Shellharbour needs a full-time digital marketing person as well as quality images and video clips.
- Marketing and promoting Shell Cove Harbour, Marina and Waterfront Precinct. This needs to be considered on several levels:
 - Pre-opening, opening and precinct activation marketing. The Fraser's Property Group is employing a Place Manager to activate the precinct, undertake pre-opening marketing, organise the opening celebrations and organise, market and promote events as part of the activation strategy. Tourism Shellharbour will need to work with the Place Manager to integrate the Shell Cove marketing with the broader destination marketing of the City, with Tourism Shellharbour leveraging its relationships and distribution channels to generate publicity.
 - Ongoing marketing and promotion following the withdrawal of the Fraser's Property Group. The Waterfront Precinct and Marina are going to need on-going place management combined with market development and marketing and promotion. The marketing and promotion will need to incorporate both product and destination marketing, including retail marketing, activity and event marketing, niche marketing to targeted groups (e.g. boating and fishing markets), exhibiting at boat shows, and destination marketing.



Shellharbour Tourism Banner at an event at Greenvalleys MTB Park – Tourism Shellharbour

- Leveraging opportunities to partner with RPT services from the airport to package and promote Shellharbour City.
- Building the business events market – working with The Waterfront Shell Cove Hotel, the Calderwood Valley Golf Resort and other venue operators to position and promote Shellharbour City as a destination for business events.
- A VFR marketing campaign targeting the local and regional resident markets.
- Capitalising on cooperative activities to target the international market, including the rapidly increasing Chinese and Indian markets. These activities could include participating in the Sydney-Melbourne Coastal Touring Route, Grand Pacific Drive (if restructured) and DNSW and/or Destination Network programs.
- Targeting the South Western and Western Sydney Growth areas, either independently or in conjunction with surrounding LGAs.

These activities will require additional marketing and promotional funds and resources.



Vietnamese delegation visiting the Shellharbour Visitor Information Centre: Tourism Shellharbour

PRIORITIES, STRATEGIES, ACTIONS



15. STRATEGIC DIRECTIONS

15.1 Vision

Shellharbour City will have a strong, diversified and sustainable visitor economy, which enhances our lifestyle, respects our environment, and generates significant social and economic benefits for our community. Shellharbour will be widely recognised as a vibrant, dynamic, contemporary city. It will be the centre for nautical, marine and aviation tourism on the South Coast, and a high profile destination for shopping, sport and outdoor and adventure-based activities, including air sports, cycling, mountain-biking, surfing and scuba diving. The City will be a preferred destination for day trips, short breaks and holidays. Quality accommodation and venues will enable the City to host an extensive range of sporting activities, events, conferences, meetings and functions.

15.2 Positioning

Within the context of the NSW South Coast and the Sydney Surrounds South Region, Shellharbour City will be positioned as a:

- Vibrant, dynamic, contemporary coastal city, with a laidback, enviable lifestyle.
- Only an 'hour and a bit' from Sydney.
- Family-friendly destination – the opportunity to relax, have fun and connect.
- Nautical and marine hub, centred on Shell Cove Harbour and Marina.
- Centre for aviation tourism – known for air-based adventures and air sports.
- Great destination for outdoor activities – walking, cycling, mountain biking, surfing and scuba diving.

15.3 Our Value Proposition and Promise

Shellharbour City's promise to visitors is:

- A location that is perfectly positioned on the NSW South Coast – an hour from Sydney and 2.5 hours from the ACT.
- Sophisticated coastal living.
- A beautiful environment – stunning coastline; pristine, uncrowded beaches; an underwater world; sparkling lake; rolling lush green hills, surrounded by the majestic Illawarra escarpment with its dramatic cliffs, timbered ridges, rainforest gullies, waterfalls and cascades.

- Choices – a playground with a ‘dash of daring’ – from enjoying the great outdoors (swimming, surfing, fishing, boating, snorkelling, diving, bushwalking, golfing, cycling and mountain biking); to wing-walking, roller skating, go-karting, sky diving or taking to the skies in a gyrocopter or a fighter jet; to retail therapy, vibrant markets and great entertainment.
- Fresh local produce and award-winning dining options – with a choice of ocean and country views.
- An invitation to celebrate – a diversity of events and festivals.

15.4 Strategic Priorities and Directions

Product Development

The focus for product development will be on:

- Enhancing, strengthening and consolidating attractions and activities that are already in place; leveraging and value adding were possible.
- Attractions and activities that are **game changing** in that they create opportunities for value-adding, market diversification and/or directional change.
- Attractions and activities that are aligned with City’s brand values and consistent with its positioning.
- Attractions and activities that will stimulate visitation and help to diversify the market base.

Priority Projects

- Shell Cove Harbour, Marina and Waterfront Precinct – building Shell Cove into a major hub for nautical and marine based tourism, an events venue and a destination for leisure and business tourism.
- Shellharbour Village – consolidating and growing the Village as a popular and viable destination.
- Killalea Reserve – developing the road and visitor infrastructure needed to meet and manage the rapidly growing demand.
- Bass Point Reserve – improving presentation, access, interpretation and visitor facilities.
- Coastal Cycleway – completing the cycleway from Shellharbour south to Dunmore, via Shell Cove Harbour and Waterfront Precinct with links to Bass Point and Killalea.
- Lake Illawarra and Windang Island – completing the Lake Illawarra cycleway and improving the marine infrastructure to encouraging on-water activities.
- HARS Museum – expansion of the Museum – new hangar and display space to house John Travolta’s 707.
- Greenvalleys Mountain Bike Park – supporting the on-going development of the Park and improving access.
- Macquarie Pass National Park - improve access and extend the walking trails, including establishing a trail to ‘Jump Rock’.



CI Speed Karting: Destination NSW

Market Development

Shellharbour City will concentrate on building market segments that are a natural fit with the products, infrastructure, facilities and services that are available in the City and surrounding region and are cost and resource efficient to target. The focus for market development will be on:

Key / priority markets:

- Youth markets – domestic and international, including students from the University of Wollongong and Universities in Sydney – day trips and short break
- Family market - holiday, short breaks and day trips
- Couples and groups of friends - short breaks and day trip markets
- Drive based touring market – including the caravan and RV segments of this market
- Regional market, focusing on the day trip and VFR markets

Allied to these, there are also opportunities to build:

- Activity-based / special interest markets – cycling, mountain biking, nautical and marine
- Business events
- Sports tourism
- International visitors
- Accessible tourism
- Cruise ship passengers



Shellharbour Ocean Swim: Destination NSW

Infrastructure, Facilities and Services to Support the Visitor Economy

Shellharbour City will progressively improve its infrastructure, facilities and services to facilitate and support growth in the visitor economy. Priorities are:

Accommodation

- Increase the diversity of accommodation and the number of beds available in the City.
- Expand caravan, RV and camping options.
- Leverage the proposed Shell Cove Waterfront Hotel and the Calderwood Golf Resort.
- To raise the on-line profile of accommodation properties and provide real-time booking facilities.



Camping Killalea Reserve: State Parks

Venues

- Continue to improve venue facilities and infrastructure to support growth and diversification of the events sector.

Visitor Information Services

- Continue to ensure that comprehensive, up-to-date information, both digital and print, on the City is available and readily accessible at all stages of the 'path to purchase' and throughout the 'journey'.
- Expand the City's on-line presence, focusing on harnessing social media, including user-generated content.
- Invest in building and maintaining a quality video library.
- Establish a contemporary, innovative Visitor Information Centre in the Waterfront Precinct at Shell Cove.
- Ensure that information is available in strategic locations including Shellharbour Village, the City Centre Civic Precinct and at the Shellharbour Airport Terminal.

Signage

- Provide comprehensive way finding, facility, interpretative and event signage throughout the City.

Transport

Road

- Advocate for the continued upgrading of the Illawarra Highway, the extension of the Princes (M1) Motorway from Waterfall into Sydney and the duplication of Picton Road.
- Improve road access to key attractions – Killalea Reserve and Bass Point Reserve.

Rail

- Advocate for improved rail services on the South Coast line.
- Support the introduction of passenger services on the Maldon-Dombarton and Moss Vale – Unanderra lines.
- Link the Coastal and Lake Illawarra Cycleways to the City's railway stations and strengthen the link between Albion Park Rail Station and the Shellharbour Airport.
- Provide access between Shellharbour Junction Station and Shell Cove, Shellharbour Village, Bass Point and Killalea Reserve.

Air

- Continue to improve airport infrastructure and facilities, including establishing a permanent passenger terminal.

Cycle

- Complete the Lake Illawarra and Coastal Cycleways to link Wollongong, Shellharbour and Kiama LGAs.
- Link the cycleways to railway stations and shopping centres and establish a link between the Lake Illawarra Cycleway and Albion Park and the Calderwood Valley.

Industry Training and Development

- Tourism Shellharbour will continue to focus on industry networking, training and development, with tourism businesses also encouraged to be part of Council's Small Business Network and the Economic Gardening Program.
- The focus for training programs will be on customer service, website development and maintenance, digital (web and social media) communication and marketing and promotion, and understanding the growing international market, including becoming 'export ready'.
- With skill shortages endemic in the hospitality industry, there is need to assess the staffing requirements for the Shell Cove Waterfront Precinct businesses and Calderwood Valley Golf Resort, and if needed, explore with TAFE opportunities to deliver training services to address possibly labour shortages and/or skills gaps.

Marketing and Promotion

Tourism Shellharbour will seek to capitalise on opportunities to cost-effectively market and promote the City, with the focus being to:

- Continue with current marketing activities, including the Unspoilt campaign and other cooperative marketing, exhibiting at consumer shows, PR marketing and strategic advertising.
- Continue to build the City's on-line presence to raise the profile of the City and its products and events, and to engage and communicate with potential consumers.
- Seek additional funding and resources to capitalise on emerging opportunities including the opening of the Shell Cove Harbour, Marine and Waterfront Precinct; RPT air services to Shellharbour Airport; rapid population growth in South Western and Western Sydney; and the growing local and regional population (VFR market).



The Farm Markets, Killalea Reserve: Illawarra Mercury



Canyoning, Macquarie Rivulet: Groupon.com

15.5 Roles and Responsibilities

Shellharbour City Council and Tourism Shellharbour will work co-operatively to implement the Destination Management Plan, build visitation and market and promote the City.

Shellharbour City Council

Council will continue to be a key stakeholder in visitor economy and be responsible for:

- The ongoing improvement and development of Council owned and/or managed attractions, facilities and infrastructure to support the growth of the visitor economy.
- Encouraging and facilitating Government and private sector investment in tourism attractions, facilities and infrastructure in the City.
- Organising and supporting events and activities within the City.
- Providing funding and resources to support Tourism Shellharbour to market and promote the City, deliver information services and build industry capacity.

Tourism Shellharbour

Tourism Shellharbour will continue to be an innovative, flexible and responsive association that leads and drives the tourism industry in Shellharbour City, and excels in the delivery of visitor information services and in marketing and promoting the City.

With the support of Shellharbour City Council, Tourism Shellharbour will:

- Provide strong leadership for the City's tourism industry and tourism stakeholders.
- Increase visitation to the City, encouraging more people to visit, explore, stay longer and spend money in the area.
- Encourage sustainable tourism - protecting and enhancing the tourism, lifestyle, environmental and cultural values and attributes of the City.
- Provide professional information services to consumers, the tourism trade and Shire operators.
- Coordinate and facilitate product and market development, including events.
- Effectively market and promote the City, its products, events and services.
- Build strong relationships with tourism stakeholders within and outside our City.
- Develop our staff and industry operators— through enrichment of skills, knowledge and experience.



Calderwood Valley Golf Course: Inside Golf

16. PRIORITIES, STRATEGIES AND ACTIONS

Priority 1: Enhance, consolidate and strengthen the attraction, experience and activity base of the City

The attraction and activity base of Shellharbour City forms the backbone of the tourism industry. Attractions and activities have a major influence on trip behaviour, providing a reason to visit the area and/or encouraging visitors to stay longer.

Objectives

- To deliver a diversity of high quality tourism attractions, experiences and activities that are consistent with the brand values of the City.
- For Shellharbour City to be recognised as a focal point for nautical, marine and aviation tourism on the NSW South Coast.
- To use the attractions, assets and facilities of the City to build and stimulate visitation year-round.

Strategies

Strategy 1: Build Shell Cove Harbour and Waterfront Precinct into a major hub for nautical and marine based tourism and lifestyle destination

Strategy 2: Realise the potential of existing attractions and assets

Strategy 3: Encourage and facilitate the development of new attractions and activities

Strategy 4: Grow the events sector

Projects that need to be developed at a regional or subregional level include:

- Lake Illawarra
- Nautical and marine activities
- Coastal and Lake Illawarra Cycleways
- Touring routes and scenic drives – including Grand Pacific Drive and Touring Route 8
- Illawarra escarpment scenic rim walk and the promotion of the escarpment National Parks, State Conservation Areas and Nature Reserves
- Golf – positioning the Sydney Surrounds South Region as a golfing destination

Priority Projects

Shell Cove Waterfront Precinct
Shellharbour Village
Killalea Reserve
Bass Point Reserve
Coastal Cycleway
Lake Illawarra & Cycleway
HARS Museum
Greenvalleys MTB Park
Macquarie Pass National Park
& State Conservation Area

Actions	Key Tasks	Responsibility
Strategy 1: Build Shell Cove Harbour and Waterfront Precinct into a major hub for nautical and marine based tourism and lifestyle destination		
1.1 Ensure that the Harbour and Waterfront Precinct are activated, effectively managed and marketed	1.1.1 Support the Shell Cove Place Manager to activate the Harbour and Waterfront Precinct including: <ul style="list-style-type: none"> Developing a program of events and activities. Building relationships with touring yacht and motorboat clubs and recreational fishing clubs. Encouraging commercial marine tourism operators to operate from the Harbour. Launching the precinct. Pre and post-opening marketing and promotion. 	Council, Tourism Shellharbour
	1.1.2 Formulate and implement a succession plan for place-making, management and marketing of the Harbour and Waterfront Precinct, following the completion of the joint venture.	Council
	1.1.3 Position and promote Shell Cove as a major destination within the Region and along the Sydney – Melbourne Coastal Route and Grand Pacific Drive touring routes.	Tourism Shellharbour / Place Manager
	1.1.4 Update print and on-line information, and marketing and promotional collateral to include the Harbour and Waterfront Precinct.	Tourism Shellharbour
	1.1.5 Organise and host familiarisation tours to Shell Cove.	Tourism Shellharbour / Place Manager
1.2 Ensure that facilities and services are in place to service the boating market.	1.2.1 Develop the marine services precinct, including fuel, slipway and repair facilities, chandlery and boat storage dry stack.	Council
1.3 Ensure that Shell Cove is linked to key attractions and facilities within the surrounding area	1.3.1 Connect Shell Cove to the Coastal Cycleway – with strong cycle and pedestrian links with these supported by effective signage and bicycle hire and bicycle racks within the Harbour precinct.	Shell Cove Joint Venture
	1.3.2 Link Shell Cove to Shellharbour Junction Station – by public transport and through walking – cycleways.	Council
	1.3.3 Provide walking and cycling links between Shell Cove and Bass Point and Killalea Reserve.	Council
	1.3.4 Ensure that both Shell Cove and Shellharbour Village are effectively signposted from the main access roads.	Council
1.4 ‘Create’ destinations along the coast for touring vessels and recreational boats to visit.	1.4.1 Improve marine infrastructure in Lake Illawarra and along the Illawarra and NSW South Coast to build and support touring vessels and provide destinations for the recreational boating market.	Council, Illawarra-Shoalhaven Joint Organisation of Councils, RMS
	1.4.2 Explore options for providing mooring buoys around Bass Point, in Lake Illawarra and in proximity to Killalea.	Council, RMS
	1.4.3 Package and promote nautical touring routes.	Tourism Shellharbour, partnering with RMS, and Illawarra and South Coast tourism organisations / Councils
1.5 Develop and promote Shell Cove packages	1.5.1 Establish promotional partnerships with the Hotel, marine tourism operators and other businesses and develop a range of packages in conjunction with the relevant RPT services, cruise ships, tour operators, motoring organisations etc. for the domestic and international markets.	Tourism Shellharbour / Operators

Actions		Key Tasks		Responsibility
Strategy 2: Realise the potential of existing attractions and assets				
2.1	Enhance Shellharbour Village as a tourism destination	2.1.1	Retain and feature the heritage character, atmosphere and lifestyle of the Village.	Council, Chamber, business operators
		2.1.2	Extend the street scaping along the western end of Addison Road to the Shellharbour Road / Harbour Boulevard Intersection.	Council
		2.1.3	Position and promote the Village as a destination on the Coastal Cycleway and provide bicycle infrastructure to encourage cyclists to stop and explore.	Council
		2.1.4	Continue to improve the foreshore and harbour areas.	Council
		2.1.5	Explore options to erect iconic public art and/or a develop a unique feature within the Village and/or Harbour precinct.	Chamber
		2.1.6	Build strong links with the Shell Cove Harbour and Waterfront Precinct.	Chamber / Shell Cove Place Manager
2.2	Expand and enhance visitor facilities in Killalea Reserve to address access and capacity constraints and accommodate growth	2.2.1	Provide input into the Plan of Management being prepared for the Park, advocating for improved access and the expansion of accommodation and visitor facilities and infrastructure.	Council / Tourism Shellharbour
		2.2.2	Relocate the access road to the southern end of the Park (via Dunmore).	State Parks / Council
		2.2.3	Expand the amount and diversity of accommodation available.	State Parks
		2.2.4	Investigate the feasibility of linking Killalea Reserve and Bass Point Reserve with a headland walking and cycling trail	State Parks / Council
		2.2.5	Continue to expand and improve visitor facilities including picnic facilities, walking and cycling tracks, amenities, bird watching hides, whale watching / viewing platform, interpretative signage etc.	State Parks
		2.2.6	Improve the event infrastructure – provide water, power and amenities to the event staging areas.	State Parks
		2.2.7	Continue to grow and promote the events held in the Park.	Killalea Reserve / Council / Tourism Shellharbour
2.3	Upgrade and position Bass Point as an iconic attraction for the City and surrounding region	2.3.1	Significantly improve the entry precinct, creating a strong sense of arrival and sense of place.	Council
		2.3.2	Provide a sealed access road to and through the Reserve.	Shell Cove JV / Council
		2.3.3	Provide additional parking between the Reserve and Shell Cove, with the parking linked to a shared pedestrian – cycleway.	Council
		2.3.4	Upgrade the area surrounding the boat ramp, including formalising the parking and addressing erosion issues.	Council
		2.3.5	Extend town water to the picnic area and expand the picnic facilities.	Council
		2.3.6	Replace entry, directional and interpretative signage throughout the Reserve.	Council
		2.3.7	Upgrade and extend the walking tracks within the Reserve and assess options for establishing a rain forest walk.	Council
		2.3.8	Link Bass Point to the Coastal Cycleway, Shell Cove and Killalea Reserve.	Council
		2.3.9	Construct a quarry viewing area and provide interpretative information.	Council
		2.3.10	If the wharf is no longer required by the Quarry, explore options for re-use for tourism activities, including the possibility of mooring small, boutique cruise ships.	Council
		2.3.11	Develop interpretative experiences and collateral – e.g. tours, sound trails, interpretative walks.	Council

Actions		Key Tasks		Responsibility
2.4	Complete the Shellharbour City section of the Coastal Cycleway	2.4.1	Extend the Coastal Cycleway through Shellharbour Village to the Shell Cove Harbour and Waterfront Precinct south to link with Kiama Coastal Cycleway at Dunmore, via (or with links to) Bass Point Reserve and Killalea Reserve and to Shellharbour Junction Railway Station.	Council
		2.4.2	Work with Wollongong and Kiama Councils to 'brand' the route and provide coordinated signage, information and promotional collateral.	Council / Tourism Shellharbour
2.5	Continue to develop Lake Illawarra as a tourist attraction and recreation asset for the City and surrounding region.	2.5.1	Continue to improve water quality in the Lake and the foreshore reserves and access points surrounding the Lake.	Shellharbour and Wollongong Councils
		2.5.2	Complete the construction of the Lake Illawarra cycleway, to provide an off-road route that completely circumnavigates the Lake and connects with the coastal cycleway.	Shellharbour and Wollongong Councils
		2.5.3	Link the Lake Illawarra Cycleway to Oak Flats Shopping Centre and Railway Station, Albion Park Railway Station and onto HARS Museum, Shellharbour City Centre and west to Albion Park and the Calderwood Valley.	Council
		2.5.4	Improve the marine infrastructure (jetties, boat ramps, pontoons, mooring buoys) around the Lake, including providing facilities, such as fishing platforms that are fully accessible for people with disabilities.	Shellharbour and Wollongong Councils
		2.5.5	Position the Lake as a destination for the smaller boats launched at Shell Cove – a sheltered destination for a day out.	Tourism Shellharbour
		2.5.6	Promote Windang Island as a visitor attraction and a highlight of the Coastal and Lake Illawarra Cycleways: <ul style="list-style-type: none"> Formalise the link between Windang Island and Pur Pur Reserve – including providing directional signage. Consider providing a walking track and viewing area on the Island. Provide interpretative material (signage and/or digital). 	Council
		2.5.7	Develop and promote Picnic Island as a 'destination' on the Lake Illawarra cycleway: <ul style="list-style-type: none"> Improve presentation – including removal of weeds and litter. Provide interpretative signage. Provide a bike rack adjacent to the bridge. 	Council
		2.5.8	Develop a canoe – kayak – stand-up paddleboard trail around the islands in the entrance channel and possibly at other locations around the Lake.	Council, Tourism Shellharbour
		2.5.9	Investigate opportunities to establish an interpretative walk on Bevan Island.	Council
		2.5.10	Continue to develop the Lake Illawarra Art Trail, focusing on installations with a high visual impact.	Council
		2.5.11	Position the Mount Warrigal local shops as a service centre and destination for the Lake Illawarra cycleway. <ul style="list-style-type: none"> Improve the presentation of the centre – landscaping, signage, etc. Provide a deck / terrace adjacent to the Centre for outdoor dining. Provide safe access across Reddall Parade. Provide bicycle racks. 	Council
		2.5.12	Encourage commercial activities on and around the Lake, including eateries, coffee and food vans, bicycle and marine craft hire, tuition (e.g. kite surfing, SUP), cruises, guided tours.	Council
		2.5.13	Encourage and support events and activities on and around the Lake.	Shellharbour and Wollongong Councils.
2.6	Encourage and support the on-going expansion of HARS Mus	2.6.1	Support HARS in securing land and funds for the extension of the Museum to include a new Hangar to display the 707 aircraft donated by John Travolta's and other aircraft.	Council / Tourism Shellharbour

Actions		Key Tasks	Responsibility
		2.6.2 Resolve issues to enable HARS to access and use the Creamery building at Albion Park for storage.	Council
		2.6.3 Provide directional signage to the Museum from the Princes Highway and proposed by-pass.	Council / RMS
		2.6.4 Investigate the feasibility of having promotional billboards for HARS at Albion Park Station.	HARS / Tourism Shellharbour
		2.6.5 Provide marketing support, including working with HARS to: <ul style="list-style-type: none"> • Launch the Aviation Hall of Fame. • Develop packages and itineraries for promotion to aviation and heritage enthusiasts, social clubs, coach tour groups etc. • Develop rail-based promotions capitalising on concession and promotional fares for seniors and families. • Position the Museum as a unique venue for conferences and functions and to build the business events market. 	Tourism Shellharbour
		2.6.6 Explore the feasibility of establishing an Australian Air Monument (similar in concept to the Australian Railway monument at Werris Creek) in the vicinity of HARS.	Council / Tourism Shellharbour
2.7	Encourage and support the on-going development of the Greenvalleys Mountain Bike Park.	2.7.1 Continue to expand the track network, visitor and event facilities.	Greenvalleys MTB Park
		2.7.2 Encourage and support the development of a primitive camping area and potentially other accommodation at and/or in close proximity to the Park.	Council
		2.7.3 Improve access to and egress from the Park from the Illawarra Highway.	RMS
		2.7.4 Support and assist the Park / GV MTB Club to access grants.	Council / Tourism Shellharbour
		2.7.5 Support and assist the Park / GV MTB Club to secure, host and market events.	Tourism Shellharbour / Council
		2.7.6 Explore the possibility of using the Park facilities to host road cycling events using the Illawarra Highway / Macquarie Pass.	Council / Tourism Shellharbour / RMS
		2.7.7 Work with MTB event organisers to promote the City's accommodation, attractions, facilities and services to event competitors and spectators.	Tourism Shellharbour
		2.7.8 Leverage the national and international MTB media interest in the Park to generate publicity for the City and surrounding region.	Tourism Shellharbour
2.8	Diversify visitor facilities in Macquarie Pass National Park and State Conservation Area	2.8.1 Advocate for the construction of a walking trail with appropriate signage to Jump Rock.	Tourism Shellharbour / Council
		2.8.2 Work with Wollongong and Kiama Councils and NPWS to explore the opportunity for a scenic rim walk along the Illawarra Escarpment.	Tourism Shellharbour / Council
		2.8.3 Promote canyoning as one of the adventure-based activities available in the City and explore options to package canyoning with other adventure-based activities.	Tourism Shellharbour
		2.8.4 Explore options to access the Macquarie Pass State Conservation Area, with the possibility of accessing Tongarra Falls, viewing and interpreting the historic coal mine and developing MTB tracks with these linked with the Greenvalleys MTB Park.	Tourism Shellharbour

Actions		Key Tasks		Responsibility
2.9	Blackbutt Reserve – provide a ‘tourism overlay’ to increase utilisation of the Park	2.9.1	Improve directional signage to Blackbutt Reserve from Shellharbour and Lake Entrance Roads.	Council
		2.9.2	Link the Reserve to the City’s cycleway network.	Council
		2.9.3	Provide information directories (including a map) at the main entrances to the Park.	Council
		2.9.4	Explore options for formalising the MTB trails within the Reserve and promoting these in conjunction with the Greenvaleys MTB Park.	Council
		2.9.5	Explore options for developing a large, innovative ‘Nature Play’ playground.	Council
		2.9.6	Assess the feasibility of revamping the amphitheatre and using for events.	Council
2.10	Raise the profile of Aviation Tourism	2.10.1	Endeavour to attract additional air sports and aviation tourism based activities to Shellharbour Airport.	Council
		2.10.2	Work with operators to raise the profile of the aviation tourism / adventure based activities available.	Tourism Shellharbour
		2.10.3	Explore options for ‘packaging’ for recreational flying clubs and social groups.	Tourism Shellharbour
		2.10.4	Explore options for providing temporary and/or permanent drop zones in Shellharbour City for Sky Dive the Beach.	Council / Sky Dive the Beach
2.11	Continue to expand the experiences and activities offered at the Illawarra Light Rail Museum	2.11.1	Explore the feasibility of extending the railway around the Shellharbour Airport to link with HARS.	Railway operators / Council
		2.11.2	Explore options for cross promoting the Railway with other railway attractions within the surrounding region (e.g. Trainworx at Termeil).	Tourism Shellharbour
2.12	‘Package’ the commercial entertainment-based attractions and activities within the City.	2.12.1	Working with operators, explore opportunities to package and market the commercial entertainment-based attractions and activities (e.g. cinema, karting, roller skating, mini-golf, surfing lessons etc.) to the regional resident and visitor markets. Marketing collateral could include voucher books.	Tourism Shellharbour
2.13	Leverage The Links and Calderwood Valley Golf Courses	2.13.1	Work with Sydney Surrounds South to position the region as a golfing destination.	Tourism Shellharbour
		2.13.2	When the proposed accommodation comes on-line at Shell Cove and Calderwood Valley, explore options for ‘stay and play’ packages (including packages with the relevant RPT services).	Tourism Shellharbour
		2.13.3	Improve the directional signage to Calderwood Valley Golf Course.	Council / RMS
2.14	Improve the touring routes and scenic drives through and within the City	2.14.1	Work with the Sydney Surrounds South Destination Network and surrounding Councils to revamp and re-activate Grand Pacific Drive.	SSS Destination Network / Tourism Shellharbour
		2.14.2	In conjunction with Shoalhaven and Wingecarribee LGAs, update signage along State Tourist Route 8.	Council / RMS
		2.14.3	Position and promote Tourist Route 8 as a drive and motorcycle-touring route within the SSS Destination Network Region.	Tourism Shellharbour
2.15	Ensure that the public spaces, parks, gardens, playground and reserves that are visually prominent and/or are used by visitors, are well presented and maintained	2.15.1	Continue to maintain and improve the presentation of parks, gardens and reserves, both to enhance the visual impact and appeal of the locality and to encourage travellers to stop.	Council
		2.15.2	Continue to improve access and facilities for people with disabilities.	Council

Actions		Key Tasks		Responsibility
Strategy 3: Encourage and facilitate the development of new attractions and activities				
3.1	Assess the potential for Aboriginal cultural tourism	3.1.1	Assess the feasibility of, and undertake business planning for, the proposed Aboriginal Interpretative Centre at Shell Cove.	Council / Aboriginal Community
		3.1.2	Explore options for Aboriginal cultural tours, activities and interpretation within the City.	
Strategy 4: Grow the events sector				
4.1	Build the events framework	4.1.1	Formulate and implement an events strategy.	Council / Tourism Shellharbour
		4.1.2	Develop an events manual to assist event organisers to stage and promote events.	Council / Tourism Shellharbour
		4.1.3	Ensure that Council’s planning regulations and Plans of Management for reserves and venues, permit the hosting of events and allow for the erection of temporary structures and signage.	Council
		4.1.4	Develop a venue database and directory, including indoor and outdoor venues.	Tourism Shellharbour
4.2	Continue to develop and promote the Tourism Shellharbour events calendar	4.2.1	Continue to maintain a comprehensive events calendar.	Tourism Shellharbour
		4.2.2	Continue to promote the calendar to the community – encouraging event organisers and sporting groups to list their event on the calendar, and for people thinking about organising an event – to check the calendar and talk to the VIC before finalising dates.	Tourism Shellharbour
		4.2.3	Provide access to information on all events being held in the City (rather than just Council events), by providing a link to the Tourism Shell Harbour event calendar from Council’s website. Include a ‘what’s on this week’ on the home page of Council’s website.	Council
		4.2.4	Encourage accommodation operators to include a link to the visitshellharbour events webpage from their property website and to promote events on their home page.	Tourism Shellharbour
4.3	Build local events into regional / signature events	4.3.1	Assess whether local events have the potential to be ‘grown’ into signature events for the City, and if so, work with organisers to formulate and implement a growth strategy / business plan	Council / Tourism Shellharbour
4.4	Capitalise on the City’s sporting facilities to attract sporting events and activities	4.4.1	Encourage and support local sporting clubs and associations to organise and/or bid for sporting events and activities.	Council / Tourism Shellharbour
		4.4.2	Market the City’s sporting event venues and facilities to event organisers.	Council / Tourism Shellharbour

Priority 2: Ensure that the infrastructure, facilities and services are in place to support the growth of the visitor economy.

Objectives

To provide the infrastructure, facilities and services needed to support and facilitate the growth of the City's visitor economy, including:

- An expanded and diversified accommodation base with a strong on-line presence.
- Improved road and rail access to and within the City.
- A network of inter-connected cycleways and shared pathways.
- Effective signage to and throughout the City.
- To meet the information needs of consumers and travellers at all stages of the 'path to purchase'

Strategies

Strategy 5: Encourage and facilitate growth in the accommodation sector

Strategy 6: Improve access to and within the City

Strategy 7: Ensure that signage is effective and contributes positively to the image of the City

Strategy 8: Deliver comprehensive information services



Beach Huts, Shellharbour Beachside Holiday Park: Tourism Shellharbour

Actions		Key Tasks		Responsibility
Strategy 5: Encourage and facilitate growth in the accommodation sector				
5.1	Continue to improve existing accommodation	5.1.1	Encourage operators / owners to continue to upgrade their properties to meet market needs and expectations.	Tourism Shellharbour
5.2	Encourage and facilitate the development of new accommodation	5.2.1	Killalea Reserve: Explore opportunities to increase and diversify the accommodation available, including expanding the camping area and providing powered and non-powered sites, self-contained cabins and possibly permanent tents.	NSW DPI Lands – State Parks
		5.2.2	Links Golf Course: <ul style="list-style-type: none">Explore the opportunity to provide self-contained cabin accommodation adjacent to the Golf Club to provide accommodation in the short to medium term.Longer term, encourage and facilitate the development of lodge / resort accommodation adjacent to the Golf Club.	Council
		5.5.3	Shellharbour Beachside Holliday Park: Explore options for: <ul style="list-style-type: none">Expanding the Park, possibly into the Basset Park Car Park and reserve area.	Council

Actions		Key Tasks		Responsibility
			<ul style="list-style-type: none"> Utilising part of the reserves in the Shellharbour – Barrack Point area for overflow camping during peak periods with this managed by the Beachside Holiday Park. Utilising the Shell Cove Business Park precinct as a temporary camping area during peak times, until the area is needed for development of the business park. 	
		5.2.4	Shell Cove – Marine Services Precinct – include a small number of basic rooms within the Precinct to cater for boat owners and crew while boats are being serviced, and for people who have boats stored in the dry stack.	Council
		5.2.5	Encourage the development of accommodation adjacent to licensed clubs.	Licensed Clubs
5.3	Continue to improve facilities and infrastructure for the touring caravan and motorhome market	5.3.1	Ensure that there are designated caravan / long rig parking spaces available in the key tourism precincts and that these spaces are effectively signposted from the main access corridors.	Council
		5.3.2	Assess the need for a public, free dump point, and provide if required.	Council
5.4	Continue to improve the on-line presence of accommodation properties	5.4.1	Encourage accommodation operators to make more effective use of web-based and digital marketing including: <ul style="list-style-type: none"> Updating their own websites to be semantic search and mobile responsive and incorporate real time booking facilities and quality images as well as information on Shellharbour City (link to download the brochure) and events held in the City and surrounding area. Listing on the higher profile accommodation booking websites. Claiming their 'my business' page on Google. Encouraging guests to review their property on both Trip Advisor and Google Review. Utilising free / low cost listings on tourism and third party websites Utilising web-based resource material on DNSW and Tourism Australia websites 	Tourism Shellharbour
		5.4.2	Encourage operators to improve their property images and include video clips / virtual tours on their websites – explore whether there is interest amongst operators to jointly fund a professional photo / film shoot.	Tourism Shellharbour
		5.4.3	Explore options with DNSW, the Destination Network and/or other service providers to run workshops on digital marketing for operators (both attractions and accommodation)	Tourism Shellharbour
5.5	Encourage improvements to customer service levels	5.5.1	Keep operators informed of any training programs and industry briefing workshops being held throughout the Region as well as the training resources available on-line.	Tourism Shellharbour
Strategy 6: Improve access to and within the City				
6.1	Advocate for improved road access to and within the City	6.1.1	Advocate for and support: <ul style="list-style-type: none"> Princes Motorway (M1) extension from Waterfall into the Sydney. Duplication of Picton Road Continued upgrading of the Illawarra Highway The development of the Albion Park – Tripoli Way project A new access road to Killalea Reserve 	Council / Tourism Shellharbour
6.2	Advocate for improved rail access to the City	6.2.1	Advocate for and support: <ul style="list-style-type: none"> Improvements in the number, speed and reliability of passenger rail services on the South Coast Line. The introduction of passenger services on the Maldon-Dombarton and Moss Vale-Unanderra lines 	Council / Tourism Shellharbour
6.3	Improve connectivity within the City	6.3.1	Integrate the City's railway stations and shopping centres within the shared pedestrian – cycleway network.	Council
		6.3.2	Strengthen the link between Albion Park Rail Station and the Shellharbour Airport / HARS Museum	Council

Actions		Key Tasks		Responsibility
6.4	Develop the Shellharbour Airport Precinct into a vibrant business hub	6.4.1	Develop terminal and parking facilities to support RPT services and other activities.	Council
		6.4.2	Seek funding to augment and extend the Airport infrastructure to facilitate development.	Council
		6.4.3	Progressively implement the Shellharbour Airport Strategic and Business Plan.	Council
Strategy 7: Ensure that signage is effective and contributes positively to the image of the City				
7.1	Identify issues with signage within the City.	7.1.1	Undertake a signage audit and formulate and implement a strategy to improve signage throughout the City.	Council / Tourism Shellharbour
7.2	Improve signage in the gateway entry corridors	7.2.1	Provide visually stimulating entry signage on each of the City's entry gateways.	RMS / Council
		7.2.2	Remove dated and damaged signs from entry corridors.	Council
7.3	Improve directional signage	7.3.1	Provide comprehensive directional signage on new routes (e.g. Albion Park Rail by-pass, Harbour Boulevard)	RMS / Council
		7.3.2	Ensure that tourist attractions, accommodation, venues and visitor facilities are effectively signposted.	Council / Tourism Shellharbour
7.4	Update facility signs	7.4.1	Progressively replace fingerboard facility signs with international symbols.	Council
7.5	Coordinate and enhance cycleway – shared pathway signage.	7.5.1	Adopt a regional approach to signage along the Coastal and Lake Illawarra cycleways, with the signage including a route map, section maps, directional signage to attractions, accommodation, eateries and other facilities along the routes	Council working with Wollongong and Kiama Councils
		7.5.2	Provide track-head / orientation signage at key locations on walking trails and cycleways and provide trail / route markers where needed.	Council
Strategy 8: Deliver comprehensive information services				
8.1	Capitalise on the high level of visitation expected in the Shell Cove Waterfront Precinct	8.1.1	Establish a VIC in the Waterfront Precinct, with the Centre having state-of-the art digital displays.	Council / Tourism Shellharbour
8.2	Provide access to information at strategic 'touch points' throughout the City.	8.2.1	Provide un-manned information displays at strategic locations throughout the City (e.g., Shellharbour Village, Shellharbour Civic Centre Precinct) and encourage accommodation and attractions operators and other businesses to display and distribute the Shellharbour Visitors Guide and other information.	Tourism Shellharbour
8.2	Continue to grow the City's on-line presence	8.2.2	Invest in building and maintaining a quality video / film library for inclusion in information and promotional collateral.	Tourism Shellharbour
		8.2.3	Continue to improve and expand the visitShellharbour website and ensure that it is optimised to respond to searches for the City's localities and main attractions and events.	Tourism Shellharbour
		8.2.4	Review Shellharbour content on third party tourism and travel websites and Apps and update / improve content and images where possible	Tourism Shellharbour
		8.2.5	Endeavour to list / feature Shellharbour City product / experiences on special interest and activity based sites (e.g. cycling, mountain biking, surfing, camping, fishing, sailing, boating etc.).	Tourism Shellharbour
		8.2.6	Ensure that google analytical and other tracking tools are activated and use these tools to monitor and assess level of interest and trends.	Tourism Shellharbour
		8.2.7	Encourage accommodation and attraction operators and event organisers to include a link to the visitshellharbour website from their websites and/or a link to download the Shellharbour Visitor Guide.	Tourism Shellharbour
		8.2.8	Use social media to communicate with potential visitors and local and regional residents (VFR) and as a touch point for the visitshellharbour website.	Tourism Shellharbour

Actions	Key Tasks	Responsibility
	8.2.9 Harness user generated content as a supporting source of information on the City.	Tourism Shellharbour
	8.2.10 Promote free Wi-Fi locations to travellers	Tourism Shellharbour

Priority 3: Build and diversify the City's market base

Shellharbour City needs to continue to build visitation and diversify its market base. In the short term, the focus for market development will be on growing the day trips and shoulder and off-season over-night markets. Over the next five years, changes in the product and accommodation available in the City will provide opportunities to target additional markets, including:

- Quality accommodation at Shell Cove and Calderwood Valley Golf Resort will provide opportunities to grow the business, business events, weddings, golf and short breaks markets as well as the international and interstate markets.
- Shell Cove Harbour and Marina will provide opportunities to grow the nautical and marine markets including touring vessels, charter and recreational boating and fishing, scuba diving, visiting small Naval vessels etc.
- Completion of the HARS Museum (existing facility) will enable the Museum to be actively marketed and promoted, providing opportunities to grow the coach and group tour markets, business events and functions.
- Opening of the Civic Precinct Auditorium will provide an additional venue for business events and functions.

Objectives

- To continue to grow visitation to Shellharbour City.
- To increase the yield from visitation.
- To spread visitation throughout the year, reducing the impacts of seasonality.

Strategies

- Strategy 9: Grow the mainstream market segments.
- Strategy 10: Leverage new accommodation and venues to diversify the market base.
- Strategy 11: Grow special interest and activity-based markets
- Strategy 12: Build the international visitor market
- Strategy 13: Develop the accessible tourism market



Lake Illawarra: Tourism Shellharbour

The product and infrastructure development needed to support and sustain growth in visitation is addressed in Priorities 1 and 2. Additional market development and marketing initiatives are given below.

Actions		Key Tasks		Responsibility
Strategy 9: Grow the mainstream market segments				
9.1	Continue to grow the family market – day trips, short breaks and holidays.	9.1.1	Position and promote Shellharbour City as a ‘child friendly’ destination that is close to home – a place for families to relax, re-connect and spend quality time – exploring, learning and having fun.	Tourism Shellharbour
		9.1.2	Participate in regional marketing and promotional campaigns targeted to the family market.	
		9.1.3	Explore opportunities for PR marketing through magazines such as Sydney’s Child.	
		9.1.4	Explore opportunities to raise the profile of Shellharbour City in the South Western and Western Sydney Growth Areas and in the southern and eastern suburbs (particularly in the higher density areas around railway stations).	
		9.1.5	Work with operators to provide ‘deals’ in the shoulder and off-peak periods.	
9.2	Build the youth market.	9.2.1	In the digital space, build awareness of Shellharbour as a destination for outdoor and adventure-based activities – featuring surfing, sea kayaking, sky diving, canyoning, cycling and mountain biking.	Tourism Shellharbour
		9.2.2	Participate in DNSW and regional marketing and promotional campaigns targeted to the youth market.	
		9.2.3	Explore opportunities to host bloggers that influence youth travel.	
		9.2.4	Explore opportunities to exhibit at University Open and Orientation Days and other activities – possibly using deal vouchers as a promotional tool.	
		9.2.5	Support tour operators who are bringing young traveller to and through the City, exploring opportunities to expand the Shellharbour City ‘offer’.	
9.3	Continue to grow the drive touring market – including touring caravans and RVs.	9.3.1	Participate in DNSW and regional campaigns and initiatives targeted to the drive touring market.	Tourism Shellharbour
		9.3.2	Participate in relevant touring route initiatives – Grand Pacific Drive, Sydney-Melbourne Coastal Touring Route, State Touring Route 8.	Tourism Shellharbour
		9.3.3	Through the Destination Network, develop and promote motorcycle touring routes, featuring the Skybridge and the mountain pass roads (Illawarra Highway, Jamberoo Mountain, Moss Vale – Kangaroo Valley roads.	Tourism Shellharbour
		9.3.4	Continue to exhibit at key consumer shows, including the caravan and camping shows.	Tourism Shellharbour
9.4	Grow the local and regional markets, and through these markets, the VFR market.	9.4.1	Endeavour to have the Shellharbour City Visitor Guide displayed in the Sales Office in the new release areas in and around Shellharbour City (e.g. Lend Lease sales office at Calderwood Valley).	Tourism Shellharbour
		9.4.2	Working with Council, develop a ‘Welcome Pack’ and other initiatives for new residents, potentially including voucher books in the Pack.	Council / Tourism Shellharbour
		9.4.3	Use popular local social media channels to communicate with local and regional residents and harness user generated content.	Tourism Shellharbour
		9.4.4	Working with operators, formulate and implement a promotional VFR campaign.	Tourism Shellharbour
		9.4.5	Working with operators, position and promote Shellharbour City as a location for functions, birthday parties etc.	Tourism Shellharbour
		9.4.6	Capitalise on opportunities for coverage in the local and regional media – including features on new products, experiences and businesses, and articles and listing in the dining out guides, what’s on, thing to do in school holidays etc.	Tourism Shellharbour
		9.4.7	Direct market to local and regional groups including:	Tourism Shellharbour

Actions		Key Tasks		Responsibility
			<ul style="list-style-type: none">• Playgroups / parent groups• Disability service providers• Retirement homes / aged care service providers• Walking clubs and groups• Sporting clubs and associations• Probus, View and other social organisations	
9.5	Target visitors staying in adjoining LGAs	9.5.1	Working with Tourism Managers from adjoining Council, explore opportunities for encouraging dispersal throughout the region and cross promotion localities, attractions, activities and experiences.	Tourism Shellharbour
		9.5.2	Position and promote Shellharbour City as a ‘wet weather’ destination – great indoor attractions and activities, plus Stockland Shellharbour.	Tourism Shellharbour
Strategy 10: Leverage the new accommodation and venues to diversify the market base				
10.1	Build the business events market	10.1.1	Prepare a business events directory, with this available on-line and as a downloadable guide.	Tourism Shellharbour working with venue and accommodation operators.
		10.1.2	Participate in relevant DNSW and Destination Network initiatives to grow regional conferencing.	
		10.1.3	Organise familiarisation tours for PCOs and other relevant industry representatives.	
		10.1.4	Encourage venue operators to provide comprehensive information (including room dimensions and capacities) on their websites.	
		10.1.5	Ensure that Shellharbour City venues are listed in relevant conference and meeting directories.	
		10.1.6	Explore options for direct marketing to businesses and industry associations in the Southern, South Western and Western areas of Sydney.	
		10.1.7	Bid for association conferences, business awards and other business events.	
		10.1.8	Work with event organisers to generate publicity about the business events held in the City – to generate awareness of the venues and activities available.	
		10.1.9	Position and promote the HARS Museum and Shell Cove Waterfront Precincts as unique venues for conference functions.	
10.2	Grow the weddings and functions market	10.2.1	Position and promote Shellharbour City as a destination for weddings and functions.	Tourism Shellharbour working with venue and accommodation operators
		10.2.2	Explore opportunities for holding a weddings expo or ‘open day’ to showcase the City’s venues.	
10.3	Grow the golf – ‘stay and play’ markets	10.3.1	Work with The Links Golf Course and the Calderwood Valley Golf Resort, and potentially RPT services, to develop and promote a range of ‘stay and play’ golf packages featuring the Calderwood Valley resort and the Shell Cove Waterfront Precinct Hotel.	Tourism Shellharbour, working with the Golf Clubs and accommodation operators.
		10.3.2	Work with the Calderwood Valley Golf Resort to generate publicity for the new golf resort, and leverage the opening of the resort to bring golf journalists and golf tour organisers to the City.	
		10.3.3	Encourage and support The Links and Calderwood Valley grow their golf events and bid to host other events.	
10.4	Grow the group and coach tour markets	10.4.1	Work with HARS, Shell Cove and other operators to develop itineraries, packaged and promotional offers targeted to coach and other groups, such as probus clubs, car clubs etc.	Tourism Shellharbour working with operators.
		10.4.2	Direct market to coach tour organisers and targeted groups.	
		10.4.3	Consider including a ‘For Groups’ page on the Shellharbour website.	

Actions		Key Tasks		Responsibility
Strategy 11: Grow special interest and activity based markets				
11.1	Grow special interest and activity based markets	11.1.1	Use the City’s assets and facilities to grow special interest and activity based markets – clubs, individuals and social groups - targeting these groups primarily through direct marketing online and PR in specialist publications and on specialist websites. <ul style="list-style-type: none">• Touring boats• Recreational fishing and boating markets• Scuba diving• Surfing• Non-powered water sports – canoeing, kayaking, kite surfing, stand-up-paddle barding, sailing• Powered water sports - water skiing, wakeboarding• Cycling• Mountain biking• Aviation enthusiasts / Learn to fly• Bush walkers and walking clubs• Golfers• Lawn Bowlers	Tourism Shellharbour working with operators and the Destination Network
11.2	Grow sports tourism	11.2.1	Encourage and support local sporting clubs and associations to grow local events and bid for and host sporting events and activities.	Council / Tourism Shellharbour
		11.2.2	Actively promote the City’s venues to sporting event organisers.	Council / Tourism Shellharbour / Operators
		11.2.3	Develop and attract boating, water sports and fishing events, leveraging Shell Cove Harbour and Marina and Lake Illawarra.	Shell Cove Place Manager / Council / Tourism Shellharbour
Strategy 12: Build the international visitor market				
12.1	Build the international day and overnight visitation to the City	12.1.1	Continue to collaborate with DNSW and the South Coast ‘Unspoilt’ campaign participants to target the international market.	Tourism Shellharbour
		12.1.2	Explore opportunities to work with the Sydney-Melbourne Coastal and Grand Pacific Drive touring routes to grow visitation.	
		12.1.3	Work with accommodation, attraction and activity operators (e.g. Greenvalleys MTB Park, marine tour activity operators) to develop ‘export ready’ product.	
		12.1.4	Endeavour to have Shellharbour products and experiences included in tour itineraries.	
		12.1.5	Leverage rail services to encourage international travellers to visit and explore the City.	

Actions		Key Tasks		Responsibility
Strategy 13: Develop the accessible tourism market				
13.1	Develop the accessible tourism market	13.1.1	Undertake research to develop an understanding of market needs and expectations.	Tourism Shellharbour
		13.1.2	Evaluate the City’s accommodation, products, facilities and infrastructure to determine if it is suitable and can meet needs and expectations. Identify ‘accessible ready’ products and infrastructure and identify work required to upgrade other products and infrastructure.	
		13.1.3	Formulate and implement a marketing strategy.	

Priority 4 Industry Development

The marketplace is evolving, and tourism and business operators need to keep abreast of changes, with the focus on customer service, website development and maintenance, digital (web and social media) communication and marketing and promotion, and understanding the growing international market, including becoming 'export ready'. With skill shortages endemic in the hospitality industry, there is also a need to assess the staffing requirements for the Shell Cove Waterfront Precinct businesses and Calderwood Valley Golf Resort, and if needed, explore with TAFE opportunities to deliver training services to address possibly labour shortages and/or skills gaps.

Objectives

- Skilled operators that understand the market, are digitally savvy and responsive to change.
- More 'export ready' tourism businesses.
- Access to trained hospitality staff to meet the growing needs of the City.

Strategies

Strategy 14: Continue to provide opportunities for industry training and development.

Strategy 15: Endeavour to meet industry needs for skilled staff.

Actions		Key Tasks		Responsibility
Strategy 14: Continue to provide opportunities for industry training and development				
14.1	Provide access to industry training and development programs	14.1.1	Continue to identify industry training needs and providing training and networking opportunities.	Tourism Shellharbour
		14.1.2	Provide input to the Destination Network and DNSW on local training needs and work with these organisations to deliver training programs within the City / Region.	Tourism Shellharbour
14.2	Hone business skills	14.2.1	Encourage tourism operators to participate in Council’s Economic Gardening program.	Tourism Shellharbour / Council

Actions		Key Tasks		Responsibility
		14.2.2	Encourage tourism operators to participate in the South Coast Regional and NSW Tourism Awards.	Tourism Shellharbour
Strategy 15: Endeavour to meet industry needs for skilled staff.				
15.1	Address future labour and skill requirements	15.1.1	Survey Tourism Shellharbour members regarding current and likely future labour and skills requirements, and labour force issues.	Tourism Shellharbour
		15.1.2	Seek information from proposed new businesses (e.g. Shell Cove Waterfront Precinct, Calderwood Valley Golf Resort, Civic Auditorium) regarding expected labour requirements, skills needed and potential issues.	Tourism Shellharbour
		15.1.3	If access to labour and the need for training emerge as significant issues, endeavour to work with TAFE to provide solutions.	Tourism Shellharbour
		15.1.4	Encourage the Destination Network to undertake an audit of the labour and skills required in the Region and develop and implement a strategy to address.	Tourism Shellharbour
		15.1.5	In conjunction with Council, Chambers and other local and regional business organisations, advocate for improvements in the TAFE system.	Tourism Shellharbour / Council

Priority 5 Effective Marketing and Promotion

Ongoing marketing and promotion is required to build awareness of Shellharbour City and its products, experiences and activities, generate an intention to visit, and convert this interest into bookings. The market place is highly competitive. It is becoming increasingly fragmented, requiring a highly coordinated and target approach utilising a range of online and more traditional media channels.

To date, with the limited resources available, Tourism Shellharbour's marketing approach has been very sound, with Tourism Shellharbour seeking to maximise exposure through cooperative activities, public relations marketing and strategic advertising, and the use of multiple on-line channels and social media. While current activities need to continue, there is also a need to leverage the marketing opportunities arising from new products and services (i.e. Shell Cove Waterfront Precinct, Calderwood Valley Golf Resort, completion of HARS Museum, RPT air services, the Civic Auditorium etc.), population growth (locally, regionally and in Sydney), and the growing international market. Tourism Shellharbour also needs to increase its activity in the digital space, focusing on using social media for communication, building relationships and marketing and promotion. These additional activities need to be resourced and funded. Ideally, Tourism Shellharbour should be looking to employ a digital marketer.

Objectives

- Increase awareness of and intention to visit, Shellharbour City
- Stronger digital presence – actively using social media (including harnessing user generated content) to communicate and 'inspire'.
- To generate maximum exposure for the limited marketing dollars available.
- To leverage emerging opportunities to grow visitation.

Strategies

Strategy 16: Continue to participate in cooperative marketing opportunities to access the mainstream domestic markets and the international market.

Strategy 17: Leverage the digital space

Actions		Key Tasks		Responsibility
Strategy 16: Participate in cooperative marketing opportunities				
16.1	Participate in relevant DNSW, Destination Network and South Coast market development and marketing and promotional initiatives	16.1.1	Continue to participate in the South Coast ‘Unspoilt’ Campaign with the ‘unspoilt’ brand values and propositions embraced locally.	Tourism Shellharbour
		16.1.2	Capitalise on opportunities offered by DNSW for public relations marketing, product and event listings, media coverage, familiarisation tours etc.	Tourism Shellharbour
		16.1.3	Work with the Destination Network to explore opportunities to penetrate the South Western Sydney and Western Sydney markets.	Tourism Shellharbour
		16.1.4	Continue to exhibit at trade and consumer shows.	Tourism Shellharbour
16.2	Participate in relevant touring route promotions	16.2.1	Work with the Destination Network Councils to restructure and revamp Grand Pacific Drive, and participate in marketing and promotional that will deliver day and overnight visitation to Shellharbour City.	Tourism Shellharbour
		16.2.2	Explore opportunities to raise Shellharbour’s profile and generate visitation through the Sydney – Melbourne Coastal touring route.	
16.3	Explore cooperative marketing opportunities to activate and leverage the Shell Cove Waterfront Precinct	16.3.1	Support / complement the marketing and promotional activities undertaken by the Shell Cove Waterfront Precinct Place Manager	Council / Tourism Shellharbour
		16.3.2	Formulate, resource and implement a marketing strategy, and seek additional funding opportunities to undertake destination and product marketing of the precinct following the withdrawal of the Fraser Property Group.	Council / Tourism Shellharbour
		16.3.3	Identify opportunities for Tourism Shellharbour to complement the marketing undertaken by the Place Manager and individual Shellharbour operators.	Tourism Shellharbour
16.4	Partner with operators to grow visitation and visitor expenditure	16.4.1	Work with local operators to formulate and implement a VFR marketing campaign.	Tourism Shellharbour
		16.4.2	Work with local operators to market and promote the City as a destination for business events and functions, including weddings.	Tourism Shellharbour
		16.4.3	Work with HARS and other operators to grow the coach and group tour markets through direct, targeted marketing.	Tourism Shellharbour
		16.4.4	Explore opportunities to partner with RPT services from the Airport	Tourism Shellharbour
		16.4.5	Explore opportunities to leverage and boost marketing undertaken by event organisers.	Tourism Shellharbour
Strategy 17: Leverage the digital space				
17.1	Enhance and expand the City’s digital presence	17.1.1	Formulate and implement a digital marketing strategy.	Tourism Shellharbour / Council
		17.1.2	Seek additional funding to employ a digital marketing specialist.	Tourism Shellharbour
		17.1.3	Capitalise on opportunities for free and low-cost listings and exposure.	Tourism Shellharbour
		17.1.4	Scope new ‘story telling’ concepts for social media to generate content and publicity	Tourism Shellharbour
		17.1.5	Explore ways of harnessing user generateRPT content.	Tourism Shellharbour

Actions		Key Tasks	Responsibility
17.2	Improve connectivity to 'boost' social media posts	17.2.2 Encourage tourism operators to provide a link to the visit Shellharbour website from their websites and to re-post relevant Tourism Shellharbour social media posts to their customer bases.	Tourism Shellharbour
		17.2.3 Explore with Council the option to have a more visually prominent link between the Council and Tourism Shellharbour on Council's website and opportunities to better coordinate social media posts.	Tourism Shellharbour / Council



Marine life and corals off Bass Point (top row and bottom right): Shellharbour Scuba Dive Snorkelling in Bushrangers Bay, Bass Point (bottom left): South Coast Register

MONITORING

It is important that the Tourism Shellharbour in conjunction with Council put in place a simple program to monitor the effectiveness of its tourism development and marketing activities in order to:

- Provide an indication of whether the strategies and actions are effective in building visitation and/or achieving economic growth. Ineffective actions can be terminated or modified.
- Assist in setting priorities and allocating funds and resources.
- Provide data to support funding applications. This is particularly important where funding for the extension of an existing program is being sought.

Potential indicators include:

- Visitation estimates provided by the LGA visitor profiles published by Tourism Research Australia.
- ABS Accommodation Performance Statistics – room nights, guest arrivals and nights, room occupancy, average stay, room rates.
- Visitor statistics email and telephone enquiry statistics collected at the Shellharbour VIC.
- Market research and monitoring undertaken by DNSW as part of the Unspoilt Campaign.
- Performance statistics available from Council enterprises (Shellharbour Airport, Beachside Holiday Park, The Links, Shell Cove).
- Visitation / performance statistics from Tourism Shellharbour members.
- Website and social media analytics, including the accommodation booking data.
- Event attendance.
- Media coverage gained (track amount of coverage and the dollar value).
- Familiarisation tours hosted and resultant coverage
- Value of new / additional investment in the tourism facilities (accommodation, attractions, tours etc.) in the City.

For some initiatives, particularly in the areas of market development, it may take several years before the results are fully realised.



Albion Park Show: Tourism Shellharbour

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Learning to Canyon, Macquarie Rivulet: Sydney University Bushwalkers