# Camden Council
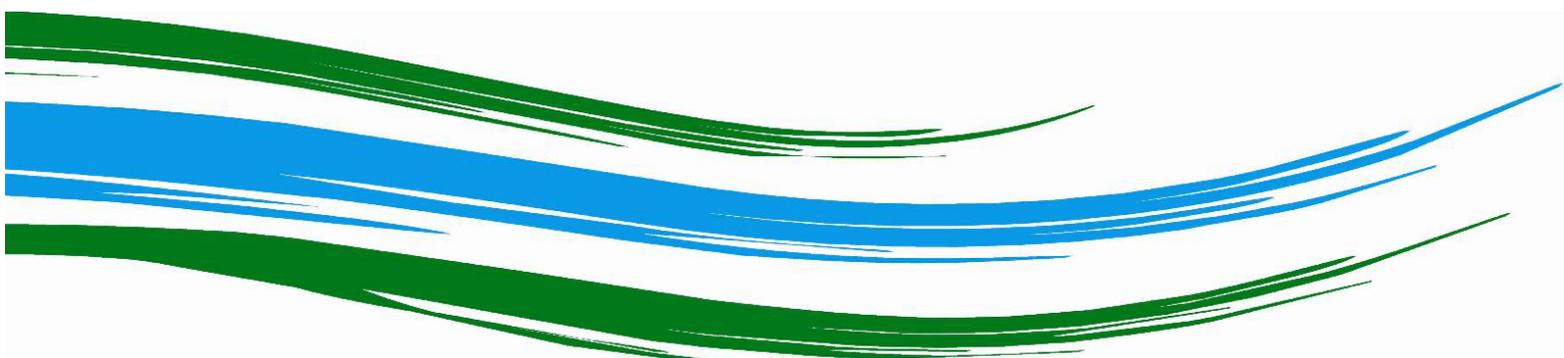## Attachments
## ORD05

**Ordinary Council Meeting**
**26 July 2016**

**Camden Civic Centre**
**Oxley Street**
**Camden**

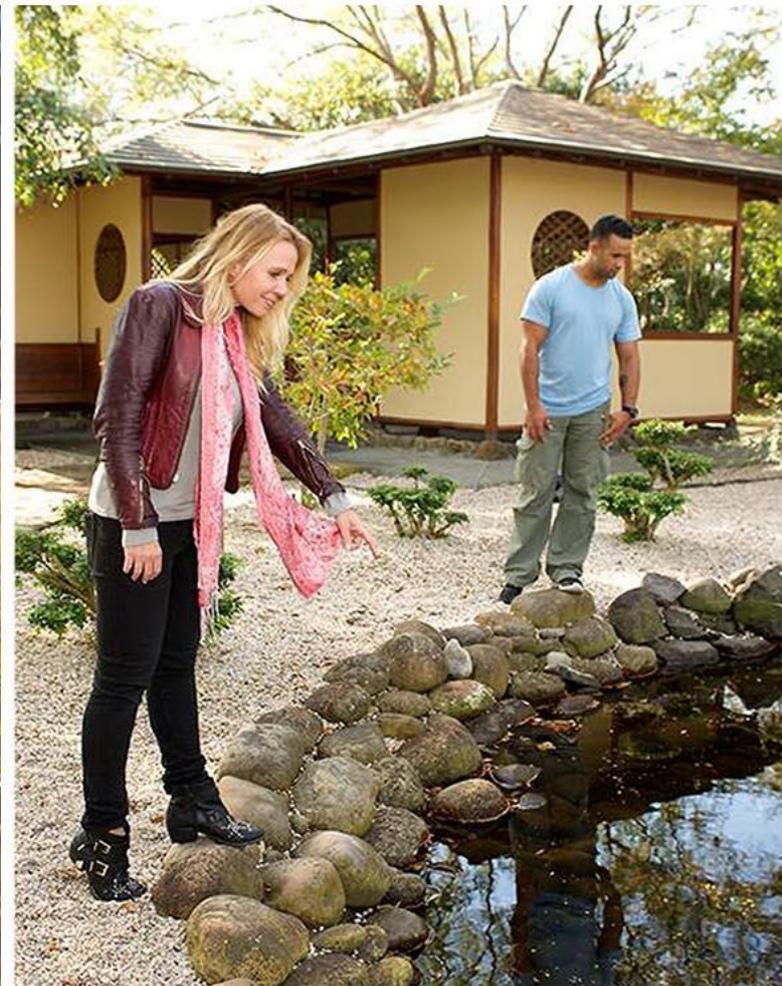MACARTHUR
**DESTINATION**
**MANAGEMENT**
**PLAN**
2016 - 2020

*Prepared for Camden Council &*
*Campbelltown City Council, 2016*

THE **STAFFORD** GROUP

camden
council

campbelltown
city council

THE STAFFORD GROUP

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**1. EXECUTIVE SUMMARY**

# 1. Executive Summary

## 1.1. Overview

The Stafford Group (The Group) was commissioned by Campbelltown City Council and Camden Council (the Councils) to undertake the development of a Destination Management Plan (DMP), including a Marketing Action Plan (MAP), for the Macarthur region.

This DMP has been developed as an update to the previous Macarthur Regional Tourism Strategy 2012 – 2015.

## 1.2. Purpose

The purpose of the DMP and MAP (here on referred to as the DMP) is to provide the Councils and all stakeholders with a clear understanding of:

- Key visitor markets and segments;
- Major preferences for experiences;
- Forecasted visitor growth; and
- Existing and potential experiential strengths of the region.

When developing this DMP, The Group has focused on tangible outcomes which can be achieved within a realistic timeframe rather than offering a wish list.

## 1.3. Issues and Gaps

Throughout the course of developing this DMP, a number of issues and gaps in the Macarthur tourism sector have been identified (see Figure 1 below). Whilst both Councils will need to play a key role in supporting the tourism sector going forward, it is important to note that the responsibility for resolving these broad ranging issues does not fall entirely on each Council's shoulders. Rather, the opportunities listed in this DMP, require the active participation of each Council as well as the tourism industry throughout the Macarthur region working in unison.

However, in the absence of a large tourism sector, the Councils will need to take a more hands on role to guide tourism activity until the sector grows.

**FIGURE 1: ISSUES AND GAPS**

| Product & Supporting Infrastructure Issues | Marketing & Promotional Issues | Other Tourism Related Issues |
|---|---|---|
| ▪ Lack of Commissionable Product<br>▪ Need for a Larger Entertainment Venue<br>▪ Growing Region – Inadequate Infrastructure Support<br>▪ Narellan Road<br>▪ Location of the Camden VIC<br>▪ Lack of Accommodation in Camden<br>▪ Inadequate Signage (interpretation and directional)<br>▪ Need to Upgrade the Camden Civic Centre | ▪ Strong competition from destinations such as Sydney and Surrounding Areas<br>▪ Inclusion in the Sydney and Surrounds Region<br>▪ Brand Differentiation<br>▪ Lack of Cooperative Marketing<br>▪ Market Perception<br>▪ Lack of robust visitor statistics to determine visitation trends | ▪ Tyranny of Distance<br>▪ Parramatta Centric Focus by State Government<br>▪ Balancing Housing and Tourism Needs<br>▪ Lifestyle Operators<br>▪ Lack of Industry Cohesion<br>▪ Lack of higher Quality Dining Options<br>▪ Lack of Tourism Investment<br>▪ Lack of Understanding of the Importance of the Tourism Industry<br>▪ Retail Trading Hours |

## 1.4. The Opportunities

The following table provides a summary of the various opportunities which Macarthur could focus on in order to activate and grow tourism on a sustainable basis. The opportunities have deliberately been kept succinct to ensure the focus is on those opportunities which are likely to generate the best possible returns in the shortest timeframe. They therefore represent the *lower hanging fruit* opportunities identified for Macarthur.

The opportunities are not in any priority order and have been segmented according to the following themes, which also align with the previous 2012 – 2015 Tourism Strategy:

- Tourism Product Development & Partnerships;
- Marketing & Promotion;
- Industry Support; and
- Visitor Servicing.

The realisation of these opportunities will help stimulate stronger visitor growth, increased length of stay, higher visitor spend and better focused tourism profiling for the Macarthur region.

| TOURISM PRODUCT DEVELOPMENT & PARTNERSHIPS |
| --- |

- **Holiday Park Development:** Development of a new (or upgrade of an existing) dedicated destination holiday park to support the growing family and caravan and camping market for the Greater Sydney region. Potential exists to make the region the hub for the caravan and camping sector for greater Sydney. Undertake a study to test the feasibility of location, size and financial viability.
- **Haunted Attraction and Festival:** Bring alive the heritage and living stories of Macarthur via a possible themed haunted attraction and/or a horror festival using resources, facilities and performing arts groups across the region. This should leverage off the marketing profile already

| TOURISM PRODUCT DEVELOPMENT & PARTNERSHIPS |
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established via the Festival of Fisher's Ghost managed by Campbelltown City Council.
- **Food Trails and Cooking Schools:** Leveraging off the growing "foodie" movement within the region, assess potential for boutique food trails which could possibly incorporate art trails and link to those interested in developing cooking schools, spice markets etc.
- **Heritage and nature-based stories through a sound and light show:** Utilising the natural background of the Australian Botanic Garden, develop a sound and light show which showcases the history of the region as a summer time initiative.
- **Link Mount Annan to Western Sydney Parklands:** develop the potential for cycle ways, walk ways and other recreational activity experiences via the Scenic Hills through promoting a 400m wide corridor to benefit local communities as well as attracting visitors.
- **Strengthen liveability of Glenfield to Macarthur Urban Renewal Corridor:** introduce tourism and related leisure elements to strengthen regional identity and liveability via various food and related experiences and promote places of interest.
- **Botanic Gardens Amphitheatre, Sculpture Garden, Horse Trails and Luge:** Development of an all-weather amphitheatre within the Australian Botanic Garden. The facility could also include various sculpture trails – art trails to offer a composite attraction linked to the Gardens botanic experiences to increase the visitor experience (the size of the amphitheatre would need to be investigated to achieve an optimum size, opening up remote areas for horse trails and investigate introducing a luge style attraction on the steeper terrain facing Campbelltown.
- **Arts Trail Activation:** There is a growing and strong arts community across a variety of arts form. Develop an art trail program to showcase artwork, which could potentially include an outdoor art sculpture trail, art festival and residential art programs and forums.
- **National Equine Experience Centre:** Development of a National Equine Experience Centre, showcasing the history of the equine industry, not only in the broader Macarthur region, but potentially nationally.
- **Aviation Business Park:** Investigate the potential to develop the current Camden Airport into an aviation business park to cater to the needs of a fly-in market needing places to land and store aircraft, for the maintenance of light aircraft and

## TOURISM PRODUCT DEVELOPMENT & PARTNERSHIPS

long term hangars etc. (we note the issue of Camden Airport potentially closing when Badgerys Creek is fully operational but this may still be 10+ years out).

- **Regional Sports Centre of Excellence:** grow sports tourism visitation and related economic benefits through strategic links to regional sports facilities offering a South West regional hub.
- **Aviation Museum:** Creation of an interactive aviation museum to showcase the history of local aviation activity in the Sydney region and leveraging off the region's airport.
- **Boutique Glamping:** Development of a boutique, quality eco-tent cluster on Council or Reserve land to provide a unique experience and cater for higher spending leisure visitors and to encourage links to treks through surrounding national parks.
- **Riverside Activation:** Investigate riverside walks allowing access to the George's and Nepean Rivers. The walkways could also offer mountain biking trails potentially and also include interpretation which features Indigenous history.
- **Music Festival:** Development of a music festival which leverages off the growing population and significant creative community in the region.
- **Investigate motor sport technology precinct:** Undertake a study to test the viability of creating a motor sport precinct as part of a wider greater Sydney initiative. Link to WSU and TAFE for training and education options as well as offering a technology park for engineering excellence.
- **Stimulate Investment into Macarthur:** Development of an investment memorandum for Macarthur which shows the type of tourism development options available and that each Council is more likely to support. There is a need to be proactive to entice new investment rather than passively waiting for it to occur.
- **Regional Sports Centre Precinct:** Potential to develop a south west Sydney major sports precinct within the proposed Campbelltown Stadium precinct or nearby and with an attached conference/entertainment centre and supporting infrastructure and facilities.
- **Regional Food Precincts and Hubs:** Development of various food experience hubs including for a café/restaurant and bar entertainment zone within the proposed regional stadium – accommodation precinct and others offering themed food markets, cultural cuisine and offering evening outdoor venue spaces.
- **Strengthening the Regional Arts Hub:** Recognising the strong performing and visual arts sectors within Campbelltown especially, and

## TOURISM PRODUCT DEVELOPMENT & PARTNERSHIPS

developing a strategic alignment to support the expansion of facilities to grow the sector overall throughout the region.

## MARKETING & PROMOTION

- **Brand Identity:** Definition and creation of (in consultation with the tourism industry) a tourism brand identity for the Macarthur region and linking to the sub-brands of Camden and Campbelltown. The brand needs to be appropriate not only for tourism and event promotion, but usable by other sectors of the economy. Currently the Macarthur brand name has a low profile and what it stands for is unknown which offers an opportunity.
- **Redeveloped Website and Augmented Reality Mobile App:** Once an identity has been established, develop a new or update the existing Macarthur regional tourism website and linked mobile app to promote the region and its offerings and to potentially offer augmented reality tours of the region.
- **Event Calendar:** Develop a regional events calendar which can be integrated into the destination website for Macarthur and can be referred to as the region's official event guide.
- **Event Evaluation:** Creation of an event evaluation criteria to be applied to existing and potential events. The purpose of this criteria is to assess their likely benefits and to ensure each Council's support is being applied to those events likely to generate the greatest economic and social benefits.
- **Packaging of Product:** Develop a range of bookable packages to showcase the unique tourism product within the Macarthur region, including accommodation, transport, food and beverage, attractions, and where possible tied to events etc.
- **Tourism Awareness Campaign:** Design a tourism awareness campaign to promote to residents of Macarthur. This is needed to highlight the importance of the tourism industry and how far the tourism dollar spreads throughout their economy. This should also be used to indicate each Council's enabling role and resource commitment to support and grow the tourism industry.
- **Car Club Destination Promotion:** Profile the region as a destination for car enthusiasts and car clubs requiring a mix of winding and straight

## MARKETING & PROMOTION

roads, good food and beverage outlets and event venues to showcase the vehicles on display.

- **Develop a Medical Tourism Strategy:** Creation of a medical tourism strategy, leveraging off the growing Campbelltown Hospital and links to the WSU School of Medicine, to attract international patients wanting to come to Australia for elective surgery as well as medical conferences etc.
- **Greater Profiling of Bird Watching:** Greater profiling of birdwatching experiences throughout the region, particularly focused on the Australian Botanic Garden and the 160+ species of birds which reside within the Gardens but also covering bird watching on Council reserve land and waterways, and within National Parks.

## INDUSTRY SUPPORT

- **Industry Taskforce:** Develop a Tourism Industry Taskforce as an informal committee of each Council (not a 355 Committee) which comprises two representatives from each Council as well as six tourism stakeholders in total to represent the tourism industry in each of the LGAs.
- **Visitor Data Base:** the lack of available and robust visitation data makes it challenging to determine market trends and to monitor opportunities. A strategy is required to gather visitor data from all accommodation establishments, attraction sites, theatres and other performance venues on a monthly basis.

## VISITOR SERVICING

- **Visitor Information Services Review:** To ensure that the VICs across both LGAs are operating to their most effective capacity, a visitor information services review should be undertaken.
- **Feasibility to Assess Location of Camden VIC:** Undertake a feasibility study to assess the current location of the VIC and the potential to relocate the VIC to Camden town centre to leverage off greater pedestrian numbers and exposure.
- **Free Wi-Fi at the VICs:** Consider offering free Wi-Fi at the region's two VICs to encourage use of the regional website and visitor dispersal throughout Macarthur.
- **Gateway Landscaping:** To create a stronger sense of arrival into the Macarthur region, commission a gateway landscaping strategy for streetscaping each of the primary arrival points

## VISITOR SERVICING

into the region and/or the primary tourism precincts, nodes and hubs identified including exit ramps off the Hume Highway.

- **Signage Program:** Develop a signage program to ensure there is a uniform approach to directional and interpretive signage throughout the Macarthur region. This should also highlight the approach which industry operators will need to follow to have quality signage installed.
- **Roving Ambassador Program:** Creation of a volunteer roving ambassador program. These roving ambassadors can provide directions, general information etc. to visitors to the Macarthur region and may be situated at main tourism hotspots, including the town centres, event locations etc. The program could capitalise on the excellent local knowledge of retirees keen to promote the area.

## 1.5.  An LTO for the Macarthur Region

One of the challenges which the tourism sector in Macarthur faces is the ability to create a unified voice for addressing issues, raising awareness and lobbying government at all levels for various forms of support to grow tourism.

Whilst both Councils are keen to eventually see the establishment of an industry operated Local Tourism Organisation (LTO) to act as Macarthur's peak tourism body, the current operating environment in Macarthur makes this outcome slightly premature.

There are a number of criteria which need to be achieved before a viable LTO is able to be established, such as commonality and agreement amongst competing operators/areas and their recognition that their ability to lobby and leverage support is dependent on them playing effectively as a team. Usually, the establishment of an industry-operated LTO is part of an evolutionary process in the maturing of a tourism destination within a region.

Currently, this commonality and agreement does not adequately exist. To deliver a workable model for the interim, we would recommend the following approach.

- Both Councils to establish a Tourism Industry Taskforce Group to represent the tourism industry throughout both Campbelltown and Camden LGAs.
- Representatives should comprise members from each Council as well as selected individuals (chosen via a formal EOI process) from the tourism sector within Macarthur (however this may also include those who reside outside of the region but who may be passionate about Macarthur).

As each Council has agreed to continue to play a significant role as enablers of tourism throughout the Macarthur region, this offers an appropriate interim step until such time in the future that a strong and coordinated LTO is able to be created.

## 1.6. Going Forward

Macarthur offers many attractive areas and experiences as a visitor destination and has the potential to develop as a more highly recognised and diversified tourism region. This outcome is possible if a whole of industry approach is created, and if each Council and industry can work collaboratively to develop the structure, marketing and working environment required for this to occur.

The recommendations provided in this DMP focus on options that are seen to identify product and tourism investment opportunities which can be used as stimulants to develop a more unified tourism direction forward for Macarthur and to

encourage additional investment into and stronger marketing of the region.

Industry feedback gathered through the consultation for this DMP indicated that focusing on marketing of existing product alone would not activate the opportunities identified and adequately address the challenges; there is a need for new product (either through enhancing existing product or actively facilitating new product. In tandem with this is the under investment in tourism which has occurred for quite some time and which needs to be addressed.

There also may be opportunities for the Macarthur region to offer Sydney-wide tourism experiences in the absence of these experiences and opportunities occurring elsewhere such as interactive haunted attractions, an equine visitor experience centre, a medical tourism hub (accommodation and hospital facilities linked, a luge ride attraction experience, a Sydney aviation museum, a series of boutique commercial glamping sites, a major caravan holiday park, etc.
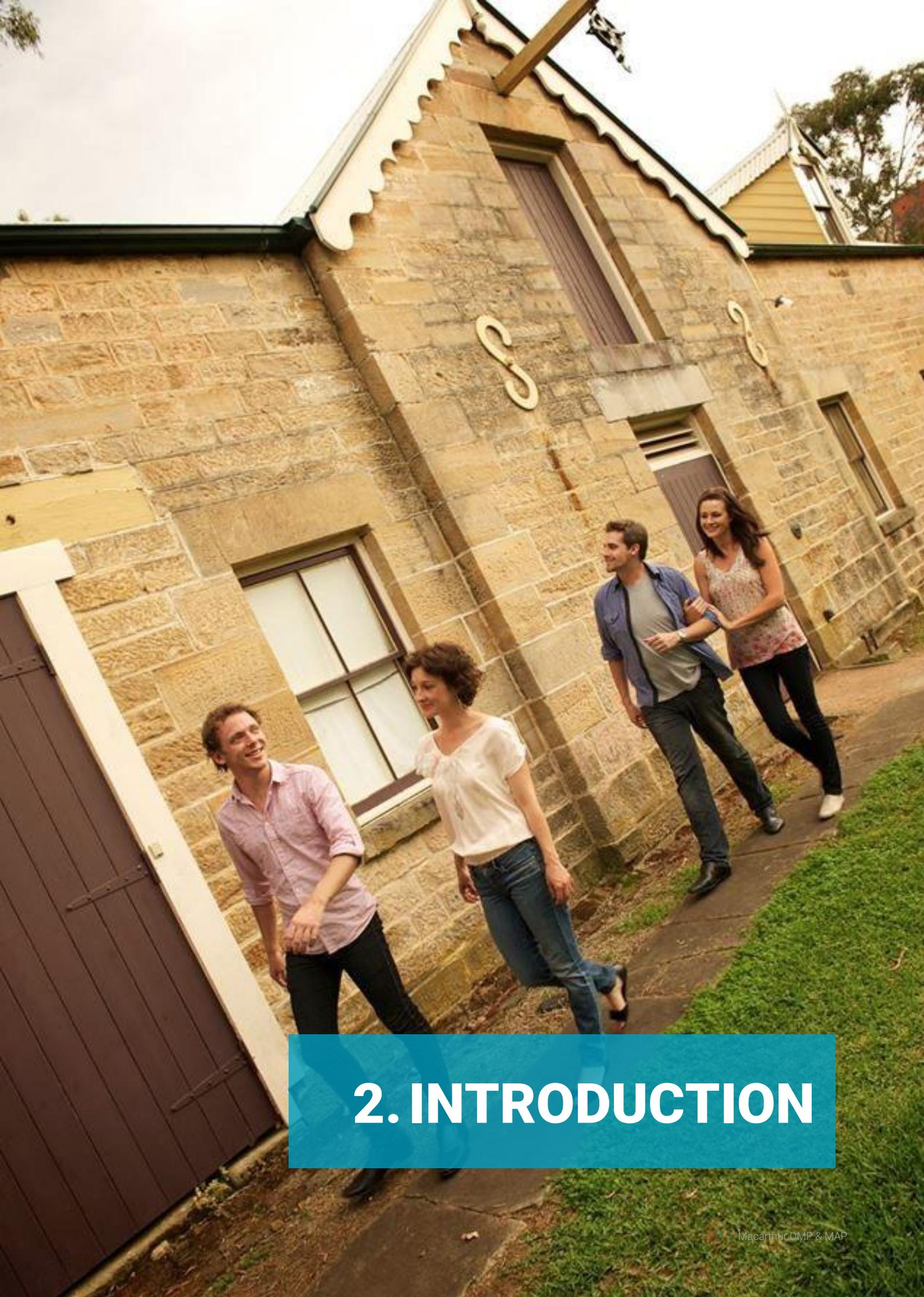
# 2. INTRODUCTION

# 2. Introduction



## 2.1. Overview

The Stafford Group (The Group) was commissioned by Campbelltown City Council and Camden Council (the Councils) to undertake the development of a Destination Management Plan (DMP), including a Marketing Action Plan (MAP) for the Macarthur region.

This DMP has been developed as an update to previous Macarthur Regional Tourism Strategy 2012 – 2015 and with a stronger emphasis on new product development and related investment requirements.

At a State Government level, the creation of DMPs for tourism destinations throughout NSW was listed as a recommendation in the Visitor Economy Taskforce Report. The purpose of the DMPs is to 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".[1]

## 2.2. Purpose

The purpose of the DMP and MAP (here on referred to as the DMP) is to provide the Councils and all stakeholders with a clear understanding of:

- key visitor markets and segments;
- major preferences for experiences;
- forecasted visitor growth; and
- existing and potential experiential strengths of the region.

## 2.3. Methodology

The process to complete this DMP involved the following:

- initial liaison with each Council to gather background information and to discuss the consultation program for the DMP;
- an ongoing literature review to build a quality context for the DMP and to fully understand projects and strategies as well as relevant government policies affecting the region;
- consultation with each Council as well as tourism industry stakeholders (as advised);
- desktop research, including a full audit of tourism product within the Macarthur region and collection of historic visitor data to each of the LGAs;
- multiple visits to the region to review product, meet with operators and assess new opportunities and development sites;

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[1] Final Report of the Visitor Economy Taskforce, A Plan to Double Overnight Visitor Expenditure to NSW by 2020, June 2012, NSW Government Trade & Investment

- liaison with industry operators (accommodation providers, food and beverage providers, farm operators, attraction operators, transport providers etc.);

- structured meetings with each Council to discuss the vision for tourism, infrastructure, development and discussion around related projects such as business parks, stadia, town centre revitalisation and education sector development;

- completion of the estimated net economic benefit tourism generates for the Macarthur region and, based on visitor forecasts, what its potential may be over the next 10 year period;

- prioritisation of the opportunities identified based on discussions with each Council, DNSW and tourism industry stakeholders etc;

- development of an Action Plan based on the opportunities identified;

- compilation of progress report findings into this DMP document to highlight issues and opportunities which have been considered by each Council; and

- presentation of the draft findings to key stakeholders in both Campbelltown and Camden.

This DMP has been finalised after final comment was received from both Councils.

The Group would like to take this opportunity to thank each Council and all stakeholders who have assisted in the ongoing development of the DMP for Macarthur.

**3. SITUATION ANALYSIS**

# 3. Situation Analysis

## 3.1. Plan Context

This DMP is the result of continued collaboration between Campbelltown and Camden Councils. Both Councils have historically and continue to recognise the important role the tourism sector plays directly and indirectly in their economies and work well in unison.

Both Councils have been actively advocating for the tourism sector since the 1990s. The following provides a summary of key milestones in this journey.

### 3.1.1. Camden Council Milestones

- 1983: Participation in the Macarthur Country Tourism Association (MCTA).
- 1988: Camden Visitor Information Centre opened.
- 1991: Council took responsibility for tourism following the closure of MCTA.
- 2000: Camden Tourism Strategy 2000 - 2005 adopted.
- 2004: 70% of the strategy actions were fully or partially implemented.
- 2005: Camden Tourism Action Plan 2005 - 2008 adopted.
- 2005: Camden Tourism Officer appointed.
- 2005: Partnership developed with Campbelltown City Council to develop a brand and image for the Macarthur region.
- 2007: www.visitcamden.com.au website developed.
- 2008: Consultant appointed to develop the Macarthur Tourism Strategy and Action Plan 2008 – 2011.

- 2008: Consultant appointed to develop the Camden Tourism Strategy and Action Plan 2008 – 2011.
- 2012: Consultant appointed to develop the Camden Tourism Strategy and Action Plan 2012-2015.
- 2015: Consultant appointed to develop this Macarthur DMP.

### 3.1.2. Campbelltown Council Milestones

- 1983: Participation in the Macarthur Country Tourism Association (MCTA).
- 1991: Council took responsibility for tourism following the closure of MCTA.
- 1997: Campbelltown Visitor Information Centre 'Quondong' opened.
- 1999: Campbelltown Tourism Action Strategy 1999 - 2002 adopted.
- 2002: Actions within strategy had been implemented.
- 2002-2005: Campbelltown City Council undergoes a corporate restructure. Tourism moves from Community Services to Corporate Governance in the newly created Communications and Marketing section.
- 2005: Campbelltown Tourism Action Plan 2005 - 2008 developed.
- 2005: Partnership developed with Camden Council to develop a brand and image for the Macarthur region.
- 2006: www.visitmacarthur.com.au website developed.
- 2008: Consultant appointed to develop the Macarthur Tourism Strategy and Action Plan 2008 – 2011.

- 2012: Campbelltown City and Camden Council worked in partnership to develop the Macarthur Tourism Strategy and Action Plan 2012 – 2015.
- 2015: Consultant appointed to develop this Macarthur DMP. The development of this DMP is a result of the Campbelltown's Community Strategic Plan Delivery Program which seeks to "support regional tourism" via the development of a regional tourism strategy.[2]

## 3.2.  The Macarthur Region

The Macarthur region (highlighted in yellow in the below figure) comprises the Campbelltown and Camden LGAs, which together, cover approximately 513 square kilometres. The region has a total population of over 202k residents[3], with approximately 71% of these residents living in the Campbelltown LGA.

FIGURE 2: MAP OF THE MACARTHUR REGION



The Macarthur region is included within the Greater Sydney or Sydney and Surrounds region, as defined by Destination NSW. This Greater Sydney region includes major visitor destinations such as Circular Quay, Manly, Bondi Beach and Sydney Olympic Park etc. Whilst close proximity to these major visitor destinations can be advantageous for Macarthur, it can also be problematic in positioning the Macarthur region as a destination in its own right. Macarthur therefore operates in a highly competitive marketplace.

The proximity (1 hr drive to the Sydney CBD) is a real asset with such a large population catchment so close. However, being so accessible makes it far harder to be recognised as distinctly different from other parts of Greater Sydney without unique product to promote and rely on.

FIGURE 3: DISTANCE FROM SYDNEY CBD[4]



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[2] Campbelltown Community Strategic Plan Delivery Program 2013 – 2017, page 27
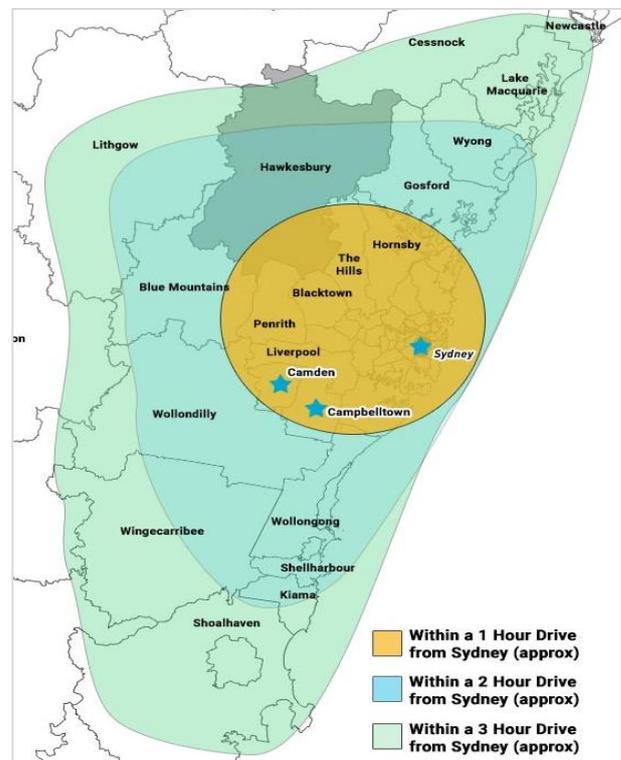
[3] http://profile.id.com.au/macroc
[4] Driving distances determined via Google Maps.

Furthermore, being relatively close to a number of popular destinations (such as the Southern Highlands and the Blue Mountains) which Sydney short break visitors can choose from, makes it more challenging to position and sell the Macarthur region as a short break overnight destination.

Figure 3 on the previous page reflects the distance from the Sydney CBD to the Macarthur region and other nearby tourism destinations on Sydney's doorstep, including the Blue Mountains, and marginally further out to the Southern Highlands, the Central Coast and the South Coast. This highlights the competitive environment the Macarthur region has to operate in and why finding a clear point of difference is so important.

Significant urban expansion out into parts of the Macarthur region (and broader Western and South Western Sydney) for residential development has also impacted on the way the region is perceived (possibly seen more as a major dormitory suburb now for greater Sydney and less as a possible tourist destination in its own right). This generates challenges in how it is perceived.

Nevertheless, being very close to such a large urban catchment area (Sydney), makes the region highly accessible not only to the local domestic market but also the inbound international market with the majority of international visitors flying into Sydney. A number of opportunities to capture these markets are included within this DMP. Importantly however, Macarthur needs to actively

encourage more local domestic visitors from Greater Sydney as these are the easier visitor market to access.

In summary, a proactive and well-coordinated approach is needed, with each Council working closely together and with industry to raise the region's profile and overall awareness.

## 3.3. Population

The following figure provides a summary of the historic population growth of both the Camden and Campbelltown LGAs from 1996 - 2011, as well as forecasted population growth from 2016 – 2031.

FIGURE 4: HISTORIC POPULATION AND FORECASTED GROWTH[5]
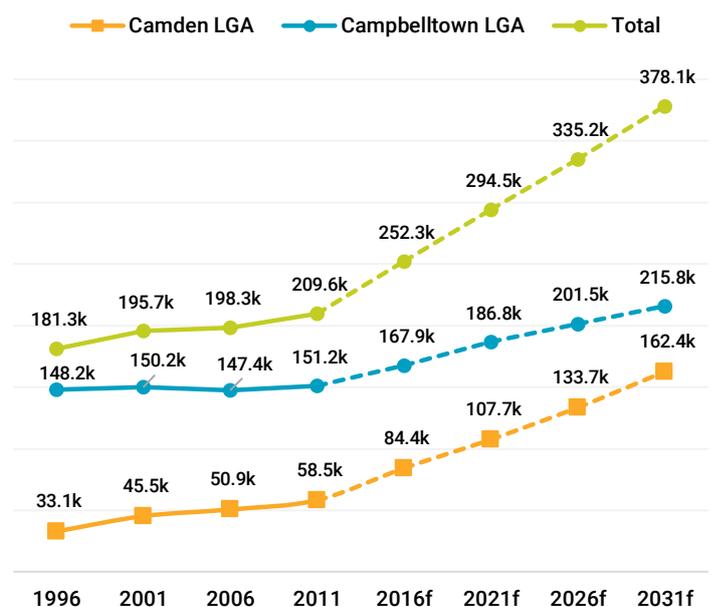


Over the 15 year period from 1996 – 2011, Camden has experienced strong population growth, with its resident population increasing by 77% (or approximately 25,000[6] residents). Campbelltown's

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population has also grown, albeit at a lower rate, growing by 2% (or just under 3,000 residents).

The NSW Government's *A Plan for Growing Sydney* (2014) expects this growth to continue, stating "the South West subregion is the fastest growing subregion in Sydney".[7]

As of the latest Census in 2011, the Macarthur region had a total population of just under 210,000 residents. The majority of these residents (72%) reside in the Campbelltown LGA, although this split is changing as the Camden region continues to experience strong population growth tied to new urban release areas.

Importantly, these growing local communities support the need for a variety of new visitor experiences to encourage a local market to stay and experience the region, as opposed to travelling into the Sydney CBD, Southern Highlands or the Blue Mountains.

## 3.4. Visitation to the Macarthur Region

### 3.4.1. Visitor Numbers

Detailed visitation data down to the LGA level is not readily available and tends to often have significant margins of error. Consequently, Destination NSW (DNSW) produce LGA visitation data on request, in four year periods to obtain an average.

Over the last four year period (YE Sept 2014), visitation to the Macarthur region averaged 1.3m visitors per annum. Of these 1.3m visitors, 57% (or 761,000 visitors) visited Campbelltown LGA whilst

the remaining 43% (or 571,000 visitors) visited Camden LGA.

The following figure provides a breakdown of visitors to the region, based on visitor type and demonstrates the majority of visitors to the region are domestic day trippers, comprising 82% of visitors, followed by domestic overnight visitors (17%) and international visitors which comprises a small percentage of visitors to the region (1.5%).

**FIGURE 5: VISITORS TO THE MACARTHUR REGION (4 YEAR AVERAGE YE SEPT 2014)[8]**
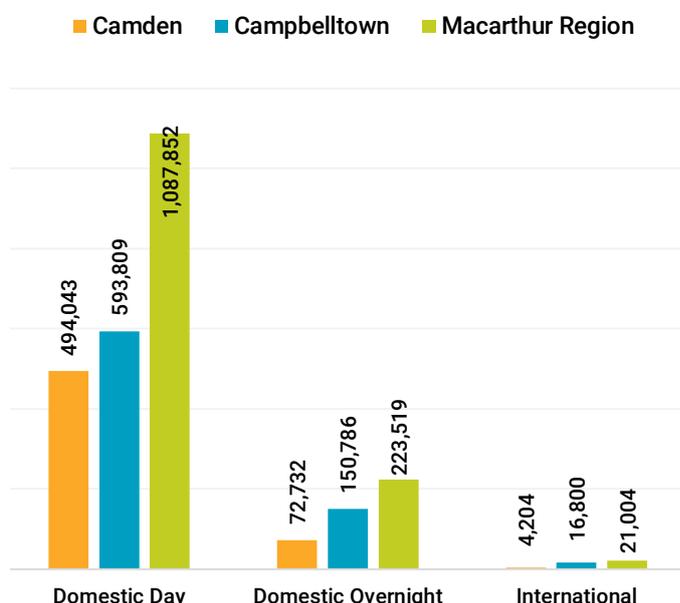


### 3.4.2. Average Length of Stay

The table on the following page provides a breakdown of the estimated average length of visitors to Macarthur over the four year period 2011 – 2014.

International visitation has a far higher average length of stay as these would comprise those in the region for business and/or education purposes and who tend to skew the international

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[7] A Plan for Growing Sydney, page 128

[8] Special data request to DNSW

holiday/leisure visitor average length of stay considerably.

**TABLE 1: AVERAGE LENGTH OF STAY (4 YEAR AVERAGE YE SEPT 2014)[9]**

|  | Camden | Campbelltown | Macarthur Region |
|---|---|---|---|
| **Domestic Day** | - | - | - |
| **Domestic Overnight** | 3.1 | 2.8 | 2.9 |
| **International** | 24.7 | 25.7 | 25.6 |

## 3.5. Regional, State and National Trends

The following provides an overview of regional, state and national trends which influence Macarthur's ability to successfully grow tourism. These trends are focused particularly on tourism, but also include economic development, environmental management, governance and social wellbeing. The trends illustrate areas where Macarthur could tap into and are generic.

### 3.5.1. Tourism continues to grow internationally

World Tourism Organisation (WTO) figures highlight continued growth in travel globally, with constant growth in all sectors: leisure, business, conferencing, visiting friends and relatives, MICE, education trips, food tourism, cruise, special interest markets etc.

Even with the global financial crisis, worldwide tourism figures overall have reflected growth. City-based market segments are looking for new day trip and overnight destinations. The development of new visitor experiences and activities in the

Macarthur can pick up on the major urban conurbation of Sydney's desire for new and easily accessible experiences (particularly because there has been a lack of new tourism product created in and around the Sydney region for some time).

Whilst tourism is not recession proof, it is far more resilient than previously, as visitor markets often view tourism and travel as a necessity rather than a luxury. This equates to more day trippers coming to regions such as Macarthur and to escape city-based areas as long as there is new or refreshed product promoted to them.

### 3.5.2. Developing countries are the standout for medium term growth

The rapid growth of visitor generating markets, such as many of those in South Asia, are already well targeted by DNSW and Tourism Australia. These visitors, coming in increasingly larger numbers, are not just after the city based experience which Sydney CBD can offer. These visitors are also keen to visit rural and regional areas where they can access suitable and appealing product.

Macarthur, surrounded by rural/natural environment, could start to develop packaged tours for these visitors. Even simple activities such as river-based kayaking, walking tours, fruit picking, horse riding etc. can have strong appeal to a number of these international visitor markets who may only visit as day visitors, preferring to stay in city based accommodation.

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[9] Special data request to DNSW

### 3.5.3. Growth in those coming from Asia

NSW is experiencing a significant increase in visitors coming from Asia (particularly China, India, Indonesia and Malaysia), but many regions are not yet ready with product or service standards to capitalise on the growth potential.

Macarthur has potential in developing inbound tours ex Sydney if it can link Sydney-based tour operators and deliver on the desire for day trips, adventure tourism, and passive tours to look at heritage buildings etc. This could include leveraging on the region's relationships with surrounding LGAs such as Wollondilly and the Southern Highlands to develop packaged tours as part of tour circuits around the South West.

### 3.5.4. A growing middle class

Greater prosperity, not only within Australia, but internationally, is rapidly growing the visitor markets with the disposable income required to go travelling.

After visitor markets tick off the major local destinations of interest (Sydney, Gold Coast and Melbourne), they tend to go looking for the next level of visitor experiences. As long as Macarthur has the products to entice the domestic market who are looking for new passive and active experiences and new events (and that these are well packaged), it can benefit from this growing cohort of mostly domestic visitors looking for new experiences within easy access of Sydney.

Importantly however, Macarthur needs to be mindful that competition is intense for capturing the domestic market, especially those interstate visitors basing themselves in Sydney and looking

for surrounding regional day trips which offer unique experiences.

The declining Australian dollar is also creating more opportunities for the domestic market to holiday at home if the right product exists. The market is value driven rather than price led.

### 3.5.5. Changing cultural and entertainment tastes of Chinese tourists

Initially, visitation ex China was via highly structured tours. As this market has matured, so has the need for new experiences which they can undertake in smaller groups (mini bus sized special interest tours) and as family groups (using rental cars to explore). The desire now exists to travel as free independent travellers and without venturing too far from major gateway cities such as Sydney.

Macarthur is geographically well located to pick up on this changing market need. This market is keen to see more Chinese quality dining experiences, more late night (7pm – 10pm) shopping opportunities and tours to factory outlets. They may also be interested in horse breeding, horse racing and the equine sector generally which the Macarthur region is particularly strong in.

### 3.5.6. New Competition for NSW – developing countries are heavily investing in tourism

The challenge for NSW (and Macarthur specifically) is that the level of competition from developing countries to attract tourists is intense and the level of investment occurring is significant.

Without new investment occurring into new tourism product within Macarthur to attract local, intrastate, interstate and international visitors, visitor growth opportunities are likely to be slow to eventuate and potentially may not occur at all.

From work undertaken in the surrounding regions, we note that most councils are actively looking to encourage investment and development into new and improved facilities in order to grow their share of visitor numbers and more importantly visitor yield. In addition, tourism facilities often correlate with new recreational facilities for locals.

### 3.5.7. Rapid growth in youth travel

The youth market (under 25's) is growing significantly fast, often buoyed by school based excursions, school exchanges and younger people travelling with more confidence as they leave school or during their university holidays or work breaks.

Macarthur can capitalise on this youth market providing it can supply the pursuits this segment is looking for. For the short – medium term this may need to focus on packaging adventure experiences to encourage greater youth interest and awareness of the product Macarthur has to offer. Currently, we consider that many domestic markets are unaware of what Macarthur has to offer this niche market.

### 3.5.8. The youth traveller – more mobile, more wealthy

The youth market has often benefited from travel and holidays traditionally funded by parents. This has led to a generation (Gen Y and Gen Z) who do not wish to go without the experiences which their parents exposed them to. More disposal income is therefore applied by this sector of the market to travel including an appetite to undertake experiences, enjoy good food and wine and a preference for better quality accommodation.

Macarthur would need to create the product opportunities for this sector to produce sufficient brag value to attract it.

In essence, the youth market has shown to be very resilient and higher spending than many older market segments and needs to be promoted to.

### 3.5.9. An increasing desire for authentic experiences

The domestic and international market desire more genuine experiences that often may simply include good quality accommodation, horse riding and hiking etc., food experiences linked by effective transport services.

For Macarthur, this will equate to local food and beverage outlets (rather than major chain food outlets), unique events, community events and more unique product. Everyone has art trails, recreation product, food trails and various events so what are the unique elements which will make Macarthur's experiences stand out?

### 3.5.10. Increased urbanisation is likely to increase the desire for open space

The greater the urban density in the Sydney region, the greater the demand for day or short break excursions to Macarthur with open space qualities to escape the city/urban landscape.

There is significant competition to capture these markets from neighbouring regions, so Macarthur has to look at a marketing campaign which both raises awareness of the product offering and experiences within the LGA and which builds on elements of uniqueness.

### 3.5.11. Internet usage continues to grow

The increasing use of the internet for researching and buying tourism products means that building an online presence – through social media channels and other online tools (particularly for bookings) – has become important for tourism businesses.

Macarthur operators need to update and maintain their websites on a regular basis.

The product audit which was undertaken as desktop research revealed the challenge associated with websites which either have not been updated because the business is no longer operating or the business owners are lacking the expertise or time required. As a result, visitors are given a false impression of what is available within the Macarthur region.[10]

A far stronger and consolidated web based presence is required to promote Macarthur and to

encourage more visitor enquiries for bookings. Whilst the Macarthur tourism website managed by Councils is regularly updated and accurate, various individual operator websites are not being updated regularly and an annual audit of industry websites is required to monitor quality and accuracy.

### 3.5.12. Increased internet usage on smartphones

There is a growing expectation by visitors to be able access information, maps, brochures, booking facilities and self-guided tours via a smart phone app or smart phone accessible website.

The potential exists to develop a mobile app or mobile accessible website for the Macarthur region which also incorporates visitor interpretation material to provide visitors with an overview of the region and each of the suburbs/areas specifically.

### 3.5.13. Information technology will continue to change how tourists access and use information

Many regions throughout the country are now well advanced in offering visitor information through a digital platform (websites, mobile apps etc.). There is a steady move away from investment in traditional bricks and mortar style VICs as the cost to councils and industry operators to supply brochures and offer services seven days a week are often noted as prohibitively expensive.

Macarthur should consider whether the funds each Council invests into their VICs could possibly

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[10] By way of example, the Macarthur destination website indicates that the Camden Acres Homestead B&B and the Garden Cottage B&B are still operational. However, discussions with Council personnel indicated these two properties are no longer operational.

Additionally, the Camden Acres Homestead B&B's website is no longer operational. This highlights the challenge of ensuring that websites are totally up to date.

generate a better return through investing in online and interactive visitor information tools.

### 3.5.14. More bookings are made online

Increasingly, visitors expect to be able to book all or most of their travel (accommodation, activities, transport etc.) online, often prior to travelling.

As a result, it is important that Macarthur operators have an active and up-to-date website with booking capabilities (where required). Websites not well maintained will quickly turn off potential visitor interest.

### 3.5.15. The changing role of the travel agent

The travel agent role is gradually being replaced by direct online bookings for hotels, rental cars, flights and events.

Macarthur needs to investigate technology solutions which will help raise its profile in a cost effective manner and encourage industry to become stronger web-based marketers.

### 3.5.16. Greater information flows between travellers

Smart phones, iPads etc. enable the sharing of information far more readily. Negative feedback on TripAdvisor, Yelp, Facebook and other travel-related websites can quickly impact on businesses and even destinations.

Macarthur needs to take advantage of increased and improved information flows to use visitors as a marketing tool to encourage others to visit by effective word of mouth advertising.

This will also require ongoing improvements in service standards to better deliver to all visitor market segments.

### 3.5.17. Overseas holidays are getting cheaper

With low cost carrier flights ex Sydney, there is increasing competition from Asian and Pacific Island destinations to lure the domestic market offshore, even for short breaks (3-4 days). What many of these destinations are doing is offering holidays which are completely packaged (flights, accommodation, transfers, food and activities). This is seen as highly appealing for the short break visitor market which is often time poor.

Macarthur operators need to remain value driven and look for value added components to offer in order to be competitive. The potential exists to package and brand certain experiences as unique.

### 3.5.18. Cruise ships on the rise

As Macarthur is close to the Sydney CBD, it has the potential to link into land based day and half day tours offered by cruise companies. Offering day tour companies a cluster of Macarthur and surrounding experiences and packaging these up for promoting to these tour companies would be required. It is important to note however that there is intense competition for these cruise visitors as they are often very high spending but also demanding.

Destination NSW (DNSW) has been developing a 10 year Cruise Development Plan[11] for NSW. This Plan is being developed because of the record number of cruise ships arriving and the expectation

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[11] Yet to be publicly released

that this will continue to grow – "in 2013-14 Sydney welcomed a record 261 cruise ships and in 2014-15 an additional 32 are booked to call into our Harbour City".[12]

Potential also exists to link with cruise ships coming into Port Kembla (Wollongong) in 2016 providing that well packaged tours are able to be offered. Inbound tour operators are likely to be keen to receive tour itineraries which they can market to passengers in advance.

### 3.5.19. Tourism operators face high (and increasing) costs

Compliance costs, government imposts and approval delays are making it increasingly difficult for tourism companies to remain profitable. Each Council needs to consider ways to assist local operators and incoming tourism companies to help them remain competitive. For example, concerns over delays in getting council approvals need to be discussed and resolved. With more available land for development than many other LGAs in Greater Sydney, Macarthur has the potential to grow and develop as a tourism investment hub, as long as it is seen to be investor friendly, open for business and with planning policies and documents which actively encourage tourism investment.

### 3.5.20. Lack of investment in the domestic market holds back local potential

Too often, destinations focus on marketing and promotion rather than the improvement of existing product and the development of new product when

attempting to grow visitation and visitor yield to a region.

Challenges in attracting new tourism attractions and facilities and the lack of capital often available to help drive this, need to be addressed. Each Council's leadership role in working with industry is vital in addressing these challenges. Whilst improving market awareness of Macarthur is a highly important outcome, expanding the product mix and creating more development opportunities is equally as important.

### 3.5.21. The increasing cost of visiting Australia

Consumers will continue to look for value adders being offered to make packages more attractive. The relative strength of the Australian dollar and the economic conditions in some source markets make it even more important for operators in Macarthur to be as value driven as possible.

### 3.5.22. Staffing challenges

Increasing challenges in attracting and keeping semi-skilled and skilled staff and the impact of penalty rates during weekends and in the evening on business viability are major challenges for hospitality sector operators especially.

Macarthur needs cafes and retailers open, especially during weekend periods when events are on and where more visitors are often about and looking to spend. Working with TAFE and other education providers to help provide tourism and hospitality trainees and apprentices needs to be considered by industry.

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[12] 10 Year Cruise Development Plan for NSW Underway (Media Release), Thursday 19th June 2014, Andrew Stoner MP Deputy Premier of NSW

## 3.6.   SWOT ANALYSIS

The following table provides a SWOT analysis for the Macarthur region, focusing on tourism related strengths, weaknesses, opportunities and threats.

It has been created after discussions with various industry and government stakeholders and from the review of research and its analysis.

There are some strengths and weaknesses which correlate back to the 2012 – 2015 Tourism Strategy, but overall a number of new opportunities and challenges have been identified.

**TABLE 2: SWOT ANALYSIS**

**STRENGTHS**

- Close proximity to key markets, especially Greater Sydney
- Both Councils are actively pro tourism
- Variety of experiences within a semi-rural setting
- Good access to major road and rail networks
- Availability of land for development
- A number of significant heritage sites
- A range of sporting and shopping facilities
- The Australian Botanic Garden and the new mountain biking trails
- Campbelltown Arts Centre – major regional gallery with a significant exhibition and performance program
- Rydges and Quest hotels, Campbelltown
- The Cube – continues to attract entertainment and major conferences
- Camden – its historic village style and café culture
- Campbelltown – cultural diversity and ethnic food stores
- Open space – Campbelltown bordered by the Georges River Nature Reserve and Camden surrounded by a rural setting and the Nepean River and Dharawal National Park
- Major events such as the Tabcorp Miracle Mile and the Camden Show.

**WEAKNESSES**

- Tyranny of distance from Sydney CBD (too close)
- Limited high quality dining options (though we note this is improving)
- Perceptions and image of the region as a dormitory residential area
- Inability to activate the major rivers for recreation or tourism due to environmental restrictions
- Limited accommodation mix
- Lack of interpretation and directional signage
- Existing performing arts venues too small and/or need upgrading
- Lack of marketing budget for tourism promotion
- Confusion over what tourism actually is
- Retailers closed on the weekend
- Location of Camden VIC
- Lack of tourism welcome signage on key highways
- Relatively small number of larger attractions
- Not currently perceived as a destination by visitors to Sydney
- Lack of operators following branding guidelines on promotional material and websites
- Some businesses looking tired and run down and limited funding to make improvements
- Consumer perception of Macarthur, and particularly Camden, as a major residential urban growth area in a rural setting
- No regional tourism entity to leverage off
- Lack of product packaging
- Limited accommodation availability in Camden LGA to cater for larger scale events
- Perception of limited things to do in the region and not seen to be a destination
- Small scale of performing arts venues (Campbelltown Arts Centre) and others needing upgrading
- No night time economy and limited family friendly evening entertainment
- Lack of robust accurate visitor data

**OPPORTUNITIES**

- Capitalise on the strength of the equine sector
- Introduction of new forms of accommodation (glamping, boutique hotel, rural retreats)
- Partnerships with surrounding LGAs and tourism regions where appropriate
- Introduction of evening experiences to encourage vibrancy throughout the region
- Development of cooking schools and enhancement of food trails to leverage off the emerging boutique food sector
- Capitalise on the air sports activity currently taking place at Camden Airport
- Development of a brand identity for the region which profiles Macarthur
- Leverage off the heritage and history of Camden in particular
- Development of a regional music festival to capitalise on the growing creative community within the region
- Greater promotion of the region as a destination for car enthusiasts and car clubs
- Identification of access points for river-based tourism experiences
- Greater promotion and profiling of Camden Town Farm possibly via events
- Improving transport connectivity (rail-bus links)
- Introduce new festivals and events
- Assess boutique heritage hotel for Camden
- Reuse existing heritage buildings in Camden township for commercial accommodation, art gallery, expanded food experience, cooking school etc.
- Develop medical tourism in Campbelltown linked to paediatric focus of Campbelltown hospital and need for new hotel to expand the concept
- Campbelltown Arts Centre expansion to continue to grow the creative sector in Macarthur
- Development of accommodation and a national equine visitor centre at Tabcorp Park at Menangle Park
- Leveraging tourism and recreational options for Badgery Creek Airport visitors and passengers prior to its commencement
- Creating the walkways, cycleways and amenities to link Mt Annan Botanical Gardens with the Scenic Hills area of Western Sydney Parkland
- Assessment of aviation business park and maintenance hub at Wedderburn Airport
- Assessing and introducing visitor attractions such as a luge experience at Mt Annan Botanical Gardens
- Creating packages for the cruise ship market for ½ and full day tours
- Assessing and developing regional and state wide skateboard events and competitions leveraging off the various quality skateboard parks within the area
- Develop an annual visitor survey to create trend data and to monitor project and program outputs

**THREATS**

- Local residents' attitude ambivalent to tourism
- Competition from other nearby destinations
- Nearby mature and rejuvenated destinations with greater marketing budgets
- Downturn in the economy – reducing disposable income used for travelling and day trips
- Urbanisation compromising rural / scenic feel to the region
- Lack of support from State Government to be recognised as a region or as offering a clear tourism proposition

# 4. PRODUCT & INFRASTRUCTURE AUDIT

# 4. Product and Infrastructure Audit

To assess current tourism services and product (attractions, accommodation, experiences etc.) provision throughout the region, The Group has completed a product and experience audit.

## 4.1. Attraction Audit

Based on desktop research, consultation and assessment, the following table provides a supply side audit of Macarthur's tourism product. The audit identified 140 tourism and recreation related experiences ranging from cultural experiences to adventure experiences to hire companies and tour operators.

It is important to note that this product audit captures only those operators who are listed on the Macarthur destination website, Council's tourism database and website and Destination NSW. It is important to understand that because there are a number of operators in the Macarthur region who do not have a web presence, they may not be captured in this audit.

The table demonstrates that Macarthur's tourism product is distributed amongst:

- recreation product and parks and reserves – over one quarter of which is free product; and
- tours – including a range of heritage, walking and heritage tours.

The full findings from the audit have been included in Supporting Documentation Section 1.

TABLE 3: MACARTHUR TOURISM PRODUCT AUDIT SUMMARY[13]

| | Campbelltown | Camden | Total Macarthur | % Breakdown |
|---|---|---|---|---|
| Recreation | 32 | 16 | 48 | 34% |
| Arts, Cultural, Heritage | 8 | 6 | 14 | 10% |
| Active / Adventure | 2 | 10 | 12 | 9% |
| Parks & Reserves | 4 | 6 | 10 | 7% |
| Market | 7 | 5 | 12 | 9% |
| Brewery/ Winery | 3 | 4 | 7 | 5% |
| Natural Areas | 5 | 0 | 5 | 4% |
| Food Experience | 2 | 4 | 6 | 4% |
| Entertainment | 4 | 1 | 5 | 4% |
| Tour Operator | 11 | 10 | 21 | 15% |
| TOTAL | 78 | 62 | 140 | |

What the product audit does not reflect is the quality of assets on offer and their competitiveness.

## 4.2. Accommodation Audit

Table 4 on the following page provides a summary list of commercial accommodation available throughout the Macarthur LGA. The larger scale hotel/motel properties are located within the Campbelltown LGA whilst Camden has smaller motel properties, one B&B and the Macarthur region's only caravan/destination park.

The full findings from the audit have been included in Supporting Documentation Section 2.

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[13] Note, the Food Experience category does not reflect all food and beverage operators, but rather, reflects food and beverage experiences which can be undertaken such as high tea experiences etc.

**TABLE 4: MACARTHUR ACCOMMODATION AUDIT SUMMARY**

|  | Campbelltown | Camden | Total Macarthur | % Breakdown |
|---|---|---|---|---|
| B&B/ Guesthouse/ Farmstay | 0 | 1 | 1 | 7% |
| Camping/ Caravan Park | 0 | 1 | 1 | 7% |
| Hotel/Motel | 5 | 3 | 8 | 53% |
| Serviced Apartments | 1 | 0 | 1 | 7% |
| Student Accomm. | 3 | 1 | 4 | 27% |
| Total | 9 | 6 | 15 | |

No assessment is provided on the quality of accommodation facilities, though we understand that with limited supply, many accommodation facilities are achieving strong occupancy rates (70% annual occupancy levels or higher).

## 4.3. Food & Beverage Audit

Table 5 provides a summary of food and beverage providers within the Macarthur region. Whilst the audit demonstrates that the region has a large selection of restaurants (54% of F&B product), anecdotal feedback from stakeholders indicates that many of these offer variable quality and there is a distinct lack of restaurants which one may classify as a "dining out" experiences. Many are noted as fast food style outlets.

As with the previous audits, it is important to note that this product audit captures only those operators who are listed on the Macarthur destination website and Council's tourism database. It is important to understand that because there are a number of food and beverage operators in the Macarthur region who do not have a web presence, they may not be captured in this audit.

The full findings from the audit have been included in Supporting Documentation Section 3.

**TABLE 5: MACARTHUR FOOD AND BEVERAGE AUDIT SUMMARY**

|  | Campbelltown | Camden | Total Macarthur | % Breakdown |
|---|---|---|---|---|
| Café | 13 | 15 | 28 | 16% |
| Ice Creamery / Dessert | 6 | 3 | 9 | 5% |
| Pub / Club | 12 | 12 | 24 | 14% |
| Restaurant | 49 | 42 | 91 | 54% |
| Takeaway | 11 | 7 | 18 | 11% |
| TOTAL | 91 | 79 | 170 | |

## 4.4. Product gap analysis

As has been identified in the opportunities section of this report, there are a number of new initiatives which should be considered to help bolster the tourism product mix within the Macarthur region. In addition, a detailed assessment of the current product mix has identified a number of potential product gaps.

These gaps are noted as follows (and not in priority order).

- The limited number of 3-5 star branded hotel rooms available, noting that Rydges, Quest and Ibis are the only branded properties currently in Macarthur and both of these are within the Campbelltown LGA.
- Limited activity capitalising on the strength of the equine sector within and surrounding the Macarthur region.
- The opportunity for expanding the existing, or developing a new, a high quality holiday park to pick up on the strong growth in the campervan and caravan market and the lack of holiday park sites in and around greater Sydney.

- The lack of packaging of product (accommodation, visitor attractions, food and beverage options etc.).

- The potential for high quality tent camps (termed glamping) within forest reserve and park areas.

- Other forms of arts and heritage tourism product to help grow the cultural tourism product base within the region overall and the lack of links between cultural product to offer various driving and walking cultural trails.

- Potential for sound and light shows particularly utilising old historic buildings and potentially the Australian Botanic Garden to offer evening based visitor experiences as there is limited evening product currently on offer[14].

- Refreshing and packaging heritage based experiences (local community museums, historic sites and sites of significance) as part of guided walking tours including ghost tours etc.

- Enhancing the existing Macarthur mobile app with augmented reality to tell the history of the unique parts of Macarthur within greater Sydney and to profile the significance of the historic Macarthur towns.

- Looking beyond Macarthur's boundaries to create synergy with tourism product in neighbouring areas such as Wollondilly and the Southern Highlands or Wollongong and the Illawarra but using Macarthur as the base to experience these from.

- Developing a major visitor perception campaign to be promoted in Greater Sydney and focused on the wide product range available within Macarthur, which is required to help raise awareness of what the region is.

- Develop a visitor attraction, possibly based on a themed horror house experience (similar to Spookers – approximately 1 hour south of the Auckland CBD) utilising a vacant building in the region and leveraging off the history of Macarthur towns.

- Position Macarthur as the equine hub for the harness racing industry in NSW and nationally and market Tabcorp Park to interstate and New Zealand horse studs and breeders to base themselves in Macarthur. Potential exists to also consider accommodation development at Tabcorp Park along with creating a nationally significant equine visitor attraction centre.



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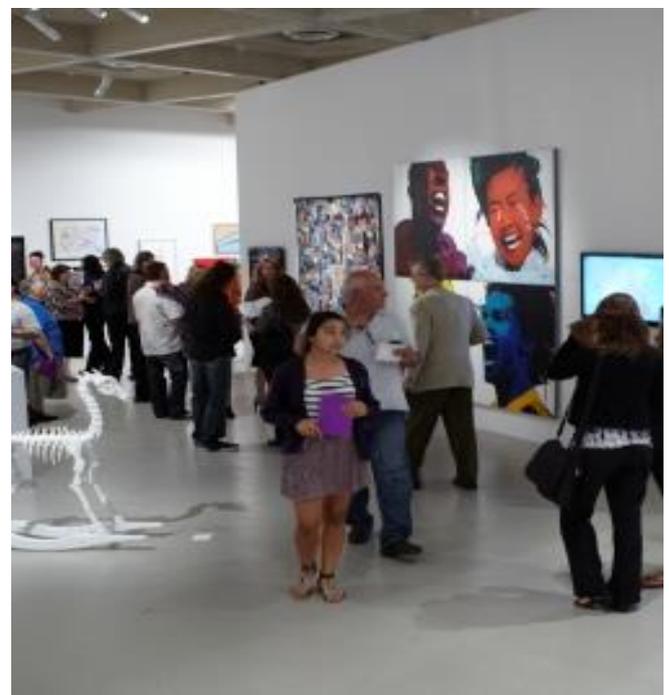
[14] We note the recent success of the sound and light show held in Picton (Wollondilly Shire) and the strong interest this generated.

# 5. IDENTIFIED ISSUES

# 5. Identified Issues

The following issues and gaps need to be addressed to facilitate the success of this DMP and ultimately, to promote the development of sustainable tourism for the region.

These issues have been identified through the discussions with Councils and stakeholders, as well as through desktop research and various site visits and assessments.

The issues have been segmented into the following categories:

- product and supporting infrastructure issues;
- marketing and promotional issues; and
- other tourism related issues.

Recommendations regarding how many of these issues can be resolved or converted into opportunities for Macarthur are outlined in Section 6 of this DMP.

## 5.1. Product and Supporting Infrastructure

### 5.1.1. Lack of Commissionable Product

Part of the challenge for the Macarthur region in growing its visitor markets is the limited amount of commissionable tourism product available, packaged and actively promoted. Much of the region's tourism promotion focus is centred on free and natural experiences such as historic and nature-based experiences.

Furthermore, Macarthur has very few large scale operators and as a result, tourism is primarily centred on small businesses which are often harder to encourage to participate in cooperative marketing initiatives and are often undercapitalised.

The ability to grow visitation and increase visitor spend will be dependent on:

- the introduction of a wider product mix offering different and new experiences (both commissionable and free);
- the development of packaged experiences to help make it easier to promote the region;
- development of collective marketing initiatives which can actively promote the region for a variety of purposes;
- a far stronger online promotional presence acknowledging the need to encourage people to visit, live, work and play in Macarthur; and
- the ability to explain to the market what the point of difference is in the region.

### 5.1.2. Need for a Larger Entertainment Venue

Whilst we understand that the region has a strong arts, culture, music and entertainment scene, the region does not have a large enough venues to cater for existing demand.

The current Campbelltown Arts Centre, which we note is highly successful, is constrained by its size and only has a theatre space which can seat approximately 170.

In order to capitalise on the burgeoning arts, culture, music and entertainment scene, there is a need to consider potentially developing a multi-purpose performing arts venue which can cater for

larger audiences but offer flexibility[15] in spaces-auditoriums in how it is designed.

### 5.1.3. Growing Region – Inadequate Infrastructure Support

The following figure demonstrates the population growth which is anticipated to occur in the region over the period 2011 – 2031. Over this period, the population is anticipated to growth by 80%, increasing from just under 210,000 to approximately 378,000. Over 20 years, this increases on average by 8,400 people per annum, or 2,800 households per year, which is significant.

FIGURE 6: MACARTHUR FORECASTED POPULATION GROWTH[16]
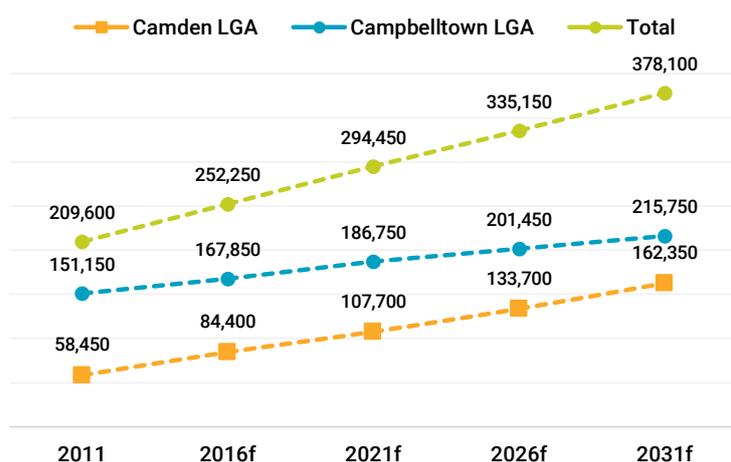


Importantly, whilst Campbelltown increases by 43% over this period, Camden increases (from a much smaller base) by 178%.

Whilst the region is recognised as a quickly growing residential area, the infrastructure support for roads, public transport services and community infrastructure (such as sporting and arts facilities)

is not keeping pace and as the region continues to grow, this issue will only further compound.

There is a need to explore opportunities for how the cost of these upgrades and facility expansions can be equitably met with support from different levels of Government.

There is also a need to explore the different ways of potentially generating a variety of income/revenue streams or other economic benefits associated with upgrading these forms of public infrastructure which are needed to support tourism.

### 5.1.4. Narellan Road

Narellan Road was highlighted by almost all stakeholders as being a major challenge for the region, with its congestion, particularly during peak hours, being a deterrent to expanding the visitor economy.

### 5.1.5. Location of the Camden VIC

The Macarthur region has two yellow i accredited VIC; one in each LGA. Whilst the location of the Campbelltown VIC is within a designated arts/cultural precinct, there was much stakeholder discussion over the location of the Camden VIC. The Camden VIC is currently located within the historic John Oxley Cottage in Elderslie on the Camden Valley Way, but as a standalone and quite isolated facility rather than being within a precinct.

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[15] We note that a current master plan for the facility indicates increasing capacity to offer a 300 seat venue though it is unclear whether this size is future proofed for longer term growth.

[16] NSW Department of Planning and Environment - *New South Wales State and Local Government Area Population Projections: 2014 Final*

**FIGURE 7: MACARTHUR VIC LOCATIONS**
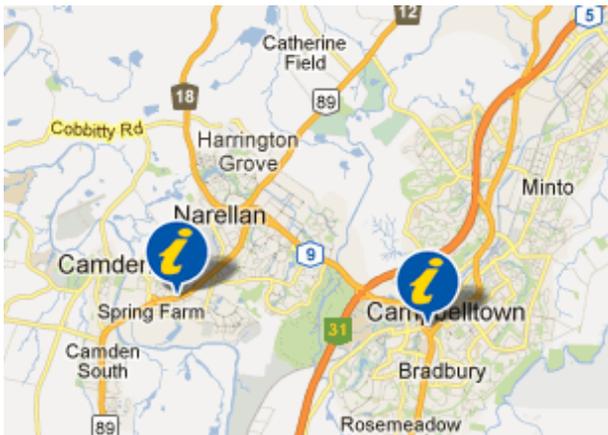


Stakeholder feedback indicated that the VIC may be better located within Camden township in order to increase its visibility and in turn, encourage greater visitor use, capitalising on the higher pedestrian traffic in the township area.

A separate assessment should be undertaken of the performance of the VIC and the possibility for introducing alternative information mechanisms. There is a need to ensure Camden Council is optimising its return on investment in visitor services. Many councils throughout Australia are performing similar assessments given the increasing reliance visitors have on technology prior to visiting and during their visit to a destination.

### 5.1.6.  Lack of Accommodation in Camden

The Macarthur region's accommodation mix is primarily centred on Rydges, Quest and Ibis, located in Campbelltown. The remaining visitor accommodation is smaller scale and family run properties. Higher quality and larger hotels, particularly within Camden, are underrepresented.

Visitor statistics from DNSW indicate only 18% of visitors to the region stay overnight, and a significant proportion of these, we would assume, would stay with friends and relatives.[17]

This lack of commercial accommodation, particularly in Camden, has several implications, including (but not limited to) the inability to secure larger events and conferences as there is insufficient accommodation (and of a high enough quality) for conference/event attendees.

Domestic and international trends identified through the consultation process and via research indicates potential for a higher quality boutique heritage hotel leveraging off the heritage feel within Camden. The size and scale of this hotel should be the subject of a feasibility assessment.

### 5.1.7.  Lack of Signage (interpretation and directional)

Analysis and stakeholder feedback indicates a lack of signage – including directional and interpretive. Directional signage, particularly within a CBD, is crucial to encourage visitation to places of interest, outline walks that can be completed through the CBD to attractions (such as heritage and cultural walks). It is important to consider that the better signposting of Macarthur's natural and built attractions, particularly the historic town of Camden and the national parks within the region, could also potentially encourage visitors and the community to make better use of these locations for walking, cycling and picnicking etc.

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[17] Based on DNSW data (4 year LGA profiles to YE Sept 2014), 30% of international visitors and 39% of domestic overnight visitors to NSW stay with a family/friend and 42% of international overnight visitors and 10% of domestic overnight visitors stay in a rented

house/apartment/flat. Only 11% of international overnight and 25% of domestic overnight visitors stay in commercial hotels, resorts, motor inns etc.

There is also a lack of interpretative signage when entering the region and at attractions. What should be considered are attractive gateway signs on all access roads into Campbelltown and Camden, highlighting the experiences and branding of the region.

Signage that could potentially be implemented includes attractive static displays (for both directional and interpretive means) as well as high-tech, innovative electronic information displays and touch screens located at attractions or in town centres.

### 5.1.8. Need to Upgrade the Camden Civic Centre

We understand that whilst the Camden Civic Centre has historically been an important venue for community and professional theatre, arts and concert performances, the facility is ageing and requires upgrading to bring it up to standard and to make it once again, a more marketable facility for larger-scale performances and productions on a regional basis.

## 5.2. Marketing and Promotion

### 5.2.1. Strong competition from destinations such as Sydney and surrounding areas

In some ways, Macarthur is fortunate to be surrounded by strong tourism destinations and brands such as Sydney and the Blue Mountains, as Macarthur can benefit from the tourism "trickle down" effect. However, being so close to these high profile and highly marketed destinations can result in Macarthur struggling to market and position itself as a distinct destination in its own right.

There is a need to ensure Macarthur has a very clear point of difference as a destination which it can easily market.

### 5.2.2. Inclusion in the Sydney and Surrounds Region

Within the DNSW boundaries, Macarthur falls within the "Sydney and Surrounds" marketing region. This provides opportunities for Macarthur to leverage off Sydney's significant marketing budget and brand. With the diversity and size of the Sydney region however, it is easy for smaller areas with limited product and an unclear brand to be overlooked.

Consultation with the Councils and stakeholders revealed that positioning Macarthur as part of the Sydney and Surrounds region has led to a distinct disadvantage. Many stakeholders commented that the focus of promotional efforts and activity within the Sydney region was strongly orientated towards the Sydney CBD and its plethora of facilities, attractions and related infrastructure to leverage off.

The current move to expand the second CBD hub of Parramatta also challenges Macarthur's ability to gain presence with the State Government push being west (rather than south west) to Parramatta.

### 5.2.3. Brand Differentiation

Macarthur, along with its individual LGAs and towns, lacks a clear identity and a discernible image. To help position Macarthur more appropriately within the Greater Sydney region, requires the development of a destination brand and identity. Importantly, this identity needs to be developed in consultation with the community to ensure the identity is accepted and utilised by not

only tourism operators and the industry generally, but other sectors of the economy and community.

### 5.2.4. Lack of Cooperative Marketing

Transport operators and tour operators based in the Sydney CBD generally have indicated a lack of interest in developing tours for the Macarthur region. Feedback which was provided on a confidential basis indicates the following reasons for this.

- There is insufficient commissionable product in the region to enable packages to be created for the domestic and international markets.

- Whilst the region does offer an attractive heritage/historic setting, the attractiveness, at times, is compromised by a limited tourism offering and shop trading hours.

- There is limited interest in some of the existing events which are seen to be more community based. The greatest impediment to encouraging and motivating inbound tour operators and wholesalers to recognise the value and importance of the Macarthur as a visitor destination, is the lack of all-weather visitor attractions or experiences. Stakeholder feedback indicates that if there was a cluster unique visitor experiences, this could act as a sufficient catalyst to encourage tours to be potentially trialled to scope interest.

### 5.2.5. Market Perception

With over 80% of visitors to the LGA being day trippers, there is a perception amongst tour operators, wholesalers and tourism intermediaries generally that the Macarthur region is primarily a day market only. That is, interstate and international visitors currently will stay in the Sydney CBD and travel out to the region for day

visitor experiences rather than consider the possibility for overnight stays. This view is reinforced by local markets from the greater Sydney region who do not yet see the need for overnight stays, possibly based on the products currently on offer, the excellent accessibility to the region and the perception that the region is not really a destination in its own right.

## 5.3. Other issues

### 5.3.1. Tyranny of Distance

Whilst the proximity to the Sydney CBD and Sydney Airport provide an important local market and important gateway for the Macarthur region, they also provide one of the greatest challenges.

The closeness of the region to Sydney is possibly seen by some markets (including locals) as merely an extension of Sydney rather than a destination in its own right. Campbelltown, for example gets a large number of travellers visiting on a daily basis but relatively few are thought to stay overnight and partake of the various recreational activities on offer.

Further research is warranted to see whether business travellers especially might consider overnight stays and what facilities will be needed to motivate them to do so. The same can be said for the meetings and small scale conference market who appear to be under represented in the visitor mix to the region. Proximity to the Sydney CBD could be a major determinant holding back growth in these sectors.

This places greater pressure on the need to develop tourism facilities which can be major stimulants to encourage people to visit and make the region a destination in its own right. By

comparison, the Blue Mountains and the Southern Highlands offer sufficient distance from Sydney to give the feeling that they are separate destinations and also benefit from different geographic landscapes and climate.

### 5.3.2. Parramatta Centric Focus by State Government

There is currently a strong focus by the NSW State government to develop and position Parramatta as Sydney's second CBD.[18] As part of this development, major infrastructure is planned including extensive higher density residential housing, stronger transport connectivity, more community infrastructure (such as theatres and stadia), medical facilities and schools.

While the development of this infrastructure is beneficial for the Great Western Sydney region, many LGAs surrounding Parramatta such as Penrith, the Hawkesbury, Blue Mountains, Liverpool and including Camden and Campbelltown, have commented that this Parramatta centric focus has resulted, in some cases, in their own needs for facilities and infrastructure being de-prioritised. This is seen to make it far harder to secure State Government funding support for important elements of infrastructure.

### 5.3.3. Balancing Housing and Tourism Needs

Tourism growth in the Macarthur region is challenged in trying to achieve a balance with State Government targets for new housing lands particularly in the South West Growth Centre of

which Campbelltown and Camden are important LGAs. This also is factored in by State Government targets on employment growth. Whilst not contrary to the needs of the tourism sector, it is certainly actively encouraging other industry sectors where the employment ratios are thought to be higher.

What may need to be considered is creating dedicated tourism and associated retail precincts which can act as nodes for tourism activity and which could aim to protect the character of town centres so the recreational and heritage values are protected.

The introduction of more major housing estates without sufficient open space areas and wider vegetated buffer zones would limit tourism potential in a variety of locations within or near urban centres in the region. It is important that tourism development is not pushed out into peripheral areas, making it harder to access etc.

Tourism facilities often link to local recreational facilities and are vital to encourage more locals to stay and enjoy their own local amenities, rather than travelling to the Sydney CBD for example, to experience some tourism activities.

### 5.3.4. Lifestyle Operators

There is a proportion of the Macarthur tourism industry operators who are thought to be lifestyle rather than full commercial operators. This extends to the hospitality and retail sector where a number of cafés, restaurants and retailers are not open during the weekend periods (and on Sunday in particular). This creates the perception that the

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[18] The NSW State Government document "A Plan for Growing Sydney" lists number of directions to follow, the second of which is Direction 1.2 "Grow Greater Parramatta – Sydney's second CBD".

Macarthur is not open on the weekends and is closed in the evenings. This is a major limitation for the area going forward.

To encourage tourism operators, hospitality operators and retailers to extend their trading hours, and in particular, trade on Sundays, it is important that they (and the general community) are provided with insight as to the economic benefits of doing so, as well as information on the importance of the tourism industry for the Macarthur.

A major factor is also encouraging far more visitors to buy local product and enjoy local facilities. These in turn, help support the economic vitality of local retail and hospitality businesses.

### 5.3.5. Lack of Industry Cohesion

Macarthur is a diverse and rapidly changing region. As a consequence, there are differing opinions as to the direction which the region as a whole, and the LGAs individually, need to pursue.

Despite best efforts, tourism coordination and integration at a regional level has struggled.

Coordination is needed in order to drive and grow tourism and to assist in developing the future tourism identity. Tourism operators need to recognise that the strength of Macarthur is in *the sum of its parts*, rather than any one part of the region. And they need to take some ownership to achieve this.

In addition, the region's operators need to derive comfort from the diversity of the region. Campbelltown having a stronger city/urban feel whilst Camden is seen as more rural. The overlap are areas such as Narellan which are seen to offer a strong urban context within Camden, so the

demarcation with Camden being rural and Campbelltown being city-urban is not always clearly delineated.

### 5.3.6. Higher Quality Dining Options

Whilst the Macarthur region does have a wide variety of cafes and ethnic cuisine to choose from, stakeholder feedback and analysis indicates a need to introduce higher quality restaurant and bar experiences. It is however also acknowledged that a higher quality food scene has been organically developing in line with the region's growing population and changing demographics. The need, however, exists to consider more "dining out" experiences rather than fast food outlets.

### 5.3.7. Lack of Tourism Investment

There has been a lack of investment in the tourism industry from commercial developers and operators for new accommodation as well as attraction/experience based product over some time. Operators also commented on the inability to upgrade existing tourism product because of lack of capital as well as zoning/planning restrictions at times.

There is benefit in each Council developing a tourism investment memorandum to indicate the type of tourism development to be supported in principle as well as the preferred locations for tourism development. Investors are looking for certainty in where they can develop and what is more likely to be supported by councils. As there are various forms of tourism investment which could be introduced into the region, a further step from this DMP could be the creation of an investment memorandum to highlight desired investment projects and the rationale why these

should succeed in the region. This is outside the scope of this DMP to provide this but needs to be contemplated by Councils to help get their investment opportunities understood and recognised.

### 5.3.8. Lack of Understanding of the Importance of the Tourism Industry

Whilst the region does have a number of very active tourism operators, there are also a number of lifestyle operators. Furthermore, while the community is generally supportive of tourism, they often fail to understand that councils are generally the largest financial supporters of tourism via visitor information services, tourism marketing and promotion, funding of local tourism organisations, maintenance of visitor infrastructure (such as signage, art galleries, museums etc.) and funding of events.

The growth of the tourism sector has potential to generate greater visitor expenditure, longer visitor length of stay and also the creation of a variety of direct and indirect jobs. Campbelltown's Community Strategic Plan lists as an objective, the development of "more jobs in the area"[19] and the LGA's Youth Strategy also notes the need to "increase the number of local employment opportunities for young people". Tourism has the potential to help facilitate this and offer a wide range of jobs (semi- skilled and skilled) to locals.

A strategy which promotes more industry participation and broader community awareness is required.

This strategy could include a community awareness campaign which demonstrates the following:

- how the tourism dollar disperses through the local economy;
- what kind of businesses benefit from tourism;
- how extended trading hours could provide benefits to a wide cross spectrum of the community;
- the estimated value of tourism via direct, indirect and induced spending impacts; and
- to help support the economic benefits, social and infrastructure improvements and higher quality environmental outcomes.

### 5.3.9. Retail Trading Hours

Limited shop trading hours, particularly over the weekend and in the evening creates the perception that Macarthur is not open at night.

To encourage retailers, and particularly restaurant and café operators, to extend their trading hours, it is important that they (as well as the general community) are provided with insight as to the economic benefits of doing so.

It is important to recognise that greater community commitment to growing and promoting tourism will lead to greater word of mouth advertising for the region.

Every effort needs to be made by the Councils to encourage and support retailers and hospitality operators to open during weekend periods and at least 3 – 4 nights per week.

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[19] Campbelltown Community Strategic Plan, Campbelltown City Council, page 14.

## 5.3.10. Lack of a Visitor Data Base

Visitation data is provided via the DNSW State Government aggregated data and apportioned on an LGA basis. The challenge is that the sample sizes are often small and the margin of error high (often with a 40%+ margin of error).

Data is needed to allow for trend analysis and forecasting. Importantly, it is a mix of visitor numbers, length of visitor stay and visitor spend patterns which need to be gathered and segmented across markets. Currently, there is insufficient data to enable a robust assessment of:

- Visitation by main purpose of visit (leisure-holiday, business, visiting friends and relatives, conferences, education etc.);

- Visitation by major market segments (locals residing within a 25km radius of the region, other visitors from greater Sydney, other NSW domestic visitors, inter-state visitors and inbound-international visitors);

- Visitation by major reasons for going such as nature based tourists, event attendees, arts and cultural visitors, food and related visitors, sports and fitness visitors etc.

Development of a robust data base will enable the collection of data on individual attractions and facilities which can help confirm seasonality impacts of visitation and related occupancy and use levels.

# 6. THE OPPORTUNITIES

# 6. The Opportunities



The following section highlights the opportunities to focus on to activate and grow tourism. The opportunities have deliberately been kept succinct to focus on those opportunities which are likely to generate the best possible returns in the shortest timeframe. They therefore represent the *lower hanging fruit* tourism opportunities.

It is also important to note that whilst each Council has an important role to play as an "enabler" in facilitating and driving these projects, they also requires the active participation of a range of stakeholders.

The opportunities have been segmented according to the following themes, which align with the previous 2012 – 2015 Tourism Strategy:

- Tourism Product Development & Partnerships;
- Marketing & Promotion;
- Industry Support; and
- Visitor Servicing.

The opportunities are not listed in priority order.

## 6.1. Tourism Product Development & Partnerships

### 6.1.1. Campbelltown Opportunities

#### 6.1.1.1. *Sports and Leisure Precinct*

Potential exists to create a major South West Sydney sporting hub and related entertainment precinct to strengthen the potential to attract major sporting and other events to the wider region and to grow the visitor economy.

Potential exists to create the hub around the Campbelltown Sports Stadium which is located adjacent to Leumeah Railway Station (see Figure 8 below) and is owned by Campbelltown City Council.

**FIGURE 8: LOCATION OF CAMPBELLTOWN STADIUM**
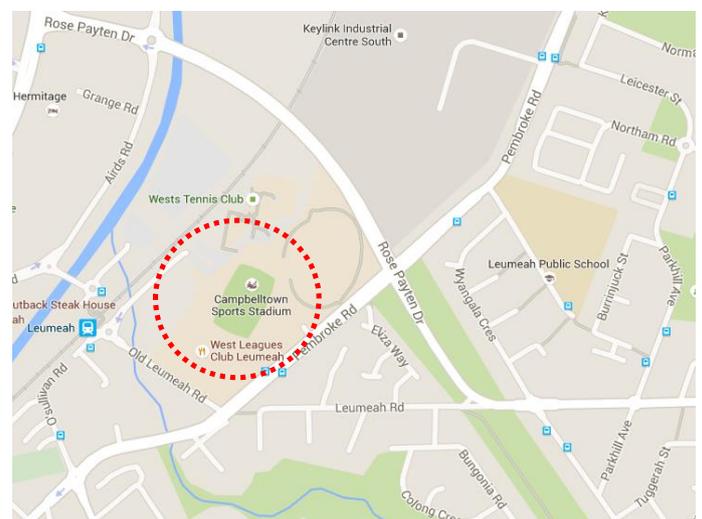


Figure 9 on the following page demonstrates the location of the Stadium compared to other stadia located within Greater Sydney (and including Wollongong). This indicates the significant population catchment it covers in South West Sydney and the importance of delivering services

to better meet the needs of the local-regional South West Sydney resident and visitor market.

To help grow the regional visitor economy there is a need to cater to forecasted growth in current and future demand for a variety of sporting and other forms of events and festivals (musical, cultural, entertainment etc.).

A feasibility study should be undertaken to determine the types and scale of facilities required to meet resident and visitor future demand and to allow for future proofing (noting the extensive population growth forecasts for the Macarthur region for the next 20 years). This should also consider how a staged approach to delivering these facilities could best occur.

**FIGURE 9: GREATER SYDNEY STADIA**
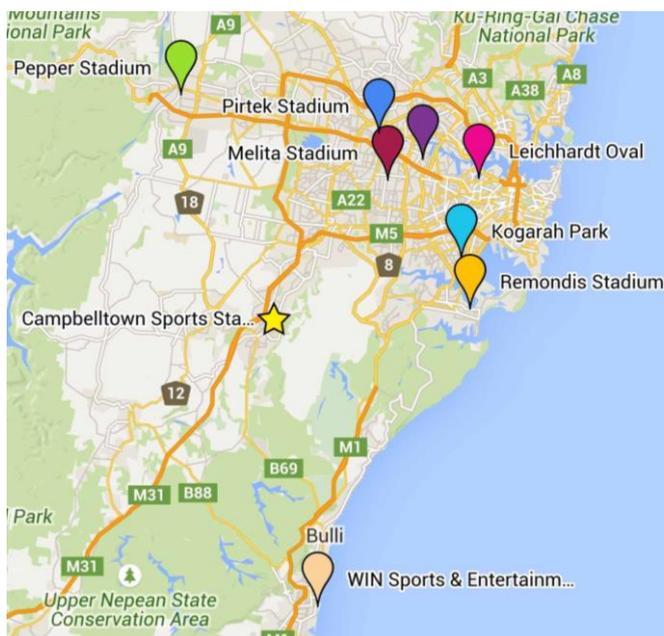


### 6.1.1.2. *Café/Restaurant and Entertainment Precinct*

Potential also exists to consider the development of a café/restaurant and entertainment precinct next to or potentially integrated within the sports and leisure precinct.

The development of such a precinct will encourage vibrancy around the stadium and help increase the length of stay of visitors and locals, with those attending events coming in early/staying after their sporting match/event to dine etc. The walkability between stadia and food precincts is a very important factor in improving visitor demand and overall marketability. And provision for night food markets and seasonal pop up markets needs to also be considered.

### 6.1.1.3. *Haunted Attraction and Festival*

Potential exists to bring alive the heritage stories of the region through an attraction and events/festival program which could be centred on the concept of "Macarthur Horrors". The concept could involve:

- identifying companies interested in creating a themed haunted experience in similar fashion possibly to www.spookers.com and possibly using redundant older buildings or other facilities;
- creating a horror food festival;
- the creation of a horror film festival and through social media, encouraging people to nominate the best horror movies so interested parties can help select the program; and
- a 2 - 4 week series of horror based events and experiences, possibly tying in with the Festival of Fisher's Ghost, commencing with Halloween and concluding over the month of November each year.

The figure on the following page illustrates an example of a best practice themed haunted/horror house in Auckland which attracts approximately 1,500 visitors per day in peak season and provides employment for over 100 staff (full time and part

time). The attraction was developed on a derelict hospital site which no other use had been found for.

With its strong performing arts sector in Campbelltown, potential may exist to encourage those active in theatre productions etc. to consider partnering on the development of a themed horror experience.

**FIGURE 10: SPOOKERS HAUNTED ATTRACTION**



#### 6.1.1.4.  *Expanding the Regional Arts Sector*

The potential exists to build on the existing strong visual and performing arts sectors in the region and Campbelltown in particular to build a strong

base of facilities. The Campbelltown Arts Centre (CAC) is noted as a highly successful regional arts centre model and could act as a base to help facilitate wider South West Sydney arts activation and overall growth of the sector. To build the visitor economy through arts based events there is a need to invest in and expand facilities to better support the arts community and offer more for local residents.

The Campbelltown Arts Centre (CAC) audience base for example, spans the Macarthur and South West region – an area with significant population growth, estimated to expand from approximately 461,000 to approximately 933,000 by 2036.[20]

The development of proposed expanded facilities at CAC is seen as strategically important to help grow the regions visitor economy through offering facilities able to cater to larger audiences and more sophisticated shows and events.

#### 6.1.1.5.  *Motor Sport Technology Precinct*

Whilst we note the desire in some parts of the Macarthur region to avoid the reintroduction[21] of any form of motor sport/endure-cross for eventing or training, compared to other major cities in Australia, Sydney has fewer facilities available. Whilst motor sport activity does come with a variety of challenges (most often seen as noise related), it also offers a number of wider economic and related benefits.

With a lack of facilities available in greater Sydney, consideration should be given to a feasibility study to determine if locations exist to introduce a new

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[20] Campbelltown Arts Centre Expansion Proposal

[21] Noting there used to be a motor sport park at Oran Park

circuit and how these might be funded and developed.

Figure 11 below provides an example of a recent state of the art motorsport hub located in a pristine region (Queenstown).

**FIGURE 11: HIGHLANDS MOTOR SPORT PRECINCT QUEENSTOWN.**



A motor sport precinct is likely to offer benefits to support a number of local community interests as well as a wider visitor market including:

- car clubs and related niche markets for club days;
- auction days and swap meets;
- motor vehicle manufacturers wanting to test vehicles and offer promotional days to media;
- product promotions for parts and accessories;
- corporates wanting to hold promotional days;
- different forms of motor sport activity (cars, bikes etc.) looking for new circuits; and
- a broad family market looking for new entertainment experiences.
- Potential benefits include:
- higher regional visitor expenditure levels via entry fees, food and beverage sales, retail and merchandising etc.;
- support for overnight accommodation operators especially for 2 day events;

- increased visitor expenditure in local food and beverage outlets;
- opportunities for sponsorship deals for local community events and activities;
- full and part time employment opportunities for locals;
- Links to training institutions (TAFE and WSU) for engineering, auto mechanics, electrical and other trades;
- ability to link with other experiences on offer to strengthen the tourism industry in the region and potential for joint marketing activities; and
- profile raising of the region overall.

### 6.1.1.6. *Glenfield to Macarthur Urban Renewal Corridor Strategy*

The Glenfield to Macarthur Urban Renewal Corridor Strategy is a joint initiative between the NSW Government and Campbelltown City Council to guide future development and infrastructure delivery over the next 20 years[22].

The Strategy offers an evidence base to support future growth in south-west Sydney by identifying opportunities for additional homes and jobs close to existing public transport, employment areas and the regional city of Campbelltown. The Strategy is based around the Glenfield, Macquarie Fields, Ingleburn, Minto, Leumeah, Campbelltown and Macarthur station precincts and outlines the future vision and character of each area, the improvements to community facilities, public spaces, the transport network and other infrastructure needed to achieve sustainable growth.

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[22] 2015-2035

**FIGURE 12: GLENFIELD TO MACARTHUR URBAN RENEWAL CORRIDOR**
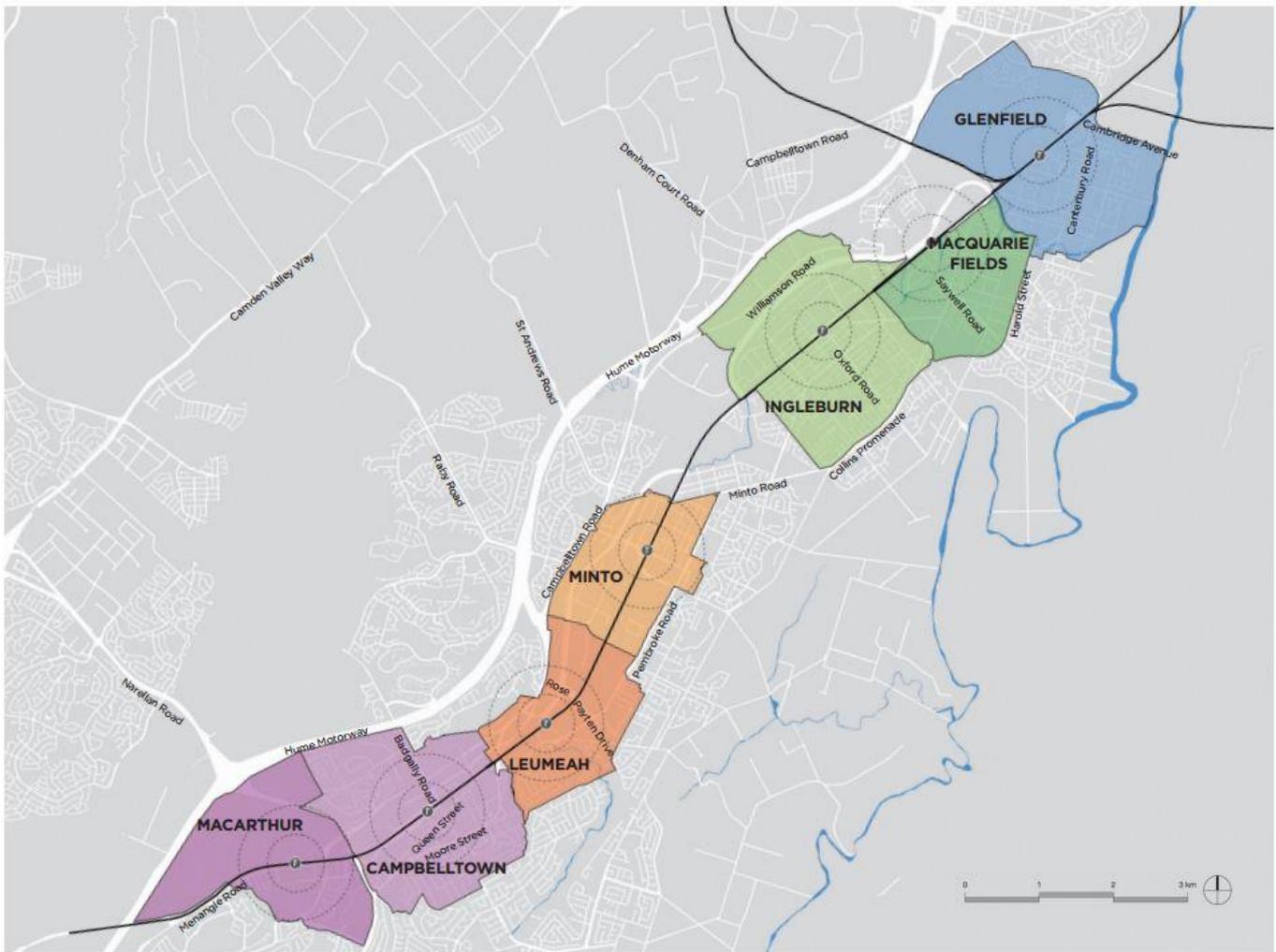


A key element which also needs to be included to strengthen the need for enhanced liveability, is the integration of tourism and leisure facilities and development to meet community needs and expectations along with the various visitor markets. Opportunities which need to be added to this Strategy and to integrate it with this DMP for Macarthur could include:

▪ recognising and promoting the unique community and ethnic mix which some of the areas along the corridor have with potential to promote fresh produce and spice markets,

cultural diversity cuisine, and general food and dining experiences;

▪ walkways and cycle ways to encourage healthy living but also to better connect places of interest and to offer safe and enjoyable trails;;

▪ sign posting and interpretative sign boards (web based and actual markers) to highlight the various heritage sites which the area is rich in and different areas of habitat; and

▪ creating safe and family friendly night time experiences such as light shows, outdoor cinema and small scale events.

### 6.1.1.7. *Regional Sports Facility*

It is noted that a significant number of locals and visitors undertake organised sport activities within the Macarthur region every weekend. This reflects the current extensive sports grounds and facilities and strong local interest and demand.

It is also understood that the Western Sydney University (Campbelltown Campus) has a strong sports program including a variety of courses in this field. Potential exists to develop a regional sports hub not only focusing on the leisure needs of locals and visitors but also the potential to encourage elite sports training and eventing.

Campbelltown City Council funded research indicates that the National Rugby League have been investigating the establishment of elite training facilities throughout Sydney for their member clubs. In addition, the A League have apparently also been investigating potential to

develop similar facilities. A variety of partnership opportunities may be available through organisations such as the South West Sydney Academy of Sport, NSW Cricket and WSU just to name a few.

As understood from the research, there are four key components to a Sport Centre of Excellence being:

- community facilities and programs;
- elite sports training facilities (e.g. altitude training, research and development);
- shared meeting and education facilities; and
- commercial opportunities (e.g. cafés, fitness centre) to help offset the cost of operating.

The objective is to ensure the facility is self-sustaining with limited or no subsidy requirement by Council.

From a tourism perspective, potential exists to build on the strength of the current sports activity

**FIGURE 13: CENTRE OF SPORTS EXCELLENCE SITE PLAN**
**Site Plan**



DRAFT

Scheme

A. Office and Comm X 2 Levels
B. Indoor Sport - 72 m X 40 m
C. Amenities
D. Elite Team X 3 Levels (Stage 2)
E. Entry
F. Existing Gym, Change and Offices

Total = 7500 m² Approx.
Carpark = 250 Spaces

**Design Principles**

1. Dynamic Sporting Expression
2. Visual Connections Between Spaces - Inside and Outside
3. Entry Statement
4. Optimise Natural Ventilation and Lighting
5. Flexibility and Staging
6. Indoor Courts

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**Centre of Sports Excellence**
**Macarthur Heights, Campbelltown**

in the Macarthur region and develop a South West Regional Sports Hub which could lead to:

- the relocation of various major sporting teams to the Macarthur region;
- the growth in leisure based community sporting activity;
- growth in elite sporting events;
- creation of new sporting based events and tournaments;
- increased over night accommodation via visitor stays;
- higher visitor spend in the region; and
- increasing recognition and promotion of the region as a visitor destination, albeit with a strong sports tourism focus.

This initiative also supports the development of the WSU Macarthur Campus as an integrated health hub with links to the hospitals and medical research facilities.

Importantly, the development of this sports hub and its growth potential needs to be supported with additional commercial accommodation, food and beverage facilities and other recreational amenities.

### 6.1.2. Camden Opportunities

#### 6.1.2.1. *Holiday Park Development*

The Macarthur region has one commercial tourist park, Poplar Caravan Park, located within Camden. The Caravan Park has undergone significant change over the past few years and has emerged as a model tourist park.



The occupancy at the park has increased by 350%, with the park achieving an average annual occupancy above 90% (and with very few permanents residing in the Park).

Whilst we understand the Poplar Caravan Park is keen to expand, in order to continue to grow the caravan and camping market to the region, there is a need to consider the development of an additional park, with the function primarily being a destination style holiday park.

Over the past 15 years, the caravan, motorhome and camping industry has been the fastest growing domestic tourism sector in Australia. In this period, caravan and RV registrations have increased by more than 250%. The industry is worth $6.5 billion nationally and currently provides for 620,000 holidays per annum.[23] The industry is constantly evolving with successful parks responding to consumer demand for better standards and facilities by transforming from traditional transit parks into holiday/destination parks.[24]

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[23] Caravan and Camping Industry Profile, Caravan and Camping Industry Association NSW, pages 2-4.

[24] More detailed trend data on caravan and destination parks can be found in Appendix 1

The development of a true destination style caravan park (i.e. following the Big 4 Model amongst others) may help the region attract a greater share of the growing interstate family visitor market. Should the owners of Poplar Tourist Park be keen, this could be undertaken as an expansion to their current park[25], or, this may need to be undertaken on a different site with greater capacity for growth.

The scale of expansion may or may not be able to be accommodated on the Poplar Caravan Park site, hence the need to consider longer term sector growth prospects and the potential for an additional destination park in the region (which may or may not be potentially run by the owner/operator of Poplar Tourist Park).

Holiday parks differ from traditional caravan parks as they offer a full holiday experience providing facilities such as swimming pools and aquatic parks, kids clubs, camp kitchens, mini-golf, group entertainment and shops etc. Consequently, these parks are attracting a growing number of families who utilise the park as their holiday destination rather than solely utilising them as a means of accommodation.

Feedback received from State tourism bodies in both NSW and Queensland emphasised the declining number of caravan parks across both States. This decline does not appear to be as a result of lack of demand, but rather as a result of the value of their land being used for other forms of development. There have been many existing caravan park sites redeveloped as residential and mixed use commercial development, especially in coastal locations.

When developing a new park, the following should be considered.

- Capacity for approximately 80 - 120 caravan and camping sites and ideally 30+ cabins.
- The park should be focused on tourists as opposed to permanent stay residents.
- The park needs to be family friendly to encourage a greater number of families to stopover and visit the region.
- Development designed by a renowned designer who is considered to be an industry leader in holiday parks is important.
- Consideration should be given into the provision of amenities such as a heated pool, spa, BBQ facilities, camp kitchen, tennis court, bike hire/loan, kid's playground (including a giant jumping castle), daily children's activities and a café and convenience store.
- Marketing of the new park as a destination hub which encourages users to base themselves in the region. They can then undertake day tours to locations outside of the region, but their location in Macarthur allows for a more relaxed and easily accessible base.

The figure on the following page demonstrates three traditional caravan parks. Often these parks have basic facilities and are used as transit parks by travellers (i.e. overnight accommodation when travelling between two destinations, rather than being a destination in their own right).

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[25] We understand that the Park has an additional 5 acres of paddock which is currently used for camping, but which provides suitable land for expansion.

**FIGURE 14: TRADITIONAL CARAVAN PARKS**



**Canobolas Caravan Park, NSW**



**Burrum Heads Beachfront Tourist Park, QLD**



**Huntsville Caravan Park, QLD**

Figure 15 demonstrates the modern form of caravan parks – often referred to as destination or holiday parks. These parks usually feature a combination of caravan/camping sites as well as units and chalets, waterparks, pools and waterslides, kid's playgrounds, game rooms, biking trails, cafes and shops.

This model is where the current and future market demand is focused and where Macarthur has a significant opportunity to become a hub for this important sector of the tourism industry in the absence of other holiday parks around greater Sydney.

**FIGURE 15: MAJOR DESTINATION HOLIDAY PARKS**



**Adventure Whitsunday Resort, QLD**



**Deniliquin Holiday Park, NSW**



**Pambula Beach Discovery Holiday Park, NSW**

With its close proximity to the M5 and M7 highways, and the region's available land, potential exists to position Macarthur as the Sydney regional hub for caravan/holiday parks. The facilities are also likely to be highly compatible with the needs of those in the equine sector requiring sites for caravan and camping.

In order to determine the most appropriate site for the destination holiday park and to assess the interest of the current tourist park owners, a feasibility and site assessment should be undertaken.

### 6.1.2.2. *Aviation Museum*

Potential exists to investigate the development of an interactive aviation museum which showcases the local history of aviation in Sydney and with a focus on light aircraft, gliding and recreational aviation as well as military history associated with Camden airport.

To support this, the potential exists to explore opportunities for the further promotion and packaging of recreational aviation activity (gliding, small aircraft training, micro lights etc.) which is undertaken at Camden Airport.

### 6.1.2.3. *Aviation Business Park*

Potential may exist for an aviation business park to support the growth in light aircraft flying and associated visitor growth. There is a growing demand for new business parks which can cater to the needs of a fly in market needing places to land and store aircraft, for maintenance of light aircraft and for long term hangars etc. Demand is seen for those wanting to fly into the Sydney region but with limitations on access into Bankstown and the need to avoid Kingsford Smith because of major commercial aircraft movements. Demand exists on the city fringe which avoids conflicts with air corridors required by these other major airports.

The creation of an aviation business park could lead to demand for more commercial accommodation nearby, shuttle buses-taxis and the various employment opportunities which could be generated to support growth in the light aircraft industry.

Whilst we note that Camden Airport may potentially close when Badgerys Creek Airport is fully operational, this may not be for some time (5

– 15 years). In the interim, the airport offers a variety of important uses.

### 6.1.3. **Macarthur Regional Opportunities**

As well as the various LGA specific tourism projects identified there are a number which offer greater potential across the Macarthur region and which may offer partnership potential for both Councils to activate. The location of these may also occur in either LGA.

### 6.1.3.1. *Botanic Gardens Amphitheatre, Sculpture Garden, Horse Trails and Luge*

Whilst the Botanic Gardens are technically located in Camden LGA they border Campbelltown LGA and offer a strong regional opportunity. The development of an amphitheatre within the Botanical Gardens is noted as a well needed all weather facility. The amphitheatre may need to include:

- an undercover sound shell to allow for performances in all weather;
- to ensure the supply of electricity and lighting and speakers is able to be provided in all weather; and
- to ensure the set up for performances can be undertaken in all weather conditions.

This presupposes that the audience would be seated outside without weather protection.

The facility could also include various sculpture trails – art trails to offer a composite attraction linked to the Garden's botanic experiences and encouraging a number of walking circuits.

The figure below provides some examples of outdoor amphitheatres. These facilities feature large outdoor sound stages set against natural backdrops.

**FIGURE 16: OUTDOOR AMPHITHEATRE EXAMPLES**







In addition to these product development opportunities it is noted that the topography on the Campbelltown side of the Gardens is steeper and may lend itself to various active attractions such as a luge track or expanded downhill mountain biking circuit. With a large parcel of fairly steep land and open space areas for development, the Gardens should investigate introducing family friendly (and environmentally sustainable) family based attractions and experiences which can maximise the value of this terrain and which may offer additional revenue streams.

**FIGURE 17: LUGE EXAMPLES**



**Skyline Luge, Calgary**



**Ridge Runner Mountain Luge/Coaster, Canada**



**Skyline Luge, Queenstown**

A feasibility study should be considered to test the viability of introducing various built forms of infrastructure which can integrate well into the Gardens along with areas to offer horse trails in more remote parts of the Gardens and which avoid conflict with other users.

### 6.1.3.2. *Heritage and Nature-Based Stories through a Sound and Light Show at the Botanic Garden*

Heritage tourism is seen to be a major potential component of Macarthur's product mix, strengthened by the extensive selection of historic buildings and the nationally important stories associated with the region in Australia's history.

Furthermore, having the Australian Botanic Garden within its boundaries, presents significant opportunities with respect to using the site as a highly attractive backdrop for telling stories.

Opportunities to create sound and light shows to showcase the region's unique history and interesting stories need to be investigated and could include developing a seasonal evening heritage experience at the Botanic Gardens.

**FIGURE 18: SOUND AND LIGHT SHOW EXAMPLES**



**The Light Garden, Centennial Park Sydney**



**The Enchanted Forest, Scotland**

The success of major light shows such as Vivid Sydney and the popularity of sound and light shows such as the Blood on the Southern Cross (Ballarat) illustrates that, with the right product and technology mix, heritage stories can be brought alive and made more interesting.

Furthermore, we understand that Picton recently had an IlluminARTe light festival in their main street which attracted over 15k visitors and was profiled by the Sydney Morning Herald and DNSW. The festival included the projection of art designs, relevant to Wollondilly's culture and history, on a variety of walls, public spaces and buildings along Picton's main street.

Whilst we would not advocate merely copying what Picton or any other destination might have done, the opportunity exists to offer a different form of sound and light show experience, noting the level of high market demand for these. The potential exists to hold this event at a different time of year, with a different theme and leveraging off different elements of the Australian Botanic Garden.

For Macarthur, the following experiences could be investigated.

- Light shows on historic buildings and within the Australian Botanic Garden (Figure 18 provides best practice examples of these).
- The "Macarthur after dark" trail experience which links a number of heritage properties and a food experience together offering visitors a progressive dinner. Essentially, visitors could complete different meal courses at a range of eateries (including pop-up eateries) around a specific part of the region whilst also stopping at historic properties on their way to the next course. Each stop would

be clearly marked and could provide an interactive historic experience either via a guide or via a short audio visual experience (5-10 minutes).

Importantly, these types of experiences will help stimulate visitors to get out during the evening; to walk, dine and experience the unique and significant history of the region. Even if locals are reluctant at times to go out in the evenings, regional visitors may provide a stronger visitor market.

### 6.1.3.3.  *Food Trails and Cooking Schools*

Macarthur is emerging as an eclectic food hub with a variety of food experiences that can be undertaken.

This, coupled with the farming background of the region, presents opportunity to introduce an integrated boutique gourmet cooking school program, helping to continue to grow the interest in Macarthur's food tourism product. Participants could learn how to cook with the local produce, enjoy their meal and purchase any of the local produce they used throughout their class.

The cooking schools could also act as a showcase for the unique products that are being produced in the region (this extends from raw produce to value add food products such as jams, chutneys, other condiments etc.).

There is also the opportunity to market specially designed classes to children visiting with families and run these classes at the same time as the adult classes. Children could participate in a range of specially designed cooking and gardening classes which both stimulates and educates children regarding the importance of healthy eating and

how fun cooking can be. Potential may also exist to extend into education programs and link to local and regional schools.

### 6.1.3.4.  *Boutique Glamping in Forest Parks/Reserves*

Potential exists to investigate selective nodes within reserves or possibly forest park land for glamping. Locations which border on the national parks should be considered with potential to link into existing park trail networks but have the accommodation actually outside of the national park land.

**FIGURE 19: GLAMPING EXAMPLES**


**South Coast, NSW**


**Florida, USA**

These accommodation sites could be part of an existing trail network but provide for overnight accommodation so extending the length of visitor stay. They also could offer potential for concession operators to pay a license fee to Council (if on Council controlled reserve land).

### 6.1.3.5.  *Leisure Focused Open Space Corridor*

Potential exists to strengthen the southern hub of Mount Annan via an approximately 400m wide open space corridor through the Scenic Hills area to link northward to the Western Sydney Parklands. The Scenic Hills area offers an interface between Camden and Campbelltown and offers important rural landscape areas which avoid the risk of over development. This corridor has benefit for:

- assisting threatened species;
- offering important vistas and view-shafts;
- helping to offer a contiguous open space corridor through the South West where there is ongoing and extensive pressure to allow more land to be rezoned for urban development;
- strengthening the connection to Mount Annan as a southern node of significance with the Botanical Gardens as the potential southern anchor point;
- improving liveability in the Macarthur region overall by highlighting the quality of green spaces which exist; and
- building a clear sense of identity to avoid a scenario where the only physical barrier to an LGA are highways and river boundaries.

The ability to create and retain a 400m wide open space corridor can help generate a variety of liveability benefits for the wider Macarthur regional community and can also stimulate tourism growth and development.

This can support opportunities including:

- creation of new walking trails linking from Mount Annan through the Scenic Hills to the Western Sydney Parklands;
- creation of cycle ways including for hybrid cycles as well as dedicated mountain biking

trails so they offer potential to various markets (families especially) and not just the dedicated mountain biking sector;

- guided walks to highlight places of heritage and cultural significance as well as areas with interesting biodiversity;
- encouraging outdoor events within the corridor which have a healthy lifestyle theme (biathlons and triathlons, family and corporate fun days and events); and
- introducing refreshment hubs/nodes (pop ups rather than permanent structures) along the corridor where food and beverage providers can establish during events and during seasonal periods where sufficient numbers of users support operating.

These natural landscapes (though often abutted by urban development in various places) are important to preserve and promote and tourism activity has the ability to stimulate economic, social and environmental benefits to support this.

These are important natural assets which already exist; it just requires that these be turned from basic natural assets to natural attractions in order to generate a variety of benefits which could assist in helping to fund their ongoing maintenance and strengthen overall liveability and sense of place.

### 6.1.3.6.  *National Equine Centre*

Potential exists to develop a national equine visitor centre at Tabcorp Park at Menangle Park and to also look to include onsite accommodation. The facility could develop as a hub to the strong equine activity across the region.

### 6.1.3.7.  *Leveraging off Badgerys Creek Airport*

The airport is anticipated to be operational by 2025 and will provide various opportunities for tourism and recreational activity to meet the needs of passengers and visitors to the general area. Assuming there is good quality and fast transport connectivity to the airport precinct, potential exists to consider:

- an accommodation precinct;
- various recreational pursuits; and
- various shows and performances using existing and future performing arts spaces.

### 6.1.3.8.  *Link between Western Sydney Parklands and Mount Annan Botanical Gardens*

As the parklands effectively borders both Council areas it offers a regional opportunity to link (via cycle ways and walkways and possibly horse trails) to Mount Annan Botanical Gardens. This offers far better utilisation of the parklands within the scenic hills area and allows both Councils the opportunity to activate initiatives as they see fit.

### 6.1.3.9.  *Wedderburn Airport Business Park*

Potential exists to expand the activity at the airport to include a business park and wider maintenance hub. Though space appears limited there is demand from the recreational aviation community to fly into areas around Sydney where they can safely store light aircraft and then use ground transport to visit various locations.

If there is onsite light aircraft maintenance facilities which can be accessed by fly in aviation visitors then the growth potential may be stronger.

### 6.1.3.10.  *Caravan and Holiday Park Expansion*

As well as the potential to expand the Poplar Caravan Park in Camden, potential exists to expand the number of holiday parks throughout the Macarthur region.

Over the past 15 years, the caravan, motorhome and camping industry has been the fastest growing domestic tourism sector in Australia. In this period, caravan and RV registrations have increased by more than 250%. The industry is worth $6.5 billion nationally.

Sydney suffers from a lack of quality holiday parks to meet the needs of the caravan and motor home visitor market. Many traditional caravan parks cater to low cost permanent stayers which often have conflict with the needs of short term visitors.

Assessment should be made of locations close to the Hume Highway and on sites with 6 acres or more which could be converted to quality holiday parks for caravaners, campers and motor home travellers. Menangle Park could be an area with potential as a location.

When developing a new park, the following should be considered.

- Accessibility to on and off ramps to the highway;
- Compatible neighbouring land users such as council reserve land, national parks and open space corridors;
- Capacity for approximately 80 - 120 caravan and camping sites and ideally 30+ cabins.
- The park should be focused on tourists as opposed to permanent stay residents.
- The park needs to be family friendly to encourage a greater number of families to stopover and visit the region.
- Development designed by a renowned designer who is considered to be an industry leader in holiday parks is important.

- Consideration should be given into the provision of amenities such as a heated pool, spa, BBQ facilities, camp kitchen, tennis court, bike hire/loan, kid's playground (including a giant jumping castle), daily children's activities and a café and convenience store.

- Marketing of the new park as a destination hub which encourages users to base themselves in the region. They can then undertake day tours to locations outside of the region, but their location in Macarthur allows for a more relaxed and easily accessible base.

**FIGURE 20: CAMPBELLTOWN'S SCENIC HILLS AND EAST EDGE SCENIC PROTECTION LANDS**[26]



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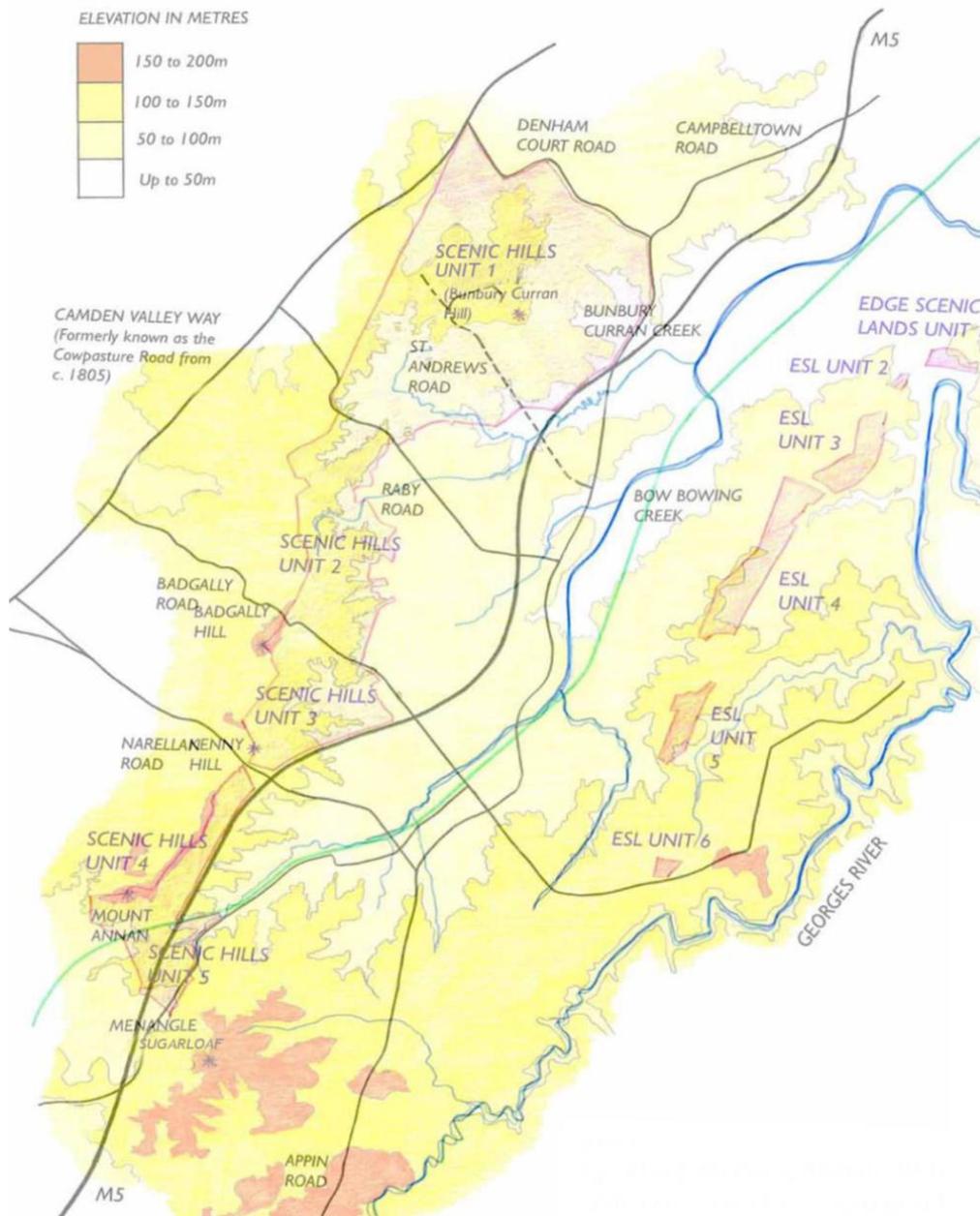
[26] Visual Analysis of Campbelltown's Scenic Hills and East Edge Scenic Protection Lands. October 2011

THE **STAFFORD** GROUP

**FIGURE 21: SOUTH WEST SUBREGION**
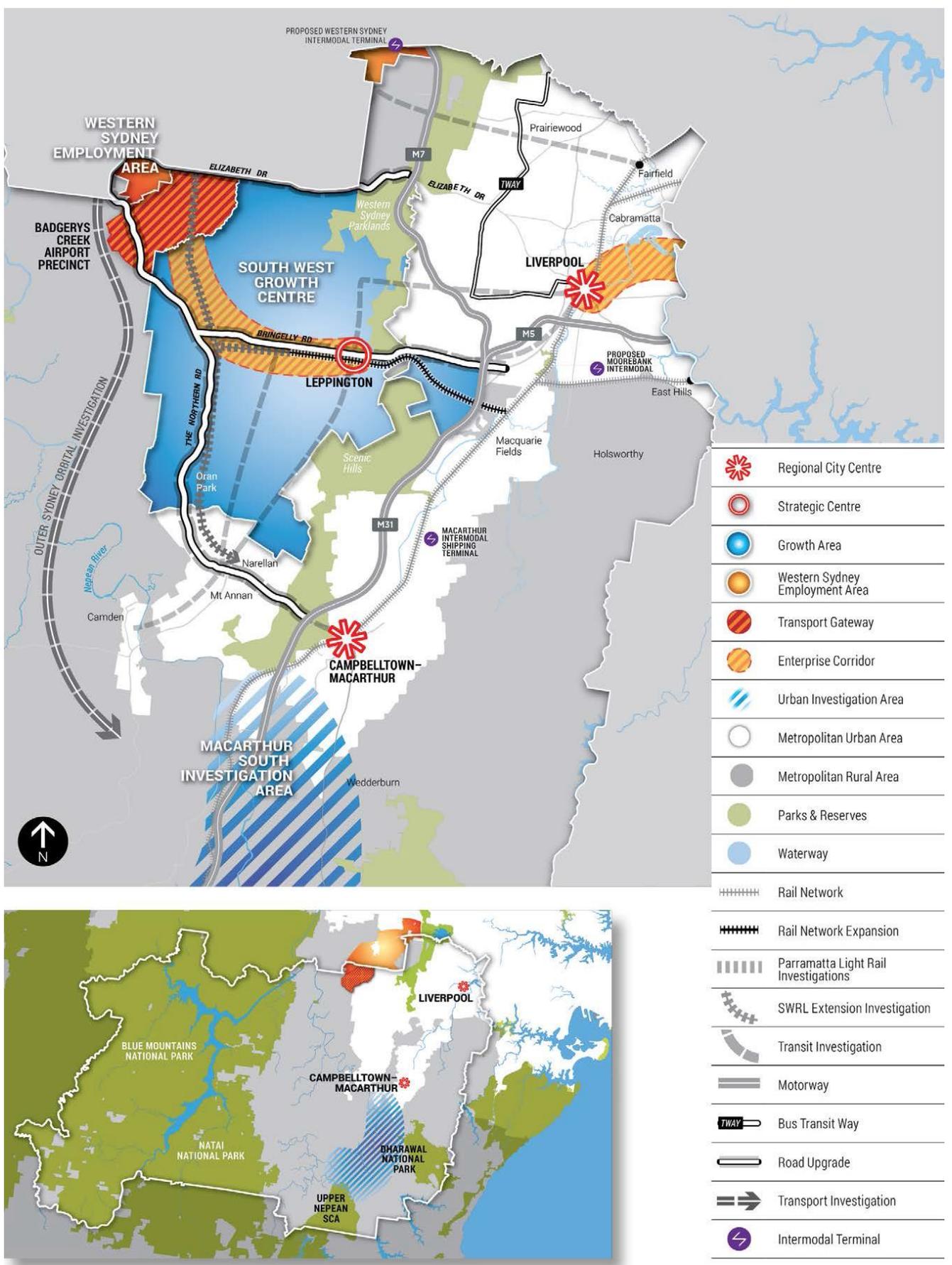
#### 6.1.3.11. *Bush Corridors for Leisure Tourism*

As well as open space corridors which can link Mount Annan with the Western Sydney Parklands and walkways and cycle ways to link the various urban centres on the Glenfield to Macarthur Urban Renewal Corridor, potential exists to develop other bushland corridors, especially where these track the major river systems (Georges and Nepean Rivers) in the region.

The existing Georges River Corridor already exists and offers a variety of natural and environmental opportunities which could include orienteering, tree tops walks, zip lining experiences etc.

Some of these include:

- introduction of board walks to offer safe and environmentally sensitive areas to walk in;
- adventure parks offering a mix of free experiences such as exercise stations (to offer a circuit); and
- paid for experiences such as high ropes courses, flying fox experiences and possible on water rafting –kayaking guided options.

Linked to these important bush corridors is one of the largest colony of Koalas in NSW which reside in the Macarthur bushland and is thought to be the only chlamydia-free colony of koalas in New South Wales.[27] The bush corridors through the Macarthur region have important links down to the Dharawal National Park and offer important corridors for a number of threatened species.

These natural bushland assets already exist within the region and, subject to being sensitively planned and managed, offer an opportunity to help position the Macarthur region as having a number of natural attributes which are not well known to most visitor markets.

I is noted that as well as the visitor market potential the conservation of koalas and their habitat within parts of the Macarthur region has long been of interest to the broader community. While a detailed population estimate remains to be determined, available evidence indicates that the numbers of koalas have increased in recent decades.

It is understood that a Comprehensive Koala Plan of Management (CKPoM) is being prepared to enable a consistent, landscape-based approach to matters relating to how koalas and their habitat are best managed. The recent listing of koalas as a threatened species for purposes of the Federal Government's Environment Protection and Biodiversity Conservation Act 1999 is particularly relevant. Working out ways to create broader community engagement with the conservation of koala habitat in the region are important to also help grow and manage visitor interest in what is a significant natural attraction.

Consideration should be given to developing a "threatened species interpretation centre" which

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[27] Dr Robert Close, from the School of Science and Health at WSU

could act as a hub for guided tours and various organized events and education based experiences. This could be focused on koalas (due to the local significance of the habitat as noted and/or the focus could be on a far wider range of fauna as well as flora. And it could have potential as a sanctuary, education and interpretation centre, with involvement not only from government, but also other organisations such as WIRES etc.

This should be subject to a feasibility study to test market demand and overall viability including the level of support from various Federal and State level organisations who may be potential stakeholders.

### 6.1.3.12. *Arts Trail*

We note there is a growing strong arts community within Macarthur. This arts community is not just solely focused on the delivery of arts and performances but is also successful in the creation of its own content.

The opportunity exists to leverage off this activity and create a series of different types of art trails. The art trials could be linked in with the other trails (such as the current food tour/trail which exists) to deliver a broader experience and could be a seasonal experience, especially if performance art is included rather than just visual arts.

### 6.1.3.13. *Riverside Activation*

Potential exists to investigate riverside activation for the Georges River and Nepean River. A conservation based approach is suggested where all opportunities are sensitively planned and managed. With this in mind, possible options for activation could include the following.

- A series of walks and cycling trails allowing passive access to the George's and Nepean Rivers. The walkways could also include mountain biking trails potentially and also include interpretation which features Indigenous history. Ideally, the walkways and trails can provide opportunities for a shuttle bus/minivan service to collect from one end of the trail and/or a seasonal coffee cart.
- Boardwalks and pontoon style small jetties to offer attractive and environmentally friendly ways to access the river's edge.
- A series of outdoor exercise stations which may also include access to the rivers for kayaking/canoeing, and link to mountain biking trails.
- Offering potential for off road Segway experiences as part of adventure experiences.

Initially, riverside activation should be investigated on Council controlled reserve land as this creates opportunities to link into tourism precincts and other attraction sites. These are also more likely to be accessible to town areas rather than more remote locations. It is also important to note that Council controlled – managed reserve areas are more likely to be easier to activate development in as State Government policy constraints prevent a number of activities occurring in National Parks and in water catchment areas controlled by Sydney Water.

Campbelltown's Community Strategic Plan notes, within its five key themes regarding community aspirations for Campbelltown:

- the need to manage healthy waterways leading to a healthy environment for the LGA's children (Objective 1);

- protection of natural resources, parks and reserves and supports the LGA's waterways (Objective 1); and
- improve the footpath and cycle way network to encourage more people to walk and cycle (Objective 3).

Each of these community aspirations could potentially be achieved through the development of riverside walkways and other activations.

The creation of riverside experiences should be subject to a feasibility study to test the level of market demand and viability of introducing the various activities and facilities as suggested. This is also important to determine how best to stage river side development to best meet community needs and to allow for revenue streams to be created where possible to help offset the ongoing cost of maintenance.

### 6.1.3.14. *Regional Music Festival*

We understand that in line with the region's growing population, the popularity and success of its arts and creativity sector is also increasing. This sector, and particularly the live music sector, is finding it difficult to showcase their talent because of limited venues within the region to perform.

The potential exists to investigate the development of a music festival, possibly focused on the rock music genre, which might not only feature major national/international acts, but could also feature a number of high quality regional acts.

There are a number of locations throughout the region which could be utilised for this festival, including the Australian Botanic Garden in Mount Annan (as we understand there is an outdoor area which can cater for up to 10,000 attendees).

### 6.1.3.15. *National Equine Experience Centre*

Tabcorp Park offers the leading harness racing club in Australia which attracts both national and international interest. This provides a significant base to grow the visitor markets into the region for racing events along with various entertainment functions etc.

Macarthur, and some of the surrounding LGAs, have a strong equine focus; whether it be equine sports, equine health, equine agistment or equine breeding.

The figure on the following page provides an overview of equine-based sporting and other facilities within the Camden LGA and broader region. Green flags represents those facilities/businesses with a primary focus on breeding. Red flags represents those with a focus on horse riding and eventing.

The opportunity needs to be investigated for developing a National Equine Experience Centre, showcasing the history of the equine industry, not only in the broader Macarthur region, but potentially extending nationally.

Additionally, the potential exists to better partner with the equine industry to leverage opportunities from existing equine events to encourage greater profile and to grow length of visitor stay in the region.

**FIGURE 22: EQUINE FACILITIES WITHIN THE BROADER SOUTH WEST REGION**
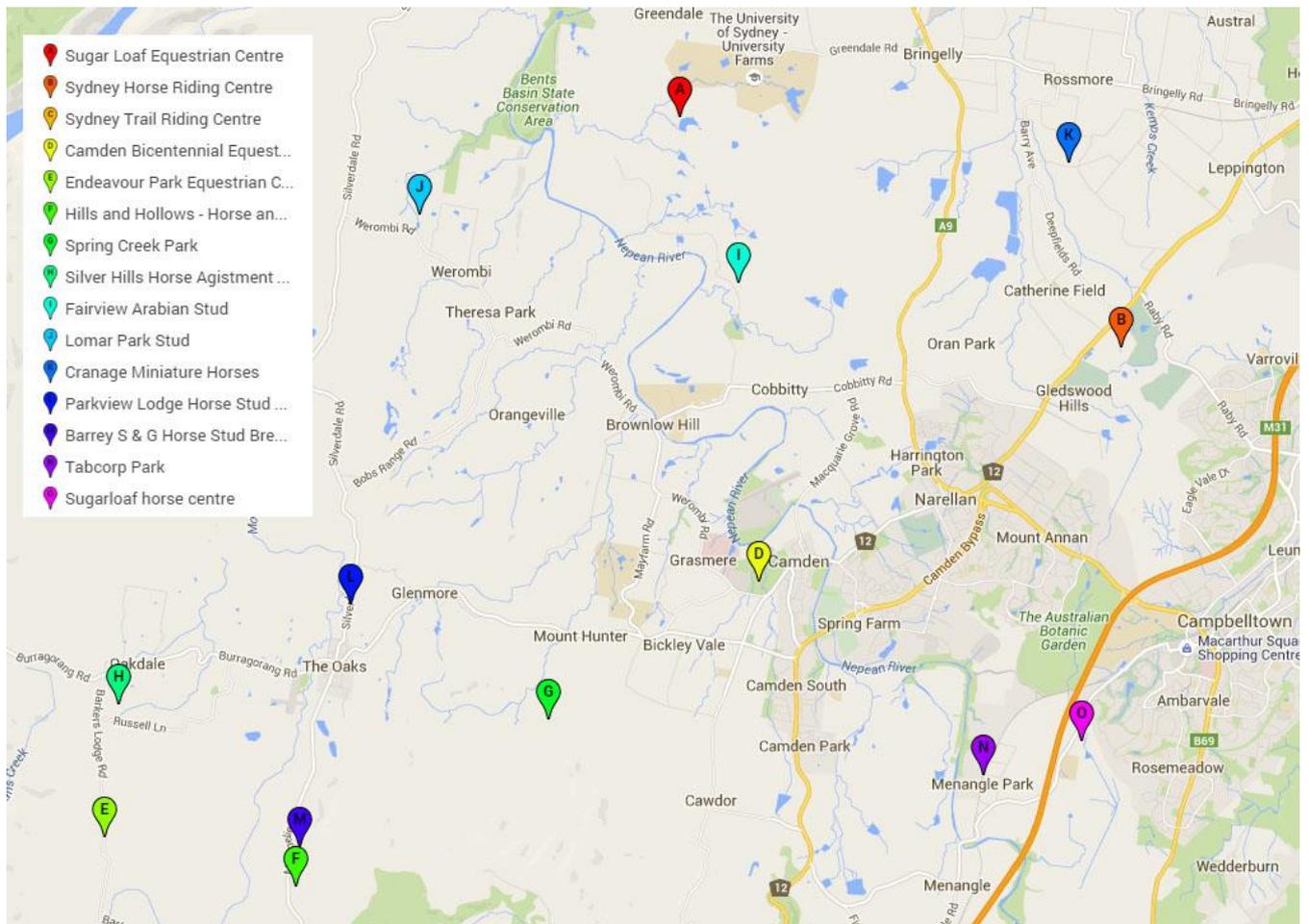


#### 6.1.3.16. *Stimulate Investment into Macarthur*

To encourage tourism investment in the region, there is a need for each Council to identify what tourism development and opportunities they wish to support, as identified in the DMP.

To encourage tourism investment into the region, there is a need for each Council to clearly indicate to industry and developers what tourism development is more likely to be supported and how this can grow the overall visitor economy.

This could be undertaken via the development of a regional tourism investment memorandum which indicates:

- the type of tourism development which each Council would like to see within their LGA;

- areas throughout the region which are suitable for the development of tourism facilities (accommodation, food and beverage, attractions, activities etc.);

- elements that, subject to planning regulations being satisfied, Council is supportive of in principle; and

- ensuring that Council planning documents (including LEPs and DCPs) and other strategic documentation illustrates that Councils are "open for business" and wishing to grow the visitor economy in specific ways.

The memorandum can be presented to the investment community to stimulate interest in the

region, including investment by developers outside of Macarthur and will help demonstrate that each Council is pro-tourism and "open for business". Investors and developers require certainty and by indicating areas where tourism development may be viewed more positively, sends a very positive signal.

## 6.2. Marketing & Promotion

### 6.2.1. Campbelltown Opportunities

#### 6.2.1.1. *Develop a Medical Tourism Strategy*

We understand Campbelltown Hospital, with its links to the Western Sydney University's medical school and major redevelopment which is underway (valued at $134m[28]), is emerging as a specialist hospital.

The potential exists to leverage off this and develop a medical tourism strategy to:

- attract international people coming in for elective surgery where they can have the operation and recuperate in the Macarthur region; and
- investigate the potential to position Campbelltown, with its medical facilities and proximity to Sydney, as a medical conferencing destination.

The other areas which can be marketed already include:

- the equine experiences for shows, racing, events etc; and
- performing arts experiences utilising the current facilities at the Campbelltown Arts Centre as well as other venues.

Whilst there are many other opportunities to develop, great care is needed to avoid promoting these until such time as they are properly developed or enhanced. These include:

- future indigenous product which needs to be well packaged with other elements of interest to inbound visitors especially;
- nature based areas and experiences which need supporting infrastructure before they are expected to be sufficiently appealing;
- interactive displays and the use of clever technology enhancements to bring alive heritage sites; and
- expansion and upgrading of visual arts facilities to draw wider audiences.

### 6.2.2. Camden Opportunities

#### 6.2.2.1. *Greater Profiling of Bird Watching*

We understand that the botanic gardens at Mount Annan is a very popular location for bird watchers, with over 160 species of birds residing in the Gardens.

In order to grow the high yield bird watching niche visitor market, there is a need to further develop facilities (such as bird hides) and package experiences with accommodation to attract the market. The market needs more regional accommodation options noting the need to visit at dawn and dusk especially.

We understand there also may be potential to investigate bird watching opportunities for Campbelltown, particularly within the Georges River and Dharawal National Park. This could allow

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[28] http://www.swslhd.nsw.gov.au/ccq/redevelopment/

for the packaging of experiences with the Australian Botanic Garden.

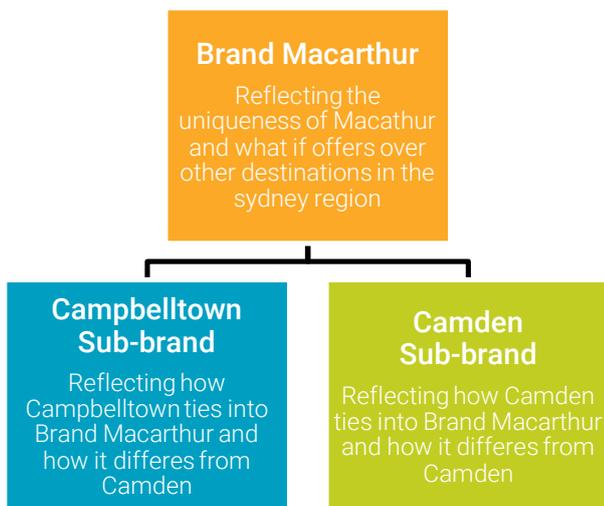### 6.2.3. Macarthur Regional Opportunities

#### 6.2.3.1. *Brand Identity*

Currently, neither the Macarthur brand proposition, nor that of the two LGAs (Camden and Campbelltown) is clearly defined or well understood by locals or visitors.

To better promote Macarthur as a tourism destination in its own right, and to profile the region as having a clear point of difference within the greater Sydney region, there is a need to develop a clearer identity.

The identity hierarchy for the region and its LGAs should reflect the following:

**FIGURE 23: MACARTHUR BRAND HIERARCHY**



**Brand Macarthur**
Reflecting the uniqueness of Macathur and what if offers over other destinations in the sydney region

**Campbelltown Sub-brand**
Reflecting how Campbelltown ties into Brand Macarthur and how it differes from Camden

**Camden Sub-brand**
Reflecting how Camden ties into Brand Macarthur and how it differes from Camden

Importantly, the Macarthur region comprises a range of tourism operators with different objectives. It is important that the tourism industry is consulted to input and take "ownership" of the brand and to use it in their marketing.

Importantly, consultation indicated that, at times, Campbelltown in particular, is associated with negative brand perceptions. The majority of stakeholders consulted with agreed that Campbelltown may be better off leveraging off the Macarthur brand (in association with Camden), primarily because it is still relatively unknown as a destination brand and could be created into anything for the future without having to address outdated perceptions.

To help raise the profile of the Macarthur brand, a series of attractive street side banners should be designed to highlight the Macarthur name utilising the redesigned branding for the region. Banners could be used on access points from the Hume Highway, along Narellan Road and on entry into key retail precincts in Campbelltown and Camden.

In time there should be opportunities to package up various products which will appeal to inbound tour operators and cruise shop companies to link to this growth sector now looking to bring cruise ships into Port Kembla.

The ITOs and cruise ship companies will only be interested when well-structured 1, 2 and 3 hour tours are offered to them which can include:

▪ unique product (gastronomy, wellness and health focussed);

▪ visits to see nationally significant natural features (waterfalls etc), botanical displays) interactive heritage and historic sites of significance; and

▪ to partake in events, markets etc.

### 6.2.3.2. *Redeveloped Website and Augmented Mobile App*

While Macarthur does have its own dedicated destination website (www.macarthur.com.au), improvements could be made to further enhance the website. These could include the following.

▪ Investigate the inclusion of a comprehensive booking system which also integrates pre-packaged deals, as well as allowing visitors to package up their own visit in the format of a shopping cart style system, allowing visitors to choose from a range of travel, accommodation, dining options, as well as experiences and events.

▪ Inclusion of a consistently updated and easy to read and navigate events calendar, with packages linked to specific events.

▪ Investigate the inclusion of augmented reality tours within the existing Macarthur mobile app (see Figure 24) which will enable the history of Macarthur to be brought alive in an interactive and flexible format. The app could also be extended to allow visitors to book accommodation, travel and activities, as well as offering a range of prebuilt packages that visitors can book via the app.

As is currently done, both Councils, should take responsibility for managing the website with the aim of handing this over to a suitable tourism industry organisation at a time in the future when a unified and well-structured LTO or similar is able to be created.

**FIGURE 24: AUGMENTED REALITY APP EXAMPLES**



**Finding Sacred Ground Augmented Reality App**



**Nearest Tube Augmented Reality App**



**MyOrpheo Mobile Guide Apps**

### 6.2.3.3. *Event Calendar*

Events and festivals provide numerous benefits by increasing visitation and expenditure, reducing low season impacts, encouraging repeat visitation as well as raising destination awareness.

The following table provides a breakdown of all events and festivals that are currently held in Macarthur. In total, there were 20 tourism based events[29] held in the 2014/15 calendar year.

**TABLE 6: EVENTS HELD IN MACARTHUR**

| Name | Suburb | Month |
|---|---|---|
| Australia Day Event | Camden | January |
| Australia Day Event | Campbelltown | January |
| Camden Show | Camden | March |
| Paws in the Park | Camden | March |
| Catch a Carp Competition | Campbelltown | March |
| Campbelltown City Challenge Walk | Campbelltown | March |
| Doll, Bear and Creative Fair | Campbelltown | March |
| Miracle Mile | Menangle Park | March |
| Ingleburn Alive | Ingleburn | March |
| Pixel Sounds Music Festival | Campbelltown | April |
| AnnanROMA Food and Wine Festival | Mount Annan | April |
| Campbelltown Steam and Machinery Museum Field Day | Menangle Park | May |
| Riverfest | Campbelltown | August |
| Campbelltown Vintage Fifties and Collectables | Campbelltown | August |
| Macarthur Caravan and Camping Expo | Menangle Park | August |
| Camden Festival | Camden | September |
| Camden Park Open House | Camden | September |
| Gilbulla Open House | Menangle | September |
| Narellan Rhythms Festival | Narellan | October |
| Light Up Camden | Camden | November |
| Festival of Fisher's Ghost | Campbelltown | November |
| New Year's Eve | Campbelltown | December |
| Campbelltown Carols | Campbelltown | December |

In order to better plan for events, as well as promote them, there is a need to develop an events calendar which should be available via the Macarthur tourism website. There are already a number of smaller event calendars developed by individuals and tourism/industry groups throughout Macarthur, however, there is a need for collaboration to create one unified events calendar which can be well promoted.



### 6.2.3.4. *Event Evaluation*

In addition to the events calendar recommendation, there is a need to create an events evaluation criteria which ascertains, based on a number of factors, how successful an event was and whether it should continue to be invested in. The criterion should focus on:

- likely cost of the event;
- level of industry support;
- level of community support;
- ability to leverage off funding sources to support event;
- timing of the event and whether it fits into the broader Sydney regional events calendar (so as to ensure it is not competing with other major events); and

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[29] We note there are several more events held in the Macarthur region, particularly gallery exhibitions etc. The events we have included are those which would appear, from online research and consultation, to be events that would attract a tourism market.

- visitor markets the event is likely to attract.

### 6.2.3.5. *Packaging of Product*

There are a number of visitor experiences, attractions, transport options and accommodation etc. available throughout the Macarthur region, however, currently there is generally very limited synergy between these operators/providers.

Some operators indicated that whilst they may have historically tried to package their product, market take up was low. There is a need for a composite experience to be offered to the consumer, helping to extend visitor stay as well as greater regional dispersal.

Packages could include, by way of example, visits to the Australian Botanic Garden, indigenous and other guided tours throughout the region's national park, horse riding experiences, Campbelltown Arts Centre, dining at high quality restaurants throughout the region as well as accommodation etc.

This will help strengthen the product offering, allow for cross product selling, increase pre bookings and help with improved transport and related planning.

The opportunity may also exist to look at cross-regional packaging, linking Macarthur's experiences with the unique experiences that exist in parts of Wollondilly, the Southern Highlands or the Illawarra. This may encourage visitors who would not have previously considered visiting

Macarthur during their stay in Sydney and may potentially create new drive circuits and day tours.

### 6.2.3.6. *Car Enthusiast Destination Promotion*

Macarthur could become an easily accessible location for car enthusiasts, including car clubs looking at daily excursions out of the Sydney CBD and which require a mix of winding and straight roads, good food and beverage outlets and event venues to showcase the vehicles on display.

To market Macarthur as a car enthusiast destination for car clubs based in the greater Sydney region and potentially regional NSW and Canberra requires coordination; a role which could possibly be undertaken by the Tourism Industry Taskforce Group (see Section 6.3.1.1 for an overview of the Taskforce).

### 6.2.3.7. *Tourism Awareness Campaign*

As is common in many other regions and LGAs, there is a lack of community awareness on the importance of tourism within Macarthur, and how the tourism dollar spreads throughout the region's economy (see Figure 25). The Macarthur tourism industry[30] is valued at just under $654m[31] and accounts for over 4k jobs[32] in the region.[33]

The NSW Government's Visitor Economy Industry Action Plan recognises the importance of the visitor economy which "is worth more than agriculture, forestry and fishing and just below mining".[34]

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[30] Note this incorporates both tourism and hospitality
[31] Direct and Indirect Output
[32] Direct and Indirect Employment
[33] http://economy.id.com.au/macroc/tourism-value?WebID=100 – Wollondilly has been excluded when calculating these values.

[34] Visitor Economy Industry Action Plan, The NSW Government Response to the Final Report of the Visitor Economy Taskforce, December 2012, page 2

The Councils should consider developing a tourism awareness campaign which demonstrates:

- how the tourism dollar disperses through the Macarthur economy to show that far more businesses benefit from tourism than just tourism businesses. This would include assessing the direct and indirect impact of visitor spend;

- what kind of businesses benefit from tourism;

- how extended trading hours could provide benefits to a wide cross spectrum of the community and visitors;

- what the estimated value is of tourism via direct, indirect and induced spending impacts; and

- to explain why Council support is required to maximise the total returns to Macarthur as demonstrated via economic benefits, social and infrastructure improvements and higher quality environmental outcomes.

**FIGURE 25: THE IMPORTANCE OF TOURISM**



## 6.3. Industry Support

### 6.3.1. Macarthur Regional Opportunities

#### 6.3.1.1. Industry Taskforce

An Industry Taskforce Group should be developed to work with each Council to activate opportunities. This group should comprise proactive tourism industry members from both Council areas.

The role of the Industry Taskforce Group should be to:

- gather and consolidate feedback from tourism operators and groups throughout their LGA (such as chambers of commerce etc.);

- provide guidance on tourism sector needs and provide assistance to Council personnel charged with implementing the DMP;

- advocate for stronger resources and focus being applied to tourism in their associated LGA;

- support each Council in lobbying DNSW and NSW State Government to strengthen the Macarthur brand and marketing opportunities;

- ensure that other areas of the local economy are aware of tourism opportunities (specific TAFE tourism training programs, events and festival benefits for retailers in general, community groups supporting heritage and culture);

- take responsibility for the creation of an enhanced brand identity for Macarthur to support tourism;

- act as a conduit to community interest groups and others with various ideas for tourism development and enhancement;

- ensure that tourism based projects are front of mind when economic development

opportunities and new investment is being considered for Macarthur; and

▪ provide input into visitor service needs.

The role of this Industry Taskforce Group will be explained further in Section 7 this DMP. Importantly, it need not be a 355 Committee of either or both Councils.

## 6.4. Visitor Servicing

### 6.4.1. Camden Opportunities

#### 6.4.1.1. *Feasibility to Assess Location of Camden VIC*

In addition to the need for a review of visitor information services throughout Macarthur, an additional assessment needs to be undertaken on the location of the Camden VIC. If Camden Council decides it wishes to continue to invest in its VIC, it is important that a site assessment is undertaken which takes into account visitor flows, and the potential increased visitation the VIC could achieve it if was located on the main street of Camden and as part of the unique heritage precinct.

### 6.4.2. Macarthur Regional Opportunities

#### 6.4.2.1. *Review of Visitor Information Services throughout Macarthur*

Macarthur currently has two yellow I accredited VICs located in Camden (John Oxley Cottage) and Campbelltown (Quondong Cottage).

From work The Group has undertaken on visitor information centres in numerous locations (Bundaberg, Cradle Coast - Tasmania, Byron Bay, Cooma-Monaro, Sunshine Coast, and Launceston etc.), we understand that councils in particular, are looking for more cost effective and efficient ways to deliver information services to visitors. In most cases, VICs operate with high net cost deficits.

Utilisation of VICs by visitors nationally is trending downward whilst operating costs continue to increase.

To ensure the VICs across both LGAs are operating most effectively, the Councils need to investigate:

▪ identifying opportunities to increase efficiencies for the delivery of visitor information services;

▪ ways to increase the effectiveness of those visitor services delivered within the region;

▪ highlight technology solutions (increased web presence, mobile apps and websites etc.) which may provide alternative and broader access to information; and

▪ to identify opportunities for developing a greater shared approach to the delivery of visitor information services throughout the Macarthur region.

Changes need to capitalise on the trend toward more online information solutions and to look at possible 24 hour touch screen monitors for each town. These technology solutions can also create the opportunity to find local or state based sponsors for the ongoing maintenance of supporting infrastructure.

#### 6.4.2.2. *Roving Ambassador Program*

The development of a roving volunteer ambassador program to promote the region could be particularly useful if, over time, the region decides that the need for VICs has diminished. Having this program already in place would mean that visitors are still able to get that face to face interaction which some visitor's desire and could be created in different parts of the region.

### 6.4.2.3. *Free Wi-Fi at the VICs*

Investigate the provision of free Wi-Fi for visitors at each of the VICs and in main streets to enable visitors to access the updated Macarthur website and to encourage greater visitor dispersal to seek out various tourist attractions and experiences.

### 6.4.2.4. *Signage Program*

There is a need to develop a signage program which includes an action plan for improving both directional (way finding) and interpretive signage throughout Macarthur, to ensure there is continuity for all signage (static and electronic).

Importantly, visitor services should include improved signage as well as an enhanced level of information available through a dynamic website, an augmented reality mobile app, touch screens and other technology solutions.

The region could consider the implementation of highly attractive and innovative (moveable) 24/7 digital touch screens (see Figure 26). These touch screens could be placed in high traffic areas and, during major events, could provide visitors with a range of information.

Touch screens can be designed to allow for the display of information as well as the booking of accommodation, transport and activities. Potential could exist to have the touch screens sponsored, as advertisements can be placed on the screen when they are not in use. They can also be used to provide community information updates.

**FIGURE 26: BEST PRACTICE EXAMPLE – HIGH TECH OUTDOOR INFORMATION TOUCH SCREENS**



### 6.4.2.5. *Gateway Landscaping*

To provide a welcoming entrance into the Macarthur region (from entry points around Camden and Campbelltown), there is a need to improve streetscaping at key entry points as well as along the Hume Highway, Narellan Road and into the Australian Botanic Garden at Mount Annan. This should also be considered for railway stations in the region.

Landscaping of main roads may include boulevarding or street planting and welcome signage where appropriate. Each Council would need to integrate a landscaping strategy for its gateway points. This also needs to include consider street improvements (seating, signage etc.), street planting, as well as pathway upgrades in areas such as heritage precincts and retail areas which cater to visitor needs.

### 6.4.2.6. *Visitor Data Base*

The creation of a robust visitor data base will significantly assist both Councils and industry to assess the success of the various marketing and development projects and strategies recommended in this DMP. The reasons for creating such a data base are outlined within the issues section of this report already.

From an opportunities perspective, the creation of a detailed and robust visitor data base will provide important strategic information for decision making including:

- Measuring the growth in targeted niche markets;

- Monitoring visitor spend patterns and the contribution tourists make to the visitor economy in each Council area and in the Macarthur Region overall;

- Developing trend data to help with forecasting of future growth;

- Assessing accommodation sector occupancy levels to help determine timing for encouraging of different forms of accommodation such as hotels, caravan parks, lodges and serviced apartments;

- Assessing utilisation rates for performance venues, event locations etc. so as to know when capacity levels may start to be reached; and

- For helping to spread the impact of seasonality so peak seasons are able to be better managed and shoulder seasons can be effectively grown.

## 6.5. Opportunities Matrices

The following matrices provide a top line summary of each of the opportunities, including their priority, the potential visitor markets which could be captured, possible location/sites to be considered, an estimation of the CAPEX required, the level of risk involved, potential time frames, the project type (commercial or public) as well as the lead stakeholder involved.

The projects have also been listed in priority order (high, medium and low) based on discussions with various stakeholders.
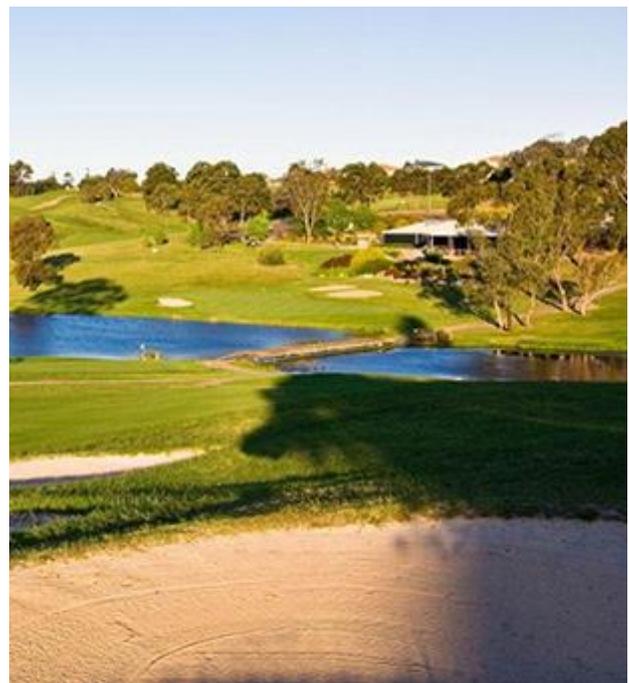
**TABLE 7: TOURISM PRODUCT DEVELOPMENT & PARTNERSHIPS**

| Opportunity | Priority | Visitor Markets to Capture[35] | Possible Location/Site | Est. CAPEX Requirement for Total Project | Level of Risk | Commercial or Public Project | Lead Stakeholder |
|---|---|---|---|---|---|---|---|
| **South West Sydney Sports Precinct** | High | Local market, domestic sporting marketing | Campbelltown Stadium | $250m+[36] | Medium – High | Public | ▪ Campbelltown City Council |
| **Café/Restaurant and Bar Precinct (contingent on Stadium Upgrades)** | High | Local market, food and wine visitors, family market, short break visitors | Surrounding Campbelltown Stadium | $20m | Medium – High | Public/Private | ▪ Campbelltown City Council |
| **Holiday Park Development** | High | Caravan & camping, family market, backpackers and the local market, short break visitors, over 55s travellers | Various (determined as part of feasibility) | < $12m | Low – Medium | Commercial | ▪ Both Councils and Tourism Industry Taskforce for Feasibility ▪ Commercial developer experienced in holiday park development |
| **Haunted Attraction and Festival** | Medium – High | International youth, international students, working holiday makers, backpackers, cruise ship visitors, the local market and the regional Sydney domestic market. | Various (determined as part of feasibility) | < $600k | Medium | Commercial | ▪ Tourism Industry Taskforce for Feasibility ▪ Commercial developer experienced in haunted attractions creation |
| **South West Sydney Performing Arts Hub** | High | Local market, cultural and heritage visitors, schools | Campbelltown Arts Centre | $30m[37] | Medium | Public | ▪ Campbelltown City Council |
| **Food Trails and Cooking Schools** | Medium | Food and wine visitors, cruise ship visitors, short break visitors, over 55s travellers | Throughout the region | $50k | Low - Medium | Commercial | ▪ Tourism Industry Taskforce and industry operators |

[35] Visitor markets are based on Destination NSW's market segment definitions, including: NSW Family Market, Domestic Caravan and Camping, International Youth, International Students, Working Holiday Makers, International Backpackers, Over 55s Travellers, Cruise Ship Visitors, Cultural and Heritage Visitors, Food and Wine Visitors, Nature Visitors, Short Break Visitors and Accessible Tourism (seniors, people with a disability, people from non-English speaking backgrounds and parents with children). We have also included various other local visitor markets such as the domestic sporting market, schools and the general local market.

[36] This cost is purely indicative as feasibility and related analysis would be required to refine the scope and determine whether the existing stadium could be easily expanded or whether a new stadium would need to be constructed. A new stadium would likely be significantly more expensive to develop.

[37] Based on discussions with Campbelltown City Council

| Opportunity | Priority | Visitor Markets to Capture[35] | Possible Location/Site | Est. CAPEX Requirement for Total Project | Level of Risk | Commercial or Public Project | Lead Stakeholder |
|---|---|---|---|---|---|---|---|
| **Heritage and nature-based stories through a sound and light show** | Medium | Cultural and heritage visitors, family market, nature visitors, international youth, local market, over 55s travellers, accessible tourism, short break visitors | Australian Botanic Garden at Mount Annan | $400k | Medium | Public/Commercial JV | ▪ Tourism Industry Taskforce with assistance from the ABG[38] |
| **Botanic Gardens Amphitheatre and Sculpture Garden, horse trails and Luge** | Medium-high | Cultural and heritage visitors, family market, nature visitors, local market, over 55s travellers, accessible tourism, cruise ship visitors, short break visitors | Australian Botanic Garden at Mount Annan | > $1.5m | Medium | Public/Commercial JV | ▪ Tourism Industry Taskforce with assistance from the ABG |
| **Boutique Glamping in Reserves and on the fringe of National Parks** | Medium | Nature visitors (including eco-tourists, bird watchers) and the family market | reserves within the Macarthur region and potentially on the fringe of National Parks | < $300k | Medium | Commercial | ▪ Both Councils with NPWS for feasibility<br>▪ Commercial operator experienced in luxury glamping for development |
| **Aviation Business Park** | Medium | Fly-in visitors | Camden Airport | > $2m | Medium – High | Commercial | ▪ Camden Council and Airstrip operator/land owner for feasibility<br>▪ Commercial business park developer for development |
| **Regional Music Festival** | Medium | International youth, local market, short break visitors | Campbelltown, Australian Botanic Garden at Mount Annan | <90k | Medium | Commercial | ▪ Tourism Industry Taskforce to solicit interest from festival/event promoters |
| **Stimulate Investment into Macarthur** | Medium | n/a | n/a | $30k (to develop memorandum) | Low – Medium | Public | ▪ Both Councils |

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[38] Australian Botanic Garden Mount Annan

| Opportunity | Priority | Visitor Markets to Capture[35] | Possible Location/Site | Est. CAPEX Requirement for Total Project | Level of Risk | Commercial or Public Project | Lead Stakeholder |
|---|---|---|---|---|---|---|---|
| **Arts Trail covering sculpture trails, artist studio tours, art displays inside facilities and externally** | Low – Medium | Cultural and heritage visitors, family market, nature visitors, international youth, local market, over 55s travellers, short break visitors | Throughout the region but possibly hubbed from the Campbelltown Arts Centre | $15k (marketing) | Low - Medium | Public | ▪ Tourism Industry Taskforce, art community and industry operators |
| **National Equine Experience Centre** | Low – Medium | Domestic (and international) sporting market, local market | Various (determined as part of feasibility) | < $12m | Medium - High | Commercial | ▪ Tourism Industry Taskforce for feasibility<br>▪ Equine industry within the region to support the development |
| **Riverside Activation** | Low – Medium | Cultural and heritage visitors, family market, nature visitors, local market, accessible tourism, caravan and camping visitors | Throughout the region at points with river access | $10k (marketing) $90k (development) | Low | Public | ▪ Tourism Industry Taskforce and NPWS |
| **Aviation Museum** | Low – Medium | Cultural and heritage visitors, local market, schools, caravan and camping visitors, short break visitors | Possibly at Camden Airport | < $3.5m | Medium - High | Public | ▪ Tourism Industry Taskforce for feasibility<br>▪ Camden Council for the development of the museum |
| **Accessibility for river based tourism activities** | Low – Medium | Cultural and heritage visitors, family market, nature visitors, international youth, local market, short break visitors | Various | n/a | Low | Public | ▪ Tourism Industry Taskforce and both Councils |
| **Glenfield to Macarthur Urban Renewal Corridor Strategy tourism infrastructure** | Low – Medium | Cultural and heritage visitors, family market, nature visitors, international youth, local market, short break visitors | various | $15k marketing | Low-medium | public | ▪ Campbelltown City Council<br>▪ Tourism Industry Taskforce<br>▪ NSW State Government |
| **Regional Sports Facility and elite sports centre** | medium | Family market, domestic (and international) sporting market | Macarthur Heights | $20m | Low-medium | Public | ▪ Campbelltown City Council<br>▪ NSW State Government<br>▪ Regional sports organisations<br>▪ NRL, AFL and other teams |

| Opportunity | Priority | Visitor Markets to Capture[35] | Possible Location/Site | Est. CAPEX Requirement for Total Project | Level of Risk | Commercial or Public Project | Lead Stakeholder |
|---|---|---|---|---|---|---|---|
| **Bush Corridors for Leisure Tourism** | Medium-low | Cultural and heritage visitors, family market, nature visitors, international youth, local market, short break visitors | Various | $15k marketing | medium | Public | ▪ Both Councils |
| **Motor Sport Technology Precinct** | medium | Family market, international youth, local market, short break visitors, backpackers, niche markets such as car and motorcycle clubs | To be determined | >$15m | Medium | Commercial | ▪ Commercial developer/operator<br>▪ Campbelltown City Council<br>▪ WSU and TAFE |

**TABLE 8: MARKETING & PROMOTION**

| Opportunity | Priority | Visitor Markets to Capture | Possible Location/Site | Est. CAPEX Requirement for Total Project | Level of Risk | Commercial or Public Project | Lead Stakeholder |
|---|---|---|---|---|---|---|---|
| **Brand Identity** | High | n/a | n/a | $40k | Low | Public | ▪ Each Council and the Tourism Industry Taskforce |
| **Redeveloped Website and Augmented Reality Mobile App** | High | n/a | n/a | $70k | Low | Public | ▪ Tourism Industry Taskforce and web/app developer |
| **Event Calendar** | Medium - High | n/a | n/a | n/a - integrate into new website | Low | Public | ▪ Tourism Industry Taskforce and event coordinators |
| **Event evaluation** | Medium - High | n/a | n/a | n/a | Low | Public | ▪ Tourism Industry Taskforce and Council economic development personnel |
| **Car Enthusiast Destination Promotion** | Medium | Car enthusiasts and car clubs, short break visitors, family market | Throughout the region | $20k for promotion | Low | Public | ▪ Tourism Industry Taskforce |

| Opportunity | Priority | Visitor Markets to Capture | Possible Location/Site | Est. CAPEX Requirement for Total Project | Level of Risk | Commercial or Public Project | Lead Stakeholder |
|---|---|---|---|---|---|---|---|
| **Packaging of Product** | Medium | Short break visitors, family market, cultural and heritage visitors, nature visitors, local market, accessible tourism, cruise ship visitors | Throughout the region | $20k for promotion | Low | Industry | ▪ Tourism Industry Taskforce and Macarthur tourism industry |
| **Tourism Awareness Campaign** | Medium | Local market | n/a | $15k for promotion | Low | Public | ▪ Tourism Industry Taskforce |
| **Medical Tourism Strategy** | Medium | Medical Tourism, Accessible Tourism, Conferencing Market | Campbelltown | $20k (strategy development) | Low | Public | ▪ Council and Industry Taskforce Group |
| **Bird Watching Profiling** | Medium | Nature visitors | Australian Botanic Garden and Riverside Reserves | $15k (marketing) $40k (hides) | Low | Public | ▪ Tourism Industry Taskforce with assistance of the ABG |

**TABLE 9: INDUSTRY SUPPORT**

| Opportunity | Priority | Visitor Markets to Capture | Possible Location/Site | Est. CAPEX Requirement for Total Project | Level of Risk | Commercial or Public Project | Lead Stakeholder |
|---|---|---|---|---|---|---|---|
| **Industry Taskforce Creation** | High | n/a | n/a | < $30k (marketing) < $20k (development) | Low - Medium | Public | ▪ Each Council |
| **Visitor Data Base** | High | To monitor targeted niche markets and monitor success of all programs aimed at growing visitor markets, visitor spend levels and length of visitor stay. | Throughout the region | < $5k for establishment and management | low | public | ▪ Each Council |

**TABLE 10: VISITOR SERVICING**

| Opportunity | Priority | Visitor Markets to Capture | Possible Location/Site | Est. CAPEX Requirement for Total Project | Level of Risk | Commercial or Public Project | Lead Stakeholder |
|---|---|---|---|---|---|---|---|
| **Review of Visitor Information Services** | Medium - High | n/a | n/a | $35k | Low | Public | ▪ Each Council and the Tourism Industry Taskforce |
| **Feasibility to Assess Location of Camden VIC** | Medium - High | n/a | n/a | < $5k (if bundled with above Review) | Low | Public | ▪ Camden Council |
| **Free Wi-Fi at the VICs** | Medium - High | n/a | Camden and Campbelltown VICs | n/a | Low | Public | ▪ Tourism Industry Taskforce and each Council |
| **Gateway Landscaping Strategy** | Low | n/a | Gateway locations to the region | $40k (strategy) | Low | Public | ▪ Each Council |
| **Signage Program** | Medium - High | n/a | n/a | $20k for signage strategy and $75k for new signs/skins | Low | Public | ▪ Tourism Industry Taskforce with assistance from relevant personnel from each Council |
| **Roving Ambassador Program** | Low | Over 55s travellers, caravan and camping market, short break visitors, food and wine visitors, accessible tourism | Throughout the region | $15k (training) | Low – Medium | Public | ▪ Tourism Industry Taskforce |

# 7. TOURISM COORDINATION FOR MACARTHUR

# 7.  Tourism Coordination for Macarthur

## 7.1.    The Challenge for Macarthur

One of the challenges which the tourism sector in Macarthur faces is the ability to create a unified voice for lobbying Government at all levels for various forms of support. Historically various formats of LTOs have been setup in an attempt to create a more unified tourism industry. Despite best efforts, these models have not produced a successful outcome.

An option discussed by several stakeholders was the renewed need for a local tourism organisation (LTO) for Macarthur. The purpose of the LTO would be to:

- act as the voice of the tourism industry operators within Macarthur;
- to provide a forum where the tourism industry can network and discuss any issues/opportunities;
- provide a forum for industry to discuss and debate issues and options;
- to meet regularly with DNSW to garner support for various marketing and promotional initiatives particularly; and
- to lobby both Councils for support for on various tourism related infrastructure and development support projects.

## 7.2.    Requirements for an industry operated LTO

Prior to a viable LTO being established, however, there are a number of criteria which are required, including:

- the ability of tourism industry stakeholders and operators within Macarthur to form a peak

body which is widely supported by industry (there is little point if many will not join an LTO);
- to ensure that the LTO is representative of industry and covers all aspects of tourism including retail;
- to ensure that it receives recognition and support by each council within the region;
- to ensure that it is able to operate as an independent body rather than as an arm of any council within the region;
- that it is able to raise membership fees or other income to pay for some of its operating costs, with the balance potentially funded by local chambers of commerce and/or council;
- that it is constituted as an incorporated society or other form of legal entity so that it is formally structured rather than ad hoc; and
- that it is truly representative of the various geographic areas within Macarthur and different types of operators.

Generally in destinations, the creation of a LTO is often part of an evolutionary process in the maturing of tourism. It requires commonality and agreement of purpose amongst competing operators and areas to recognise that their ability to lobby and leverage support from government at various levels is dependent on playing as a "team". It is also highly dependent on an agreed common purpose and outcome being achieved.

## 7.3. Forming an LTO in Macarthur

Currently within Macarthur, there are limited groups (aside from each Council) which would appear to be providing a voice for the tourism sector. It would appear that there are different and divergent views at times between tourism operators within each of the LGAs on what they perceive the future of tourism in the Macarthur may look like. Whilst there is likely to be agreement on some issues, it is considered too early to determine that a common single LTO could be formed to represent the views, aspirations and outcomes required by industry throughout Macarthur.

## 7.4. The Suggested Way Forward

As such, forming an industry operated LTO is currently considered slightly premature for Macarthur. To be representative of the various tourism stakeholder groups throughout Macarthur, it is therefore suggested that an interim solution be found. This could involve:

- an industry taskforce being established which comprises representatives from each Council as well as industry members which are representative of both the Camden and Campbelltown LGAs;
- the Taskforce is not a 355 committee but rather an "unofficial" committee of both Councils;
- the Taskforce acts as the voice of local tourism stakeholders and the conduit between each Council and the various stakeholder groups; and
- this process will strengthen communication and will support the creation of more unified

views and expectations by each of the local tourism stakeholder groups.

The Taskforce should also look to actively engage industry throughout the region, possibly including holding four – five networking nights per annum.

As each Council has demonstrated its commitment to continue to play a key role as an "enabler" of tourism for the region, this offers an appropriate interim step until such time in the future that a strong and vibrant LTO is able to be created.

# 8. ECONOMIC OUTCOMES

# 8. Economic Outcomes



## 8.1. Assessment of the Net Economic Benefit

The following section provides an overview of the likely benefits that could be generated as a result of the implementation of this DMP and the opportunities identified within it.

### 8.1.1. Output/Sales

Total output/sales is the total gross value of sales generated by the tourism industry in the Macarthur region[39] and comprises the sum of local sales as well as international and domestic exports.

Over the six year period from 2009 - 2014, total tourism industry output in the Macarthur region grew by 15% ($86mm), increasing from $567.8m in 2009 to $653.6m.[40] These figures reflect the contribution of gross sales to local GDP.

### 8.1.2. Employment

Tourism related employment accounts for 6% of total employment in Macarthur, generating just over 4k[41] direct[42] and indirect[43] jobs in the 2014 FY.

It is important to note that whilst this percentage would appear low (as a percentage of total employment by industry sector) it is the potential growth which should be focused on. For example introduction of a conference venue attached to the Campbelltown Stadium or other large facilities could significantly increase tourism-related employment.

Though the data indicates a decline of 15% over the 6 year period assessed (2009 – 2014), the potential exists to turn this around through stimulating a number of new visitor experiences and products, including in retail, food and beverage and new visitor experiences.

Tourism has the potential to significantly grow its importance to the employment base for Macarthur and most importantly, act as a catalyst to stimulate employment for both younger people (which will encourage more of them to stay in the region and others to relocate to the region) and mature aged people who will find casual, part time and potential full time employment options which the region will benefit from.

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[39] Including only the LGAs of Camden and Campbelltown
[40] Value of Tourism and Hospitality, Economy ID (National Economics (NIEIR) - Modelled series)
[41] Value of Tourism and Hospitality, Economy ID (National Economics (NIEIR) - Modelled series)
[42] Direct employment is people who are directly employed in tourism and hospitality related jobs within the area.

[43] Indirect employment is people who are employed as a result of the flow-on effects of employment in tourism and hospitality to other related intermediate industries, as well as the increase in local consumption created by the wages and salaries of tourism and hospitality workers, which in turn creates additional employment.

Tourism offers the potential to attract people across a very wide age range to work in the sector full-time, part-time and on a casual basis.

## 8.2. Visitor Spend

In the absence of visitor spend data[44], The Group has averaged visitor spend in the LGAs of Penrith, Blue Mountains, Wingecarribee and Wollongong and applied this average to Macarthur's visitor numbers to obtain total visitor spend.

The following table provides an overview of estimated visitor spend by visitors to Macarthur.

TABLE 11: VISITOR SPEND BREAKDOWN[45]

| Visitor Segment | Total | Per Visitor | Per night |
|---|---|---|---|
| Domestic Day Visitors | $96.0m | $88 | n/a |
| Domestic Overnight Visitors | $89.3m | $400 | $161 |
| International Visitors | $28.5m | $1,355 | $82 |

While international visitors are estimated to have the greatest spend per trip ($1,355), domestic overnight visitor's yield the greatest spend on a per night basis ($400 per night). Domestic day trippers contribute the smallest amount at just $88 per trip. This demonstrates the importance of the domestic overnight visitor market to Macarthur and the need to focus on initiatives which may assist in converting domestic day trippers to domestic overnight visitors.

Development of new commercial accommodation facilities is therefore an important catalyst for increasing spending levels.

## 8.3. Growth in the Net Economic Benefit

### 8.3.1. Visitor Forecast Scenarios

To estimate the growth in the net economic benefit of growing Macarthur's tourism sector, a series of visitor growth forecasts have been developed.[46] These forecasts range from a low growth scenario to a high growth scenario. The table provided in Supporting Documentation 4 illustrates these growth scenarios over a 10 year period. Key points to note include the following.

- Under the low growth scenario, visitation, over the 10 year period, grows from 1.33m to 1.77m, a total growth of 436k visitors (or a 33% increase). This level of growth reflects natural growth in visitation to the Macarthur, with little-to-no new product development.

- Under the medium growth scenario, visitation grows by 61%, increasing from 1.33m to 2.14m visitors. The majority of growth under this scenario originates from domestic day trip visitors, growing from 1.1m to 1.8m. To achieve this level of growth, it is assumed that

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[44] Discussions with DNSW revealed that this data is not available due to a small sample size and a large margin of error
[45] Based on data provided by DNSW as part of a special data request.

[46] At the time of this writing, no existing visitor forecasts for the Macarthur region were available.

it would necessitate expansion by major existing tourism operators in the Macarthur region.

- Under the high growth scenario, visitation more than doubles, increasing from 1.33m to 2.8m, a total growth of 1.47m visitors. This growth has been based on the introduction of approximately 8 – 12 new medium - larger tourism operators (attractors, experiences, accommodation facilities, tours, events etc.) in the region.

### 8.3.2. Growth in Visitor Spend

Based on the visitor forecasts developed, and using existing visitor spend figures for visitors to the Macarthur region, The Group has provided top line estimates of the growth in visitor spend under each forecast scenario. The table provided in Supporting Documentation 5 page provides the results of this assessment.

Points to note include the following.

- Under the low growth scenario, spend increases from an estimated $214m in 2014 to just under $262m by 2024, a total growth of 33%.
- Under the medium growth scenario, visitor spend increases by over 60%, growing from $214m to just under $345m.
- Under the high growth scenario, visitor spend increases by $227m, growing from $214m to just over $441m.

Importantly, these forecasts in visitor spend should be considered conservative as they make no

provision for increases in average visitor spend per person. The introduction of new overnight accommodation facilities would result in higher visitor expenditure associated with spend on consumables, accommodation, food and beverage and other goods and services.

### 8.4. Tourism Multipliers

In addition to the direct expenditure from visitors, there are associated visitor expenditure multiplier effects into the local economy. These flow-on effects have been expressed as a tourism output multiplier of 0.92[47], being that for every dollar spent by visitors in Macarthur, the broader local economy is estimated to benefit a further $0.92. These flow-on benefits go beyond traditional sectors associated with the tourism industry, to include sectors such as administration and wholesale trade, thus demonstrating the interconnectedness of tourism to other parts of the economy.

The growth of the tourism sector in the Macarthur region (through new developments, upgrades of existing product, new events, marketing etc.) will support a range of other sectors in the region. The table in Supporting Documentation 6 provides an overview of the results achieved when applying the tourism multiplier of 0.92 to the current estimated value of tourism in Macarthur and the forecasted growth scenarios.

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[47] Tourism's Contribution to the Australian Economy 1997-98 to 2009-10, Department of Resources, Energy and Tourism

Key points to note include the following.

- Applying the tourism multiplier to the total spend by visitors to Macarthur of $214m (2013/14 estimate), produces an estimated $197m as additional annual spend in the local economy.

- Under the low visitor forecast scenario it has been estimated that cumulative visitor spend will total $2.51b over the 10 year period assessed (2015 – 2024). Applying the tourism multiplier to this visitor spend figure produces an estimated additional $2.31b spend in the local economy.

- Visitor spend under the medium growth scenario totals $2.8b over the 10 year period 2015 – 2024, with a multiplier effect of $2.58b.

- Under the high visitor growth scenario, visitor spend is estimated to total $3.25b. Applying the multiplier to this spend figure results in an estimated additional $2.99b being spent in the local economy over the 10 year period assessed.

As can be seen in the above assessment, the contribution to the Macarthur regional economy from tourism can be significant.

Furthermore, the economic values are conservative as they do not reflect higher average visitor spend attributed to a broader range of products and amenities and invariable price increases which will occur.

The upside benefits to Macarthur, therefore, from supporting and growing the tourism sector, should be considered significant.

# 9. TOURISM MARKETING ACTION PLAN

# 9. Tourism Marketing Action Plan

The following are the key result areas to be focused on to help facilitate the successful implementation of this DMP.

Please note that this action plan contains steps required to realise future opportunities and achieve the recommendations included in this DMP, as well as supplementary actions that can be undertaken to further the success of this DMP.

Short term strategies are those to be implemented within the next two years (2016-2018), medium term are those within the following three years (2019 - 2021) and long term includes those to be undertaken after five or more years (2022 onwards) but which may need to commence in the medium term.

**TABLE 12: KEY PERFORMANCE AREA 1**

| Tourism Product Development & Partnership Opportunities | | | | |
|---|---|---|---|---|
| **Action** | **Tasks** | **Responsibility** | **Timeframe** | **KPIs** |
| **Holiday Park Development Feasibility Assessment** | ▪ Council to investigate possible land sites it has which could be used and zoned for the development of the destination park<br>▪ Feasibility assessment undertaken to indicate viability of the destination park<br>▪ If viable, Council to put opportunity out to tender for reputable park operators (including current operators of Poplar Tourist Park) | Camden and Campbelltown City Council (for feasibility) | Short Term (feasibility)<br><br>Medium – Long Term (project development) | ▪ Land assessment to be undertaken by January 2017<br>▪ Make contact with destination park operators by June 2017 to determine potential costs associated and revenue generating opportunities<br>▪ Undertake feasibility by July 2017<br>▪ If a positive outcome then solicit destination park investor interest in development at the site. |
| **Haunted Attraction and Festival Feasibility Assessment** | ▪ Undertake a feasibility assessment to investigate the development of a haunted attraction. This should include a site assessment of old Council sites which could provide space for the attraction and should leverage off the marketing profile of the Fisher's Ghost Festival held in Campbelltown.<br>▪ Undertake discussions with similar attractor operators to gauge interest for developing/operating the attraction | Tourism Industry Taskforce | Short – Medium Term (feasibility)<br><br>Medium – Long Term (project development) | ▪ Feasibility to be undertaken by December 2017<br>▪ Discussions with similar attractor operators to be undertaken by March 2018 |
| **SW Sydney Integrated Sports Precinct (including integrated café/restaurant and entertainment precinct) Full Feasibility Assessment** | ▪ Complete a full feasibility, including cost benefit assessment, on the potential for a major sports precinct<br>▪ Submit the feasibility to State Treasury for a Gateway Review on the basis that it will require State Government funding support<br>▪ Securing funding for the development and implementation | Campbelltown City Council | Short Term (feasibility and gateway review)<br><br>Long Term (project development) | ▪ Undertake full feasibility by July 2016<br>▪ Initiate Gateway Review by November 2016<br>▪ Assuming positive response submit to State Government on or before June 2017 |

| Tourism Product Development & Partnership Opportunities | | | | |
|---|---|---|---|---|
| **Action** | **Tasks** | **Responsibility** | **Timeframe** | **KPIs** |
| **SW Sydney Arts Hub Expansion** | ▪ Undertake full feasibility to support arts expansion<br>▪ Determine optimum regional initiatives<br>▪ Submit the feasibility to State Treasury for a Gateway Review on the basis that it will require State Government funding support<br>▪ Securing funding for development and implementation including expansion of existing facilities | Campbelltown City Council,<br><br>Arts NSW<br><br>Regional arts bodies | Short Term (feasibility and gateway review)<br><br>Medium – Long Term (project development) | ▪ Undertake full feasibility by June 2016<br>▪ Initiate Gateway Review by August 2016<br>▪ Assuming positive response submit to State Government on or before June 2017 |
| **Food Trails and Cooking Schools Feasibility Assessment** | ▪ Undertake feasibility for the development of a cooking school which caters for both adults and children. This will involve investigating possible demand, the most suitable location, potential operators and grants which could be applied for<br>▪ Work with industry to develop and market a range of food trails (possibly tied in with art trails) throughout the Macarthur region | Tourism Industry Taskforce | Medium Term (feasibility)<br><br>Medium – Long Term (project development) | ▪ Feasibility to be undertaken by December 2018<br>▪ If positive outcome, then solicit operator interest by June 2019<br>▪ Introduce by December 2020 |
| **Australian Botanic Garden Sound and Light Show Feasibility Assessment** | ▪ Undertake feasibility regarding the development of a sound and light show to showcase heritage stories of the region at the Australian Botanic Garden (ABG) in Mount Annan, using the natural environment as the backdrop for the show | Tourism Industry Taskforce with assistance from the ABG | Short Term (feasibility)<br><br>Medium Term (project development) | ▪ Feasibility to be undertaken by December 2017<br>▪ If positive outcome, then solicit operator interest by June 2018<br>▪ Introduce by December 2019 |
| **Botanic Garden Amphitheatre and Sculpture Garden, Horse Trails and Luge Feasibility Assessment** | ▪ Undertake feasibility study and business case development to assess the development of an amphitheatre and possibly sculpture garden at the ABG. Also feasibility for horse trails and luge attraction.<br>▪ Determine priority project, partner potential | Tourism Industry Taskforce with assistance from the ABG | Short Term (feasibility)<br><br>Medium Term (project development) | ▪ Feasibility to be undertaken on or before January 2017<br>▪ If positive outcome, then solicit operator interest by June 2017<br>▪ Introduce by December 2018 |
| **Boutique Glamping in Reserves Feasibility Assessment** | ▪ Council to investigate possible land sites it has which could be used and is suitably zoned for the development of glamping<br>▪ Feasibility assessment undertaken to indicate viability of the glamping operation, including number required to operate viably.<br>▪ If viable, Council to put opportunity out to tender for reputable glamping operators | Both Councils | Short Term (feasibility)<br><br>Medium Term (project development) | ▪ Land assessment to be undertaken by March 2018<br>▪ Feasibility assessment to be undertaken by December 2018<br>▪ Tender put out by February 2019 |
| **Development of Macarthur Arts Trails** | ▪ Work with industry to develop and market a range of art trails (possibly tied in with food trails) throughout the Macarthur region | Tourism Industry Taskforce, art community and industry operators | Short Term | ▪ 2 trails developed and marketed by June 2018<br>▪ A further 2 trails developed and marketed by December 2019 |

| Tourism Product Development & Partnership Opportunities | | | | |
|---|---|---|---|---|
| **Action** | **Tasks** | **Responsibility** | **Timeframe** | **KPIs** |
| **National Equine Experience Centre Feasibility Assessment** | ▪ Undertake a feasibility (possibly go out to specialist firms to undertake feasibility) on the development of a national equine interactive centre. This should include a detailed site assessment as there are various sites throughout the region which could be suitable | Tourism Industry Taskforce | Short Term (feasibility)<br><br>Medium - Long Term (project development) | ▪ Feasibility to be undertaken by November 2017 |
| **Glenfield to Macarthur Urban Renewal Corridor Strategy tourism activations** | ▪ Identify walkways, cycle ways, information hubs and interpretation and directional information boards, heritage sites of significance<br>▪ Prioritise staging and integrate into renewal corridor<br>▪ Identify opportunities for commercial seasonal tourism activities, | Campbelltown City Council | Short Term (feasibility)<br><br>Medium - Long Term (project development) | ▪ Investigation by June 2016 |
| **Regional Sports Facility and Elite Sport Centre** | ▪ Assess viability – completed June 2015<br>▪ Determine economic value and benefits to visitor economy<br>▪ Gain support from State Government<br>▪ Gather support from NRL, AFL, and other sports codes<br>▪ Assess and secure funding sources<br>▪ Develop facilities | ▪ Campbelltown City Council<br>▪ State Sport Bodies<br>▪ WSU | Short Term (feasibility)<br><br>Medium - Long Term (project development) | ▪ Complete follow up investigations by June 2016<br>▪ Refinement and development subject to sporting codes support and State and Federal Governments matching support |
| **Bush Corridors for Leisure Tourism** | ▪ Assess locations for activation<br>▪ Undertake feasibility for determining market demand for various tourism activities<br>▪ Assess and secure funding sources | ▪ Both Councils<br>▪ NSW State Government | Short Term (feasibility)<br><br>Medium - Long Term (project development) | ▪ Assess by February 2017<br>▪ Feasibility study for individual projects by June 2017<br>▪ Implement by June 2018 |
| **Motor Sport and Technology Precinct** | ▪ Undertake site assessment study to identify possible sites which could cater for the precinct<br>▪ Complete feasibility to determine the viability of introducing a new motor sport precinct and how this might be funded | Tourism Industry Taskforce | Short Term (investigation)<br><br>Medium – Long Term (development – if proven viable) | ▪ Investigation to be undertaken by March 2017 |
| **Regional Music Festival Investigation** | ▪ Undertake investigation for the introduction of a music festival in the region, possibly focused on the rock music genre. Investigation should including assessment of possible locations, including the 10k pax outdoor area within the Australian Botanic Garden as well as discussions with possible event promoters. | Tourism Industry Taskforce | Short Term (investigation)<br><br>Medium – Long Term (festival introduction) | ▪ Investigation to be undertaken by January 2017, including discussions with event promoters and location assessment |
| **Creation and Marketing of Riverside Activity** | ▪ Work with stakeholders to create a series of riverside walks, activity nodes and experiences. Some of the walks may already exist and may just require better profiling, signage and marketing. | Tourism Industry Taskforce, Councils, NPWS and other Government agencies | Short – Medium Term | ▪ Riverside walks profiling and packaging to commence by December 2017 |

| Tourism Product Development & Partnership Opportunities | | | | |
|---|---|---|---|---|
| **Action** | **Tasks** | **Responsibility** | **Timeframe** | **KPIs** |
| **Aviation Museum Feasibility Assessment** | ▪ Undertake a feasibility (possibly go out to specialist firms to undertake feasibility) on the development of an aviation museum. This should include a detailed site assessment as there are various sites (including the Camden Airport) throughout the Camden LGA which could be suitable | Tourism Industry Taskforce | Medium Term (feasibility)<br><br>Long Term (project development | ▪ Feasibility to be undertaken by December 2019 |
| **Aviation Business Park Feasibility** | ▪ Feasibility study to assess potential to develop an aviation business park/precinct at Camden | Camden Council and Airstrip operator/land owner | Medium Term (feasibility)<br><br>Long Term (project development) | ▪ Feasibility to be undertaken by April 2021 |
| **River Access Assessment** | ▪ Undertake assessment into possible points of river access throughout the region, where tourism-based activity could be undertaken | Tourism Industry Taskforce | Medium – Long Term | ▪ Assessment to be undertaken by July 2017 |
| **Creation of Macarthur Investment Memorandum** | ▪ Create an investment memorandum to stimulate investment by developers into Macarthur<br>▪ Investment memorandum should indicate the types of development in tourism which each Council will actively support | Both Councils | Short term | ▪ Memorandum drafted and approved by March 2017 |

**TABLE 13: KEY PERFORMANCE AREA 2**

| Marketing & Promotion Opportunities | | | | |
|---|---|---|---|---|
| **Action** | **Tasks** | **Responsibility** | **Timeframe** | **KPIs** |
| **Creation of a Brand Identity for the Macarthur tourism region** | ▪ Development of regional destination identity, as well as potential sub-brands for Campbelltown and Camden in consultation with the tourism industry<br>▪ Creation of an EOI for the development of a brand for the Macarthur region (and its two LGAs as sub-brands)<br>▪ Selection of a brand designer | Each Council, Tourism Industry Taskforce | Short term | ▪ Undertake workshops with tourism industry to discuss identity concepts by January 2017<br>▪ Have identities drafted by February 2017<br>▪ Have identities confirmed by April 2017 |
| **Development of Updated Website and Integrated Augmented Reality Mobile App** | ▪ Once identity is developed for Macarthur, commission developer to design an updated website and integrated mobile app (or mobile accessible site) | Tourism Industry Taskforce and web/app developer | Short Term | ▪ Commission web developer by end of April 2017<br>▪ Have draft website and app/mobile accessible site ready by end of July 2017<br>▪ Launch website and app by August 2017 |
| **Packaging of Product** | ▪ Identify product which could be packaged and promoted including accommodation, transport, activities etc.<br>▪ This will involve a wide range of stakeholders but Council and the Tourism Subcommittee need to take a leadership role and undertake the facilitation for this | Tourism Industry Taskforce and Macarthur tourism industry | Ongoing | ▪ Work with Macarthur tourism industry to develop 3 packages by March 2017<br>▪ Packages to be promoted from April 2017<br>▪ A further 3 packages to be developed and promoted by January 2018 |

| Marketing & Promotion Opportunities | | | | |
|---|---|---|---|---|
| Action | Tasks | Responsibility | Timeframe | KPIs |
| **Development of an Events Calendar** | ▪ Development of events calendar, to be available via the destination website | Tourism Industry Taskforce and event coordinators | Ongoing | ▪ Collation of all future events (next 1 – 2 years) and roll out on new website (to be developed by November 2017)<br>▪ Ongoing updating of events calendar |
| **Creation and Application of an Event Evaluation Criteria** | ▪ Tourism Industry Taskforce, working with economic development personnel at each Council, to develop a criterion to assess proposed events and their likely benefit.<br>▪ Criteria could include likely cost of event, level of industry and community support, ability to leverage off funding sources to support the event, timing of the event and visitor markets the event is likely to attract<br>▪ Application of event success criterion to existing council-run and supported events to ensure events list includes on those with the greatest economic and social benefit | Tourism Industry Taskforce and Council economic development personnel | Short Term and Ongoing | ▪ Event success criterion to be developed by June 2017<br>▪ Criterion to be applied to all new events ongoing<br>▪ Events success criterion applied to current events by December 2017 |
| **Development of a Community Tourism Awareness Campaign** | ▪ Develop a community tourism awareness program which demonstrates the contribution of tourism to the Macarthur economy | Tourism Industry Taskforce | Short - Medium Term | ▪ Community awareness program rolled out by December 2018 |
| **Creation of a Medical Tourism Strategy** | ▪ Create EOI for the development of a medical tourism strategy<br>▪ Selection of firm to develop strategy | Tourism Industry Taskforce | Medium Term | ▪ EOI to be released to selected firms by January 2018<br>▪ Firm to be selected by March 2018<br>▪ Strategy to be developed by July 2018 |
| **Car Enthusiast Destination Promotion** | ▪ Develop marketing programme to promote the Macarthur as a region for car touring by car clubs and car enthusiasts | Tourism Industry Taskforce | Medium Term | ▪ Marketing programme to be developed and introduced by May 2018 |
| **Greater Profiling of Bird Watching** | ▪ Greater profiling of bird watching experiences through promotion in bird watching/wildlife magazines, via social media, product packaging etc. | Tourism Industry Taskforce with assistance of the ABG | Ongoing | ▪ Start increased profiling of these experiences by January 2018 |

**TABLE 14: KEY PERFORMANCE AREA 3**

| Industry Support Opportunities | | | | |
|---|---|---|---|---|
| **Action** | **Tasks** | **Responsibility** | **Timeframe** | **KPIs** |
| **Creation of an EOI and Selection of Tourism Industry Taskforce** | ▪ Develop Expression of Interest seeking strategically-minded local community members (and possibly embers outside the region who have a keen interest) to join the Tourism Industry Taskforce.<br>▪ The selection panel for the EOI should consist of internal Council personnel and an external stakeholder<br>▪ Skill base required includes: digital/technology skills, innovation/forward thinking skills and finance skills<br>▪ The taskforce should meet every 3 months to discuss progress | Council | Short term | ▪ Develop EOI by January 2017<br>▪ Tourism Industry Taskforce to be selected by June 2017 |
| **Development of the Terms of Reference for the Taskforce** | ▪ Develop the "Terms of Reference" for the Taskforce | Council | Short term | ▪ Terms of reference to be developed by March 2017 |
| **Review the Composition of the Taskforce** | ▪ The Taskforce will be a term commitment determined by both Councils including a timeframe for reviewing its composition. | Council | Ongoing | ▪ Review composition of the Taskforce according to timeframe determined by both Councils<br>▪ Resubmit the EOI if the composition of the Taskforce needs to change |
| **Development of Visitor Data Base** | ▪ Establish survey for capturing all visitation<br>▪ Garner support from all accommodation operators, attractions, event coordinators, performance and related venues<br>▪ Capture and collate visitor trends on a monthly basis<br>▪ Record findings and release to industry every quarter | Councils | Ongoing | ▪ 85% or more of industry operators and venue operators send in visitor data sheets each month on line<br>▪ Quarterly report to industry well received<br>▪ Determination of industry enhancements and gaps needing to be filled via feedback |

**TABLE 15: KEY PERFORMANCE AREA 4**

| Visitor Servicing Opportunities | | | | |
|---|---|---|---|---|
| **Action** | **Tasks** | **Responsibility** | **Timeframe** | **KPIs** |
| **Review of Visitor Information Services throughout Macarthur** | ▪ Develop a visitor information services strategy for Macarthur focusing on the current provision of visitor information and opportunities that exist to increase the ROI of visitor information services | Each Council and the Tourism Industry Taskforce | Short – Medium Term | ▪ Undertake investigation by June 2018<br>▪ Implement changes by October 2019 |
| **Feasibility to Assess Location of Camden VIC** | ▪ Undertake a feasibility study to assess the location and possible other sites which the Camden VIC could be located to increase its exposure and access | Camden Council | Short Term | ▪ Undertake feasibility study concurrently with above review by December 2017 |

| Visitor Servicing Opportunities | | | | |
|---|---|---|---|---|
| Action | Tasks | Responsibility | Timeframe | KPIs |
| **Investigate Free Wi-Fi at the VICs** | ▪ Tourism Industry Taskforce to investigate the provision of free Wi-Fi in the two VICs as a method of encouraging vibrancy and use of the VICs | Tourism Industry Taskforce and each Council | Medium Term | ▪ Undertake investigation by September 2018 |
| **Development of a Regional Signage Program** | ▪ Development of a signage strategy which identifies ideal signage locations to promote Macarthur's attractions/experiences in a highly appealing way<br>▪ The signage strategy should also assess the need and appropriate location for directional signage across the region | Each Council, DNSW | Short – Medium Term | ▪ Signage strategy to be developed by September 2018<br>▪ Designs for new signage completed and tested by January 2019<br>▪ New signage submitted for State Govt. approval by March 2019<br>▪ New signage is installed no later than 4 months post State Govt. approval |
| **Development of a Roving Ambassador Program** | ▪ Development of volunteer-based, roving ambassador program, particularly during peak visitor periods. | Tourism Industry Taskforce | Medium Term | ▪ Establish and implement program by March 2019<br>▪ Sign up 20 volunteers at program start date<br>▪ Increase volunteer base by 10% per annum from program start date |
| **Gateway Landscaping** | ▪ Develop a landscape strategy for gateway points into the Macarthur region | Each Council | Medium – Long Term | ▪ Develop landscape strategy by December 2019<br>▪ Implement landscape strategy by December 2020 |

# 10. SUPPORTING DOCUMENTATION

# 10.  Supporting Documentation

## Supporting Documentation 1: Tourism Product Audit

| Name | LGA | Suburb | Type | Free or Pay For |
|---|---|---|---|---|
| Balloon Aloft Sydney | Camden | Camden | Active / Adventure | Pay For |
| Curtis Aviation | Camden | Camden | Active / Adventure | Pay For |
| Dynamic Helicopters | Camden | Camden | Active / Adventure | Pay For |
| Gostner Aviation | Camden | Camden | Active / Adventure | Pay For |
| Southern Cross Gliding Club | Camden | Camden | Active / Adventure | Pay For |
| Ultimate Paintball | Camden | Camden Park | Active / Adventure | Pay For |
| Jump Zone Revolution | Camden | Gregory Hills | Active / Adventure | Pay For |
| Enduro Trail Mountain Biking | Camden | Mount Annan | Active / Adventure | Free |
| Playmaze for Kids | Camden | Narellan | Active / Adventure | Pay For |
| Ultimate Karting Sydney | Camden | Smeaton Grange | Active / Adventure | Pay For |
| Camden Museum & Historical Society | Camden | Camden | Arts, Cultural, Heritage | Free |
| Camden Park House (Only Open to Public Once Yearly) | Camden | Camden | Arts, Cultural, Heritage | Pay For |
| Camden Society of Artists | Camden | Camden | Arts, Cultural, Heritage | Free |
| Gledswood Homestead Historic Property & Tours | Camden | Catherine Field | Arts, Cultural, Heritage | Pay For |
| John Oxley Cottage Historic Property | Camden | Elderslie | Arts, Cultural, Heritage | Free |
| Wivenhoe House Historic Property | Camden | Kirkham | Arts, Cultural, Heritage | Free |
| Cobbitty Winery | Camden | Cobbitty | Brewery/Winery | Pay For |
| Camden Estate Wines | Camden | Elderslie | Brewery/Winery | Pay For |
| Gledswood Homestead Wines | Camden | Gledswood Hills | Brewery/Winery | Pay For |
| Fussy Grape Winery | Camden | Oran Park | Brewery/Winery | Pay For |
| United Cinemas | Camden | Narellan | Entertainment | Pay For |
| Back Galley Cafe High Tea | Camden | Camden | Food Experience | Pay For |
| Barenz High Tea | Camden | Camden | Food Experience | Pay For |
| Gledswood Country High Tea | Camden | Catherine Field | Food Experience | Pay For |
| Harrington Grove Country Club High Tea | Camden | Harrington Park | Food Experience | Pay For |
| Camden Fresh Produce Markets | Camden | Camden | Market | Free |
| Macarthur Community Indoor Markets | Camden | Camden | Market | Free |
| Pitter Patter Markets | Camden | Camden | Market | Free |
| Cobbitty Village Markets | Camden | Cobbitty | Market | Free |
| Macarthur Regional Farmers Market | Camden | Mount Annan | Market | Free |
| Camden Community Garden | Camden | Camden | Parks & Reserves | Pay For |
| Macarthur Park | Camden | Camden | Parks & Reserves | Free |
| Curry Reserve | Camden | Elderslie | Parks & Reserves | Free |
| Macarthur Centre for Sustainable Living | Camden | Mount Annan | Parks & Reserves | Free |
| The Australian Botanic Garden | Camden | Mount Annan | Parks & Reserves | Free |
| William Howe Reserve | Camden | Narellan Vale | Parks & Reserves | Free |
| Camden Bicentennial Equestrian Park | Camden | Camden | Recreation | Pay For |
| Camden Main Street | Camden | Camden | Recreation | Free |
| Camden RSL Club | Camden | Camden | Recreation | Pay For |
| Camden Sports Club | Camden | Camden | Recreation | Pay For |
| Camden Swimming Pool | Camden | Camden | Recreation | Pay For |
| Camden Town Farm | Camden | Camden | Recreation | Pay For |
| Nepean River Cycleway | Camden | Camden | Recreation | Free |
| Lakeside Country Club | Camden | Catherine Field | Recreation | Pay For |
| Cobbitty Village | Camden | Cobbitty | Recreation | Free |
| Teen Ranch Camps | Camden | Cobbitty | Recreation | Pay For |
| Camden Skate Facility | Camden | Elderslie | Recreation | Free |
| Sydney Horse Riding Centre | Camden | Gledswood Hills | Recreation | Pay For |

| Name | LGA | Suburb | Type | Free or Pay For |
|---|---|---|---|---|
| Mount Annan Leisure Centre YMCA | Camden | Mount Annan | Recreation | Pay For |
| Camden Golf Club | Camden | Narellan | Recreation | Pay For |
| Narellan Town Centre | Camden | Narellan | Recreation | Free |
| Maximum Skating | Camden | Smeaton Grange | Recreation | Pay For |
| Aerowasp Helicopter Flights | Camden | Camden | Tour Operator | Pay For |
| Air Combat Australia | Camden | Camden | Tour Operator | Pay For |
| Belganny Farm (Organised Tours and Special Events Only) | Camden | Camden | Tour Operator | Pay For |
| Camden Aviation | Camden | Camden | Tour Operator | Pay For |
| Camden Heritage Walking Tour | Camden | Camden | Tour Operator | Free |
| Macarthur Food and Wine Tours | Camden | Camden | Tour Operator | Pay For |
| United Aero Helicopters | Camden | Camden | Tour Operator | Pay For |
| Wivenhoe House Tours | Camden | Kirkham | Tour Operator | Pay For |
| Narellan Heritage Walking Tour | Camden | Narellan | Tour Operator | Free |
| Macarthur Winter Warmer Tour | Camden | Oran Park | Tour Operator | Pay For |
| M9 Laser Skirmish | Campbelltown | Campbelltown | Active / Adventure | Pay For |
| Fastlane Go Karting | Campbelltown | Minto | Active / Adventure | Pay For |
| Campbelltown Arts Centre | Campbelltown | Campbelltown | Arts, Cultural, Heritage | Free |
| Campbelltown Craft Society | Campbelltown | Campbelltown | Arts, Cultural, Heritage | Free |
| Dredge's Cottage | Campbelltown | Campbelltown | Arts, Cultural, Heritage | Free |
| Glenalvon - Campbelltown and Airds Historical Society | Campbelltown | Campbelltown | Arts, Cultural, Heritage | Free |
| Japanese Gardens and Teahouse | Campbelltown | Campbelltown | Arts, Cultural, Heritage | Free |
| Quondong Cottage Historic Property | Campbelltown | Campbelltown | Arts, Cultural, Heritage | Free |
| Campbelltown Steam and Machinery Museum | Campbelltown | Menangle Park | Arts, Cultural, Heritage | Pay For |
| Menangle House Historic Property | Campbelltown | Menangle Park | Arts, Cultural, Heritage | Pay For |
| Infusion Bar & Microbrewery | Campbelltown | Campbelltown | Brewery/Winery | Pay For |
| The Beer Shed | Campbelltown | Leumeah | Brewery/Winery | Pay For |
| Razorback Ridge Wines | Campbelltown | Menangle Park | Brewery/Winery | Pay For |
| Campbelltown Town Hall Theatre | Campbelltown | Campbelltown | Entertainment | Pay For |
| Dumaresq Street Cinemas | Campbelltown | Campbelltown | Entertainment | Pay For |
| Event Cinemas | Campbelltown | Campbelltown | Entertainment | Pay For |
| The CUBE Entertainment Centre | Campbelltown | Campbelltown | Entertainment | Pay For |
| Arts Centre Cafe Sunday High Tea | Campbelltown | Campbelltown | Food Experience | Pay For |
| Infusion Restaurant High Tea | Campbelltown | Campbelltown | Food Experience | Pay For |
| Bradbury Market on the Parkway | Campbelltown | Bradbury | Market | Free |
| Eat. Shop. Love. - Macarthur Markets | Campbelltown | Campbelltown | Market | Free |
| First Friday Foodie Feast Market | Campbelltown | Campbelltown | Market | Free |
| Waminda Craft Markets | Campbelltown | Campbelltown | Market | Free |
| Markets Are Us | Campbelltown | Ingleburn | Market | Free |
| Tiny Tots Baby Market | Campbelltown | Ingleburn | Market | Free |
| Boot Hill Markets | Campbelltown | Minto | Market | Free |
| Ingleburn Reserve | Campbelltown | Ingleburn | Natural Areas | Free |
| Frere's Crossing | Campbelltown | Kentlyn | Natural Areas | Free |
| Keith Longhurst Reserve | Campbelltown | Kentlyn | Natural Areas | Free |
| Simmo's Beach | Campbelltown | Macquarie Fields | Natural Areas | Free |
| Dharawal National Park | Campbelltown | Wedderburn | Natural Areas | Free |
| Koshigaya Park | Campbelltown | Campbelltown | Parks & Reserves | Free |
| Mawson Park | Campbelltown | Campbelltown | Parks & Reserves | Free |
| Sculpture Garden | Campbelltown | Campbelltown | Parks & Reserves | Free |
| Pembroke Park | Campbelltown | Minto | Parks & Reserves | Free |
| Apex park Cycleway | Campbelltown | Bradbury | Recreation | Free |
| Gordon Fetterplace Aquatic Centre | Campbelltown | Bradbury | Recreation | Pay For |
| Campbelltown Bicycle Education Centre | Campbelltown | Campbelltown | Recreation | Pay For |
| Campbelltown City Bowling Club | Campbelltown | Campbelltown | Recreation | Pay For |
| Campbelltown Main Street | Campbelltown | Campbelltown | Recreation | Free |
| Campbelltown Skate Park | Campbelltown | Campbelltown | Recreation | Free |

| Name | LGA | Suburb | Type | Free or Pay For |
|---|---|---|---|---|
| Kids Kingdom (within the Catholic Club) | Campbelltown | Campbelltown | Recreation | Pay For |
| Kingpin Bowling Macarthur | Campbelltown | Campbelltown | Recreation | Pay For |
| Macquarie Fields Skate Park | Campbelltown | Campbelltown | Recreation | Free |
| Mega Mini Golf | Campbelltown | Campbelltown | Recreation | Pay For |
| Mountain Devils Bushwalking | Campbelltown | Campbelltown | Recreation | Pay For |
| Park Central Cycleway | Campbelltown | Campbelltown | Recreation | Free |
| Sydey Trail Riding Centre | Campbelltown | Denham Court | Recreation | Pay For |
| Eagle Vale Central | Campbelltown | Eagle Vale | Recreation | Pay For |
| Campbelltown Golf Club | Campbelltown | Glen Alpine | Recreation | Pay For |
| Eschol Park Cycleway | Campbelltown | Kearns | Recreation | Free |
| Campbelltown Athletics Centre | Campbelltown | Leumeah | Recreation | Pay For |
| Campbelltown City Bowling Centre | Campbelltown | Leumeah | Recreation | Pay For |
| Campbelltown Sports Stadium | Campbelltown | Leumeah | Recreation | Pay For |
| Lollipops Playland | Campbelltown | Leumeah | Recreation | Pay For |
| Monkey Mania | Campbelltown | Leumeah | Recreation | Pay For |
| Wizard of Oz Funland | Campbelltown | Leumeah | Recreation | Pay For |
| Macquarie Fields Indoor Sports Centre | Campbelltown | Macquarie Fields | Recreation | Pay For |
| Macquarie Fields Leisure Centre | Campbelltown | Macquarie Fields | Recreation | Pay For |
| Macquarie Road Reserve Bike and Triathlon Track | Campbelltown | Macquarie Fields | Recreation | Free |
| Macquarie Links International Golf Club | Campbelltown | Macquarie Links | Recreation | Pay For |
| Sugarloaf Horse Centre | Campbelltown | Menangle Park | Recreation | Pay For |
| Tabcorp Park | Campbelltown | Menangle Park | Recreation | Pay For |
| Campbelltown Indoor Sports Centre | Campbelltown | Minto | Recreation | Pay For |
| Coronation Park Cycleway | Campbelltown | Minto | Recreation | Free |
| Minto Indoor Sports Centre | Campbelltown | Minto | Recreation | Pay For |
| Macarthur Grange Country Club | Campbelltown | Varroville | Recreation | Pay For |
| Camden Country Tour | Campbelltown | Campbelltown | Tour Operator | Pay For |
| Campbelltown Heritage and Cultural Walk | Campbelltown | Campbelltown | Tour Operator | Free |
| Campbelltown Historical Ghost Tours | Campbelltown | Campbelltown | Tour Operator | Pay For |
| Design your own tour of Macarthur | Campbelltown | Campbelltown | Tour Operator | Pay For |
| Fisher's Ghost Explorer Tour | Campbelltown | Campbelltown | Tour Operator | Pay For |
| Ghost and Ghoul Tour | Campbelltown | Campbelltown | Tour Operator | Pay For |
| Glenalvon House Tours | Campbelltown | Campbelltown | Tour Operator | Pay For |
| Heritage and Bushranging Tour | Campbelltown | Campbelltown | Tour Operator | Pay For |
| Menangle Road Explorer Tour | Campbelltown | Campbelltown | Tour Operator | Pay For |
| Ingleburn Heritage Plaque Walking Tour | Campbelltown | Ingleburn | Tour Operator | Free |
| Dharawal National Park Indigenous Walking Tours | Campbelltown | Wedderburn | Tour Operator | Pay For |

## Supporting Documentation 2: Accommodation Audit

| Name | LGA | Suburb | Type | Rate $ (Standard Room) | Rooms | Star Rating |
|---|---|---|---|---|---|---|
| Camden Hillview B&B | Camden | Camden | B&B/Guesthouse/ Farmstay | 180.00 | 1 | - |
| Poplar Tourist Park, Camden | Camden | Elderslie | Camping/Caravan Park | Cabin from $100/Powered Site $32/Unpowered Site $25 | 6 Cabins + Powered Camping Sites | - |
| Teen Ranch | Camden | Cobbitty | Student Accommodation | Unknown | - | 3.5 |
| Camden Valley Inn | Camden | Camden Park | Hotel/Motel | 135.00 | 40 | - |
| Crown Hotel Motel | Camden | Camden | Hotel/Motel | - | 18 | - |
| Narellan Motor Inn | Camden | Narellan | Hotel/Motel | 137.00 | 51 | 3 |
| Wedderburn Christian Campsite | Campbelltown | Wedderburn | Student Accommodation | $40 | 15 cabins | 4 |
| Campbelltown Colonial Motor Inn | Campbelltown | Campbelltown | Hotel/Motel | - | | - |
| Hermitage Motel | Campbelltown | Leumeah | Hotel/Motel | 139.00 | 35 | 3.5 |
| Ibis Budget Campbelltown | Campbelltown | Campbelltown | Hotel/Motel | 69.00 | 72 | 4 |
| Maclin Lodge Motel | Campbelltown | Campbelltown | Hotel/Motel | 95.00 | 65 rooms and 20 self-contained apartments | 3.5 |
| Rydges Campbelltown | Campbelltown | Campbelltown | Hotel/Motel | 159.00 | 116 | 4.5 |
| Quest Campbelltown | Campbelltown | Campbelltown | Serviced Apartments | 154.00 | 81 | 4.5 |
| Hurlstone Group Accommodation | Campbelltown | Glenfield | Student Accommodation | 25.00 | - | - |
| WSU Village | Campbelltown | Campbelltown | Student Accommodation | See Note | - | - |

# Supporting Documentation 3: Food and Beverage Audit

| Name | Type | LGA |
|---|---|---|
| 2 Entice U | Café | Campbelltown |
| The ARThouse Espresso Bar Restaurant | Café | Camden |
| Arts Centre Cafe | Café | Campbelltown |
| The Argyle Gourmet Cafe | Café | Camden |
| Back Galley Cafe | Café | Camden |
| Bar Centrale | Café | Campbelltown |
| Cafe Creme Della Crème Continental Patisserie | Café | Camden |
| Café La Escapada | Café | Campbelltown |
| Cafe on Cobbitty | Café | Camden |
| Cafe Kulcha | Café | Campbelltown |
| Cafe Tiahna | Café | Campbelltown |
| Cobbitty General Store, Cafe and Post Office | Café | Camden |
| Coco Cubano Cafe and Bar | Café | Campbelltown |
| The Coffee Club | Café | Campbelltown |
| Coffee Gossip | Café | Camden |
| Deli D'Lish | Café | Camden |
| Eats on Argyle | Café | Camden |
| Elm Tree Cafe | Café | Camden |
| Euro Expresso | Café | Campbelltown |
| Fairview Cafe and Bistro | Café | Campbelltown |
| FOOD.DRINK | Café | Camden |
| Jamaica Blue | Café | Campbelltown |
| Oran Park Town Cafe | Café | Camden |
| Primo Mondo | Café | Campbelltown |
| R Coffee Co | Café | Camden |
| Squeeze and Grind | Café | Camden |
| Village Coffee Shop | Café | Camden |
| What the Fudge | Café | Campbelltown |
| Cold Rock Campbelltown | Ice Creamery / Dessert | Campbelltown |
| Lickits Frozen Custard | Ice Creamery / Dessert | Camden |
| Michel's Patisserie Camden | Ice Creamery / Dessert | Camden |
| Michel's Patisserie Narellan | Ice Creamery / Dessert | Camden |
| Pancakes on the Rocks | Ice Creamery / Dessert | Campbelltown |
| Scoops Ice Cream and Lolly Bar | Ice Creamery / Dessert | Campbelltown |
| Sweet Tooth Gelato and Dessert Bar | Ice Creamery / Dessert | Campbelltown |
| Yogurtland | Ice Creamery / Dessert | Campbelltown |
| The Bradbury | Pub / Club | Campbelltown |
| The View at Camden Golf Club | Pub / Club | Camden |
| Camden Hotel | Pub / Club | Camden |
| Camden RSL Club Restaurant | Pub / Club | Camden |
| Camden Sports Club | Pub / Club | Camden |
| Camden Valley Inn | Pub / Club | Camden |
| Campbelltown Catholic Club | Pub / Club | Campbelltown |
| Baiez Hotel | Pub / Club | Campbelltown |

| Name | Type | LGA |
|---|---|---|
| Campbelltown RSL | Pub / Club | Campbelltown |
| Club Hotel Campbelltown | Pub / Club | Campbelltown |
| Club Hotel Leumeah | Pub / Club | Campbelltown |
| Country Club Camden Valley | Pub / Club | Camden |
| Crown Hotel | Pub / Club | Camden |
| The Horse and Jockey Inn | Pub / Club | Campbelltown |
| Infusion Bar and Micro Brewery | Pub / Club | Campbelltown |
| Ingleburn Bowling and Recreation Club | Pub / Club | Campbelltown |
| Lakeside Golf Club Camden | Pub / Club | Camden |
| Macarthur Tavern | Pub / Club | Campbelltown |
| The Merino Tavern | Pub / Club | Camden |
| Mount Annan Hotel | Pub / Club | Camden |
| Narellan Hotel | Pub / Club | Camden |
| Plough and Harrow Hotel | Pub / Club | Camden |
| Raby Tavern | Pub / Club | Campbelltown |
| Wests Leagues Club Bistro | Pub / Club | Campbelltown |
| Aalishaan | Restaurant | Campbelltown |
| ANH's Oriental Noodle House | Restaurant | Campbelltown |
| Antico Bar and Grill | Restaurant | Camden |
| Antico's Garden Cafe Restaurant | Restaurant | Camden |
| Antico Woodfire Pizza | Restaurant | Camden |
| Baltoros Cafe & Restaurant | Restaurant | Campbelltown |
| Bangkok Nawamin | Restaurant | Campbelltown |
| Barenz | Restaurant | Camden |
| Bella's Pizza House | Restaurant | Camden |
| Bistro Calavia | Restaurant | Camden |
| Blissful Garden Malaysian Restaurant | Restaurant | Camden |
| Bohemian Euro German Restaurant | Restaurant | Camden |
| Camden King Chinese | Restaurant | Camden |
| Chan's Inn Chinese | Restaurant | Campbelltown |
| Chilli Joe | Restaurant | Campbelltown |
| Chocolateria San Churro | Ice Creamery / Dessert | Campbelltown |
| Chola Indian Restaurant | Restaurant | Camden |
| Chow's Pine Garden Chinese | Restaurant | Campbelltown |
| Crown Tandoori Restaurant | Restaurant | Campbelltown |
| Enzo's Italian Restaurant and Pizzeria | Restaurant | Camden |
| Enzo's Cucina | Restaurant | Campbelltown |
| Essen Cafe and Restaurant | Restaurant | Campbelltown |
| Fan Thai Restaurant | Restaurant | Camden |
| Fillippo's Restaurant | Restaurant | Campbelltown |
| Five O's | Restaurant | Campbelltown |
| Flowerdrum Palace | Restaurant | Campbelltown |
| Georges on Queen | Restaurant | Campbelltown |
| Gledswood Homestead Cellar Door Wine and Tapas | Restaurant | Camden |
| Gold Wheel Chinese | Restaurant | Campbelltown |

| Name | Type | LGA |
|---|---|---|
| Grand Taco Mexican | Restaurant | Camden |
| The Grange Restaurant and Bar | Restaurant | Camden |
| Harrington's Bar and Grill | Restaurant | Camden |
| Haruki Japanese Fusion Restaurant | Restaurant | Camden |
| The Hermitage Restaurant | Restaurant | Campbelltown |
| Hog's Breath Cafe | Restaurant | Campbelltown |
| House of Bamboo Chinese | Restaurant | Campbelltown |
| Infusion Restaurant | Restaurant | Campbelltown |
| Isabelle's Woodfire Oven Pizzeria | Restaurant | Campbelltown |
| The Italian Food Project | Restaurant | Camden |
| Joy's Thai Restaurant | Restaurant | Camden |
| Kochukaru Japanese Restaurant | Restaurant | Camden |
| Kwality Curries | Restaurant | Camden |
| Lewis' Kitchen | Restaurant | Camden |
| Little India | Restaurant | Campbelltown |
| Luigi's Restaurant | Restaurant | Camden |
| Luxay Thai Restaurant | Restaurant | Camden |
| Mina's Thai Restaurant | Restaurant | Campbelltown |
| Mount Annan Chinese | Restaurant | Camden |
| Mr Ho Chinese Restaurant | Restaurant | Camden |
| Mustang Spur Steak Ranch | Restaurant | Campbelltown |
| Nailati | Restaurant | Camden |
| Nam Oi Thai Kitchen | Restaurant | Campbelltown |
| Noodle Paradise Campbelltown | Restaurant | Campbelltown |
| Noodle Paradise Mount Annan | Restaurant | Camden |
| Noodle Republic | Restaurant | Campbelltown |
| Outback Steakhouse | Restaurant | Campbelltown |
| Panarotti's | Restaurant | Campbelltown |
| Peking Village Chinese | Restaurant | Campbelltown |
| Pho 76 Chinese and Vietnamese Cuisines | Restaurant | Campbelltown |
| Pho Real: Vietnamese Noodle House | Restaurant | Campbelltown |
| Phuong's Oriental Noodle House | Restaurant | Camden |
| Piccola Italia Pizzeria | Restaurant | Camden |
| Pink Diamond Restaurant | Restaurant | Campbelltown |
| Platinum Grill | Restaurant | Campbelltown |
| Rashays Cafe and Restaurant Campbelltown | Restaurant | Campbelltown |
| Rashays Cafe and Restaurant Narellan | Restaurant | Camden |
| Ribs and Rumps Grill and Seafood | Restaurant | Campbelltown |
| Royal Thailicious Restaurant | Restaurant | Camden |
| Saam Thai | Restaurant | Campbelltown |
| Salute Trattoria Pizza and Pasta | Restaurant | Camden |
| Samba Cafe and Grill | Restaurant | Campbelltown |
| Satay Hutt | Restaurant | Campbelltown |
| Silver Jade Chinese | Restaurant | Camden |
| Sizzler Campbelltown | Restaurant | Campbelltown |
| Spice of Life | Restaurant | Campbelltown |

| Name | Type | LGA |
|------|------|-----|
| Stone Grill | Restaurant | Campbelltown |
| Sushi Bay | Restaurant | Campbelltown |
| Tabers Restaurant | Restaurant | Campbelltown |
| Thai Centric | Restaurant | Campbelltown |
| Thai Chilli | Restaurant | Campbelltown |
| Thai Harrington | Restaurant | Camden |
| Thai Recipes | Restaurant | Campbelltown |
| Thai Splendid | Restaurant | Campbelltown |
| The Taste | Restaurant | Campbelltown |
| This is Thai | Restaurant | Camden |
| 5 Star Thai tanic | Restaurant | Camden |
| Trattoria La Vigna | Restaurant | Camden |
| Turkoise | Restaurant | Campbelltown |
| Tuscany Italian Restaurant | Restaurant | Camden |
| Vienna on Argyle | Restaurant | Camden |
| Ziafat Indian Restaurant | Restaurant | Camden |
| Crust Gourmet Pizza Bar | Takeaway | Campbelltown |
| Melaleuca House | Restaurant | Camden |
| McDonalds Campbelltown | Takeaway | Campbelltown |
| McDonalds Campbelltown Mall | Takeaway | Campbelltown |
| McDonalds Woodbine | Takeaway | Campbelltown |
| McDonalds Camden | Takeaway | Camden |
| Subway Camden | Takeaway | Camden |
| Subway Campbelltown Queen St | Takeaway | Campbelltown |
| Subway Campbelltown Blaxland Serviceway | Takeaway | Campbelltown |
| KFC Macarthur Sq | Takeaway | Campbelltown |
| KFC Woodbine | Takeaway | Campbelltown |
| KFC Carlton | Takeaway | Campbelltown |
| KFC Narellan | Takeaway | Camden |
| KFC Narellan Town Centre | Takeaway | Camden |
| Pizza Hut Narellan | Takeaway | Camden |
| Pizza Hut Camden | Takeaway | Camden |
| Pizza Hut Campbelltown | Takeaway | Campbelltown |
| Dominos Pizza Campbelltown | Takeaway | Campbelltown |
| Dominos Pizza Camden | Takeaway | Camden |

## Supporting Documentation 4: Estimated Visitor Forecast Scenarios

**TABLE 16: ESTIMATED VISITOR FORECAST SCENARIOS**

| Low Growth | 2014 | AAGR | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | Growth 2014 - 2024 | % Growth 2014 - 2024 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| International Visitors | 21.0k | 5% | 22.1k | 23.2k | 24.3k | 25.5k | 26.8k | 28.1k | 29.6k | 31.0k | 32.6k | 34.2k | 13.2k | 63% |
| Domestic Overnight Visitors | 223.5k | 2% | 228.0k | 232.5k | 237.2k | 241.9k | 246.8k | 251.7k | 256.8k | 261.9k | 267.1k | 272.5k | 48.9k | 22% |
| Domestic Daytrip Visitors | 1.1m | 3% | 1.1m | 1.2m | 1.2m | 1.2m | 1.3m | 1.3m | 1.3m | 1.4m | 1.4m | 1.5m | 374.1k | 34% |
| Total | 1.33m | - | 1.37m | 1.41m | 1.45m | 1.49m | 1.53m | 1.58m | 1.62m | 1.67m | 1.72m | 1.77m | 436.29k | 33% |

| Medium Growth | 2014 | AAGR | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | Growth 2014 - 2024 | % Growth 2014 - 2024 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| International Visitors | 21.0k | 7% | 22.5k | 24.0k | 25.7k | 27.5k | 29.5k | 31.5k | 33.7k | 36.1k | 38.6k | 41.3k | 20.3k | 97% |
| Domestic Overnight Visitors | 223.5k | 4% | 232.5k | 241.8k | 251.4k | 261.5k | 271.9k | 282.8k | 294.1k | 305.9k | 318.1k | 330.9k | 107.3k | 48% |
| Domestic Daytrip Visitors | 1.1m | 5% | 1.1m | 1.2m | 1.3m | 1.3m | 1.4m | 1.5m | 1.5m | 1.6m | 1.7m | 1.8m | 684.1k | 63% |
| Total | 1.33m | - | 1.40m | 1.47m | 1.54m | 1.61m | 1.69m | 1.77m | 1.86m | 1.95m | 2.04m | 2.14m | 811.80k | 61% |

| High Growth | 2014 | AAGR | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | Growth 2014 - 2024 | % Growth 2014 - 2024 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| International Visitors | 21.0k | 10% | 23.1k | 25.4k | 28.0k | 30.8k | 33.8k | 37.2k | 40.9k | 45.0k | 49.5k | 54.5k | 33.5k | 159% |
| Domestic Overnight Visitors | 223.5k | 6% | 236.9k | 251.1k | 266.2k | 282.2k | 299.1k | 317.1k | 336.1k | 356.3k | 377.6k | 400.3k | 176.8k | 79% |
| Domestic Daytrip Visitors | 1.1m | 8% | 1.2m | 1.3m | 1.4m | 1.5m | 1.6m | 1.7m | 1.9m | 2.0m | 2.2m | 2.3m | 1.3m | 116% |
| Total | 1.33m | - | 1.43m | 1.55m | 1.66m | 1.79m | 1.93m | 2.08m | 2.24m | 2.41m | 2.60m | 2.80m | 1.47m | 110% |

## Supporting Documentation 5: Estimated Growth in Visitor Spend

TABLE 17: ESTIMATED GROWTH IN VISITOR SPEND

| Low Growth | 2013/14 Estimated Spend P/Trip | 2013/14 Est. Total Visitor Spend | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | Growth 2014 - 2024 | % Growth 2014 - 2024 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| International Visitors | $1,355 | $28.5m | $29.9m | $31.4m | $32.9m | $34.6m | $36.3m | $38.1m | $40.0m | $42.0m | $44.2m | $46.4m | $17.9m | 63% |
| Domestic Overnight Visitors | $400 | $89.3m | $91.1m | $92.9m | $94.8m | $96.7m | $98.6m | $100.6m | $102.6m | $104.6m | $106.7m | $108.9m | $19.6m | 22% |
| Domestic Daytrip Visitors | $88 | $96.0m | $98.9m | $101.8m | $104.9m | $108.1m | $111.3m | $114.6m | $118.1m | $121.6m | $125.3m | $129.0m | $33.0m | 34% |
| **Total Visitor Spend** | - | **$213.8m** | **$219.8m** | **$226.1m** | **$232.6m** | **$239.3m** | **$246.2m** | **$253.3m** | **$260.7m** | **$268.3m** | **$276.1m** | **$284.2m** | **$70.5m** | **33%** |

| Medium Growth | 2013/14 Estimated Spend P/Trip | 2013/14 Est. Total Visitor Spend | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | Growth 2014 - 2024 | % Growth 2014 - 2024 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| International Visitors | $1,355 | $28.5m | $30.5m | $32.6m | $34.9m | $37.3m | $39.9m | $42.7m | $45.7m | $48.9m | $52.3m | $56.0m | $27.5m | 97% |
| Domestic Overnight Visitors | $400 | $89.3m | $92.9m | $96.6m | $100.4m | $104.5m | $108.6m | $113.0m | $117.5m | $122.2m | $127.1m | $132.2m | $42.9m | 48% |
| Domestic Daytrip Visitors | $88 | $96.0m | $100.8m | $105.8m | $111.1m | $116.7m | $122.5m | $128.7m | $135.1m | $141.8m | $148.9m | $156.4m | $60.4m | 63% |
| **Total Visitor Spend** | - | **$213.8m** | **$224.1m** | **$235.0m** | **$246.4m** | **$258.5m** | **$271.1m** | **$284.4m** | **$298.3m** | **$312.9m** | **$328.4m** | **$344.5m** | **$130.8m** | **61%** |

| High Growth | 2013/14 Estimated Spend P/Trip | 2013/14 Est. Total Visitor Spend | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | Growth 2014 - 2024 | % Growth 2014 - 2024 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| International Visitors | $1,355 | $28.5m | $30.5m | $32.6m | $34.9m | $37.3m | $39.9m | $42.7m | $45.7m | $48.9m | $52.3m | $56.0m | $27.5m | 97% |
| Domestic Overnight Visitors | $400 | $89.3m | $92.9m | $96.6m | $100.4m | $104.5m | $108.6m | $113.0m | $117.5m | $122.2m | $127.1m | $132.2m | $42.9m | 48% |
| Domestic Daytrip Visitors | $88 | $96.0m | $100.8m | $105.8m | $111.1m | $116.7m | $122.5m | $128.7m | $135.1m | $141.8m | $148.9m | $156.4m | $60.4m | 63% |
| **Total Visitor Spend** | - | **$213.8m** | **$224.1m** | **$235.0m** | **$246.4m** | **$258.5m** | **$271.1m** | **$284.4m** | **$298.3m** | **$312.9m** | **$328.4m** | **$344.5m** | **$130.8m** | **61%** |

## Supporting Documentation 6: Estimated Tourism Multipliers

TABLE 18: ESTIMATED TOURISM MULTIPLIERS

| Low Growth | 2013/14 Estimated Spend P/Trip | 2013/14 Est. Total Visitor Spend | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | Growth 2014 - 2024 | % Growth 2014 - 2024 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Total Visitor Spend | - | $213.8m | $219.8m | $226.1m | $232.6m | $239.3m | $246.2m | $253.3m | $260.7m | $268.3m | $276.1m | $284.2m | $70.5m | 33% |
| **Multiplier** | **0.92** | **$196.7m** | **$202.3m** | **$208.0m** | **$214.0m** | **$220.2m** | **$226.5m** | **$233.1m** | **$239.8m** | **$246.8m** | **$254.0m** | **$261.5m** | **$2.31b** | **$2.31b** |
| | | | | | | | | | | | | | | |
| Medium Growth | 2013/14 Estimated Spend P/Trip | 2013/14 Est. Total Visitor Spend | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | Growth 2014 - 2024 | % Growth 2014 - 2024 |
| Total Visitor Spend | - | $213.8m | $224.1m | $235.0m | $246.4m | $258.5m | $271.1m | $284.4m | $298.3m | $312.9m | $328.4m | $344.5m | $130.8m | 61% |
| **Multiplier** | **0.92** | **$196.7m** | **$206.2m** | **$216.2m** | **$226.7m** | **$237.8m** | **$249.4m** | **$261.6m** | **$274.4m** | **$287.9m** | **$302.1m** | **$317.0m** | **$2.58b** | **$2.58b** |
| | | | | | | | | | | | | | | |
| High Growth | 2013/14 Estimated Spend P/Trip | 2013/14 Est. Total Visitor Spend | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | Growth 2014 - 2024 | % Growth 2014 - 2024 |
| Total Visitor Spend | - | $213.8m | $224.1m | $235.0m | $246.4m | $258.5m | $271.1m | $284.4m | $298.3m | $312.9m | $328.4m | $344.5m | $130.8m | 61% |
| **Multiplier** | **0.92** | **$196.7m** | **$211.3m** | **$227.0m** | **$244.0m** | **$262.2m** | **$281.9m** | **$303.1m** | **$325.9m** | **$350.5m** | **$377.1m** | **$405.7m** | **$2.99b** | **$2.99b** |

# Supporting Documentation 7: Camden Specific Marketing Actions

The following are the key result areas to be focused on to help facilitate the successful implementation of this DMP for Camden Council personnel specifically.

Please note that this action plan contains steps required to realise future opportunities and achieve the recommendations included in this DMP, as well as supplementary actions that can be undertaken to further the success of this DMP.

Short term strategies are those to be implemented within the next two years (2016-2018), medium term are those within the following three years (2019 - 2021) and long term includes those to be undertaken after five or more years (2022 onwards) but which may need to commence in the medium term.

The following includes the key for the responsibility column included in the Action Plan.

- CCM:    Civic Centre Manager
- EDO:    Economic Development Officer
- EO:      Events Officer
- IS:       Information Services
- LA:       Landscape Architect
- MRS:    Manager Recreation and Sustainability
- PM:      Capital Works Project Manager
- PRO:    Public Relations Officer
- RP:       Recreation Planner
- SGO:    Senior Governance Officer
- TCC:    Town Centre Coordinator
- TE:       Traffic Engineer
- TO:       Tourism Officer
- VICC:   Visitor Information Centre Coordinator

**TABLE 19: CAMDEN SPECIFIC MARKETING ACTIONS - KEY PERFORMANCE AREA 1**

| Tourism Product Development & Partnership Opportunities | | | | |
|---|---|---|---|---|
| Action | Tasks | Camden Responsibility | Timeframe | KPIs |
| Holiday Park Development Feasibility Assessment | ▪ Council to investigate possible land sites it has which could be used and zoned for the development of the destination park<br>▪ Feasibility assessment undertaken to indicate viability of the destination park<br>▪ If viable, Council to put opportunity out to tender for reputable park operators (including current operators of Poplar Tourist Park) | TO, EDO | Short Term (feasibility)<br><br>Medium – Long Term (project development) | ▪ Land assessment to be undertaken by January 2017<br>▪ Make contact with destination park operators by June 2017 to determine potential costs associated and revenue generating opportunities<br>▪ Undertake feasibility by July 2017<br>▪ If a positive outcome then solicit destination park investor interest in development at the site. |

| Tourism Product Development & Partnership Opportunities | | | | |
|---|---|---|---|---|
| Action | Tasks | Camden Responsibility | Timeframe | KPIs |
| Haunted Attraction and Festival Feasibility Assessment | ▪ Undertake a feasibility assessment to investigate the development of a haunted attraction. This should include a site assessment of old Council sites which could provide space for the attraction and should leverage off the marketing profile of the Fisher's Ghost Festival held in Campbelltown.<br>▪ Undertake discussions with similar attractor operators to gauge interest for developing/operating the attraction | TO, EDO | Short – Medium Term (feasibility)<br><br>Medium – Long Term (project development) | ▪ Feasibility to be undertaken by December 2017<br>▪ Discussions with similar attractor operators to be undertaken by March 2018 |
| Boutique Glamping in Reserves Feasibility Assessment | ▪ Council to investigate possible land sites it has which could be used and is suitably zoned for the development of glamping<br>▪ Feasibility assessment undertaken to indicate viability of the glamping operation, including number required to operate viably.<br>▪ If viable, Council to put opportunity out to tender for reputable glamping operators | TO, EDO | Short Term (feasibility)<br><br>Medium Term (project development) | ▪ Land assessment to be undertaken by March 2018<br>▪ Feasibility assessment to be undertaken by December 2018<br>▪ Tender put out by February 2019 |
| Development of Macarthur Arts Trails | ▪ Work with industry to develop and market a range of art trails (possibly tied in with food trails) throughout the Macarthur region | TO | Short Term | ▪ 2 trails developed and marketed by June 2018<br>▪ A further 2 trails developed and marketed by December 2019 |
| National Equine Experience Centre Feasibility Assessment | ▪ Undertake a feasibility (possibly go out to specialist firms to undertake feasibility) on the development of a national equine interactive centre. This should include a detailed site assessment as there are various sites throughout the region which could be suitable | TO, RP | Short Term (feasibility)<br><br>Medium - Long Term (project development) | ▪ Feasibility to be undertaken by November 2017 |
| Bush Corridors for Leisure Tourism | ▪ Assess locations for activation<br>▪ Undertake feasibility for determining market demand for various tourism activities<br>▪ Assess and secure funding sources | ▪ TO, RP | Short Term (feasibility)<br><br>Medium - Long Term (project development) | ▪ Assess by February 2017<br>▪ Feasibility study for individual projects by June 2017<br>▪ Implement by June 2018 |
| Motor Sport and Technology Precinct | ▪ Undertake site assessment study to identify possible sites which could cater for the precinct<br>▪ Complete feasibility to determine the viability of introducing a new motor sport precinct and how this might be funded | TO | Short Term (investigation)<br><br>Medium – Long Term (development – if proven viable) | ▪ Investigation to be undertaken by March 2017 |

| Tourism Product Development & Partnership Opportunities | | | | |
|---|---|---|---|---|
| Action | Tasks | Camden Responsibility | Timeframe | KPIs |
| Regional Music Festival Investigation | ▪ Undertake investigation for the introduction of a music festival in the region, possibly focused on the rock music genre. Investigation should including assessment of possible locations, including the 10k pax outdoor area within the Australian Botanic Garden as well as discussions with possible event promoters. | TO, EO | Short Term (investigation)<br><br>Medium – Long Term (festival introduction) | ▪ Investigation to be undertaken by November 2016, including discussions with event promoters and location assessment |
| Creation and Marketing of Riverside Activity | ▪ Work with stakeholders to investigate and create a series of riverside walks, activity nodes and experiences. Some of the walks may already exist and may just require better profiling, signage and marketing. | TO, RP | Short – Medium Term | ▪ Riverside walks profiling and packaging to commence by December 2017 |
| Aviation Museum Feasibility Assessment | ▪ Undertake a feasibility (possibly go out to specialist firms to undertake feasibility) on the development of an aviation museum. This should include a detailed site assessment as there are various sites (including the Camden Airport) throughout the Camden LGA which could be suitable | TO, EDO | Medium Term (feasibility)<br><br>Long Term (project development | ▪ Feasibility to be undertaken by December 2019 |
| Aviation Business Park Feasibility | ▪ Feasibility study to assess potential to develop an aviation business park/precinct at Camden | Camden Council and Airstrip operator/land owner<br><br>TO, EDO | Medium Term (feasibility)<br><br>Long Term (project development) | ▪ Feasibility to be undertaken by April 2021 |
| Creation of Macarthur Investment Memorandum | ▪ Create an investment memorandum to stimulate investment by developers into Macarthur region<br>▪ Investment memorandum should indicate the types of development in tourism which each Council will actively support | EDO | Short term | ▪ Memorandum drafted and approved by March 2017 |

**TABLE 20: CAMDEN SPECIFIC MARKETING ACTIONS - KEY PERFORMANCE AREA 2**

| Marketing & Promotion Opportunities | | | | |
|---|---|---|---|---|
| Action | Tasks | Camden Responsibility | Timeframe | KPIs |
| Creation of a Brand Identity for the Macarthur tourism region | ▪ Development of regional destination identity, as well as potential sub-brands for Campbelltown and Camden in consultation with the tourism industry<br>▪ Creation of an EOI for the development of a brand for the Macarthur region (and its two LGAs as sub-brands)<br>▪ Selection of a brand designer | TO, PRO | Short term | ▪ Undertake workshops with tourism industry to discuss identity concepts by January 2017<br>▪ Have identities drafted by February 2017<br>▪ Have identities confirmed by April 2017 |
| Development of Updated Website and Integrated Augmented Reality Mobile App | ▪ Once identity is developed for Macarthur, commission developer to design an updated website and integrated mobile app (or mobile accessible site) | TO | Short Term | ▪ Commission web developer by end of April 2017<br>▪ Have draft website and app/mobile accessible site ready by end of July 2017<br>▪ Launch website and app by August 2017 |
| Packaging of Product | ▪ Identify product which could be packaged and promoted including accommodation, transport, activities etc.<br>▪ This will involve a wide range of stakeholders but Council and the Tourism Subcommittee need to take a leadership role and undertake the facilitation for this | TO | Ongoing | ▪ Work with Macarthur tourism industry to develop 3 packages by March 2017<br>▪ Packages to be promoted from April 2017<br>▪ A further 3 packages to be developed and promoted by January 2018 |
| Development of an Events Calendar | ▪ Development of events calendar, to be available via the destination website | TO, EO | Ongoing | ▪ Collation of all future events (next 1 – 2 years) and roll out on new website (to be developed by November 2017)<br>▪ Ongoing updating of events calendar |
| Creation and Application of an Event Evaluation Criteria | ▪ Tourism Industry Taskforce, working with economic development personnel at each Council, to develop a criterion to assess proposed events and their likely benefit.<br>▪ Criteria could include likely cost of event, level of industry and community support, ability to leverage off funding sources to support the event, timing of the event and visitor markets the event is likely to attract<br>▪ Application of event success criterion to existing council-run and supported events to ensure events list includes on those with the greatest economic and social benefit | TO, EO | Short Term and Ongoing | ▪ Event success criterion to be developed by June 2017<br>▪ Criterion to be applied to all new events ongoing<br>▪ Events success criterion applied to current events by December 2017 |
| Development of a Community Tourism Awareness Campaign | ▪ Develop a community tourism awareness program which demonstrates the contribution of tourism to the Macarthur economy | TO | Short - Medium Term | ▪ Community awareness program rolled out by December 2018 |

| Marketing & Promotion Opportunities | | | | |
|---|---|---|---|---|
| Action | Tasks | Camden Responsibility | Timeframe | KPIs |
| Creation of a Medical Tourism Strategy | ▪ Create EOI for the development of a medical tourism strategy<br>▪ Selection of firm to develop strategy | TO | Medium Term | ▪ EOI to be released to selected firms by January 2018<br>▪ Firm to be selected by March 2018<br>▪ Strategy to be developed by July 2018 |
| Car Enthusiast Destination Promotion | ▪ Develop marketing programme to promote the Macarthur as a region for car touring by car clubs and car enthusiasts | TO | Medium Term | ▪ Marketing programme to be developed and introduced by May 2018 |
| Greater Profiling of Bird Watching | ▪ Greater profiling of bird watching experiences through promotion in bird watching/wildlife magazines, via social media, product packaging etc. | TO | Ongoing | ▪ Start increased profiling of these experiences by January 2018 |

**TABLE 21: CAMDEN SPECIFIC MARKETING ACTIONS - KEY PERFORMANCE AREA 3**

| Industry Support Opportunities | | | | |
|---|---|---|---|---|
| Action | Tasks | Responsibility | Timeframe | KPIs |
| Creation of an EOI and Selection of Tourism Industry Taskforce | ▪ Develop Expression of Interest seeking strategically-minded local community members (and possibly embers outside the region who have a keen interest) to join the Tourism Industry Taskforce.<br>▪ The selection panel for the EOI should consist of internal Council personnel and an external stakeholder<br>▪ Skill base required includes: digital/technology skills, innovation/forward thinking skills and finance skills<br>▪ The taskforce should meet every 3 months to discuss progress | TO | Short term | ▪ Develop EOI by January 2017<br>▪ Tourism Industry Taskforce to be selected by June 2017 |
| Development of the Terms of Reference for the Taskforce | ▪ Develop the "Terms of Reference" for the Taskforce | TO, GO | Short term | ▪ Terms of reference to be developed by March 2017 |
| Review the Composition of the Taskforce | ▪ The Taskforce will be a term commitment determined by both Councils including a timeframe for reviewing its composition. | TO | Ongoing | ▪ Review composition of the Taskforce according to timeframe determined by both Councils<br>▪ Resubmit the EOI if the composition of the Taskforce needs to change |
| Development of Visitor Data Base | ▪ Establish survey for capturing all visitation<br>▪ Garner support from all accommodation operators, attractions, event coordinators, performance and related venues<br>▪ Capture and collate visitor trends on a monthly basis<br>▪ Record findings and release to industry every quarter | TO | Ongoing | ▪ 85% or more of industry operators and venue operators send in visitor data sheets each month on line<br>▪ Quarterly report to industry well received<br>▪ Determination of industry enhancements and gaps needing to be filled via feedback |

**TABLE 22: CAMDEN SPECIFIC MARKETING ACTIONS - KEY PERFORMANCE AREA 4**

| Visitor Servicing Opportunities | | | | |
|---|---|---|---|---|
| Action | Tasks | Responsibility | Timeframe | KPIs |
| Review of Visitor Information Services throughout Macarthur | ▪ Develop a visitor information services strategy for Macarthur focusing on the current provision of visitor information and opportunities that exist to increase the ROI of visitor information services | TO, VICC | Short – Medium Term | ▪ Undertake investigation by June 2018<br>▪ Implement changes by October 2019 |
| Feasibility to Assess Location of Camden VIC | ▪ Undertake a feasibility study to assess the location and possible other sites which the Camden VIC could be located to increase its exposure and access | TO, VICC | Short Term | ▪ Undertake feasibility study concurrently with above review by December 2017 |
| Investigate Free Wi-Fi at the VICs | ▪ Tourism Industry Taskforce to investigate the provision of free Wi-Fi in the two VICs as a method of encouraging vibrancy and use of the VICs | TO, IS | Medium Term | ▪ Undertake investigation by September 2018 |
| Development of a Regional Signage Program | ▪ Development of a signage strategy which identifies ideal signage locations to promote Macarthur's attractions/experiences in a highly appealing way<br>▪ The signage strategy should also assess the need and appropriate location for directional signage across the region | TO, TE, PRO | Short – Medium Term | ▪ Signage strategy to be developed by September 2018<br>▪ Designs for new signage completed and tested by January 2019<br>▪ New signage submitted for State Govt. approval by March 2019<br>▪ New signage is installed no later than 4 months post State Govt. approval |
| Development of a Roving Ambassador Program | ▪ Development of volunteer-based, roving ambassador program, particularly during peak visitor periods. | TO | Medium Term | ▪ Establish and implement program by March 2019<br>▪ Sign up 20 volunteers at program start date<br>▪ Increase volunteer base by 10% per annum from program start date |
| Gateway Landscaping | ▪ Develop a landscape strategy for gateway points into the Macarthur region | TO, MRP | Medium – Long Term | ▪ Develop landscape strategy by December 2019<br>▪ Implement landscape strategy by December 2020 |

THE **STAFFORD** GROUP

# CAMDEN LGA
# DESTINATION MANAGEMENT PLAN

February, 2016

THE STAFFORD GROUP

**THE STAFFORD GROUP**

www.thestaffordgroup.com.au

*Report Image credits: Camden Council and Capture Camden*

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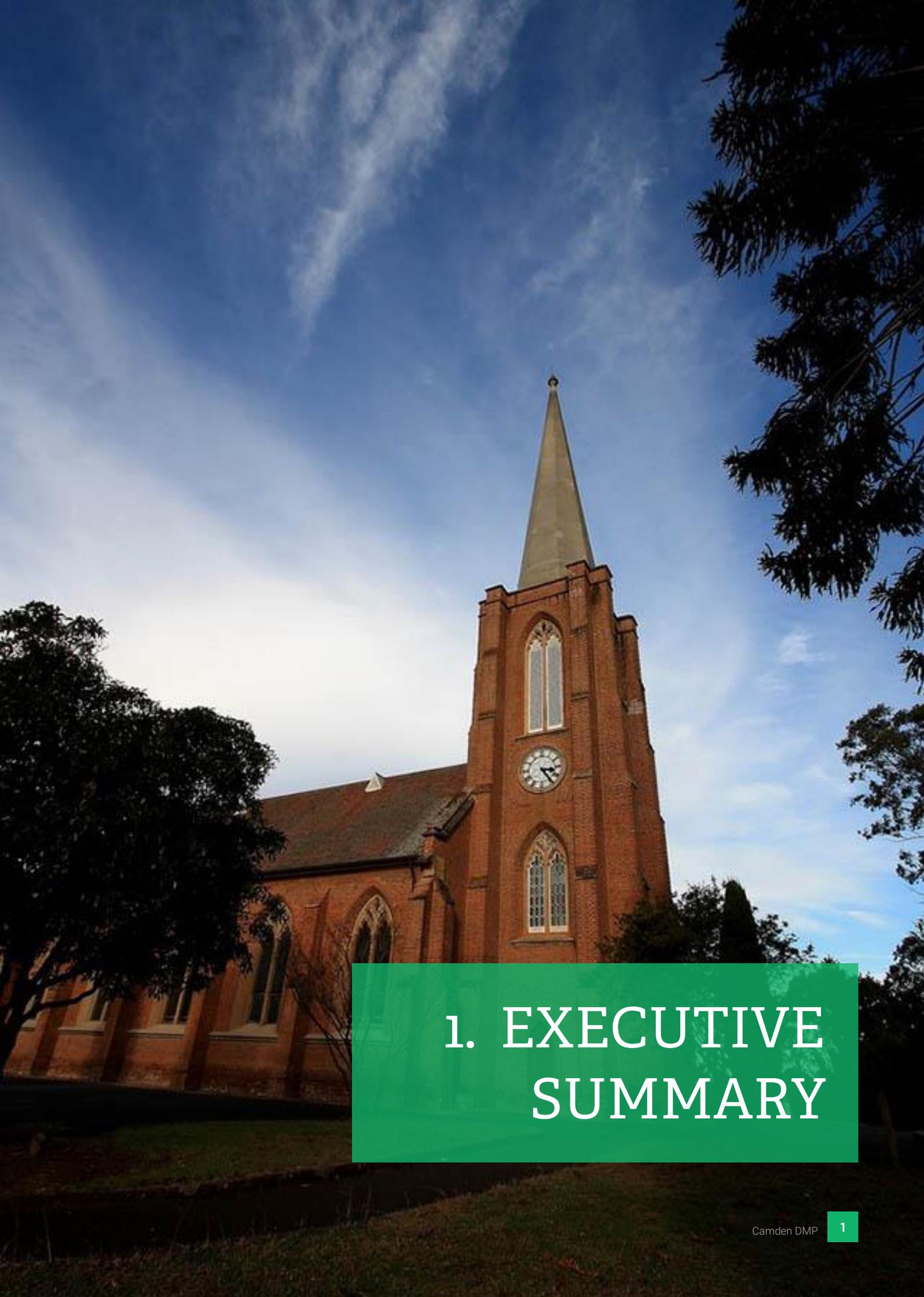# List of Tables & Figures

# 1. EXECUTIVE SUMMARY

# 1. Executive Summary

## 1.1. Overview

The Stafford Group (The Group) was commissioned by Camden Council (Council) to undertake the development of a Destination Management Plan (DMP), including a Marketing Action Plan (MAP), for the Camden Local Government Area (LGA).

It is important to note that concurrently to the development of this DMP for Camden LGA, a broader DMP for the Macarthur region (which includes both Camden and Campbelltown LGAs) is also being developed.

Whilst Camden Council is fully supportive of the regional DMP, and have provided significant input into the regional DMP, they also recognise the important opportunities available locally within the Camden LGA which require a DMP specifically focused on local outcomes for Camden LGA.

As The Stafford Group is developing both DMPs, it is the intention that this DMP will dovetail into the regional DMP, however, it will provide far more detail on Camden-specific issues and initiatives that were identified within the regional DMP.

It also identifies a number of tourism initiatives which are more easily activated by Camden stakeholders specifically as opposed to those which are cross-regional and identified in the broader Macarthur DMP.

## 1.2. Purpose

The purpose of developing the DMP for Camden includes the following:

- Providing a clear understanding of key visitor markets and market segments;
- Visitor segment preferences in terms of experiences required;
- Forecasted growth in key visitor markets;
- Identifying existing and potential experiential strengths of the region;
- An outline of the infrastructure, experiences and products required to meet anticipated potential visitor needs over the medium – long term for the LGA;
- A top line analysis of the net economic benefit arising from the development of the products/experiences; and
- Provide stakeholders, at all levels, with a clear view of the tourism investment opportunities and requirements within the LGA.

## 1.3. Issues and Gaps

The table on the following page provides an overview of the issues and gaps which were identified through developing this DMP.

Whilst it will be important that Camden Council play a key supporting role to enable the growth of the tourism sector going forward, the responsibility for resolving these wide ranging issues will require the active participation of Council as well as the tourism industry throughout Camden LGA.

Additionally, many of these issues/gaps were noted at a regional level as well and therefore, the opportunity exists for collaboration throughout the Macarthur region (including Camden and Campbelltown Council's and the tourism industry throughout) to resolve some of these issues/gaps.

**FIGURE 1: ISSUES**

| PRODUCT & SUPPORTING INFRASTRUCTURE ISSUES |
| --- |
| ▪ Lack of Commissionable Product<br>▪ Growing Region – Inadequate Infrastructure to support the level of growth<br>▪ Narellan Road traffic congestion<br>▪ Location of the Camden VIC<br>▪ Lack of Accommodation in Camden<br>▪ Inadequate Signage (interpretation and directional)<br>▪ Need to Upgrade the Civic Centre |

| MARKETING & PROMOTIONAL ISSUES |
| --- |
| ▪ Strong competition from destinations such as Sydney and Surrounding Areas<br>▪ Inclusion in the Sydney and Surrounds Region makes it hard to be seen and heard<br>▪ Brand Differentiation<br>▪ Lack of Cooperative Marketing<br>▪ Market Perception |

| OTHER TOURISM RELATED ISSUES |
| --- |
| ▪ Tyranny of Distance perception<br>▪ Parramatta Centric Focus by State Government<br>▪ Balancing Housing and Tourism Needs<br>▪ Lifestyle Operators<br>▪ Lack of Industry Cohesion<br>▪ Lack of Tourism Investment<br>▪ Lack of Understanding of the Importance of the Tourism Industry<br>▪ Retail Trading Hours |



## 1.4. The Target Markets

The various target markets are identified when the various opportunities are discussed within this DMP. The key ones for Camden to focus on are noted as:

▪ The family market from greater Sydney coming for events and festivals and with a focus on food and produce markets;

▪ The equine sector visitor market nationally for competitions and eventing;

▪ The sports tourism market from greater Sydney and regional NSW coming for major sporting events and competitions;

▪ The international inbound tour market and cruise ship visitor market looking for new 2-3hour site seeing and food related tour options; and

▪ The Macarthur region and western Sydney market looking for evening based sound and light shows, night markets and related night time events.

## 1.5. The Opportunities

The following tables provide a summary of the various opportunities which Camden could focus on in order to activate and grow tourism on a sustainable basis.

The opportunities are not in any priority order and have been segmented according to the following

themes, which also align with the previous 2012 – 2015 Tourism Strategy:

- Tourism Product Development & Partnerships;
- Marketing & Promotion;
- Industry Support; and
- Visitor Servicing.

Additionally, the opportunities have been listed according to whether they are Camden-specific initiatives, or whether the opportunity could be achieved in collaboration with Campbelltown City Council, as part of the Macarthur region. This has been done because visitors do not recognise LGA boundaries but rather identify with tourism destinations. Several of the opportunities outlined would be better profiled if they were undertaken for the broader Macarthur region.

The realisation of these opportunities will help stimulate stronger visitor growth, increased length of stay, higher visitor spend and better focused tourism profiling for the Camden LGA.

## TOURISM PRODUCT DEVELOPMENT & PARTNERSHIPS

**Camden-Specific Initiatives:**

- **Holiday Park Development:** Development of a new (or expand the existing) dedicated destination holiday park to support the growing family and caravan and camping market in the Greater Sydney region;
- **Heritage and nature-based stories through a sound and light show:** Utilising the natural background of the Australian Botanic Garden, develop a sound and light show which showcases the history of the region as a summer time initiative;
- **Botanic Gardens Amphitheatre and Sculpture Garden:** Development of an all-weather amphitheatre within the Australian Botanic

## TOURISM PRODUCT DEVELOPMENT & PARTNERSHIPS

Garden. The facility could also include various sculpture trails – art trails to offer a composite attraction linked to the Gardens botanic experiences to increase the visitor experience (the size of the amphitheatre would need to be investigated to achieve an optimum size). Investigate a luge experience on the eastern ridge line and a site for glamping.

- **Civic Centre Upgrades:** Undertake study to assess the cost of upgrades to make the civic centre a more actively used and highly marketable to a local and broader regional market.
- **National Equine Experience Centre:** Development of a National Equine Experience Centre, showcasing the history of the equine industry, not only in Greater Sydney, but potentially nationally;
- **Upgrade Equestrian Park:** upgrade the Equestrian Park to enable it to remain competitive against growing competition interstate to hold national and related events;
- **Sound and Light Show:** investigate the potential to develop a seasonal sound and light show utilising building façades in Camden's historic main street and separately, lighting up the key attractions for night time tours of Camden and surrounds.
- **Aviation Business Park:** Investigate the potential to develop the current Camden Airport into an aviation business park to cater to the needs of a fly-in market needing places to land and store aircraft, for the maintenance of light aircraft and long term hangars etc. (we note the issue of Camden Airport potentially closing when Badgerys Creek is fully operational but this may still be 10+ years out);
- **Aviation Museum:** Creation of an interactive aviation museum to showcase the history of local aviation activity in the Sydney region and leveraging off the region's airport;

## TOURISM PRODUCT DEVELOPMENT & PARTNERSHIPS

- **Heritage boutique Hotel:** investigate the development of a heritage arts hotel in Camden utilising existing unused buildings for a mixed use art hotel, art gallery and function centre;

- **Heritage Township Activation:** investigate the introduction of place making changes to Camden town centre to develop it as a far stronger pedestrian friendly hub for locals and visitors. This acknowledges the stronger economic benefits especially which can be achieved through protecting the heritage streetscape and encouraging greater visitation to the town centre.

**Broader Regional Initiatives:**

- **Haunted Attraction and Festival:** Bring alive the heritage and living stories of Macarthur via a possible themed haunted attraction and/or a horror festival using resources, facilities and performing arts groups across the region;

- **Food Trails and Cooking Schools:** Leveraging off the growing "foodie" movement within the region, assess potential for boutique food trails which could possibly incorporate art trails and link to those interested in developing cooking schools;

- **Arts Trail Activation:** There is a growing and strong arts community across a variety of arts form. Develop an art trail program to showcase artwork, which could potentially include an outdoor art sculpture trail, art festival and residential art programs and forums;

- **Narellan Sports Hub:** Investigate the development of the Hub as a multi-purpose sports and event centre to provide a larger arena for sports, cultural and eventing in general.

- **Boutique Glamping in Reserves:** Development of a boutique, quality eco-tent cluster on land adjoin a National Park to provide a unique experience and cater for higher spending leisure visitors;

- **Riverside Walks:** Investigate riverside walks allowing access to the Nepean River. The

## TOURISM PRODUCT DEVELOPMENT & PARTNERSHIPS

walkways could also offer mountain biking trails potentially and also include interpretation which features Indigenous history; and

- **Stimulate Investment into the region:** Development of an investment memorandum for the LGA, and broader Macarthur region, which showcases the type of tourism development that Council is more likely to support. There is a need to be proactive to entice new investment rather than passively waiting for it to occur.

## MARKETING & PROMOTION

**Camden-Specific Initiatives:**

- **Greater Profiling of Bird Watching:** Greater profiling of birdwatching experiences throughout the region, particularly focused on the Australian Botanic Garden and the 160+ species of birds which reside within the Gardens but also covering bird watching on Council reserve land and waterways etc.

- **Brand Identity:** Definition and creation of a tourism brand for Camden. The brand needs to be appropriate not only for tourism and event promotion, but usable by other sectors of the economy. Currently the Camden brand name has a low profile and what it stands for is unclear other than semi-rural or country;

- **Tourism Awareness Campaign:** Design a tourism awareness campaign to promote to residents of Camden. This is needed to highlight the importance of the tourism industry and how far the tourism dollar spreads throughout their economy. This should also be used to indicate Council's enabling role and resource commitment to support the tourism industry to grow; and

- **Greater Promotion of Camden Town Farm and food trails-experiences:** Develop a promotional campaign focussed on the Town Farm as a hub

## MARKETING & PROMOTION

for food experiences and link to a new dynamic regional website for promotion.

**Broader Regional Initiatives:**

- **New Website and Augmented Reality Mobile App:** Once an identity has been established, develop a new Camden destination website (which supports and leverages off the Macarthur destination website) and linked mobile app to promote the region and its offerings and to potentially offer augmented reality tours of the LGA;

- **Event Calendar:** Develop a regional events calendar which can be integrated into the destination website for Camden (and the broader Macarthur destination website) and can be referred to as the region's official event guide;

- **Event Evaluation:** Creation of an event evaluation criteria to be applied to existing and potential events. The purpose of this criteria is to assess their likely benefits and to ensure Council's support is being applied to those events likely to generate the greatest economic and social benefits;

- **Packaging of Product:** Develop a range of bookable packages to showcase the unique tourism product within Camden and the Macarthur region, including accommodation, transport, food and beverage, attractions, and where possible tied to events etc.

## INDUSTRY SUPPORT

**Broader Regional Initiatives:**

- Industry Taskforce: Develop a Macarthur Tourism Industry Taskforce as an informal committee of each Council (not a 355 Committee) which comprises two representatives from both Camden Council and Campbelltown Council as well as six tourism stakeholders in total to represent the tourism industry in each of the LGAs.

## VISITOR SERVICING

**Camden Specific Initiatives:**

- **Visitor Information Services Review:** To ensure that the VIC is operating to its most effective capacity, a visitor information services review should be undertaken;

- **Free Wi-Fi at the VIC and in Camden Township:** Consider offering free Wi-Fi at the VIC to encourage use of the website and visitor dispersal and offer it within Camden town centre as a way of supporting the heritage focus and greater use of amenities; and

- **Roving Ambassador Program:** Creation of a volunteer roving ambassador program. These roving ambassadors can provide directions, general information etc. to visitors to the heritage precinct in Camden and may be situated at main tourism hotspots, including the town centre, the Town Farm and Equestrian Park and other event locations etc. The program could capitalise on the excellent local knowledge of retirees keen to promote the area.

**Broader Regional Initiatives:**

- **Gateway Landscaping:** To create a stronger sense of arrival into Camden LGA and the Macarthur region, commission a gateway landscaping strategy for streetscaping each of the primary arrival points into the region and/or the primary tourism precincts, nodes and hubs identified; and

- **Signage Program:** Develop a signage program to ensure there is a uniform approach to directional and interpretive signage throughout the Camden LGA and the Macarthur region. This should also highlight the approach which industry operators will need to follow to have quality signage installed.

## 1.6.    Going Forward

Recommendations provided in this DMP focus on strategic options to support and potentially guide, Council and industry's involvement in tourism. The opportunities identified are *lower hanging fruit options* and identify product development, tourism investment, industry support, marketing and branding and visitor servicing opportunities which can be used as stimulants to refocus and motivate local industry and investors to develop, enhance and upgrade.

Importantly, tourism will need to develop carefully and at a pace which allows the community to derive comfort that the level of growth occurring is well managed and sustainable. Given the absence of a large, strong tourism sector in the LGA, Council will need to take a strong leadership role in working with industry and major partners to grow opportunities and encourage new investment to occur in the LGA.
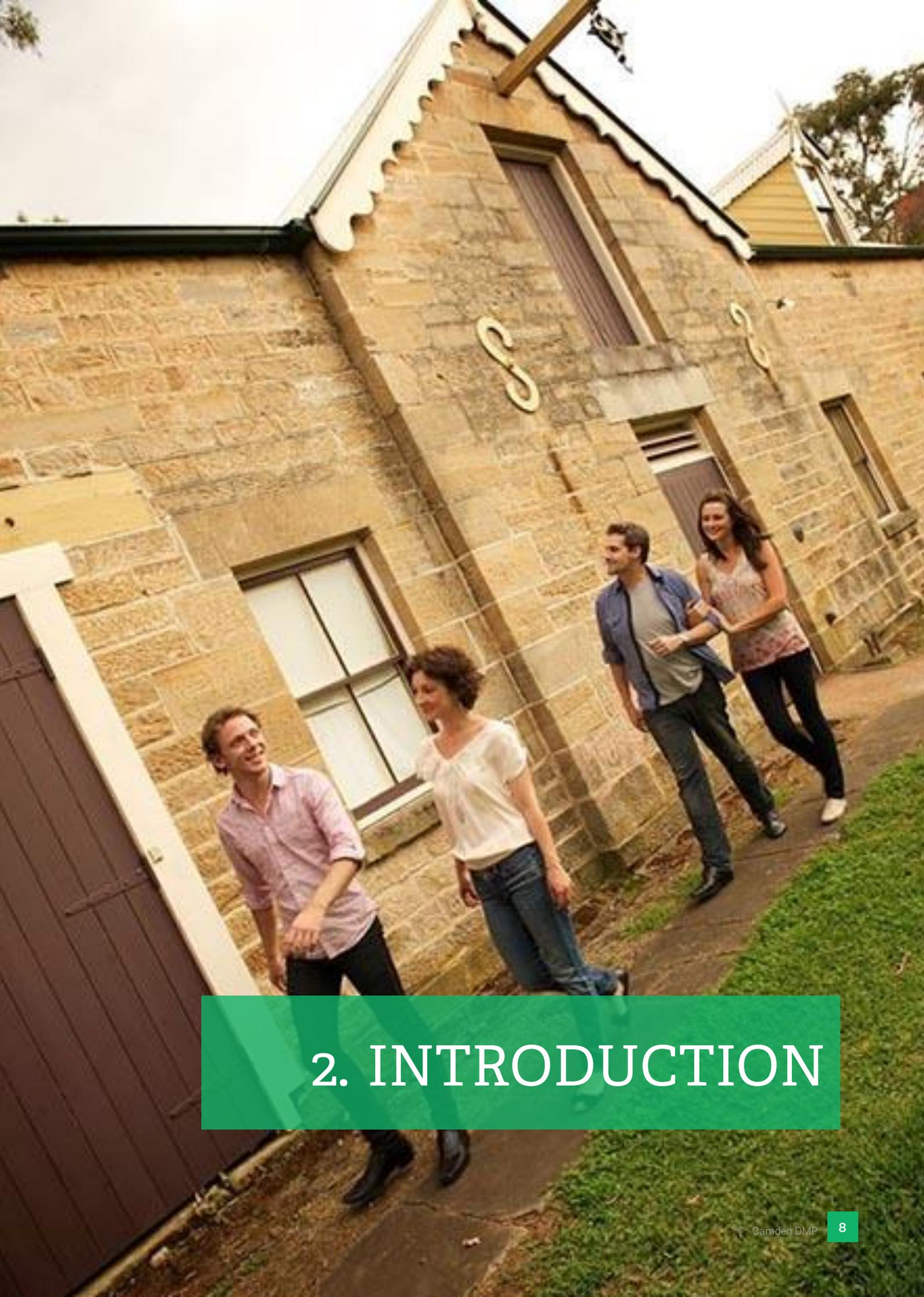
# 2. INTRODUCTION

# 2. Introduction

## 2.1. Overview

The Stafford Group (The Group) was commissioned by Camden Council (Council) to undertake the development of a Destination Management Plan (DMP), including a Marketing Action Plan (MAP) for the Camden Local Government Area (LGA).

It is important to note that concurrently to the development of this DMP for Camden LGA, a broader DMP for the Macarthur region (which includes both Camden and Campbelltown LGAs) is also being developed. Whilst Camden Council is fully supportive of this regional DMP, they also recognise the significant opportunities available locally within the Camden LGA which require a DMP specifically focused on local outcomes for Camden LGA.

As The Stafford Group is developing both DMPs, it is the intention that this DMP will dovetail into the regional DMP, however, it will provide far more detail on Camden-specific issues and initiatives that were identified within the regional DMP.

It also identifies a number of tourism initiatives which are more easily activated by Camden stakeholders specifically as opposed to those which are cross-regional and identified in the broader Macarthur DMP.

This document represents the draft DMP (comprising various stages) and subsequently, represents preliminary findings only.



## 2.2. Methodology

The process to complete this DMP has involved the following:

- Initial liaison with Council to gather additional background information that may not have been provided for the Macarthur DMP and to discuss the consultation program for the DMP;
- An ongoing literature review to build a solid background for the DMP and to fully understand projects and strategies as well as relevant government policies affecting the region;
- Consultation with Council as well as a selection of tourism industry stakeholders (as advised);
- Desktop research, including a full audit of tourism product within the Camden LGA (based on the audit completed for the Macarthur DMP);

- A number of visits to Camden to review product, meet with operators and assess new opportunities and development sites;
- Development of schematics to illustrate tourism place making initiatives which offer potential for Camden;
- Liaison with industry operators (accommodation operators, food and beverage providers, farm operators, attraction operators, transport providers etc.);
- Structured meetings with Council to discuss the vision for tourism, infrastructure, development and discussion around related projects such as business parks, town centre revitalisation and education sector development;
- Discussions with Council regarding the issues and opportunities identified;
- Completion of the Marketing Action Plan;
- Development of this draft DMP;
- Preparation of the final DMP after feedback with Council and other stakeholders.

The Group would like to take this opportunity to thank Council and all stakeholders who have assisted in the ongoing development of the DMP for Camden LGA.

# 3. SITUATION ANALYSIS

Apple & lily

# 3. Situation Analysis

## 3.1.    Plan Context

This DMP is being developed as a result of Camden Council's recognition of the value of the tourism sector and the valuable opportunities which exist within the sector.

Council has been actively advocating for the tourism sector since the 1990s. The following provides a summary of key milestones in this journey.

- 1983: Participation in the Macarthur Country Tourism Association (MCTA);
- 1988: Camden Visitor Information Centre opened;
- 1991: Council took responsibility for tourism following the closure of MCTA;
- 2000: Camden Tourism Strategy 2000 - 2005 adopted;
- 2004: 70% of the strategy actions were fully or partially implemented;
- 2005: Camden Tourism Action Plan 2005 - 2008 adopted;
- 2005: Camden Tourism Officer appointed;
- 2005: Partnership developed with Campbelltown City Council to develop a brand and image for the Macarthur region;
- 2007: visitcamden.com.au website developed;
- 2008: Macarthur Tourism Strategy and Action Plan 2008 – 2011 developed;
- 2008: Camden Tourism Strategy and Action Plan 2008 – 2011 developed;

- 2012: Camden Tourism Strategy and Action Plan 2012 - 2015 developed;
- 2015: Macarthur DMP currently being developed; and
- 2015: Camden DMP currently being developed.

## 3.2.    The Camden LGA

Camden LGA is located south west of Sydney and covers approximately 201 square kilometres. The LGA has a total population of just over 67k residents[1], with a large majority of these residents residing in the Mount Annan, Harrington Park and Narellan Vale suburbs.

The LGA comprises a mix of agricultural farm land, a variety of towns and villages, new residential sub division areas as well as associated commercial and industry hubs.

**FIGURE 2: LOCATION MAP OF THE CAMDEN LGA WITHIN GREATER SYDNEY**



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[1] http://profile.id.com.au/camden

Camden LGA (along with Campbelltown LGA and the Macarthur region) is included within the Sydney and Surrounds region, as defined by Destination NSW. This Sydney and Surrounds region includes major visitor destinations such as Circular Quay, Manly, Bondi Beach and Sydney Olympic Park etc. Whilst close proximity to these major visitor destinations can be advantageous for Camden LGA, it can also be problematic in positioning the LGA, as a destination in its own right.

The proximity (1 hours' drive away) is a real asset with such a large population catchment so easily accessible. However, being so accessible makes it far harder to be recognised as distinctly different from other parts of Sydney and Surrounds.

Furthermore, being near by a number of popular destinations (such as the Southern Highlands and the Blue Mountains) which Sydney short break visitors can choose from, makes it more challenging to position and sell Camden as a short break destination.

Figure 2 reflects the distance from the Sydney CBD to the Camden LGA and other nearby tourism destinations on Sydney's doorstep, including the Blue Mountains, and marginally further out to the Southern Highlands, the Central Coast and the South Coast. This highlights the competitive environment the Camden LGA has to operate in.

Significant urban expansion out into parts of the Camden LGA (and broader Western Sydney) for residential development has also impacted on the way the region is perceived (possibly more as a

major dormitory suburb for greater Sydney and less as a possible tourist destination in its own right).

**FIGURE 3: DISTANCE FROM SYDNEY CBD[2]**
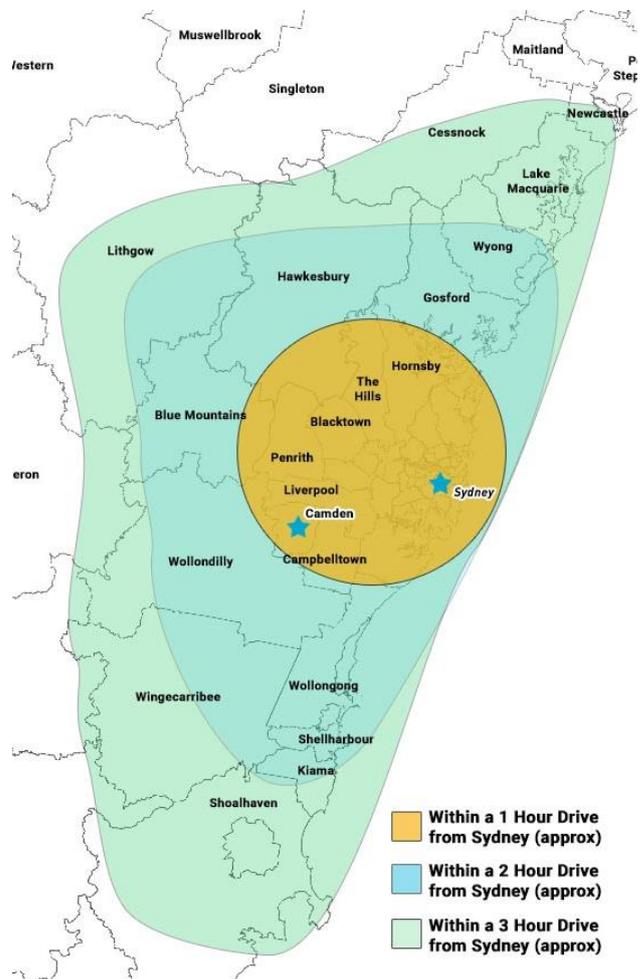


Nevertheless, being very close to such a large urban catchment area (Sydney), makes the LGA highly accessible not only to the local domestic market but also the inbound international market which the majority of international visitors fly into. A number of opportunities to capture these markets are included within this DMP.

Importantly however, Camden needs to actively encourage more local domestic visitors from Greater Sydney as the easier visitor market to access.

[2] Driving distances determined via Google Maps.
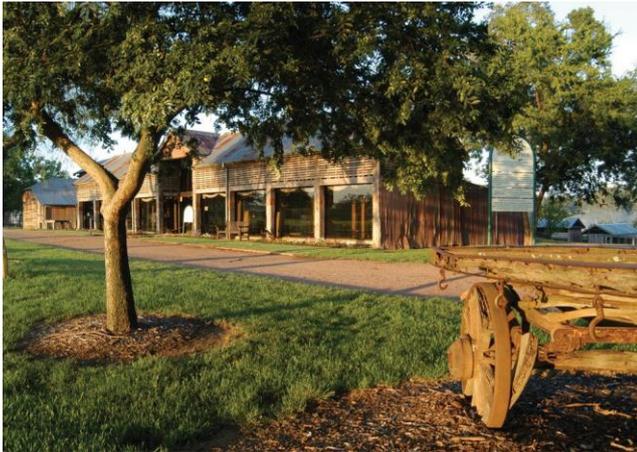
## 3.3. Population

The figure below illustrates Camden's population growth over the period 1996 - 2011, as well as forecasted population growth from 2016 – 2031.

Over the 15 year period from 1996 – 2011, Camden's population has almost doubled, growing from 33,100 residents to 58,440.

**FIGURE 4: HISTORIC POPULATION AND FORECASTED GROWTH[3]**
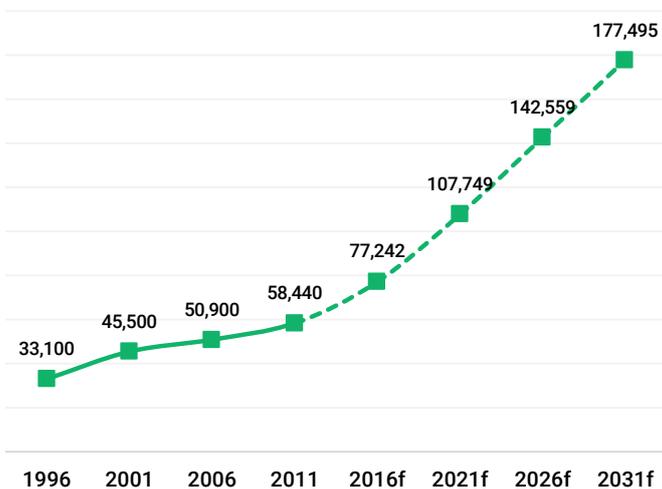


This growth is anticipated to continue, with Camden LGA being in Sydney's South West Growth Centre and having the major urban development precincts of Oran Park and Leppington North. Consequently,

the population forecasts for Camden LGA estimate a 204% increase in Camden's population, growing from 58,440 in 2011 to an estimated 177,495 by 2031.

To support this growth in population not only necessitates the development of additional housing and urban release areas, but also requires the development of supporting infrastructure (roads, schools, medical facilities etc.), retail, hospitality services as well as community facilities, activities and infrastructure to enhance the "liveability" of the LGA. This includes parks, museums, cultural attractors, events, sporting facilities, family attractions, accommodation etc.

## 3.4. Visitation to the Camden LGA

### 3.4.1. Visitor Numbers

Due to the small sample sizes and inconsistencies that can result, visitor data down to an LGA level is not readily available for all LGAs throughout NSW. Special data requests to the State tourism body, Destination NSW however yielded visitor data for the Camden LGA which is based on a four year period to obtain an average.

Over the last four year period (YE Sept 2014), visitation to the Camden LGA totalled 571k visitors. Over this period, the largest source of visitation for Camden, not dissimilar to other LGAs in the Greater Sydney region, comprised domestic day visitation, representing 87% (494k visitors) of visitation to the LGA. This was followed by domestic overnight visitors (13% or 73k visitors) and international visitation (1% or 4.2k visitors).

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[3]         http://forecast.id.com.au/camden/population-households-dwellings

While The Group does not discount the importance of the domestic day trip market, however, we recognise the increased yield which can often be generated by converting day trip visitors into overnight visitors (increased spend as a result of accommodation, food and beverage etc.). This DMP aims to provide recommendations and strategies which will assist in converting some of these day visitors into overnight visitors.

**FIGURE 5: VISITORS TO THE CAMDEN LGA (4 YEAR AVERAGE YE SEPT 2014)[4]**
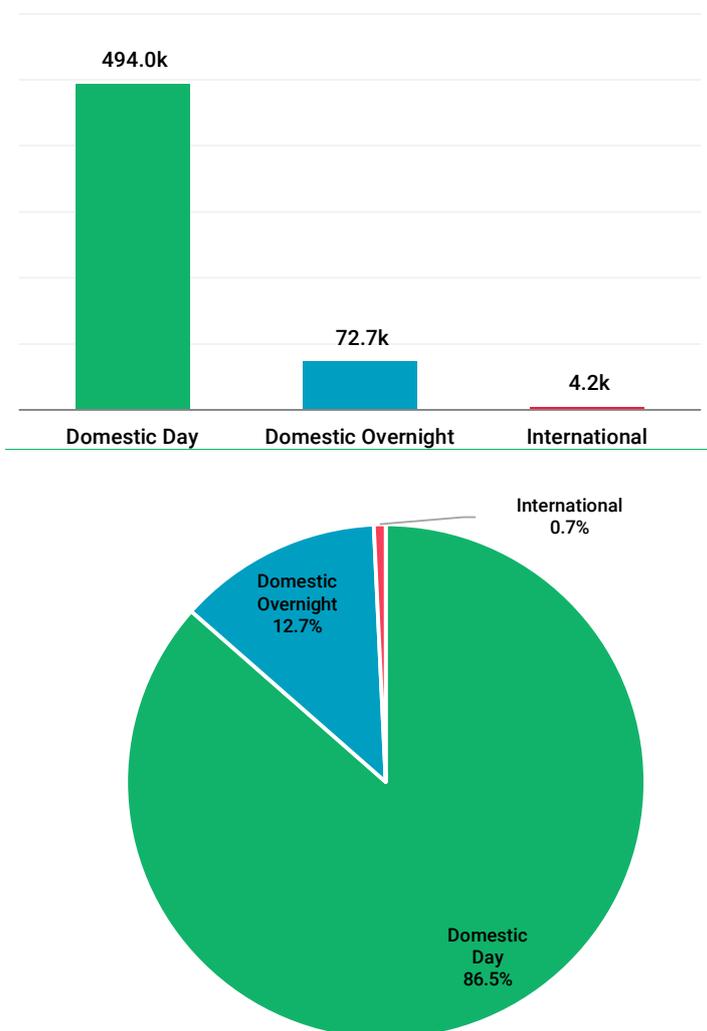




### 3.4.2. Average Length of Stay

The following table provides a breakdown of the average length of visitors to Camden LGA over the four year period 2011 – 2014. International visitation has a far higher average length of stay as these would comprise those in the LGA for business and/or education purposes and who tend to skew the international holiday/leisure visitor average length of stay considerably.

**TABLE 1: AVERAGE LENGTH OF STAY (4 YEAR AVERAGE YE SEPT 2014)**

| Average Length of Stay (Nights) | |
|---|---|
| **Domestic Day** | - |
| **Domestic Overnight** | 3.1 |
| **International** | 24.7 |

## 3.5. Swot Analysis

The table on the following page provides a SWOT analysis for the Camden LGA, focusing on tourism related strengths, weaknesses, opportunities and threats.

It has been created after discussions with various industry and government stakeholders and from the review of research and associated analysis.

There are some strengths and weaknesses which correlate back to the 2012 – 2015 Tourism Strategy, but overall a number of new opportunities and challenges have been identified.

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[4] Special data request to DNSW

**TABLE 2: SWOT ANALYSIS**

## STRENGTHS

- Close proximity to key markets, especially Greater Sydney
- Council is actively pro tourism
- Variety of experiences within a rural setting
- Good access to major road and rail networks
- Availability of land for development
- A number of significant heritage sites
- A range of sporting and shopping facilities
- The Australian Botanic Garden and the new mountain biking trails
- Its historic village style and café culture
- Open space –surrounded by a rural setting and the Nepean River
- Camden airport as a tourism hub and potential commercial hub
- Strong relationship with Campbelltown City Council and alignment with tourism vision going forward
- Camden is the most intact Macarthur heritage town on the Cumberland Plain

## WEAKNESSES

- Tyranny of distance from Sydney CBD
- Limited accommodation availability in Camden LGA to cater for large scale events
- Perceptions and image of the LGA as a dormitory residential area
- Inability to activate the major rivers for recreation or tourism due to environmental restrictions
- Lack of interpretation and directional signage
- Lack of marketing budget for tourism promotion
- Confusion over what tourism actually is
- Retailers closed on the weekend
- Location of Camden VIC
- Lack of tourism welcome signage on key highways
- Relatively small number of significant attractions
- Not currently perceived as a destination by visitors to Sydney
- Lack of operators following branding guidelines on promotional material and websites
- Some businesses looking tired and run down and lack funding to make improvements
- Consumer perception of Camden as a major residential urban growth area in a rural setting
- No regional tourism entity to leverage off
- Lack of product packaging

## OPPORTUNITIES

- Create Camden town centre into a strong heritage precinct through clever place making initiatives
- Capitalise on the strength of the equine sector, possibly through the development of an equine interpretation centre
- Introduction of new forms of accommodation (boutique hotel, glamping, rural retreats)
- Partnerships with surrounding LGAs and tourism regions
- Introduction of evening experiences to encourage vibrancy throughout the region
- Development of cooking schools and enhancement of food trails to leverage off the emerging boutique foot sector
- Capitalise on the air sports activity currently taking place at Camden Airport
- Development of a brand identity for the LGA (as part of a broader Macarthur destination brand)
- Leverage off the heritage and history of Camden via sound and light shows, walking tours, augmented reality apps etc.
- Greater promotion and profiling of Camden Town Farm possibly via events
- Improving transport connectivity (rail-bus links)
- Introduce new festivals and events
- Assess boutique heritage hotel for Camden
- Reuse existing heritage buildings in Camden township for commercial accommodation, art gallery, expanded food experience, cooking school etc.
- An arts hotel and art gallery and café-dining experience in John St utilising the current Council building and adjoining police station and court house

## THREATS

- Introduction of inappropriate facilities or infrastructure which weakens Camden town centre's heritage value
- Local residents' attitude ambivalent to tourism
- Competition from other nearby destinations
- Nearby mature and rejuvenated destinations with greater marketing budgets
- Downturn in the economy – reducing disposable income used for travelling and day trips
- Urbanisation compromising rural / scenic feel to the LGA
- Lack of support from State Government to be recognised as a region or as offering a tourism proposition

# 4. PRODUCT & INFRASTRUCTURE AUDIT

# 4. Product & Infrastructure Audit

To assess current tourism services and product (attractions, accommodation, experiences etc.) provision throughout the LGA, The Group has completed a product and experience audit.

## 4.1.    Attraction Audit

Based on desktop research, consultation and assessment, the following table provides a supply side audit of Camden's tourism product. The audit identified 63 tourism attraction related experiences and ranging from cultural experiences to adventure experiences to tour operators. The following table provides a breakdown of these experiences and their location within the Camden LGA.

TABLE 3: CAMDEN LGA TOURISM PRODUCT AUDIT SUMMARY

|  | Count | % Breakdown |
|---|---|---|
| Recreation | 17 | 27% |
| Active / Adventure | 10 | 16% |
| Tour Operator | 10 | 16% |
| Arts, Cultural, Heritage | 6 | 10% |
| Parks & Reserves | 6 | 10% |
| Market | 5 | 8% |
| Brewery/Winery | 4 | 6% |
| Food Experience | 4 | 6% |
| Entertainment | 1 | 2% |
| TOTAL | 63 | 100% |

It is important to note that this product audit captures only those operators who are listed on the Macarthur destination website, Council's tourism database and website and Destination NSW. It is important to understand that because there are a number of operators in the Camden LGA who do not have a web presence, they may not be captured in this audit.

The table demonstrates that Camden's tourism product is distributed amongst:

- Recreation product and parks and reserves - most of which is free product; and
- Act/adventure product and tour operators - most of which is pay for product.

The full findings from the audit have been included in Supporting Documentation Section 1.

What the product audit does not reflect is the quality of assets on offer and their competitiveness.

## 4.2.    Accommodation Audit

The following table provides a summary list of commercial accommodation available throughout the Camden LGA. This demonstrates that Camden has very few larger scale hotels, with the majority of accommodation comprising motels and B&B style facilities.

TABLE 4: CAMDEN LGA ACCOMMODATION AUDIT SUMMARY

|  | Count | % Breakdown |
|---|---|---|
| Motel | 4 | 44% |
| B&B/Guesthouse/Farmstay | 3 | 33% |
| Camping/Caravan Park | 1 | 11% |
| Student Accommodation/ Schools Camps | 1 | 11% |
| Serviced Apartments | 0 | 0% |
| Total | 9 | 100% |

No assessment is provided on the quality of accommodation facilities, though we understand

that with limited supply, many accommodation facilities are achieving strong occupancy rates.

The full findings from the audit have been included in Supporting Documentation Section 2.

## 4.3. Food & Beverage Audit

Table 5 provides a summary of food and beverage (F&B) providers within the Camden LGA. Whilst the audit demonstrates that the LGA has a large proportion of restaurants (53% of F&B product), anecdotal feedback from stakeholders indicates that many of these offer variable quality and there is a distinct lack of restaurants which one may classify as a "dining out" experiences. Many are fast food style outlets.

TABLE 5: CAMDEN LGA F&B AUDIT SUMMARY

|  | Count | % Breakdown |
|---|---|---|
| **Café** | 16 | 20% |
| **Ice Creamery / Dessert** | 3 | 4% |
| **Pub / Club** | 12 | 15% |
| **Restaurant** | 42 | 53% |
| **Takeaway** | 7 | 9% |
| **TOTAL** | **80** | **100%** |

We understand however, that a number of food and beverage operators within Camden are putting significant effort into increasing the quality and range of food and beverage experiences available within the LGA and Camden's recognition as a destination for food experiences is growing.

As with the previous audits, it is important to note that this product audit captures only those operators who are listed on the Macarthur destination website and Council's tourism database. It is important to understand that because there are a number of food and beverage operators in the Macarthur region who

do not have a web presence, they may not be captured in this audit.

The full findings from the audit have been included in Supporting Documentation Section 3.



## 4.4. Product gap analysis

As has been identified in the opportunities section of this report, there are a number of new initiatives which could be considered to help bolster the tourism product mix within Camden. In addition, a detailed assessment of the current product mix has identified a number of potential product gaps.

These gaps are noted as follows (and not in priority order):

- The lack of commercial accommodation in the LGA;
- Lack of capitalising on the strength of the equine sector within Camden and the broader surrounding region;
- The opportunity for enhancing the existing, or developing a new, a high quality holiday park to pick up on the strong growth in the campervan

and caravan market and the lack of holiday park sites in and around greater Sydney;

- The lack of packaging of product (accommodation, visitor attractions, food and beverage options etc.);

- Other forms of arts and heritage tourism product to help grow the cultural tourism product base within the region overall and the lack of links between cultural product to offer a trail;

- Potential for sound and light shows particularly utilising old historic buildings and the Australian Botanic Gardens to offer evening based visitor experiences as there is limited evening product currently on offer[5];

- Refreshing and packaging heritage based experiences (local community museums, historic sites and sites of significance) as part of guided walking tours including ghost tours etc.;

- Development of a mobile app with augmented reality to tell the history of the unique parts of Camden (possibly integrating with a regional Macarthur app);

- Looking beyond the LGA's boundaries to create synergy with tourism product in neighbouring areas but using Camden as the base to experience these from;

- Developing a major visitor perception campaign to be promoted in Greater Sydney and focused on the wide product range available within Camden, which is required to help change perceptions of what the region is; and

- Develop a major visitor attraction, possibly based on a themed horror house experience (similar to Spookers – approximately 1 hour

south of the Auckland CBD) utilising a vacant building in the region and leveraging off the history of Macarthur towns.





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[5] We note the recent success of the sound and light show held in Picton (Wollondilly Shire) and the strong interest this generated.
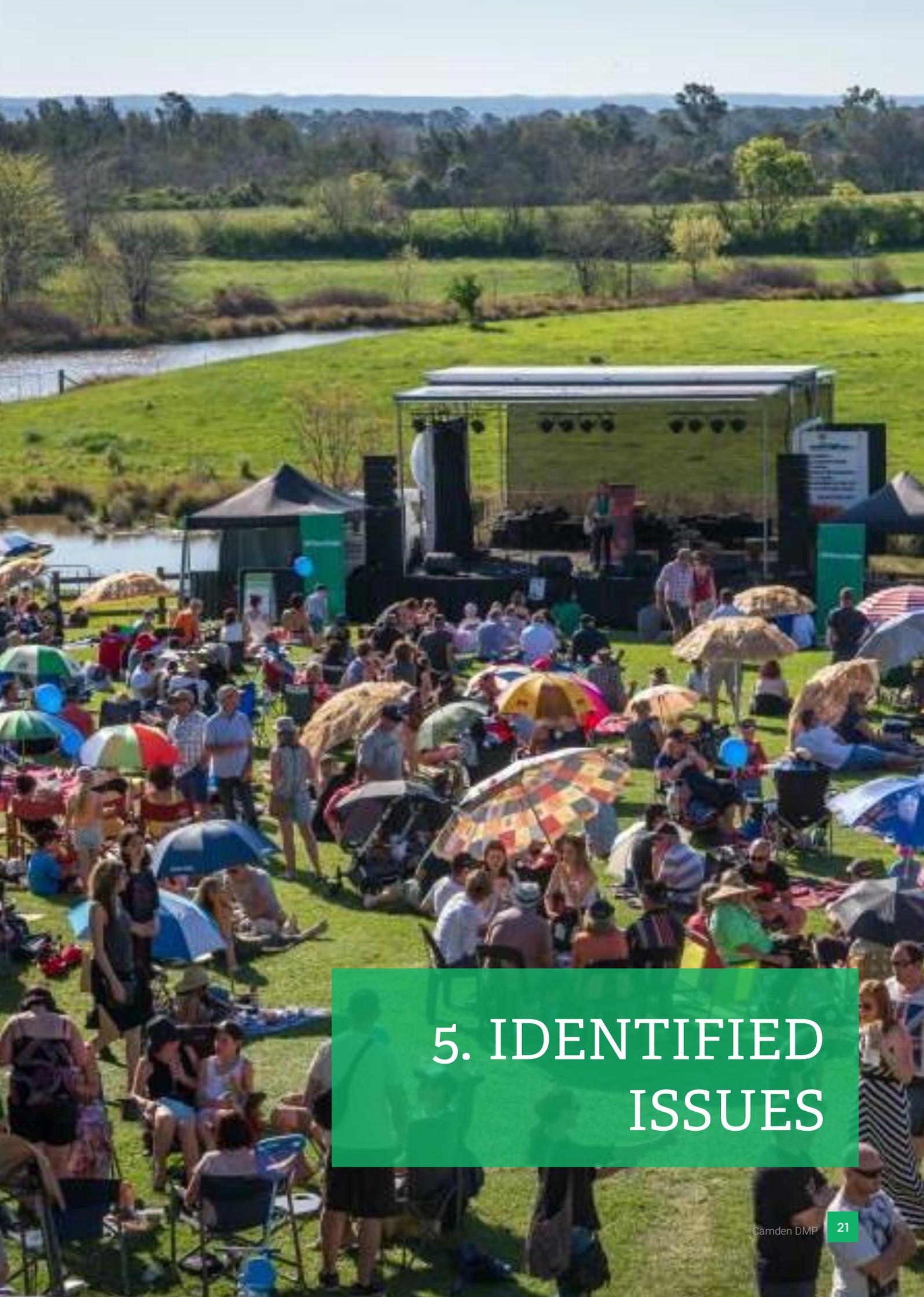
# 5. IDENTIFIED ISSUES

# 5. Identified Issues

These issues and gaps will need to be addressed to help facilitate the success of this DMP and ultimately, to promote the development of sustainable tourism for Camden.

These issues have been identified through the discussions with Council and stakeholders, as well as through desktop research and various site visits and assessments.

The issues have been segmented into the following categories:

- Product and supporting infrastructure issues;
- Marketing and promotional issues; and
- Other tourism related issues.

It is important to note that the responsibility of resolving these issues does not fall only on Council's shoulders. Rather, many will require the active participation of Camden tourism operators as well as other stakeholders.

Recommendations regarding how many of these issues can be resolved or converted into opportunities for Camden are outlined in Section 5 of this DMP.

## 5.1. Product and Supporting Infrastructure

### 5.1.1. Lack of Commissionable Product

Part of the challenge for Camden in growing its visitor markets is the limited amount of commissionable tourism product available, well packaged and actively promoted. Much of the region's tourism promotion focus is centred on free

and natural experiences such as historic and nature-based assets and farmers markets etc.

Furthermore, Camden has very few large scale operators and as a result, tourism is primarily centred on small businesses which are generally far harder to encourage to participate in cooperative marketing initiatives and who are often undercapitalised.

The ability to grow visitation to Camden and increase visitor spend especially will be dependent on:

- The introduction of a wider product mix offering different and new experiences (both commissionable and free);
- The development of packaged experiences to help make it easier to promote Camden;
- Development of collective marketing initiatives which can actively promote the region for a variety of purposes; and
- A far stronger online (website, mobile app etc.) promotional presence acknowledging the need to encourage people to visit, live, work and play in Camden, as part of an overarching Macarthur regional tourism/destination website.

### 5.1.2. Growing Region – Inadequate Infrastructure Support

The following figure demonstrates the population growth which is anticipated to occur in the Camden LGA over the period 2011 – 2031. Over this period, the total region's population is anticipated to growth by 178%, increasing from 58k to 162k. This is

significant and is important to note as it helps support a number of tourism businesses.

**FIGURE 6: CAMDEN FORECASTED POPULATION GROWTH[6]**



| 2011 | 2016f | 2021f | 2026f | 2031f |

58,450 — 84,400 — 107,700 — 133,700 — 162,350
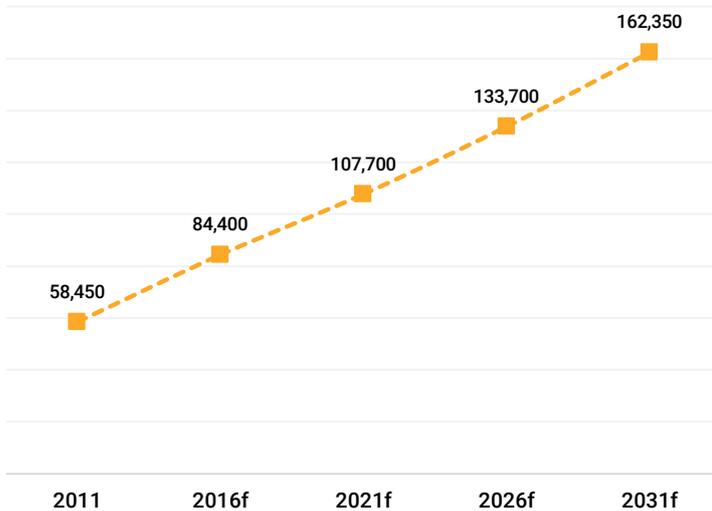
Feedback received from stakeholders indicated that whilst the region is recognised as an important growing residential area, the infrastructure support by way of roads, public transport services and community infrastructure (such as sporting and arts facilities) is struggling to keep up and as the LGA continues to grow, this issue will only intensify.

There is a need to explore opportunities for how the cost of these upgrades can be met with possible support from different levels of government.

There is also a need to explore the different ways of potentially generating a variety of income/revenue streams and other economic benefits associated with upgrading these forms of public infrastructure.

### 5.1.3. Narellan Road

Narellan Road was highlighted by almost all stakeholders as being a major challenge for Camden, with its congestion, particularly during peak hour, being a deterrent to growing visitor flows. The constant negative publicity this road gets in not only main stream media but also on radio traffic reports acts as a serious disincentive to attract visitors when they perceive it is constantly congested. It may be worth creating a section on the enhanced tourism website for the Macarthur region to have a portal to advise how quickly traffic is flowing so visitors can see there isn't a problem at different times of the day and week.

### 5.1.4. Location of the Camden VIC

Many stakeholders felt that the Camden VIC (which is currently situated within the historic John Oxley Cottage in Elderslie on the Camden Valley Way) should be ideally located within Camden township in order to increase its visibility and in turn, encourage greater numbers of visitors to stop and enjoy the retail experience which Camden can offer.

A separate assessment needs to be undertaken looking at the performance of the VIC and possible alternative information mechanisms to ensure Camden Council is obtaining the optimum return for its investment into visitor services. Many councils are performing similar assessments given the increasing reliance visitors have on technology prior to visiting and during their visit to a destination and the traditional low percentage of visitors who use a VIC.

[6] NSW Department of Planning and Environment - New South Wales State and Local Government Area Population Projections: 2014 Final

### 5.1.5. Accommodation in Camden

Camden's accommodation mix is primarily limited to the Camden Valley Inn and a small number of motels and B&Bs. Most visitor accommodation is small scale and family run properties. Higher quality and larger hotels, particularly within Camden, are underrepresented. The only other major accommodation provider is the existing Poplar Caravan Park which we note generates very high occupancy levels.

Visitor statistics from DNSW indicate only 13% of visitors to Camden LGA stay overnight, and a significant proportion of these are assumed to stay with friends and relatives.[7]

This lack of commercial accommodation has several implications, including (but not limited to) the inability to secure larger events and conferences as there is insufficient accommodation (and of a high enough quality) for conference/event attendees unless they can be accommodated in surrounding areas.

Domestic and international trends identified through the consultation process and via research indicates a potential for a higher quality boutique heritage hotel within Camden. The size and scale of this hotel should be the subject of a feasibility assessment however, and may be dependent on gaining access to appropriate heritage style buildings able to be retrofitted for this purpose.

### 5.1.6. Signage (interpretation and directional)

There is a lack of signage – including directional and interpretive. Directional signage, particularly within a CBD, is crucial to encourage visitation to places of interest, outline walks that can be completed through the CBD to attractions (such as heritage and cultural walks).

It is important to consider that the better signposting of Camden's natural and built attractions, particularly the historic town centre, the large Camden Bicentennial Equestrian Park and Town Farm along with the national parks within the region, could potentially encourage visitors and the community to make better use of these facilities for walking, cycling and picnicking etc.

There is also a lack of interpretative signage when entering the region and at attractions. What should be considered are attractive gateway signs on major access roads into Camden, highlighting the key experiences and branding of the LGA. As the area is steeped in history, the potential exists to use sign boards, markers and mobile apps to bring alive the heritage significance of the LGA.

Signage that could potentially be implemented includes attractive static displays (for both directional and interpretive means) as well as high-tech, innovative electronic information displays and touch screens which could be located in town centre main streets.

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[7] Based on DNSW data (4 year LGA profiles to YE Sept 2014), 30% of international visitors and 39% of domestic overnight visitors to NSW stay with a family/friend and 42% of international overnight visitors and 10% of domestic overnight visitors stay in a rented house/apartment/flat. Only 11% of international overnight and 25% of domestic overnight visitors stay in commercial hotels, resorts, motor ins etc.

### 5.1.7. Need to Upgrade the Civic Centre

We understand that whilst the Camden Civic Centre has historically been an important venue for community and professional theatre, arts and concert performances, the facility is ageing and requires upgrading to bring it up to standard to make it once again, a marketable facility for larger-scale performances and productions within the wider region. An assessment and feasibility of the cost benefit of doing such an upgrade should be considered.

## 5.2. Marketing and Promotion

### 5.2.1. Strong competition from destinations such as Sydney and Blue Mountains

In some ways, Camden LGA is fortunate to be surrounded by strong tourism destinations and brands such as Sydney and the Blue Mountains, as Camden LGA can benefit from the tourism "trickle down" effect. However, being so close to these high profile and highly marketed destinations can result in Camden LGA struggling to market and position itself as a distinct destination in its own right.

There is a need to ensure that Camden LGA, as part of the Macarthur region, has a very clear point of difference as a destination and can leverage off product gaps seen in the Greater Sydney region. These are outlined in the opportunities section of this DMP.

### 5.2.2. Inclusion in the Sydney and Surrounds Region

Whilst Camden does not have a local tourism organisation (or LTO), it is generally accepted that "Macarthur" represents the "unofficial" tourism region covering Camden, Campbelltown and Wollondilly. We understand however, that whilst Campbelltown is keen to work closely with Camden to strengthen the regional visitor economy and look at various cooperative marketing programs, Wollondilly would prefer to market and align with the Southern Highlands.

Within the DNSW boundaries, Camden LGA falls within the "Sydney and Surrounds" marketing region (see figure below). This provides opportunities for Camden in terms of being able to leverage off Sydney's significant marketing budget and brand. With the diversity and size of the Sydney region, it is easy for smaller areas, however, with limited product and branding, to be overlooked. This is why developing new product and providing for greater market awareness of Camden is so important.

FIGURE 7: DNSW TOURISM REGIONS

Consultation with Council and stakeholders revealed that positioning Camden LGA as part of Greater Sydney region has led to a current disadvantage. Many stakeholders commented that the focus of promotional efforts and activity within the Sydney region has traditionally been strongly orientated towards the Sydney CBD and the mass of facilities, attractions and related infrastructure to leverage off.

The current move to expand the second CBD hub of Parramatta also challenges Camden's ability to be adequately seen and heard as a developing tourism destination.

### 5.2.3. Brand Differentiation

Camden LGA, and the Macarthur region as a whole, currently lacks a clear identity and a discernible image. To position Camden LGA more appropriately within the Sydney and Surrounds region, there is a need to develop a destination brand/identity. Importantly, this identity needs to be developed in consultation with the community to ensure the identity is accepted and utilised by tourism operators and the industry generally and achieves community buy in and support. Whilst many comment that Camden is the "country or rural element of Macarthur", this potentially under sells the unique position Camden LGA has.

### 5.2.4. Lack of Cooperative Marketing

Transport operators and tour operators based in the Sydney CBD generally have indicated a lack of interest in developing tours for both the Camden LGA and the broader Macarthur region. Feedback which was provided on a confidential basis indicates the following reasons for this:

- There is insufficient commissionable product in the region to enable packages to be created for the domestic and international markets;
- Whilst the region does offer an attractive heritage/historic setting, their attractiveness, at times, is compromised by limited retail and limited shop trading hours;
- There is limited interest in some of the existing events which are seen to be more community based; and
- The greatest impediment to encouraging and motivating inbound tour operators and wholesalers to recognise the value and importance of Camden as a visitor destination, is the lack of a major all-weather reasonably sized visitor attraction or experience and larger scale or unique commercial accommodation. If there was one unique visitor experience, this could act as a sufficient catalyst to encourage tours to be potentially trialled to scope interest.

### 5.2.5. Market Perception

With 87% of visitors to the LGA being day trippers, there is a perception amongst tour operators, wholesalers and tourism intermediaries generally that Camden is a day visitor market only. That is, interstate and international visitors currently will stay in the Sydney CBD and travel out to the region for day visitor experiences rather than consider the possibility for overnight stays. This view is reinforced by local markets from the greater Sydney region who do not yet see the need for overnight stays, possibly based on the products currently on offer, the excellent accessibility via the M5 and M7 to the region and the perception that the region is not yet a destination in its own right.

A gap which exists is the lack of evening-based visitor experiences to help encourage greater visitation overall and to help develop a stronger overnight visitor market.

## 5.3. Other issues

### 5.3.1. Tyranny of Distance

Whilst the proximity to the Sydney CBD and Sydney Airport provide an important local market and link for the LGA, they also provide one of the greatest challenges. The fundamental challenge of the closeness of the region to Sydney is possibly seen by some markets (including locals) as merely an extension of Sydney rather than a destination in its own right. Highway quality allows locals and visitors (depending on traffic) to reach the Sydney CBD in one hour.

This places greater pressure to develop tourism facilities which can be major stimulants to encourage people to visit and make the region a destination in its own right. By comparison, the Blue Mountains and the Southern Highlands offer sufficient distance from Sydney (1.5 hours' drive) to give the feeling that they are separate destinations and also benefit from different geographic landscapes and microclimates.

### 5.3.2. Parramatta Centric Focus

There is currently a very strong focus by the NSW State government to develop and position Parramatta as Sydney's second CBD.[8] As part of this development, major infrastructure is planned including residential housing, transport connectivity,

community infrastructure (such as theatres and stadia), medical facilities and schools.

While the development of this infrastructure is beneficial for the Great Western Sydney region, many LGAs surrounding Parramatta such as Penrith, the Hawkesbury, Blue Mountains, Liverpool and including Camden and Campbelltown, have commented that this Parramatta centric focus has resulted, in some cases, in their own needs for facilities and infrastructure being overlooked or at best, downgraded.

Tourism has the potential to support a number of projects for Camden and the wider Macarthur region and through this, to provide additional benefits to support State Government funding.



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[8] The NSW State Government document "A Plan for Growing Sydney" lists number of directions to follow, the second of which is Direction 1.2 " Grow Greater Parramatta – Sydney's second CBD".

### 5.3.3. Balancing Housing and Tourism Needs

Tourism growth in Camden is challenged in trying to achieve a balance with State Government targets for new housing lands particularly in the South West Growth Centre of which Camden is an important LGA. This also is factored in by State Government targets on employment growth which is not contrary to the needs of the tourism sector but it is certainly actively encouraging other industry sectors where the employment ratios are thought to be higher.

What may need to be considered is creating dedicated tourism and related retail precincts which can act as nodes for tourism destination activity and which can help protect the character of town centres so the recreational and heritage values are not lost.

The introduction of more major housing estates and lack of sufficient open space areas and wider buffer zones could inadvertently limit tourism potential in a variety of locations within or near urban centres in particular. It is important that tourism development is not pushed out into peripheral areas, making it harder to access and develop. Camden's town assets lie as much in its historic built environment as its natural outdoors environment.

### 5.3.4. Lifestyle Operators

There is a proportion of Camden's tourism industry operators who are seen to be more lifestyle rather than full commercial operators. This extends to the hospitality and retail sector where a number of cafés, restaurants and retailers are not open during the weekend periods (and on Sunday in particular). This creates the perception that Camden is not open on the weekends. This is a major limitation for the area going forward in developing as a tourism destination.

To encourage tourism operators, hospitality operators and retailers to extend their trading hours, and in particular, trade on Sundays, it is important that they (and the general community) are provided with insight as to the economic benefits of doing so, as well as information on the importance of the tourism industry for Camden. We suspect many visitors will have a preference for visiting Camden on the weekends if they knew it was open for business.

### 5.3.5. Lack of Industry Cohesion

Camden is a diverse and rapidly changing LGA. As a consequence, there are differing opinions as to the direction which the region as a whole, and the LGA individually, needs to pursue for tourism.

Despite best efforts, coordination and integration, at the broader Macarthur regional level struggles, and, as a result, this makes it harder for Camden to develop as a tourism destination.

Coordination is needed in order to drive and grow tourism on a sustainable basis and to assist in developing the future tourism identity which is required. Tourism operators need to recognise that the strength of Camden (within the wider Macarthur region) is in *the sum of its parts*, rather than any one part of the region. And they need to take some ownership to achieve this.

### 5.3.6. Lack of Tourism Investment

There has been a lack of investment in the tourism industry from commercial developers and operators for new accommodation as well as attraction/experience based product. Operators also commented on the inability to upgrade existing tourism product because of lack of capital as well as zoning/planning restrictions.

There would be benefit in Council developing a tourism investment portfolio to indicate the kind of tourism development it will support as well as the most appropriate location for tourism development. Investors are looking for certainty in where they can develop and what is more likely to be supported by Council. Many investors see Council applied red tape as the major barrier and lack of support in LEP and DCP planning documents which do not encourage investment, especially into the tourism sector.

### 5.3.7. Lack of Understanding of the Importance of the Tourism Industry

Whilst the Camden LGA does have a number of active tourism operators, there are also a large number of lifestyle operators. Furthermore, while the community is generally supportive of tourism, as is similar in many other regions, they often fail to understand that councils are generally the largest financial supporters of tourism via visitor information services, tourism marketing and promotion, funding of local tourism organisations, maintenance of visitor infrastructure (such as signage, art galleries, museums etc.).

A strategy which promotes far more industry participation and broader community awareness is probably required. This strategy could include a community awareness campaign which demonstrates the following:

- How the tourism dollar disperses through the local economy;
- The breadth of businesses who benefit from tourism;
- How extended trading hours could provide benefits to a wide cross spectrum of the community and grow the visitor economy;

- The estimated value of tourism via direct, indirect and induced spending impacts; and
- To help support why Council/rate payer funding is required to maximise the total returns to Camden LGA as demonstrated via economic benefits, social and infrastructure improvements and higher quality environmental outcomes.

### 5.3.8. Evening Retail Trading Hours

Limited shop trading hours, particularly in the evening, creates the perception that Camden is not open at night.

To encourage retailers, and particularly restaurant and café operators, to extend their trading hours, it is important that they (as well as the general community) are provided with insight as to the economic benefits of doing so.

It is important to recognise that greater community commitment to growing and promoting tourism will lead to greater word of mouth advertising for the LGA. It may also be useful to start this as a seasonal initiative to over the months where more festivals/events occur and more visitors are about.

# 6. THE OPPORTUNITIES

# 6. The Opportunities



The following section highlights the opportunities which Camden could focus on in order to activate and grow tourism on a sustainable basis. The opportunities have deliberately been kept succinct to ensure that the focus is on those opportunities which are likely to generate the best possible returns in the shortest timeframe. They therefore represent the *lower hanging fruit* opportunities for Camden LGA.

The opportunities[9] have been segmented according to the following themes, which align with the previous 2012 – 2015 Tourism Strategy:

- Tourism Product Development & Partnerships;
- Marketing & Promotion;
- Industry Support; and
- Visitor Servicing.

Additionally, whilst new opportunities have been identified, there are several which were taken from the regional Macarthur DMP (which was completed by The Group) as these were identified in the regional DMP as being Camden-specific. These opportunities have been further expanded upon as part of this Camden LGA-specific DMP.

In addition to the opportunities noted below, there are additional opportunities pertaining specifically to tourism place making, which have been noted in Section 6 of this DMP.

## 6.1. Tourism Product Development & Partnerships

### 6.1.1. Holiday Park Expansion

The region has one commercial tourist park, Poplar Caravan Park, located within Camden. We understand this Tourist Park has undergone significant change over the past few years and has emerged as a model tourist park.

Discussions with the manager of the Park indicate that occupancy at the park has increased by 350%, with the park achieving an average annual occupancy of 98% (and with very few permanents residing in the Park).

Whilst we understand the Park is keen to expand, The Group considers that in order to continue to grow the caravan and camping market to the region, there is a need to consider the development of an

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[9] Note, the following opportunities are not listed in priority order.

additional park, with the function primarily being a destination style holiday park.

Over the past 15 years, the caravan, motorhome and camping industry has been the fastest growing domestic tourism sector in Australia. In this period, caravan and RV registrations have increased by more than 250%. The industry is worth $6.5 billion nationally and currently provides for 620,000 holidays per annum. The industry is constantly evolving with successful parks responding to consumer demand for better standards and facilities by transforming from traditional transit parks into holiday/destination parks.

We consider that the development of a true destination style caravan park (i.e. following the Big 4 Model amongst others) may help Camden attract a greater share of the interstate and intrastate family visitor market. Should the owners of Poplar Tourist Park be keen, this could be undertaken as an expansion to their current park, or, this may need to be undertaken on a different site with greater capacity for growth.

The scale of expansion may or may not be able to be accommodated on the Poplar Tourist Park site, hence the need to consider longer term growth prospects and the potential for an additional destination park in the region (which may or may not be potentially run by the owner/operator of Poplar Tourist Park).

Holiday parks differ from traditional caravan parks as they offer a full holiday experience providing facilities such as swimming pools and aquatic parks, kids clubs, camp kitchens, mini-golf, group entertainment and shops etc. Consequently, these parks are attracting a growing number of families who utilise the park as their holiday destination rather than solely utilising them as a means of accommodation.

Feedback received from State tourism bodies in both NSW and Queensland emphasised the declining number of caravan parks across both States. This decline does not appear to be as a result of lack of demand, but rather as a result of the value of their land being used for other forms of development. There have been many existing caravan park sites redeveloped as residential and mixed use commercial development, especially in coastal locations.

When developing a new park, the following should be considered:

- Capacity for approximately 80 - 120 caravan powered sites and 60 – 100 non powered camping sites and ideally 30 cabins/chalets;

- The park should be focused on tourists as opposed to permanent stay campers;

- The park needs to be family friendly to encourage a greater number of families to stopover and visit the region and use Camden as a base for visiting greater Sydney;

- Development designed by a renowned designer who is considered to be an industry leader in holiday parks is important so best practice is applied; and

- Consideration should be given to the provision of amenities such as a heated pool, spa, BBQ facilities, camp kitchen, tennis court, bike hire/loan, kid's playground (including a giant jumping castle), daily children's activities and a café and convenience store.

The following figure demonstrates 4 traditional caravan parks. Often these parks have very basic facilities and are used as transit parks by travellers (i.e. overnight accommodation when travelling between two destinations, rather than being a destination in its own right).

**FIGURE 8: TRADITIONAL CARAVAN PARKS**



**Canobolas Caravan Park, NSW**



**Burrum Heads Beachfront Tourist Park, QLD**



**Goomalling Caravan Park, WA**

The figure below demonstrates the modern form of caravan parks – often referred to as destination or holiday parks. These parks usually feature a combination of caravan/camping sites as well as units and chalets, waterparks, pools and waterslides, kid's playgrounds, game rooms, biking trails, cafes and shops.

This model is where the current and future market demand is focused and where Camden has a significant opportunity to become a hub for this important sector of the tourism industry.

**FIGURE 9: DESTINATION HOLIDAY PARKS**



**Deniliquin Holiday Park, NSW**



**Pambula Beach Discovery Holiday Park, NSW**



**MacDonnell Range Holiday Park, NT**

In order to determine the most appropriate site for the destination holiday park and to assess the interest of the current tourist park owners, a feasibility and site assessment should be undertaken. The emphasis here needs to be on recognition that Camden could offer a hub for caravaners and RVs in Greater Sydney. It is on the edge of major highways providing excellent access to Sydney CBD and the wider region.

The opportunity for Camden is significant in a broader Sydney context to offer a camping/caravan/RV and related hub to help cater for the continuing growth of this sector of the visitor market.

### 6.1.2. Haunted Attraction and Festival

Potential exists to bring alive the heritage and living stories of Macarthur through an attraction and events/festival program which could be centred on the concept of "Macarthur Horrors". The concept could involve:

- Identifying companies interested in creating a themed haunted attraction in similar fashion to www.spookers.com and possibly using redundant heritage buildings or other facilities which can be easily retrofitted for the purpose;
- Creating a horror food festival;
- The creation of a horror film festival and through social media, encouraging people to nominate the best horror movies so interested parties can help select the program; and
- A 2 - 4 week series of horror based events and experiences, possibly tying in with the Campbelltown Festival of Fisher's Ghost, commencing with Halloween and concluding over the month of November each year.

The figure below illustrates an example of a best practice themed haunted/horror house in Auckland which attractors approximately 1,500 visitors per day in peak season (100 per day in low season) and provides employment for over 100 staff (full time and part time). The attraction was developed on a derelict hospital site which no other use had been found for.

FIGURE 10: SPOOKERS HAUNTED ATTRACTION

### 6.1.3.   National Equine Interactive Centre



Camden, and the surrounding LGAs, have a strong equine focus whether it be on equine sports, equine health, equine agistment or equine breeding.

The figure below provides an overview of equine-based sporting and other facilities within the Camden LGA and broader region. Green represents those facilities/businesses with a primary focus on breeding. Red represents those with a focus on horse riding and eventing.

FIGURE 11: EQUINE FACILITIES WITHIN THE BROADER SOUTH WEST REGION
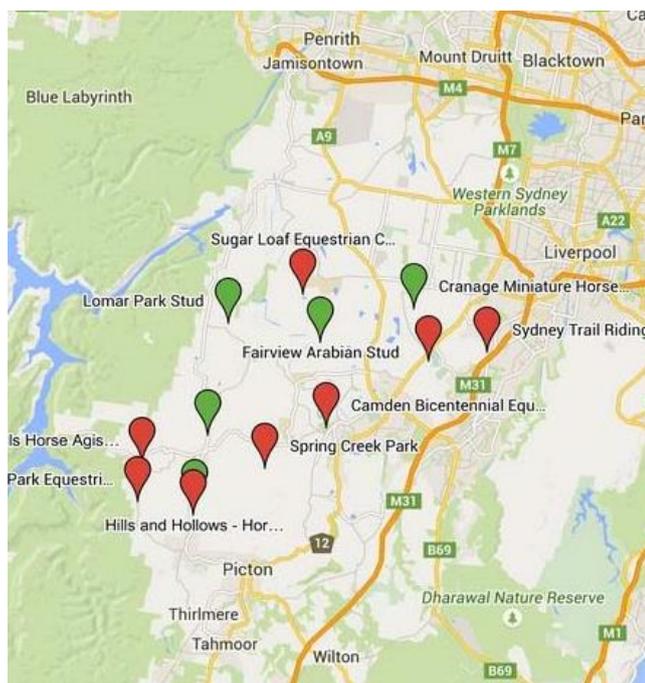


The nationally significant Bicentennial Equestrian Park in Camden (see Figure 12 below) is also a major hub for many events (polocrosse, cross country, show jumping, rodeo etc.) with national and state events such as the National Heavy Horse Show and the NSW Polocrosse Club Championships being held at the Park.

FIGURE 12: BICENTENNIAL EQUESTRIAN PARK



The opportunity may exist to develop a National Equine Interactive Centre, showcasing the history of the equine industry, not only in the broader Macarthur region, but potentially extending nationally.

Additionally, the potential exists to partner with the equine industry to leverage opportunities from existing equine events to encourage greater profile and to grow length of visitor stay.

We note however that whilst there are significant facilities in Camden for the sector, major investment is needed to upgrade and expand facilities. There is concern amongst equine-sector stakeholders that without reinvestment, the Bicentennial Equestrian Park could start to lose major events to other

equestrian facilities in Melbourne etc. The opportunity and threat is therefore State significant.

There is a need for a coordinator to help improve the services and facilities to sustain equine based events. This needs to include:

- Improved catering of events including coffee carts and more substantial services to support national and inter- state eventing especially;
- Coordination of equine event activity;
- Packaging of supporting facilities such as accommodation options, dining options, other supporting services; and
- Upgrading of elements of infrastructure.

We note concerns expressed on the age of facilities and infrastructure (areas to wash down-groom horses etc.). There is a risk that without improvements to upgrade basic elements of infrastructure that major events will be lost to other equine parks in Victoria and other States as well as other locations in NSW.

### 6.1.4. Food Trails and Cooking Schools

Camden is emerging as an eclectic food hub with a variety of food experiences that can be undertaken.

This, coupled with the strong farming background of the region, presents opportunity to introduce an integrated boutique gourmet cooking school program, helping to continue to grow the interest in Camden's food tourism product. Participants could learn how to cook with the local produce, enjoy their meal and purchase any of the produce they used throughout their class.

The cooking schools could also act as a showcase for the unique products that are being produced in Camden (this extends from raw produce to value

add food products such as jams, chutneys, other condiments etc.).

There is also the opportunity to market specially designed classes to children visiting with families and run these classes at the same time as the adult classes. Children could participate in a range of specially designed cooking and gardening classes which both stimulates and educates children regarding the importance of healthy eating and how fun cooking can be. Potential may also exist to extend into education programs and link to local and regional schools.

With the current farmers market and other activities at the Town Farm, the potential may exist to create a series of food trails and activities linked to the Town Farm to leverage off its success.

### 6.1.5. Civic Centre Upgrades

A short study should be undertaken to assess the types of upgrades which should be undertaken to make the Civic Centre a more actively used and highly marketable facility to a local and broader regional market.

### 6.1.6. Aviation Museum

Potential exists to investigate the development of a highly interactive aviation museum which showcases the history of aviation in Sydney and with a focus on light aircraft, gliding and recreational aviation, along with the military history of Camden airport.

To support this, the potential exists to explore opportunities for the further promotion and packaging of recreational aviation activity (gliding, small aircraft training, micro lights etc.) which is undertaken at Camden Airport.

Whilst we note the advent of Badgerys Creek International Airport is likely to require the closure of Camden Airport in the future, we consider this possibility makes the historic connection for an aviation museum even more important so the history is not lost. In addition, there is likely to be an element of delay before Badgerys Creek is operational which could allow for a further 5 – 10 years of recreational aviation activity at Camden.

### 6.1.7. Aviation Business Park

Potential may exist for an aviation business park to support the growth in light aircraft flying and visitor growth. There is a growing demand for new aviation business parks which can cater to the needs of a fly in market needing places to land and store aircraft, for maintenance of light aircraft and for long term hangars etc.

Demand is seen for those wanting to fly into the Sydney region but with limitations on access into Bankstown and the need to avoid Kingsford Smith because of major commercial aircraft movements. Demand exists on the city fringe which avoids conflicts with air corridors required by these other major airports and Camden may offer potential for this.

The creation of an aviation business park could lead to demand for more commercial accommodation nearby, shuttle buses-taxis and the various employment opportunities which could be generated to support growth in the light aircraft industry.

We would also suggest that until there is absolute certainty on the need for Camden Airport to close because of anticipated activity at Badgerys Creek, that opportunities for further growth should be

investigated. Unofficial feedback from various sources indicates that at best, Badgerys Creek Airport may not be operational for 15 years; this provides a suitable length of time for Camden Airport to further strengthen its important position as the primary Sydney aviation hub for light aircraft training, hot air ballooning, gliding, parachuting and other leisure based aviation pursuits.

### 6.1.8. Heritage and nature-based stories through a sound and light show at the Botanic Garden

Heritage tourism is seen to be a major potential component of Camden's product mix, strengthened by the extensive selection of historic buildings and the nationally important stories associated with the LGA in Australia's history.

Furthermore, having the Australian Botanic Garden within its boundaries, presents significant opportunities to using the site as a highly attractive backdrop for telling stories as well.

Opportunities to create sound and light shows to showcase the region's unique history and interesting stories need to be investigated and could include developing a seasonal evening heritage experience in the Botanic Gardens.

The success of major light shows such as Vivid Sydney and the popularity of sound and light shows such as the Blood on the Southern Cross (Ballarat) illustrates that, with the right product and technology mix, heritage stories can be brought alive and made more interesting.

Furthermore, we understand that Picton recently had an IlluminARTe light festival in their main street which attracted over 15k visitors and was profiled by the Sydney Morning Herald and DNSW. The festival included the projection of art designs, relevant to

Wollondilly's culture and history, on a variety of walls, public spaces and buildings along Picton's main street.

Whilst we would not advocate merely copying what Picton or any other destination might have done, the opportunity exists to offer a different form of sound and light show experience, noting the level of high market demand for these. The potential exists to hold this event at a different time of year, with a different theme and leveraging off different elements of the Australian Botanic Garden.

For Camden, the following experiences could be investigated:

- Light shows on historic buildings and/or within the Australian Botanic Garden (Figure 13 provides best practice examples of these);
- The "Camden after dark" trail experience which links a number of heritage properties and a food experience together offering visitors a progressive dinner. Essentially, visitors could complete different meal courses at a range of eateries (including pop-up eateries) around a specific part of the LGA whilst also stopping at historic properties on their way to the next course. Each stop would be clearly marked and could provide an interactive historic experience either via a guide or via a short audio visual experience (5-10 minutes). This could also allow the introduction of local guides to help tell the stories.

**FIGURE 13: SOUND AND LIGHT SHOW EXAMPLES**



**The Light Garden, Centennial Park Sydney**



**The Enchanted Forest, Scotland**



**Longwood Gardens Light Show, USA**

Importantly, these types of experiences will help stimulate visitors to get out during the evening; to walk, dine and experience the unique and significant history of Camden. Even if locals were reluctant at times to go out in the evenings, regional visitors may provide a stronger visitor market to support the restaurant and café sector.

## 6.1.9. Narellan Sports Hub

There is a need to investigate the development of the proposed Narellan Sports Hub as a multi-purpose sports and event centre to provide a larger arena for sports, cultural and a variety of shows and performance events in general. As long as the Hub can be designed to offer maximum flexibility, the potential to host a number of non- sporting events should be possible.

This is seen as particularly important to ensure that the Hub is well used (day and night) and is able to generate a variety of revenue streams to help offset its ongoing operating costs.



**FIGURE 14: NARELLAN SPORTS HUB MASTERPLAN**



Narellan Sports Hub - Revised Draft Masterplan
December 2015
NTS
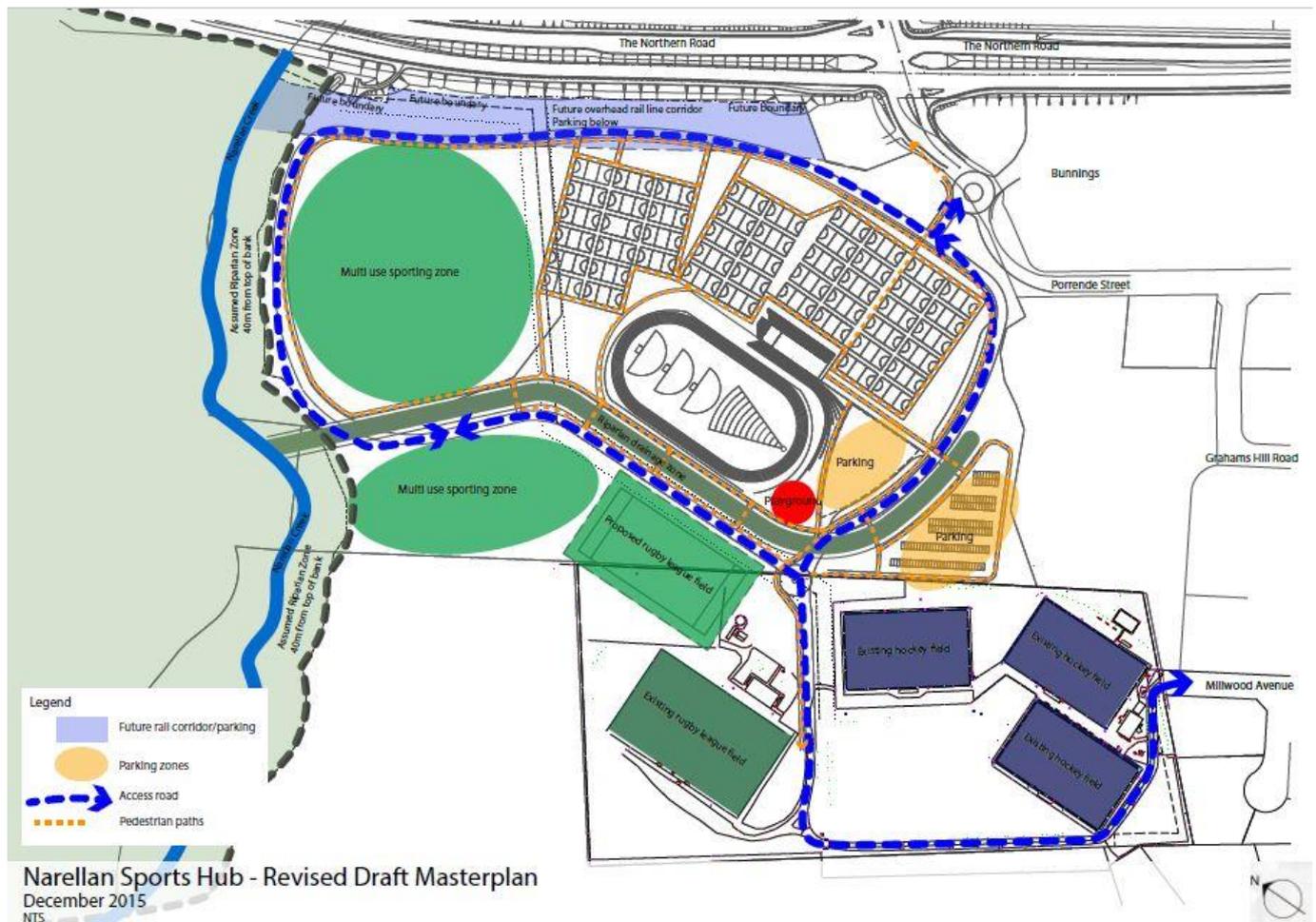
### 6.1.10. Botanic Gardens Amphitheatre and Sculpture Garden



The development of an amphitheatre within the Botanical Gardens is noted as a well needed all weather facility. The amphitheatre may need to include:

- An undercover sound shell to allow for performances in all weather;
- To ensure the supply of electricity and lighting and speakers is able to be provided in all weather; and
- To ensure the set up for performances can be undertaken in all weather conditions.

This presupposes that the audience would be seated outside without weather protection.

The facility could also include various sculpture trails – art trails to offer a composite attraction linked to the Gardens botanic experiences.

Figure 15 provides some examples of outdoor amphitheatres. These facilities feature large outdoor sound stages set against natural backdrops and tend to be highly seasonal.

**FIGURE 15: OUTDOOR AMPHITHEATRE EXAMPLES**

### 6.1.11. Glamping in National Parks

Potential exists to investigate camping sites/nodes in reserves or possibly national park areas for high quality glamping. These accommodation sites could be part of an existing trail network and could provide for overnight accommodation so extending the length of visitor stays. They also could offer potential for concession operators to pay a license fee to National Parks or to Council if on reserve land to operate sites.

The benefit of glamping concessions is the ability to attract higher spending visitors into Camden and the opportunity to relocate to different sites to meet market demand and to also avoid site environmental problems from occurring.

**FIGURE 16: GLAMPING EXAMPLES**



### 6.1.12. Riverside Walks

Potential exists to investigate riverside walks allowing access to the George's and Nepean Rivers. The walkways could also include mountain biking trails potentially and also include interpretation which features Indigenous history.

Ideally, the walkways and trails can provide opportunities for a shuttle bus/minivan service to collect from one end of the trail and/or a seasonal coffee cart.

### 6.1.13. Stimulate Investment into Camden

To encourage investment into Camden, there is a need to clearly indicate to industry and developers what tourism development is more likely to be supported. This should be undertaken via the development of an investment memorandum which indicates:

- The type of tourism development which Council would like to see within the LGA;
- The areas throughout the LGA which are suitable for the development of tourism facilities (accommodation, food and beverage, attractions, activities etc.); and
- The elements which are more likely to get Council support.

This memorandum can be taken to the investment community to stimulate investment in Camden and would help demonstrate that Council is pro-tourism and "open for business". Investors and developers require certainty and by indicating areas where tourism development may be viewed more positively, sends a very positive signal.

## 6.2. Marketing & Promotion

### 6.2.1. Brand Identity

Currently, the tourism brand proposition of Camden is not clearly defined or well understood by locals and visitors.

To better promote Camden as a destination in its own right, and to profile its point of difference within the Sydney and Surrounds region, there is a need to develop a clear identity.

**FIGURE 17: CAMDEN BRAND ELEMENTS**

Camden

Heritage and History

Food and Farming

Equine Events
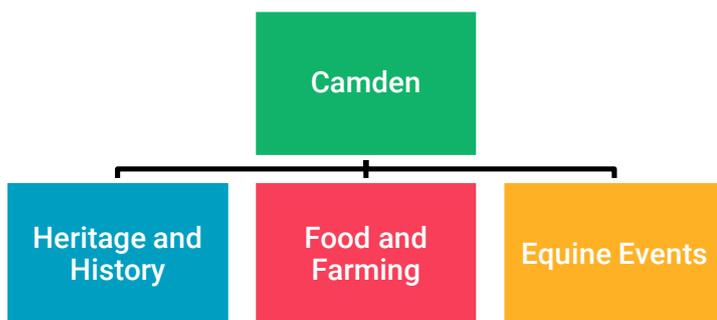
Importantly, Camden comprises a range of tourism operators and other stakeholders with different goals and objectives. It is important that the tourism industry is consulted to input and take "ownership" of the brand for Camden.

### 6.2.2. Website and Mobile App

Camden does not have its own dedicated destination website, but rather, leverages off the Macarthur website. Whilst The Group considers that leveraging off this broader regional site may allow for increased exposure for Camden, there is a need to consider developing a Camden-specific website which profiles Camden's own identity (whilst still leveraging off and supporting the regional destination website).

Additionally, The Group considers several enhancements could be undertaken to the existing regional site, including:

- Investigate the inclusion of a comprehensive booking system which also integrates pre-packaged deals, as well as allowing visitors to package up their own visit in the format of a shopping cart style system, allowing visitors to choose from a range of travel, accommodation, dining options, as well as experiences and events;

- Inclusion of a consistently updated and easy to read and navigate annual events calendar, with packages linked to specific events; and

- Investigate the inclusion of augmented reality tours within the existing Macarthur mobile app (see Figure 19) which will enable the history of Macarthur to be brought alive in an interactive and flexible format. The app could also be extended to allow visitors to book accommodation, travel and activities, as well as offering a range of prebuilt packages that visitors can book via the app.

**FIGURE 18: MOBILE APP TOUR & AUGMENTED REALITY EXAMPLES**



**Finding Sacred Ground Augmented Reality App**
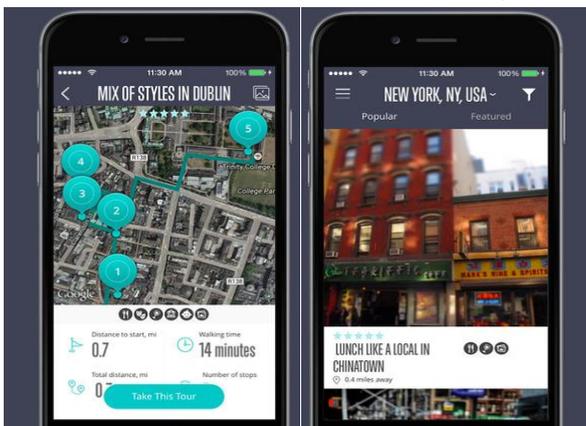


**Kamino Walking Tours App**



**Nearest Tube Augmented Reality App**

As is currently done, both Councils, should take responsibility for managing the website with the aim of handing this over to a suitable tourism industry organisation at a time in the future when a unified and well-structured LTO or similar is able to be created.

We see greater risk in Camden creating its own website rather than helping to strengthen the Macarthur one. Over time, and as more tourism product is created in Camden, a dedicated website and/or an augmented reality mobile app can be considered but there is little benefit and considerable cost in attempting to develop and maintain a separate stand- alone web site at this stage.

For the time being, we consider it will be far more cost effective for Camden to work in tandem with Campbelltown Council under the joint Macarthur regional website. The introduction of a dedicated sub-portal for each LGA however needs to be integrated into the Macarthur website.

### 6.2.3. Packaging of Product

There are a number of visitor experiences, attractions, transport options and accommodation etc. available throughout Camden, however, currently there is generally very limited synergy between these operators/providers.

Some operators indicated that whilst they may have historically tried to package their product, market take up was low. There is a need for a composite package experience to be offered to the consumer, helping to extend visitor stay as well as greater regional dispersal.

Packages could include activities such as horse riding, food trails, aviation activities etc. connecting to accommodation offers and also food and beverage experiences. This will help strengthen the product offering, allow for cross product selling, increase pre bookings and help with improved transport and related planning.

The opportunity may also exist to look at cross-regional packaging, linking Camden and other

Macarthur experiences with the unique experiences that exist in parts of Wollondilly and the Southern Highlands. This may encourage visitors who would not have previously considered visiting Camden during their stay in Sydney.

There is also a need to explain to the Sydney local market what product exists in Camden to enjoy.

### 6.2.4. Greater Profiling of Bird Watching

We understand that the botanic gardens at Mount Annan is a very popular location for bird watchers, with over 160 species of birds residing in the Gardens.

In order to grow the bird watching niche visitor market, there is a need to further develop facilities (such as bird hides) and package experiences with accommodation to attract the market. The market needs more regional accommodation options noting the need to visit at dawn and dusk especially.

In addition, we understand that good bird watching exists at the Bicentennial Equestrian Park, Town Farm and in other parts of the Camden LGA. These opportunities need to be documented and built into the updated website to encourage visitation from bird watchers.

### 6.2.5. Event Calendar

Events and festivals provide numerous benefits by increasing visitation and expenditure, reducing low season impacts, encouraging repeat visitation as well as raising destination awareness.

The following table provides a breakdown of all events and festivals that are currently held in

Camden. In total, there were 20 tourism based events[10] held in the 2014/15 calendar year.

TABLE 6: MAJOR EVENTS HELD IN CAMDEN

| Name | Type | Suburb |
|---|---|---|
| Australia Day Event | Event | Camden |
| Camden Show | Event | Camden |
| Paws in the Park | Event | Camden |
| Light Up Camden | Event | Camden |
| Narellan Rhythms Festival | Event | Narellan |
| Camden Festival | Event | Camden |

In order to better plan for events, as well as promote them, there is a need to develop an events calendar which should be available via the joint Camden-Campbelltown Macarthur tourism website. There are already a number of smaller event calendars developed by individuals and tourism/industry groups throughout the broader region, however, there is a need for collaboration to create one unified events calendar which can be well promoted and which avoids overlap and strains the use of volunteers especially.

### 6.2.6. Event Evaluation

In addition to the events calendar recommendation, there is a need to create an events success evaluation criteria which ascertains, based on a number of factors, how successful an event was and whether it should continue to be invested in. The criterion should focus on:

- Likely cost of the event;
- Level of industry support;
- Level of community support;
- Ability to leverage off funding sources to support event;

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[10] We note there are several more events held in the Camden LGA, particularly gallery exhibitions etc. The events we have included are those which would appear, from online research and consultation, to be events that would attract a tourism market.

- Timing of the event and whether it fits into the broader Sydney regional events calendar (so as to ensure it is not competing with other major events);
- Visitor markets the event is likely to attract;
- Ability to attract funding partners; and
- Assessment of the lifecycle for the event and any sunset timeframe.

### 6.2.7. Tourism Awareness Campaign

As is common in many other regions and LGAs, there is thought to be a lack of community awareness on the importance of tourism within Camden, and how the tourism dollar spreads throughout the LGA's economy (see Figure 20). Camden's tourism industry[11] is valued at just under $332m[12] and accounts for over 2k jobs[13] in the LGA.[14]

The Councils should consider developing a tourism awareness campaign which demonstrates:

- How the tourism dollar disperses through Camden's economy, so far more businesses benefit from tourism than just tourism businesses. This would include assessing the direct and indirect impact of visitor spend;
- What kind of businesses benefit from tourism;
- How extended trading hours could provide benefits to a wide cross spectrum of the community and visitors;
- What the estimated value is of tourism via direct, indirect and induced spending impacts; and
- To help support why Council/rate payer funding is required to maximise the total returns to

Camden as demonstrated via economic benefits, social and infrastructure improvements and higher quality environmental outcomes.

**FIGURE 19: THE IMPORTANCE OF TOURISM**



## 6.3. Industry Support

### 6.3.1. Tourism Industry Taskforce

As part of the Macarthur DMP, a Macarthur Tourism Industry Taskforce has been recommended to help provide effective industry input. This Taskforce should comprise representatives from both Camden and Campbelltown Councils as well as tourism industry stakeholders to represent the tourism industry from each LGA.

It has been recommended that the role of the Macarthur Tourism Industry Taskforce should be:

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[11] Note this incorporates both tourism and hospitality
[12] Direct and Indirect Output
[13] Direct and Indirect Employment

[14] http://economy.id.com.au/macroc/tourism-value?WebID=100 – Campbelltown and Wollondilly have been excluded when calculating these values.

- To gather and consolidate feedback from the various tourism individuals and groups throughout their LGA (such as chambers of commerce etc.);

- To provide guidance on tourism sector needs and provide assistance to Council personnel charged with implementing the DMP;

- To advocate for stronger resources and focus being applied to tourism in their associated LGA;

- To support Council in lobbying DNSW and NSW State Government to strengthen the Macarthur brand;

- To ensure that other areas of the local economy are aware of tourism opportunities (specific TAFE tourism training programs, events and festival benefits for retailers in general, community groups supporting heritage and culture);

- To take responsibility for the creation of an enhanced brand identity for Macarthur to support tourism;

- To act as a conduit to community interest groups and others with various ideas for tourism development and enhancement;

- To ensure that tourism based projects are front of mind when economic development opportunities and new investment is being considered for Macarthur; and

- Provide input into visitor service needs.

Whilst this Taskforce should be able to work with each Council to activate regional initiatives, there will be a need for those Taskforce members from Camden specifically to be engaged by Camden Council, as tourism industry advisors, to inform on Camden specific issues.

Importantly, the broader regional Tourism Industry Taskforce need not be a 355 Committee of Council but rather a flexible industry group to allow for changing members etc. and potential needs.

We do not envisage a need, at this stage, for a separate Camden tourism industry taskforce.

## 6.4. Visitor Servicing

### 6.4.1. Review of Visitor Information Services throughout Camden

Camden currently has one yellow i accredited VIC located at John Oxley Cottage.

From work The Group has undertaken on visitor information centres in numerous locations (Bundaberg, Cradle Coast (Tasmania), Byron Bay, the Hawkesbury, Cooma-Monaro, Sunshine Coast, and Launceston by way of example), we understand that many councils are looking for more effective and cost-efficient ways to deliver information to visitors. In most cases, VICs generate high net cost deficits and utilisation of VICs by visitors nationally is trending downward whilst operating costs continue to increase.

In order to ensure that visitor services are optimised to meet the needs of most visitors, it is recommended that Council investigate:

- Identifying opportunities to increase efficiencies for the delivery of visitor information services;

- Ways to increase the effectiveness of those visitor services delivered within the LGA;

- Highlight technology solutions (increased web presence, mobile apps and shared websites etc.) which may provide alternative and broader access to information; and

- To identify opportunities for developing a greater shared approach to the delivery of visitor

information services throughout the Macarthur region.

For Camden, changes need to capitalise on the trend toward more online information solutions and to look at possible 24 hour touch screen monitors for each town centre. These technology solutions can also create the opportunity to find local or state based sponsors for the ongoing maintenance of supporting infrastructure.

Whilst visitors still often enjoy the interpersonal services which face to face interaction with VIC staff can provide, this comes at a cost. From comparative research on many VICs in numerous LGAs, the average net operating deficit (cost after revenue is deducted) averages $250k+ per annum. Furthermore, the VICs are generally only capturing on average 10 - 18% of all visitors to their region, raising the question, what is being done to capture and market to the other 82 - 90% of visitors?

### 6.4.2. Feasibility to Assess Location of Camden VIC

In addition to the review of visitor information services throughout Camden, an additional assessment needs to be undertaken on the location of the Camden VIC. If Camden Council decides it wishes to continue to invest in its VIC, it is important that a site assessment is undertaken which takes into account visitor flows, and the potential increased visitation the VIC could achieve it if was located on the main street of Camden and as part of the unique heritage precinct.

There are many opportunities to identify higher profile sites with greater pedestrian traffic to capture more visitors.

### 6.4.3. Roving Ambassador Program

The development of a roving volunteer ambassador program to promote Camden could be particularly useful if, over time, Council decides that the need for VIC's has reduced. Having this program already in place would mean that visitors are still able to get that face to face interaction which some visitor's desire and these could be created in each part of the LGA.

### 6.4.4. Free Wi-Fi at the VIC

There is a need to investigate the provision of free Wi-Fi for visitors at Camden VIC and in main streets to enable visitors to access the updated website and to encourage visitor dispersal throughout the LGA and broader region.

It is important that visitor information is made far more accessible. Free Wi-Fi is also a good selling feature.

### 6.4.5. Signage Program

There is a need to develop a signage program for the region which includes an action plan for improving both directional (way finding) and interpretive signage throughout Camden, to ensure there is continuity for all signage (static and electronic).

Importantly, visitor services should include improved signage as well as an enhanced level of information available through a regional dynamic website, mobile app, touch screens and other technology solutions.

Camden could consider the implementation of highly attractive and innovative (and moveable) 24/7 digital touch screens (see Figure 21). These touch screens could be placed in high traffic areas and

during major events, can be moved to event areas in order to provide visitors with a range of information.

**FIGURE 20: OUTDOOR INFORMATION TOUCH SCREENS**



These touch screens can be designed to allow for the display of information as well as the booking of accommodation, transport and activities and the potential could exist to have these touch screens to be sponsored as advertisements can be placed on the screen when they are not in use. They can also be used to provide community information updates.

### 6.4.6.    Gateway Landscaping

To provide a welcoming entrance into the Camden LGA (from entry points around Camden), there is a need to improve streetscaping at key entry points through stronger landscaping of main roads (boulevards or street planting) and welcome signage where possible. Council needs to create a

landscaping strategy for its gateway points. This could also consider street side improvements (seating, signage etc.), street planting, as well as pathway upgrades in areas such as heritage precincts or retail areas which cater to visitor needs such as on Argyle and John streets in the Camden township.

### 6.5.    Opportunities Matrix

The following matrices provide a top line summary of each of the opportunities, including their priority, the visitor markets captured, possible location/sites to be considered, an estimation of the CAPEX required, the level of risk involved, potential time frames, the project type (commercial or public) as well as the lead stakeholder involved.

**TABLE 7: TOURISM PRODUCT DEVELOPMENT & PARTNERSHIPS**

| Opportunity | Priority | Visitor Markets to Capture[15] | Possible Location/Site | Est. CAPEX Requirement for Total Project | Level of Risk | Commercial or Public Project | Lead Stakeholder |
|---|---|---|---|---|---|---|---|
| **Holiday Park Development** | High | Caravan & camping, family market, backpackers and the local market, short break visitors, over 55s travellers | Various (determined as part of feasibility) | < $12m | Low – Medium | Commercial | ▪ Council and Tourism Industry Taskforce for Feasibility<br>▪ Commercial developer experienced in holiday park development |
| **Haunted Attraction and Festival** | Medium – High | International youth, international students, working holiday makers, backpackers, cruise ship visitors, the local market and the regional Sydney domestic market. | Various (determined as part of feasibility) | < $600k | Medium | Commercial | ▪ Tourism Industry Taskforce for Feasibility<br>▪ Commercial developer experienced in haunted attractions creation |
| **Food Trails and Cooking Schools** | Medium | Food and wine visitors, cruise ship visitors, short break visitors, over 55s travellers | Throughout the region | $50k | Low - Medium | Commercial | ▪ Tourism Industry Taskforce and industry operators |
| **Heritage and nature-based stories through a sound and light show** | Medium | Cultural and heritage visitors, family market, nature visitors, international youth, local market, over 55s travellers, accessible tourism, short break visitors | Australian Botanic Garden at Mount Annan | $400k | Medium | Public/Commercial JV | ▪ Tourism Industry Taskforce with assistance from the ABG[16] |
| **Civic Centre Upgrade** | Medium | Local and broader regional market | Camden Civic Centre | n/a (subject to feasibility) | Medium | Public | ▪ Council |
| **Botanic Gardens Amphitheatre and Sculpture Garden** | Medium | Cultural and heritage visitors, family market, nature visitors, local market, over 55s travellers, accessible tourism, cruise ship visitors, short break visitors | Australian Botanic Garden at Mount Annan | > $500k | Medium | Public | ▪ Tourism Industry Taskforce with assistance from the ABG |
| **Boutique Glamping in National Parks or Reserves** | Medium | Nature visitors (including eco-tourists, bird watchers) and the family market | National parks and reserves within the Macarthur | < $300k | Medium | Commercial | ▪ Both Councils with NPWS for feasibility<br>▪ Commercial operator experienced in luxury glamping for development |

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[15] Visitor markets are based on Destination NSW's market segment definitions, including: NSW Family Market, Domestic Caravan and Camping, International Youth, International Students, Working Holiday Makers, International Backpackers, Over 55s Travellers, Cruise Ship Visitors, Cultural and Heritage Visitors, Food and Wine Visitors, Nature Visitors, Short Break Visitors and Accessible Tourism (seniors, people with a disability, people from non-English speaking backgrounds and parents with children). We have also included various other local visitor markets such as the domestic sporting market, schools and the general local market.
[16] Australian Botanic Garden Mount Annan

| Opportunity | Priority | Visitor Markets to Capture[15] | Possible Location/Site | Est. CAPEX Requirement for Total Project | Level of Risk | Commercial or Public Project | Lead Stakeholder |
|---|---|---|---|---|---|---|---|
| **Aviation Business Park** | Medium | Fly-in visitors | Camden Airport | > $2m | Medium – High | Commercial | ▪ Camden Council and Airstrip operator/land owner for feasibility ▪ Commercial business park developer for development |
| **Stimulate Investment into Camden LGA and the Macarthur region** | Medium | n/a | n/a | $30k (to develop memorandum) | Low – Medium | Public | ▪ Both Councils |
| **Narellan Sports Hub** | Medium | Develop the proposed Narellan Sports Hub as a flexible multi-purpose event centre able to cater for a variety of shows and events other than sporting events | Narellan Park (adjacent to existing sports facilities) | $200k for initial design work | Low-medium | Public | ▪ Camden Council ▪ Sporting bodies |
| **Arts Trail** | Low – Medium | Cultural and heritage visitors, family market, nature visitors, international youth, local market, over 55s travellers, short break visitors | Throughout the region | $15k (marketing) | Low - Medium | Public | ▪ Tourism Industry Taskforce, art community and industry operators |
| **National Equine Experience Centre** | Low – Medium | Domestic (and international) sporting market, local market | Various (determined as part of feasibility) | < $12m | Medium - High | Commercial | ▪ Tourism Industry Taskforce for feasibility ▪ Equine industry within the region to support the development |
| **Riverside Walks** | Low – Medium | Cultural and heritage visitors, family market, nature visitors, local market, accessible tourism, caravan and camping visitors | Throughout the region at points with river access | $10k (marketing) $30k (development) | Low | Public | ▪ Tourism Industry Taskforce and NPWS |
| **Aviation Museum** | Low – Medium | Cultural and heritage visitors, local market, schools, caravan and camping visitors, short break visitors | Possibly at Camden Airport | < $3.5m | Medium - High | Public | ▪ Tourism Industry Taskforce for feasibility ▪ Camden Council for the development of the museum |

TABLE 8: MARKETING & PROMOTION

| Opportunity | Priority | Visitor Markets to Capture | Possible Location/Site | Est. CAPEX Requirement for Total Project | Level of Risk | Commercial or Public Project | Lead Stakeholder |
|---|---|---|---|---|---|---|---|
| **Brand Identity** | High | n/a | n/a | $40k | Low | Public | ▪ Each Council and the Tourism Industry Taskforce |
| **Website and Augmented Reality Mobile App** | High | n/a | n/a | $70k | Low | Public | ▪ Camden Council and web/app developer |
| **Event Calendar** | Medium - High | n/a | n/a | n/a - integrate into new website | Low | Public | ▪ Tourism Industry Taskforce and event coordinators |
| **Event evaluation** | Medium - High | n/a | n/a | n/a | Low | Public | ▪ Tourism Industry Taskforce and Council economic development personnel |
| **Packaging of Product** | Medium | Short break visitors, family market, cultural and heritage visitors, nature visitors, local market, accessible tourism, cruise ship visitors | Throughout the region | $20k for promotion | Low | Industry | ▪ Tourism Industry Taskforce and Macarthur tourism industry |
| **Tourism Awareness Campaign** | Medium | Local market | n/a | $15k for promotion | Low | Public | ▪ Tourism Industry Taskforce |
| **Bird Watching Profiling** | Medium | Nature visitors | Australian Botanic Garden and Riverside Reserves | $15k (marketing) $40k (hides) | Low | Public | ▪ Tourism Industry Taskforce with assistance of the ABG |

TABLE 9: INDUSTRY SUPPORT

| Opportunity | Priority | Visitor Markets to Capture | Possible Location/Site | Est. CAPEX Requirement for Total Project | Level of Risk | Commercial or Public Project | Lead Stakeholder |
|---|---|---|---|---|---|---|---|
| **Industry Taskforce Creation** | High | n/a | n/a | < $30k (marketing) < $20k (development) | Low - Medium | Public | ▪ Each Council |

**TABLE 10: VISITOR SERVICING**

| Opportunity | Priority | Visitor Markets to Capture | Possible Location/Site | Est. CAPEX Requirement for Total Project | Level of Risk | Commercial or Public Project | Lead Stakeholder |
|---|---|---|---|---|---|---|---|
| **Review of Visitor Information Services** | Medium - High | n/a | n/a | $35k | Low | Public | ▪ Each Council and the Tourism Industry Taskforce |
| **Feasibility to Assess Location of Camden VIC** | Medium - High | n/a | n/a | < $5k (if bundled with above Review) | Low | Public | ▪ Camden Council |
| **Free Wi-Fi at the VICs** | Medium - High | n/a | Camden and Campbelltown VICs | n/a | Low | Public | ▪ Tourism Industry Taskforce and each Council |
| **Gateway Landscaping Strategy** | Low | n/a | Gateway locations to the region | $40k (strategy) | Low | Public | ▪ Camden Council |
| **Signage Program** | Medium - High | n/a | n/a | $20k for signage strategy and $75k for new signs/skins | Low | Public | ▪ Tourism Industry Taskforce with assistance from relevant personnel from each Council |
| **Roving Ambassador Program** | Low | Over 55s travellers, caravan and camping market, short break visitors, food and wine visitors, accessible tourism | Throughout the region | $15k (training) | Low – Medium | Public | ▪ Tourism Industry Taskforce |

# 7. TOURISM PLACE MAKING

# 7. Tourism Place Making

The schematics included in this section reflect opportunities specifically centred on heritage Camden township to strengthen the tourism offering and to leverage off a number of existing assets. These assets have the potential to become tourism attractions and experiences but will need various forms of enhancement and activation to achieve this. We consider they collectively are State significant.

The focus on Camden town centre (rather than the whole LGA) for tourism is based on:

- The existing concentration of heritage sites in and around the township which allows for a stronger base to build from;
- The town offers one of the few remaining attractive heritage town centres in greater Sydney and NSW which needs to be protected and preserved and tourism can help achieve this; and
- A number of the new development opportunities can start within this heritage precinct and eventually expand out following walkways, cycle ways etc. and using river systems etc.

## 7.1. Boutique Hotel

The existing State Government owned and unused former police station and courthouse in John Street offer a highly attractive cluster of heritage buildings along with the adjacent existing Council Chambers. We note that Council is relocating to Oran Park in 2016 which could free up the use of the existing Council building.

These buildings are approximately 100 metres from the intersection with the Camden township main street (Argyle Street) and offer a highly attractive heritage cluster. Council has developed on attractive library and facilities centre across the road from these buildings in John Street with clever use of retrofitting heritage buildings to offer a modern use within a heritage façade. There is therefore a strong heritage presence already within John Street on both sides of the street and which strengthens the attractiveness of the area.

With a lack of commercial accommodation within Camden LGA and a desire to also create an art gallery to showcase local artists as well as offering touring exhibitions, the potential exists to combine both uses. The concept (see Figure 22 on the following page) proposed could therefore include:

- Gifting by State Government of the police station and courthouse to Council based on maintaining the heritage features and developing into a heritage precinct;
- Retaining the façade on John Street of the buildings and their heritage integrity whilst allowing internal modifications where necessary to make them more usable and attractive public spaces;
- Identifying a quality heritage hotel developer and investor to work with Council to create an integrated heritage precinct which effectively links the three buildings;

- That the preferred building use cater for a stunning art gallery space with café and art retail space;
- A meeting-function room space which is designed for a variety of smaller scale (100 seat) conferences and functions;
- Offering the meeting room – function space for art forums, classes etc. to encourage art tours to Camden or musical performances;
- A heritage art hotel utilising a mix of the buildings and offering 30-40 potential hotel suites; and
- Offering attractive outdoor spaces for dining and art displays as well.

The concept needs to be subject to a feasibility study and is dependent on State Government agreeing to hand over the two buildings to Council to activate after a number of years which they have been left vacant.

The schematic is provided for illustrative purposes only to illustrate that the three heritage buildings (and a possible connecting space behind them) could offer a highly workable way to protect and use the buildings and deliver facilities to support community use and visitor economy growth. Such a facility would also generate a number of local new full-time and part-time jobs.

**FIGURE 21: REUSE AND PRESERVATION OF UNUSED HERITAGE BUILDINGS**
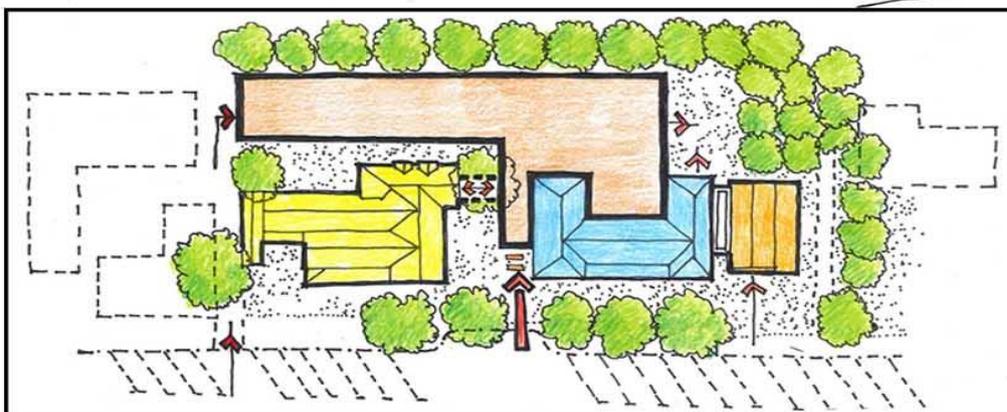
## 7.2.    Boutique Cider House/Micro Brewery/Gourmet Bakery

The closed dairy factory building on the northern entry of the Camden township offers a highly prominent gateway marker (see Figure 23 below) for Camden.

Ideally, the building (if able to be re activated) could be a prominent site for a boutique cider house, microbrewery or gourmet bakery which its size and site offer potential for. Its use as a semi industrial beverage centre maintains its historic past (albeit with a different beverage use) and could help strengthen the food – agrarian focus of Camden as seen through the current farmers markets, food and beverage retail offering and the desire by stakeholders to grow this further.

The Grounds in Alexandria (south Sydney) provide an example of a multi-functional artisan/food focused hub which this site could potentially offer similar potential for.

Further investigation into this site, its ability to get reactivated as suggested, and at worst the ability to paint it dramatically as a marker for entry into Camden township is required.

**FIGURE 22: CAMDEN VALE MILK FACTORY**
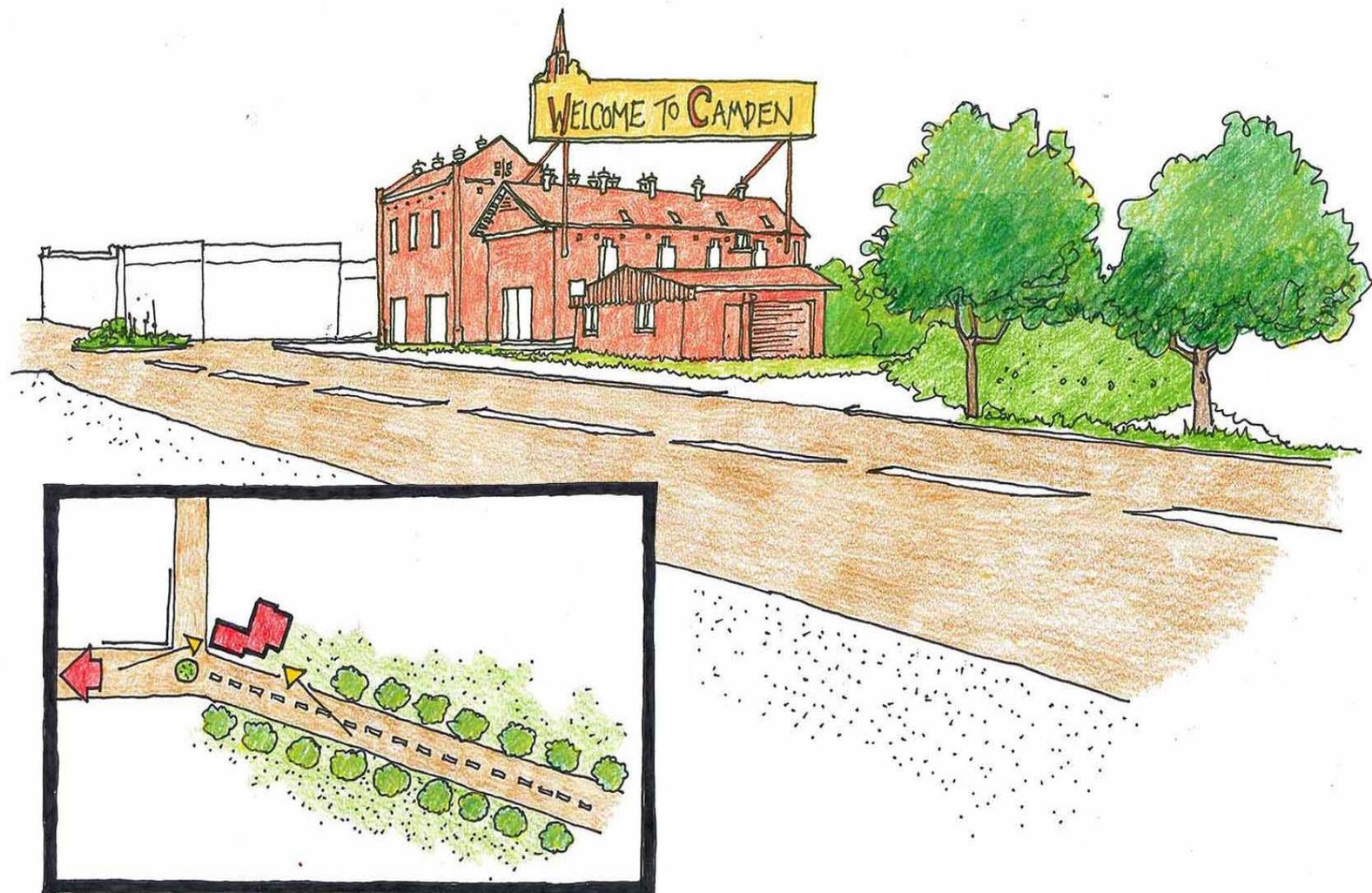
## 7.3. Strengthening Civic Connections

The opportunity exists to strengthen the town centre of Camden and to actively encourage stronger walkability in the core area. This DMP dovetails into the current Camden Town Centre Strategy by supporting the need for wider pavement areas in Argyle Street especially and the maintenance of the high level of landscaping already achieved via street planting.

The link from the Town Farm at the western end of John Street up along the proposed heritage precinct (encompassing the current council building and disused police station and court house) into the town centre on Argyle Street and linking up John Street to the spire of St Johns Church at the other end of John Street creates the focal T intersection for a tourism based heritage connection.

This T connection ideally needs to be strengthened as a highly pedestrian friendly heritage precinct whilst still allowing safe vehicle movements.

There is ample space to cater to the needs of both vehicles and pedestrians and to strengthen the connection between the town centre and the Town Farm (which is a 7 minute walk).

The fact that there is a highly workable Town Farm which also offers a function and event venue for markets, weddings etc. and is effectively part of the township makes Camden unique in a NSW setting. This alone is an important and highly marketable attribute.

Tourism thrives when attractive and complementary elements such as heritage retail precincts, fresh produce markets, café dining experiences, arts and cultural amenities and theme based experiences such as equine facilities can be linked together and offer a composite experience. These types of composite experiences are often very hard to create when the elements don't already exist because planning, traffic, environmental related rules and regulations often challenge the compatibility of uses. Having all these already in existence should therefore be seen as a major bonus for Camden.

> As identified in the Camden Town Centre Strategy, there is economic benefit in providing for greater and improved pedestrian accessibility to make the town centre more appealing and safer to use. And this need not reduce vehicular movement and traffic efficiency in and around the town centre.

There are no other Macarthur towns in the State which offer the potential to create and promote such a strong heritage theme and which can generate significant economic benefit from tourism.

The attractiveness of the township as one of the few remaining intact Macarthur town centres further strengthens its appeal as a visitor destination. Its importance for tourism is enhanced by its setting and preservation of its heritage built environment.

Consideration to enhance the town centres tourism appeal and to grow the visitor economy could include:

- The widening of the footpaths as planned and related enhancements to the streetscape to promote greater walkability;
- Improvements to landscaping to potentially extend the impact of the jacaranda trees into surrounding streets as a further recognisable feature of Camden;
- Creating footpath brass markers to denote the history of the area and famous locals and to help with self-guided walking tours;
- Introducing interpretative sign boards (24/7 touch screen monitors) to support a heritage walk and to provide information on community events;
- Introduce more seating to increase amenity of the public domain.

The main street of Camden township (Argyle Street) offers a highly attractive streetscape with or without the Jacarandas in bloom. The street could be a stronger tourism hub with associated economic benefits by:

- Looking to use footpaths and the facades of buildings for potential sound and light shows as a seasonal event activity (a regional Vivid event extension);
- Creating an annual food fair utilising the widened footpaths and shop fronts of the main street (Argyle) including the intersection with John Street as the epi centre;
- Theming the buildings in the main street and the heritage precinct in John Street for a possible Macarthur haunted event with a variety of activities including zombie walks etc.; and
- Creating the Camden long lunch (11am – 5pm) where part of John Street or Argyle Street is closed to allow 200+ people to dine with all local restaurants etc. providing a range of courses and only using local produce.

In summary, potential exists to position Camden township as a vibrant and economically strong tourism hub in greater Sydney rather than just with a south west Sydney focus. The heritage assets, streetscape, Town Farm, Equestrian amenities and strong natural food presence are all elements to build on. Protecting the heritage nature of the town including its unique vistas and view-shafts are also important considerations.

Making the town centre more pedestrian friendly will be a key ingredient in this outcome and the current Town Centre Strategy is aligned to achieve this outcome.

## 7.4.    Hubs and Nodes

Figure 24 on the following page graphically illustrates the close proximity of a number of key elements of infrastructure to the Camden town centre. These have been identified as various activity nodes for tourism and include:

- The Town Farm (6 - 7  minute walk to the town centre) as an agri-food node with a strong focus on healthy eating, locally grown produce, an event under cover venue, a venue for weddings

and other life cycle and potential corporate events;

- The equestrian park (7 - 10 minute walk) with its numerous fields for polo cross, pony club events, cross country etc.

- The Camden Airport (5 - 7 minutes' drive from the Town Centre) and offering a wide variety of aviation experiences (hot air ballooning, sky diving, light aircraft training etc.) and which may be restricted when Badgerys Creek International Airport is eventually operational but which for the interim (next 5 - 20 years) offers an important range of visitor experiences;

- The Botanic Garden at Mount Annan (a 12 minute drive from the Town Centre) could offer a variety of visitor experiences including introducing a sound shell for concerts and events, extending the mountain biking trails offering an area dedicated to horse trails only and a possible luge attraction experience on the eastern ridge line;

- The Nepean River (a 5 minute walk to the Town Centre) and which could offer a variety of passive and active walking trails and cycle ways including the introduction of exercise stations along the river closest to the town centre and the Town Farm; and

- Reinforcing the heritage precinct with the epicentre of Argyle and John Streets and using the spire of St Johns as a ready reference point for walking tours etc.

It is rare to find a heritage town so intact and with so many complimentary activity nodes and experiences within easy walks or drives.

**FIGURE 23: SCHEMATIC 10 - CAMDEN HUBS AND NODES**

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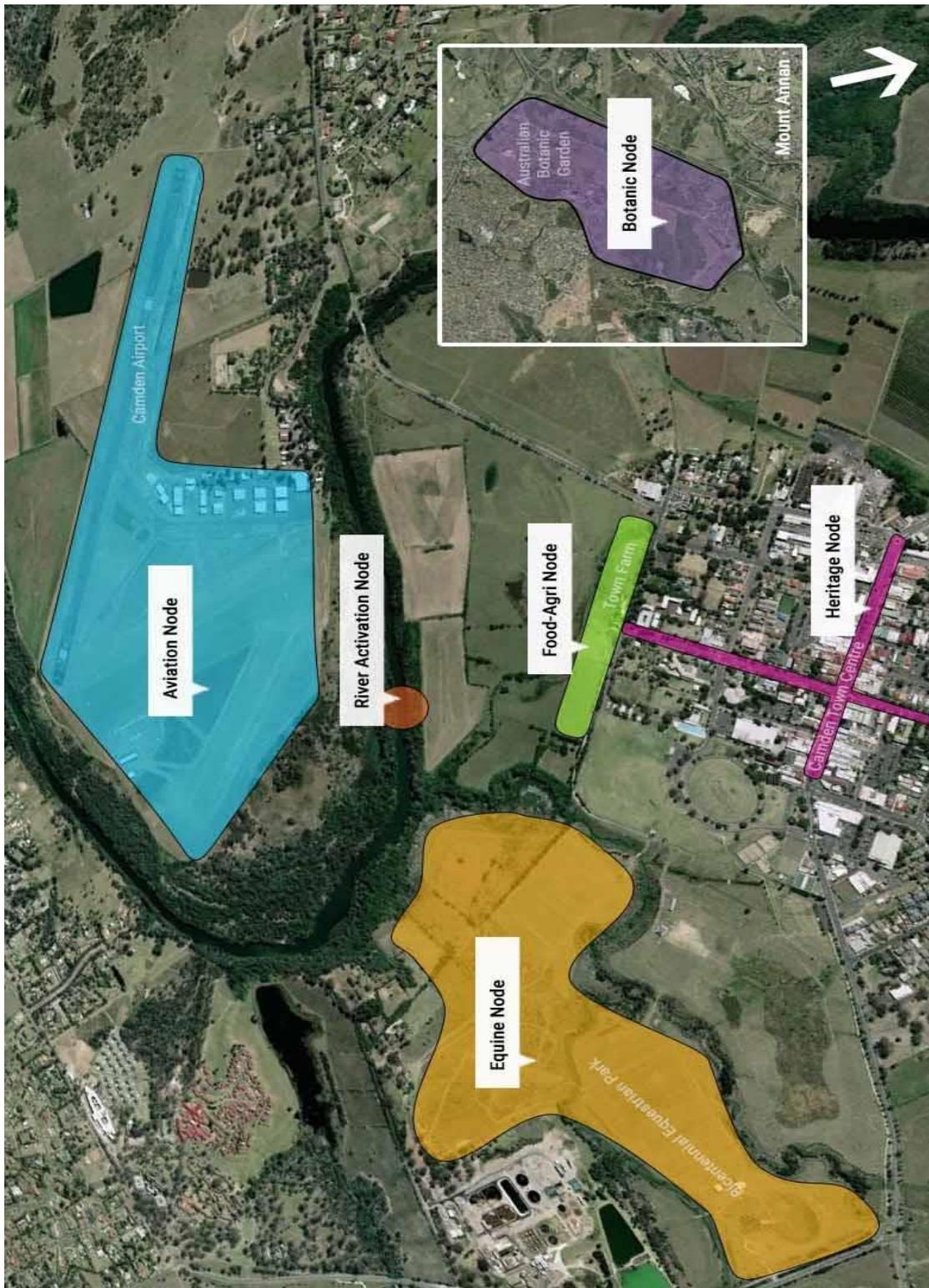
[17] Whilst the areas in Figure 24 denote designated activity zones which can easily integrate for tourism, the actual total area of the Town Farm and the BEP for example, are actually much larger. The areas covered above are therefore just the hub or node where most tourism activity could occur.

## 7.5.    The Equestrian Park

The Camden Bicentennial Equestrian Park offers an elevated site for looking back over Camden town centre and key nodes. It is an attractive site during the daytime but could also be easily activated at night time. This could include lighting up park of the Town Farm, St Johns Church, the Camden Hospital and part of the Equestrian Park as part of a story telling tour and night walk experience.

There is much important history attached to the location and fascinating stories which can be brought alive.  This activity could be seasonal and only offered in summer months as a starting point. It would also help to better inform visitor markets about the unique Macarthur history of the area and encourage and support overnight accommodation in the LGA.

**FIGURE 24: CAMDEN BICENTENNIAL EQUESTRIAN PARK VIEWING POINT SCHEMATIC**
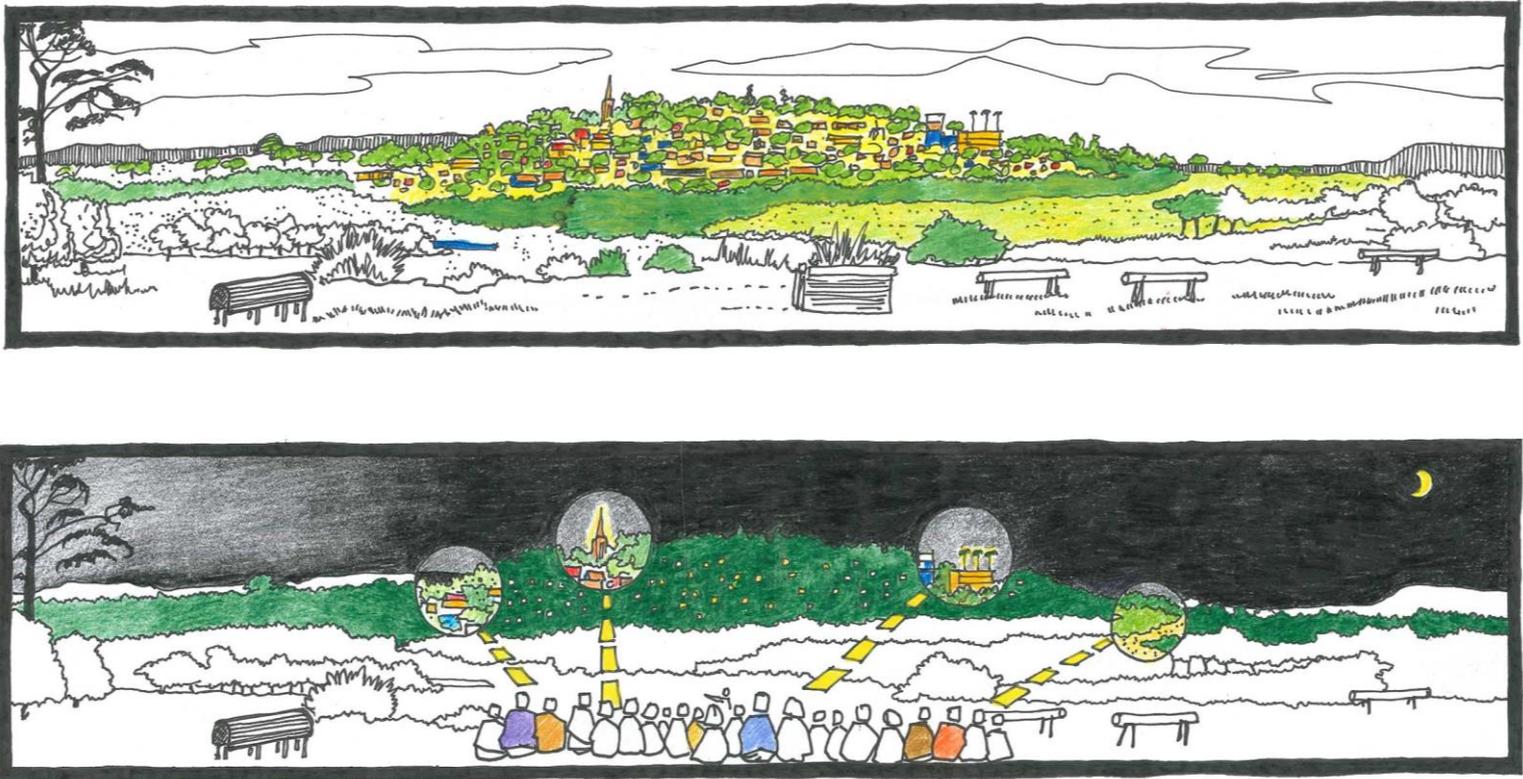
8. ECONOMIC OUTCOMES

# 8. Economic Outcomes

## 8.1. Assessment of the Net Economic Benefit

The following section provides an overview of the likely benefits that could be generated as a result of the implementation of this DMP and the opportunities identified within it.

### 8.1.1. Output/Sales

Total output/sales is the total gross value of sales generated by the tourism industry in Camden LGA and comprises the sum of local sales as well as international and domestic exports.

The Figure below illustrates total tourism industry output over the period 2009 – 2014. Over the six year period assessed, the cumulative growth averaged 3% or $8.6m per annum. These figures reflect the contribution of gross sales to local GDP.

**FIGURE 25: TOURISM INDUSTRY OUTPUT/SALES[18]**



$289.4m  $277.2m  $287.5m  $302.1m  $330.9m  $332.5m

2008/09  2009/10  2010/11  2011/12  2012/13  2013/14

### 8.1.2. Employment

Tourism related employment accounts for just under 9% of total employment in Camden, generating just over 2k direct[19] and indirect[20] jobs in the 2014 FY. The Figure below illustrates tourism-related employment in Camden LGA over the period 2009 – 2014.

It is important to note that whilst this percentage would appear low (as a percentage of total employment by industry sector) it is the potential growth which should be focused on.

**FIGURE 26: EMPLOYMENT GENERATED VIA THE TOURISM INDUSTRY[21]**



2,260  2,325  2,136  1,833  1,959  2,045

2008/09  2009/10  2010/11  2011/12  2012/13  2013/14
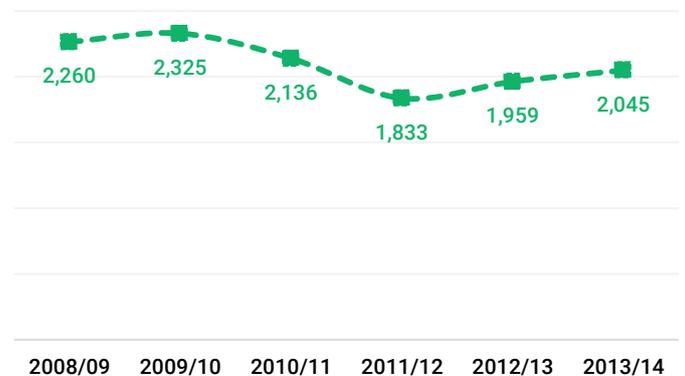
Though this data indicates a decline averaging 2% (or 43 jobs) per annum over the 6 year period, the potential exists to turn this around through

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[18] Value of Tourism and Hospitality, Economy ID (National Economics (NIEIR) - Modelled series)
[19] Direct employment is people who are directly employed in tourism and hospitality related jobs within the area.
[20] Indirect employment is people who are employed as a result of the flow-on effects of employment in tourism and hospitality to other

related intermediate industries, as well as the increase in local consumption created by the wages and salaries of tourism and hospitality workers, which in turn creates additional employment.
[21] Value of Tourism and Hospitality, Economy ID (National Economics (NIEIR) - Modelled series)

stimulating a number of new visitor experiences and products, including in retail and food and beverage.

Tourism has the potential to significantly grow its importance to the employment base for Camden LGA and most importantly, act as a catalyst to stimulate employment for both younger people (which will encourage more of them to stay in the region and others to relocate to the region) and mature aged people who will find casual, part time and potential full time employment options which the region will benefit from.

Tourism offers the potential to attract people across a very wide age range to work in the sector full-time, part-time and on a casual basis.



## 8.2. Visitor Spend

In the absence of visitor spend data[22], The Group has averaged visitor spend in the LGAs of Penrith, Blue Mountains, Wingecarribee and Wollongong and applied this average to Camden's visitor numbers to obtain total visitor spend.

The following table provides an overview of estimated visitor spend by visitors to Camden.

While international visitors are estimated to have the greatest spend per trip ($1,355), domestic overnight visitor's yield the greatest spend on a per night basis ($400 per night). Domestic day trippers contribute the smallest amount at just $88 per trip. This demonstrates the importance of the domestic overnight visitor market to Camden and the need to focus on initiatives which may assist in converting domestic day trippers to domestic overnight visitors.

Development of new commercial accommodation facilities is therefore an important catalyst for increasing spending levels.

**TABLE 11: VISITOR SPEND BREAKDOWN[23]**

| Visitor Segment | Total | Per Visitor | Per night |
|---|---|---|---|
| Domestic Day Visitors | $43.6m | $88 | n/a |
| Domestic Overnight Visitors | $29.1m | $400 | $161 |
| International Visitors | $5.7m | $1,355 | $82 |

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[22] Discussions with DNSW revealed that this data is not available due to a small sample size and a large margin of error

[23] Based on data provided by DNSW as part of a special data request.

## 8.3. Growth in the Net Economic Benefit

### 8.3.1. Visitor Forecast Scenarios

To estimate the growth in the net economic benefit of growing Camden's tourism sector, a series of visitor growth forecasts have been developed.[24] These forecasts range from a low growth scenario to a high growth scenario. The table provided in Supporting Documentation 4 illustrates these growth scenarios over a 10 year period. Key points to note include:

- Under the low growth scenario, visitation, over the 10 year period (2015 – 2024), grows from just over 587k to just under 760k, a total growth of 172k visitors (or a 29% increase). This level of growth reflects natural growth in visitation to Camden, with little-to-no new product development;

- Under the medium growth scenario, visitation grows by 54%, increasing from 599k to 921k visitors. The majority of growth under this scenario originates from domestic day trip visitors, growing from 519k to 805k. To achieve this level of growth, it is assumed that it would necessitate expansion by major existing tourism operators in Camden LGA; and

- Under the high growth scenario, visitation almost doubles, increasing from 615k to 1.21m, a total growth of 592k visitors. This growth has been based on the introduction of approximately 4 - 6 new medium - larger tourism operators (attractors, experiences, accommodation facilities, tours, events etc.) in the LGA.

### 8.3.2. Growth in Visitor Spend

Based on the visitor forecasts developed, and using existing visitor spend figures for visitors to Camden LGA, The Group has provided top line estimates of the growth in visitor spend under each forecast scenario. The table provided in Supporting Documentation 5 page provides the results of this assessment.

Points to note include:

- Under the low growth scenario, spend increases from an estimated $80.5m in 2015 to $103.3m by 2024, a total growth of 28%;

- Under the medium growth scenario, visitor spend increases by 53%, growing from $82.1m to just under $125.2m; and

- Under the high growth scenario, visitor spend increases by $76.8m, growing from $84.2m to $160.9m.

Importantly, these forecasts in visitor spend should be considered conservative as they make no provision for increases in average visitor spend per person. The introduction of new overnight accommodation facilities would result in higher visitor expenditure associated with spend on consumables, accommodation, food and beverage and other goods and services.

## 8.4. Tourism Multipliers

In addition to the direct expenditure from visitors, there are associated visitor expenditure multiplier effects into the local economy. These flow-on effects have been expressed as a tourism output multiplier of 0.92[25], being that for every dollar spent

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[24] At the time of this writing, no existing visitor forecasts for the Macarthur region were available.

[25] Tourism's Contribution to the Australian Economy 1997-98 to 2009-10, Department of Resources, Energy and Tourism

by visitors in Camden, the broader local economy is estimated to benefit a further $0.92. These flow-on benefits go beyond traditional sectors associated with the tourism industry, to include sectors such as administration and wholesale trade, thus demonstrating the interconnectedness of tourism to other parts of the economy.

The growth of the tourism sector in Camden (through new developments, upgrades of existing product, new events, marketing etc.) will support a range of other sectors in the LGA. The table in Supporting Documentation 6 provides an overview of the results achieved when applying the tourism multiplier of 0.92 to the current estimated value of tourism in Camden and the forecasted growth scenarios.

Key points to note include:

- Applying the tourism multiplier to the total spend by visitors to Camden of $214m (2013/14 estimate), produces an estimated $72m as additional annual spend in the local economy;

- Under the low visitor forecast scenario it has been estimated that cumulative visitor spend will total $915m over the 10 year period assessed (2015 – 2024). Applying the tourism multiplier to this visitor spend figure produces an estimated additional $841m spend in the local economy;

- Visitor spend under the medium growth scenario totals $1.02b over the 10 year period 2015 – 2024, with a multiplier effect of $941m; and

- Under the high visitor growth scenario, visitor spend is estimated to total $1.19b. Applying the multiplier to this spend figure results in an

estimated additional $1.09b being spent in the local economy over the 10 year period assessed.

As can be seen in the above assessment, the contribution to the LGA's economy from tourism can be significant.

Furthermore, the economic values are conservative as they do not reflect higher average visitor spend attributed to a broader range of products and amenities and invariable price increases which will occur.

The upside benefits to Camden, therefore, from supporting and growing the tourism sector, should be considered significant.

# 9. TOURISM MARKETING ACTION PLAN

# 9. Tourism Marketing Action Plan



The following are the key result areas to be focused on to help facilitate the successful implementation of this DMP.

Please note that this action plan contains steps required to realise future opportunities and achieve the recommendations included in this DMP, as well as supplementary actions that can be undertaken to further the success of this DMP.

Short term strategies are those to be implemented within the next two years (2017-2019), medium term are those within the following three years (2020 - 2022) and long term includes those to be undertaken after five or more years (2023 onwards) but which may need to commence in the medium term.

Whilst there are many Camden-specific opportunities which have been identified, there are also a number of opportunities which may be more easily implemented and profiled at a Macarthur regional level, requiring input from both Camden and Campbelltown Councils. The opportunities have, therefore, been listed as "regional initiatives" or "Camden specific" projects.

The following includes the key for the responsibility column included in the Action Plan.

- CCM:     Civic Centre Manager
- EDO:     Economic Development Officer
- EO:       Events Officer
- IS:        Information Services
- LA:        Landscape Architect
- MRS:     Manager Recreation and Sustainability
- PM:       Capital Works Project Manager
- PRO:     Public Relations Officer
- RP:        Recreation Planner
- SGO:     Senior Governance Officer
- TCC:      Town Centre Coordinator
- TE:        Traffic Engineer
- TO:        Tourism Officer
- VICC:     Visitor Information Centre Coordinator

**TABLE 12: KEY PERFORMANCE AREA 1**

| | Tourism Product Development & Partnership Opportunities | | | | | |
|---|---|---|---|---|---|---|
| Action | Tasks | Regional Initiative or Camden specific | Responsibility | Budget | Timeframe | KPIs |
| **Tourism Place Making** | ▪ Review the suggested street improvements and other opportunities for Argyle and John Street and which include the input of Council engineers, planners, economic officers and senior exec. | Camden specific | TO, TCC, LA, EDO, PO | - | Short Term (Review)<br><br>Short to Medium Term (Implement changes suggested) | ▪ Review street improvements by June 2017<br>▪ Implement street improvements by June 2018 |
| **Holiday Park Development Feasibility Assessment** | ▪ Council to investigate possible land sites it has which could be used and zoned for the development of the destination park<br>▪ Feasibility assessment undertaken to indicate viability of the destination park<br>▪ If viable, Council to put opportunity out to tender for reputable park operators (including current operators of Poplar Tourist Park) | Camden specific | TO, EDO | $30k for feasibility | Short Term (feasibility)<br><br>Medium – Long Term (project development) | ▪ Land assessment to be undertaken by January 2017<br>▪ Make contact with destination park operators by June 2017 to determine potential costs associated and revenue generating opportunities<br>▪ Undertake feasibility by July 2017<br>▪ If a positive outcome then solicit destination park investor interest in development at the site. |
| **Haunted Attraction and Festival Feasibility Assessment** | ▪ Undertake a feasibility assessment to investigate the development of a haunted attraction within the region. this should include a site assessment of old Council sites which could provide space for the attraction<br>▪ Undertake discussions with similar attractor operators to gauge interest for developing/operating the attraction | Regional | TO, EO | $30k for feasibility | Short – Medium Term (feasibility)<br><br>Medium – Long Term (project development) | ▪ Feasibility to be undertaken by December 2017<br>▪ Discussions with similar attractor operators to be undertaken by March 2018 |
| **Solicit Heritage Hotel Developer Interest** | ▪ Identifying a quality heritage hotel developer and investor to work with Council to create an integrated heritage precinct which effectively links the three buildings | Camden specific | TO, EDO | n/a | Short Term (solicit interest)<br><br>Medium – Long term (project development) | ▪ Undertake discussions with heritage hotel developers by June 2017 |
| **Food Trails and Cooking Schools Feasibility Assessment** | ▪ Undertake feasibility for the development of a cooking school which caters for both adults and children. This will involve investigating possible demand, the most suitable location, potential operators and grants which could be applied for<br>▪ Work with industry to develop and market a range of food trails (possibly tied in with art trails) throughout the Macarthur region | Regional | TO | $15k for feasibility | Medium Term (feasibility)<br><br>Medium – Long Term (project development) | ▪ Feasibility to be undertaken by December 2018<br>▪ If positive outcome, then solicit operator interest by June 2019<br>▪ Introduce by December 2020 |

| Tourism Product Development & Partnership Opportunities | | | | | | |
|---|---|---|---|---|---|---|
| **Action** | **Tasks** | **Regional Initiative or Camden specific** | **Responsibility** | **Budget** | **Timeframe** | **KPIs** |
| **Civic Centre Upgrades** | ▪ Undertake feasibility assessment to assess the types of upgrades which should be undertaken to make the civic centre a more actively used and highly marketable to a local and broader regional market | Camden specific | TO, CCM | $12k for feasibility | Medium Term (feasibility)  Medium – Long Term (project development) | ▪ Feasibility to be undertaken by June 2019 |
| **Australian Botanic Garden Sound and Light Show Feasibility Assessment** | ▪ Undertake feasibility regarding the development of a sound and light show to showcase heritage stories of the region at the Australian Botanic Garden (ABG) in Mount Annan, using the natural environment as the backdrop for the show | Camden specific | TO | $20k for feasibility | Short Term (feasibility)  Medium Term (project development) | ▪ Feasibility to be undertaken by December 2017 ▪ If positive outcome, then solicit operator interest by June 2018 ▪ Introduce by December 2019 |
| **Botanic Gardens Amphitheatre and Sculpture Garden Feasibility Assessment** | ▪ Undertake feasibility to assess the development of an amphitheatre and possibly sculpture garden at the ABG. The feasibility would need to assess demand for an outdoor amphitheatre (with possibly a covered stage) and the size | Camden specific | TO | $30k for feasibility | Short Term (feasibility)  Medium Term (project development) | ▪ Feasibility to be undertaken by December 2017 ▪ If positive outcome, then solicit operator interest by June 2018 ▪ Introduce by December 2019 |
| **Boutique Glamping in National Parks / Reserves Feasibility Assessment** | ▪ Council to investigate possible land sites it has which could be used and is suitably zoned for the development of glamping ▪ Feasibility assessment undertaken to indicate viability of the glamping operation, including number required to operate viably. ▪ If viable, Council to put opportunity out to tender for reputable glamping operators | Regional | TO, EDO | $15k for feasibility | Short Term (feasibility)  Medium Term (project development) | ▪ Land assessment to be undertaken by March 2018 ▪ Feasibility assessment to be undertaken by December 2018 ▪ Tender put out by February 2019 |
| **Development of Macarthur Arts Trails** | ▪ Work with industry to develop and market a range of art trails (possibly tied in with food trails) throughout the Macarthur region | Regional | TO | $15k for marketing | Short Term | ▪ 2 trails developed and marketed by June 2018 ▪ A further 2 trails developed and marketed by December 2019 |
| **National Equine Experience Centre Feasibility Assessment** | ▪ Undertake a feasibility (possibly go out to specialist firms to undertake feasibility) on the development of a national equine interactive centre. This should include a detailed site assessment as there are various sites throughout the region which could be suitable | Camden specific | TO, RP | $25k for feasibility | Short Term (feasibility)  Medium - Long Term (project development) | ▪ Feasibility to be undertaken by November 2017 |
| **Creation and Marketing of Riverside Walks** | ▪ Work with national parks to create a series of riverside walks. These walks may already exist and may just need better profiling, signage and marketing. | Regional | TO, RP | $15k for marketing | Short – Medium Term | ▪ Riverside walks profiling and packaging to commence by December 2017 |

| Tourism Product Development & Partnership Opportunities | | | | | | |
|---|---|---|---|---|---|---|
| Action | Tasks | Regional Initiative or Camden specific | Responsibility | Budget | Timeframe | KPIs |
| **Aviation Museum Feasibility Assessment** | ▪ Undertake a feasibility (possibly go out to specialist firms to undertake feasibility) on the development of an aviation museum. This should include a detailed site assessment as there are various sites (including the Camden Airport) throughout the Camden LGA which could be suitable | Camden specific | TO, EDO | $25k for feasibility | Medium Term (feasibility)<br><br>Long Term (project development | ▪ Feasibility to be undertaken by December 2019 |
| **Aviation Business Park Feasibility** | ▪ Feasibility study to assess potential to develop an aviation business park/precinct at Camden | Camden specific | TO, EDO | $15k for feasibility | Medium Term (feasibility)<br><br>Long Term (project development) | ▪ Feasibility to be undertaken by April 2021 |
| **Creation of Camden Investment Memorandum** | ▪ Create an investment memorandum to stimulate investment by developers into Camden LGA<br>▪ Investment memorandum should indicate the types of development in tourism which Council will actively support | Regional (if developed as a Macarthur Investment Memorandum) – Camden specific (if developed as an LGA specific Memorandum) | EDO | $20k for investment memorandum<br><br>$10k for graphic design and promotion | Short term | ▪ Memorandum drafted and approved by March 2017 |

**TABLE 13: KEY PERFORMANCE AREA 2**

| Marketing & Promotion Opportunities | | | | | | |
|---|---|---|---|---|---|---|
| Action | Tasks | Regional Initiative or Camden specific | Responsibility | Budget | Timeframe | KPIs |
| **Creation of a Tourism Brand Identity for Camden (as part of the broader Macarthur destination branding)** | ▪ Development of regional Macarthur destination identity, as well as potential sub-brands for Camden and Campbelltown in consultation with the tourism industry<br>▪ Creation of an EOI for the development of a brand for the Macarthur region (and its two LGAs as sub-brands)<br>▪ Selection of a brand designer | Regional with sub-brand input by each Council | TO, PRO | $40k for workshops and identity design | Short term | ▪ Undertake workshops with tourism industry to discuss identity concepts by January 2017<br>▪ Have identities drafted by February 2017<br>▪ Have identities confirmed by April 2017 |
| **Development of Updated Website and Integrated Augmented Reality Mobile App** | ▪ Once identity is developed, commission developer to design a website and integrated mobile app (or mobile accessible site) for Camden | Camden specific (but leveraging off and supporting regional website) | TO | $90k | Short Term | ▪ Commission web developer by end of April 2017<br>▪ Have draft website and app/mobile accessible site ready by end of July 2017<br>▪ Launch website and app by August 2017 |

| Marketing & Promotion Opportunities | | | | | | |
|---|---|---|---|---|---|---|
| **Action** | **Tasks** | **Regional Initiative or Camden specific** | **Responsibility** | **Budget** | **Timeframe** | **KPIs** |
| **Packaging of Product** | • Identify product which could be packaged and promoted including accommodation, transport, activities etc.<br>• This will involve a wide range of stakeholders but Council and the Tourism Subcommittee need to take a leadership role and undertake the facilitation for this | Regional with LGA specific packages managed by tourism industry in each LGA | TO | $20k for promotion | Ongoing | • Work with Macarthur tourism industry to develop 3 packages by March 2017<br>• Packages to be promoted from April 2017<br>• A further 3 packages to be developed and promoted by January 2018 |
| **Development of a Community Tourism Awareness Campaign** | • Develop a community tourism awareness program which demonstrates the contribution of tourism to the Macarthur economy | Regional | TO, PRO | $15k for promotion | Medium Term | • Community awareness program rolled out by December 2018 |
| **Greater Profiling of Bird Watching** | • Greater profiling of bird watching experiences through promotion in bird watching/wildlife magazines, via social media, product packaging etc. | Camden specific | TO | $15k for marketing $40k for hides | Ongoing | • Start increased profiling of these experiences by December 2018 |
| **Development of an Events Calendar** | • Development of events calendar, to be available via the destination website | Regional calendar with LGA-based events managed by applicable Council/personnel | TO, EO | n/a – integrate into new website | Ongoing | • Collation of all future events (next 1 – 2 years) and roll out on new website (to be developed by November 2017)<br>• Ongoing updating of events calendar |
| **Creation and Application of an Event Evaluation Criteria** | • Tourism Industry Taskforce, working with economic development personnel at each Council, to develop a criterion to assess proposed events and their likely benefit.<br>• Criteria could include likely cost of event, level of industry and community support, ability to leverage off funding sources to support the event, timing of the event and visitor markets the event is likely to attract<br>• Application of event success criterion to existing council-run and supported events to ensure events list includes on those with the greatest economic and social benefit | Regional with evaluation of LGA specific events evaluated by applicable Council | TO, EDO | n/a | Short Term and Ongoing | • Event success criterion to be developed by June 2017<br>• Criterion to be applied to all new events ongoing<br>• Events success criterion applied to current events by December 2017 |

**TABLE 14: KEY PERFORMANCE AREA 3**

| Industry Support Opportunities | | | | | | |
|---|---|---|---|---|---|---|
| **Action** | **Tasks** | **Regional Initiative or Camden specific** | **Responsibility** | **Budget** | **Timeframe** | **KPIs** |
| **Creation of an EOI and Selection of Tourism Industry Taskforce** | ▪ Develop Expression of Interest seeking strategically-minded local community members (and possibly embers outside the region who have a keen interest) to join the Tourism Industry Taskforce.<br>▪ The selection panel for the EOI should consist of internal Council personnel and an external stakeholder<br>▪ Skill base required includes: digital/technology skills, innovation/forward thinking skills and finance skills<br>▪ The taskforce should meet every 3 months to discuss progress | Regional | TO | <$30k (marketing) <$20k (development) | Short term | ▪ Develop EOI by January 2017<br>▪ Tourism Industry Taskforce to be selected by June 2017 |
| **Development of the Terms of Reference for the Taskforce** | ▪ Develop the "Terms of Reference" for the Taskforce | Regional | TO, GO | n/a | Short term | ▪ Terms of reference to be developed by March 2017 |
| **Review the Composition of the Taskforce** | ▪ The Taskforce will be a term commitment determined by both Councils including a timeframe for reviewing its composition. | Regional | TO, GO | n/a | Ongoing | ▪ Review composition of the Taskforce according to timeframe determined by both Councils<br>▪ Resubmit the EOI if the composition of the Taskforce needs to change |

**TABLE 15: KEY PERFORMANCE AREA 4**

| Visitor Servicing Opportunities | | | | | | |
|---|---|---|---|---|---|---|
| Action | Tasks | Regional Initiative or Camden specific | Responsibility | Budget | Timeframe | KPIs |
| **Review of Visitor Information Services** | ▪ Develop a visitor information services strategy focusing on the current provision of visitor information and opportunities that exist to increase the ROI of visitor information services | Regional | TO, VICC | $35k | Short – Medium Term | ▪ Undertake investigation by June 2018<br>▪ Implement changes by October 2019 |
| **Feasibility to Assess Location of Camden VIC** | ▪ Undertake a feasibility study to assess the location and possible other sites which the Camden VIC could be located to increase its exposure and access | Camden specific | TO, VICC | < $5k (if bundled with above Review) | Short Term | ▪ Undertake feasibility study concurrently with above review by December 2017 |
| **Investigate Free Wi-Fi at the VICs** | ▪ Tourism Industry Taskforce to investigate the provision of free Wi-Fi at Camden VIC as a method of encouraging vibrancy and use of the VIC | Regional | TO, IS | n/a | Medium Term | ▪ Undertake investigation by September 2018 |
| **Development of a Regional Signage Program** | ▪ Development of a signage strategy which identifies ideal signage locations to promote both Camden's and Macarthur's attractions/ experiences in a highly appealing way<br>▪ The signage strategy should also assess the need and appropriate location for directional signage across the region | Regional | TO, TE, PRO | $20k for signage strategy and<br><br>$75k for new signs/skins | Short – Medium Term | ▪ Signage strategy to be developed by September 2018<br>▪ Designs for new signage completed and tested by January 2019<br>▪ New signage submitted for State Govt. approval by March 2019<br>▪ New signage is installed no later than 4 months post State Govt. approval |
| **Development of a Roving Ambassador Program** | ▪ Development of volunteer-based, roving ambassador program, particularly during peak visitor periods. | Camden specific | TO | $15k for establishment of program and roster management | Medium Term | ▪ Establish and implement program by March 2019<br>▪ Sign up 20 volunteers at program start date<br>▪ Increase volunteer base by 10% per annum from program start date |
| **Gateway Landscaping** | ▪ Develop a landscape strategy for gateway points into the Macarthur region and LGA | Regional and Camden specific | TO, MRP | $35k (strategy development) | Medium – Long Term | ▪ Develop landscape strategy by December 2019<br>▪ Implement landscape strategy by December 2020 |

# 10. SUPPORTING DOCUMENTATION

# 10. Supporting Documentation

## Supporting Documentation 1: Tourism Product Audit

| Name | Suburb | Type | Free or Pay for? |
|------|--------|------|------------------|
| Balloon Aloft Sydney | Camden | Active / Adventure | Pay For |
| Curtis Aviation | Camden | Active / Adventure | Pay For |
| Dynamic Helicopters | Camden | Active / Adventure | Pay For |
| Enduro Trail Mountain Biking | Mount Annan | Active / Adventure | Free |
| Gostner Aviation | Camden | Active / Adventure | Pay For |
| Jump Zone Revolution | Gregory Hills | Active / Adventure | Pay For |
| Playmaze for Kids | Narellan | Active / Adventure | Pay For |
| Southern Cross Gliding Club | Camden | Active / Adventure | Pay For |
| Ultimate Karting Sydney | Smeaton Grange | Active / Adventure | Pay For |
| Ultimate Paintball | Camden Park | Active / Adventure | Pay For |
| Camden Museum & Historical Society | Camden | Arts, Cultural, Heritage | Free |
| Camden Park House (Only Open to Public Once Yearly) | Camden | Arts, Cultural, Heritage | Pay For |
| Camden Society of Artists | Camden | Arts, Cultural, Heritage | Free |
| Gledswood Homestead Historic Property & Tours | Catherine Field | Arts, Cultural, Heritage | Pay For |
| John Oxley Cottage Historic Property | Elderslie | Arts, Cultural, Heritage | Free |
| Wivenhoe House Historic Property | Kirkham | Arts, Cultural, Heritage | Free |
| Camden Estate Wines | Elderslie | Brewery/Winery | Pay For |
| Cobbitty Winery | Cobbitty | Brewery/Winery | Pay For |
| Fussy Grape Winery | Oran Park | Brewery/Winery | Pay For |
| Gledswood Homestead Wines | Gledswood Hills | Brewery/Winery | Pay For |
| United Cinemas | Narellan | Entertainment | Pay For |
| Back Galley Cafe High Tea | Camden | Food Experience | Pay For |
| Barenz High Tea | Camden | Food Experience | Pay For |
| Gledswood Country High Tea | Catherine Field | Food Experience | Pay For |
| Harrington Grove Country Club High Tea | Harrington Park | Food Experience | Pay For |
| Camden Fresh Produce Markets | Camden | Market | Free |
| Cobbitty Village Markets | Cobbitty | Market | Free |
| Macarthur Community Indoor Markets | Camden | Market | Free |
| Pitter Patter Markets | Camden | Market | Free |
| The Closet Sale | Camden | Market | Free |
| Camden Community Garden | Camden | Parks & Reserves | Pay For |
| Curry Reserve | Elderslie | Parks & Reserves | Free |
| Macarthur Centre for Sustainable Living | Mount Annan | Parks & Reserves | Free |
| Macarthur Park | Camden | Parks & Reserves | Free |
| The Australian Botanic Garden | Mount Annan | Parks & Reserves | Free |
| William Howe Reserve | Narellan Vale | Parks & Reserves | Free |

| Name | Suburb | Type | Free or Pay for? |
|---|---|---|---|
| Camden Bicentennial Equestrian Park | Camden | Recreation | Pay For |
| Camden Golf Club | Narellan | Recreation | Pay For |
| Camden Main Street | Camden | Recreation | Free |
| Camden RSL Club | Camden | Recreation | Pay For |
| Camden Skate Facility | Elderslie | Recreation | Free |
| Camden Sports Club | Camden | Recreation | Pay For |
| Camden Swimming Pool | Camden | Recreation | Pay For |
| Camden Town Farm | Camden | Recreation | Pay For |
| Cobbitty Village | Cobbitty | Recreation | Free |
| Lakeside Country Club | Catherine Field | Recreation | Pay For |
| Macquarie Fields Skate Park | Smeaton Grange | Recreation | Free |
| Maximum Skating | Smeaton Grange | Recreation | Pay For |
| Mount Annan Leisure Centre YMCA | Mount Annan | Recreation | Pay For |
| Narellan Town Centre | Narellan | Recreation | Free |
| Nepean River Cycleway | Camden | Recreation | Free |
| Sydney Horse Riding Centre | Gledswood Hills | Recreation | Pay For |
| Teen Ranch Camps | Cobbitty | Recreation | Pay For |
| Aerowasp Helicopter Flights | Camden | Tour Operator | Pay For |
| Air Combat Australia | Camden | Tour Operator | Pay For |
| Belganny Farm (Organised Tours and Special Events Only) | Camden | Tour Operator | Pay For |
| Camden Aviation | Camden | Tour Operator | Pay For |
| Camden Heritage Walking Tour | Camden | Tour Operator | Free |
| Macarthur Food and Wine Tours | Camden | Tour Operator | Pay For |
| Macarthur Winter Warmer Tour | Oran Park | Tour Operator | Pay For |
| Narellan Heritage Walking Tour | Narellan | Tour Operator | Free |
| United Aero Helicopters | Camden | Tour Operator | Pay For |
| Wivenhoe House Tours | Kirkham | Tour Operator | Pay For |

## Supporting Documentation 2: Accommodation Audit

| Name | LGA | Suburb | Type | Rate $ (Standard Room) | Rooms | Star Rating |
|------|-----|--------|------|------------------------|-------|-------------|
| Camden Acres Homestead B&B | Camden | Elderslie | B&B/ Guesthouse/ Farmstay | - | 22 | - |
| Camden Hillview B&B | Camden | Camden | B&B/ | 180.00 | 1 | - |
| Garden Cottage B&B | Camden | Camden | Guesthouse/ | 110 | - | - |
| Poplar Tourist Park, Camden | Camden | Elderslie | Camping/ Caravan Park | Cabin from $100/Powered Site $32/Unpowered Site $25 | 6 Cabins + Powered Camping Sites | - |
| Teen Ranch | Camden | Cobbitty | Camping/ Caravan Park | Unknown | - | 3.5 |
| Camden Country Club Motel | Camden | Camden | Motel | 105.00 | 24 | - |
| Camden Valley Inn | Camden | Camden Park | Motel | 135.00 | 40 | - |
| Crown Hotel Motel | Camden | Camden | Motel | - | 18 | - |
| Narellan Motor Inn | Camden | Narellan | Motel | 137.00 | 51 | 3 |

## Supporting Documentation 3: Food and Beverage Audit

| Name | Type |
|---|---|
| The ARThouse Espresso Bar Restaurant | Café |
| Arts Centre Cafe | Café |
| The Argyle Gourmet Cafe | Café |
| Back Galley Cafe | Café |
| Cafe Creme Della Crème Continental Patisserie | Café |
| Cafe on Cobbitty | Café |
| Cobbitty General Store, Cafe and Post Office | Café |
| Coffee Gossip | Café |
| Deli D'Lish | Café |
| Eats on Argyle | Café |
| Elm Tree Cafe | Café |
| FOOD.DRINK | Café |
| Oran Park Town Cafe | Café |
| R Coffee Co | Café |
| Squeeze and Grind | Café |
| Village Coffee Shop | Café |
| Lickits Frozen Custard | Ice Creamery / Dessert |
| Michel's Patisserie Camden | Ice Creamery / Dessert |
| Michel's Patisserie Narellan | Ice Creamery / Dessert |
| The View at Camden Golf Club | Pub / Club |
| Camden Hotel | Pub / Club |
| Camden RSL Club Restaurant | Pub / Club |
| Camden Sports Club | Pub / Club |
| Camden Valley Inn | Pub / Club |
| Country Club Camden Valley | Pub / Club |
| Crown Hotel | Pub / Club |
| Lakeside Golf Club Camden | Pub / Club |
| The Merino Tavern | Pub / Club |
| Mount Annan Hotel | Pub / Club |
| Narellan Hotel | Pub / Club |
| Plough and Harrow Hotel | Pub / Club |
| Antico Bar and Grill | Restaurant |
| Antico's Garden Cafe Restaurant | Restaurant |
| Antico Woodfire Pizza | Restaurant |
| Barenz | Restaurant |
| Bella's Pizza House | Restaurant |
| Bistro Calavia | Restaurant |
| Blissful Garden Malaysian Restaurant | Restaurant |
| Bohemian Euro German Restaurant | Restaurant |
| Camden King Chinese | Restaurant |
| Chola Indian Restaurant | Restaurant |
| Enzo's Italian Restaurant and Pizzeria | Restaurant |
| Fan Thai Restaurant | Restaurant |
| Gledswood Homestead Cellar Door Wine and Tapas | Restaurant |

| Name | Type |
|------|------|
| Grand Taco Mexican | Restaurant |
| The Grange Restaurant and Bar | Restaurant |
| Harrington's Bar and Grill | Restaurant |
| Haruki Japanese Fusion Restaurant | Restaurant |
| The Italian Food Project | Restaurant |
| Joy's Thai Restaurant | Restaurant |
| Kochukaru Japanese Restaurant | Restaurant |
| Kwality Curries | Restaurant |
| Lewis' Kitchen | Restaurant |
| Luigi's Restaurant | Restaurant |
| Luxay Thai Restaurant | Restaurant |
| Mount Annan Chinese | Restaurant |
| Mr Ho Chinese Restaurant | Restaurant |
| Nailati | Restaurant |
| Noodle Paradise Mount Annan | Restaurant |
| Phuong's Oriental Noodle House | Restaurant |
| Piccola Italia Pizzeria | Restaurant |
| Rashays Cafe and Restaurant Narellan | Restaurant |
| Royal Thailicious Restaurant | Restaurant |
| Salute Trattoria Pizza and Pasta | Restaurant |
| Silver Jade Chinese | Restaurant |
| Thai Harrington | Restaurant |
| This is Thai | Restaurant |
| 5 Star Thai tanic | Restaurant |
| Trattoria La Vigna | Restaurant |
| Tuscany Italian Restaurant | Restaurant |
| Vienna on Argyle | Restaurant |
| Ziafat Indian Restaurant | Restaurant |
| Melaleuca House | Restaurant |
| McDonalds Camden | Takeaway |
| Subway Camden | Takeaway |
| KFC Narellan | Takeaway |
| KFC Narellan Town Centre | Takeaway |
| Pizza Hut Narellan | Takeaway |
| Pizza Hut Camden | Takeaway |
| Dominos Pizza Camden | Takeaway |

## Supporting Documentation 4: Estimated Visitor Forecast Scenarios

**TABLE 16: ESTIMATED VISITOR FORECAST SCENARIOS**

| Low Growth | 2014 | AAGR | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | Growth 2015 - 2024 | % Growth 2015 - 2024 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| International Visitors | 4.2k | 5% | 4.4k | 4.6k | 4.9k | 5.1k | 5.4k | 5.6k | 5.9k | 6.2k | 6.5k | 6.8k | 2.6k | 63% |
| Domestic Overnight Visitors | 72.7k | 2% | 74.2k | 75.7k | 77.2k | 78.7k | 80.3k | 81.9k | 83.5k | 85.2k | 86.9k | 88.7k | 15.9k | 22% |
| Domestic Daytrip Visitors | 494.0k | 3% | 508.9k | 524.1k | 539.9k | 556.0k | 572.7k | 589.9k | 607.6k | 625.8k | 644.6k | 664.0k | 169.9k | 34% |
| Total | 570.98k | | 587.47k | 604.44k | 621.90k | 639.89k | 658.40k | 677.46k | 697.07k | 717.27k | 738.06k | 759.46k | 172.00k | 29% |

| Medium Growth | 2014 | AAGR | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | Growth 2015 - 2024 | % Growth 2015 - 2024 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| International Visitors | 4.2k | 7% | 4.5k | 4.8k | 5.2k | 5.5k | 5.9k | 6.3k | 6.8k | 7.2k | 7.7k | 8.3k | 4.1k | 97% |
| Domestic Overnight Visitors | 72.7k | 4% | 75.6k | 78.7k | 81.8k | 85.1k | 88.5k | 92.0k | 95.7k | 99.5k | 103.5k | 107.7k | 34.9k | 48% |
| Domestic Daytrip Visitors | 494.0k | 5% | 518.7k | 544.7k | 571.9k | 600.5k | 630.5k | 662.1k | 695.2k | 729.9k | 766.4k | 804.7k | 310.7k | 63% |
| Total | 570.98k | | 598.88k | 628.16k | 658.88k | 691.11k | 724.92k | 760.40k | 797.63k | 836.69k | 877.67k | 920.68k | 321.79k | 54% |

| High Growth | 2014 | AAGR | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | Growth 2015 - 2024 | % Growth 2015 - 2024 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| International Visitors | 4.2k | 10% | 4.6k | 5.1k | 5.6k | 6.2k | 6.8k | 7.4k | 8.2k | 9.0k | 9.9k | 10.9k | 6.7k | 159% |
| Domestic Overnight Visitors | 72.7k | 6% | 77.1k | 81.7k | 86.6k | 91.8k | 97.3k | 103.2k | 109.4k | 115.9k | 122.9k | 130.3k | 57.5k | 79% |
| Domestic Daytrip Visitors | 494.0k | 8% | 533.6k | 576.3k | 622.4k | 672.1k | 725.9k | 784.0k | 846.7k | 914.4k | 987.6k | 1.1m | 572.6k | 116% |
| Total | 570.98k | | 615.29k | 663.06k | 714.57k | 770.12k | 830.01k | 894.60k | 964.26k | 1.04m | 1.12m | 1.21m | 592.47k | 96% |

## Supporting Documentation 5: Estimated Growth in Visitor Spend

**TABLE 17: ESTIMATED GROWTH IN VISITOR SPEND**

| Low Growth | 2013/14 Estimated Spend P/Trip | 2013/14 Est. Total Visitor Spend | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | Growth 2015 - 2024 | % Growth 2015 - 2024 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| International Visitors | $1,355 | $5.7m | $6.0m | $6.3m | $6.6m | $6.9m | $7.3m | $7.6m | $8.0m | $8.4m | $8.8m | $9.3m | $3.6m | 63% |
| Domestic Overnight Visitors | $400 | $29.1m | $29.6m | $30.2m | $30.8m | $31.5m | $32.1m | $32.7m | $33.4m | $34.0m | $34.7m | $35.4m | $6.4m | 22% |
| Domestic Daytrip Visitors | $88 | $43.6m | $44.9m | $46.3m | $47.6m | $49.1m | $50.5m | $52.1m | $53.6m | $55.2m | $56.9m | $58.6m | $15.0m | 34% |
| **Total Visitor Spend** | | $78.4m | $80.5m | $82.8m | $85.1m | $87.4m | $89.9m | $92.4m | $95.0m | $97.7m | $100.4m | $103.3m | $22.8m | 28% |

| Medium Growth | 2013/14 Estimated Spend P/Trip | 2013/14 Est. Total Visitor Spend | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | Growth 2015 - 2024 | % Growth 2015 - 2024 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| International Visitors | $1,355 | $5.7m | $6.1m | $6.5m | $7.0m | $7.5m | $8.0m | $8.5m | $9.1m | $9.8m | $10.5m | $11.2m | $5.5m | 97% |
| Domestic Overnight Visitors | $400 | $29.1m | $30.2m | $31.4m | $32.7m | $34.0m | $35.4m | $36.8m | $38.2m | $39.8m | $41.4m | $43.0m | $14.0m | 48% |
| Domestic Daytrip Visitors | $88 | $43.6m | $45.8m | $48.1m | $50.5m | $53.0m | $55.6m | $58.4m | $61.3m | $64.4m | $67.6m | $71.0m | $27.4m | 63% |
| **Total Visitor Spend** | | $78.4m | $82.1m | $86.0m | $90.1m | $94.5m | $99.0m | $103.7m | $108.7m | $114.0m | $119.5m | $125.2m | $43.1m | 53% |

| High Growth | 2013/14 Estimated Spend P/Trip | 2013/14 Est. Total Visitor Spend | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | Growth 2015 - 2024 | % Growth 2015 - 2024 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| International Visitors | $1,355 | $5.7m | $6.3m | $6.9m | $7.6m | $8.3m | $9.2m | $10.1m | $11.1m | $12.2m | $13.4m | $14.8m | $9.1m | 159% |
| Domestic Overnight Visitors | $400 | $29.1m | $30.8m | $32.6m | $34.6m | $36.7m | $38.9m | $41.2m | $43.7m | $46.3m | $49.1m | $52.0m | $23.0m | 79% |
| Domestic Daytrip Visitors | $88 | $43.6m | $47.1m | $50.9m | $54.9m | $59.3m | $64.1m | $69.2m | $74.7m | $80.7m | $87.2m | $94.1m | $50.5m | 116% |
| **Total Visitor Spend** | | $78.4m | $84.2m | $90.4m | $97.1m | $104.3m | $112.1m | $120.5m | $129.5m | $139.2m | $149.7m | $160.9m | $76.8m | 91% |

# Supporting Documentation 6: Estimated Tourism Multipliers

**TABLE 18: ESTIMATED TOURISM MULTIPLIERS**

| Low Growth | 2013/14 Estimated Spend P/Trip | 2013/14 Est. Total Visitor Spend | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | Growth 2015 - 2024 | % Growth 2015 - 2024 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Total Visitor Spend | - | $78.4m | $80.5m | $82.8m | $85.1m | $87.4m | $89.9m | $92.4m | $95.0m | $97.7m | $100.4m | $103.3m | $22.8m | 28% |
| **Multiplier** | **0.92** | $72.1m | $74.1m | $76.1m | $78.3m | $80.5m | $82.7m | $85.0m | $87.4m | $89.9m | $92.4m | $95.0m | $841.4m | |

| Medium Growth | 2013/14 Estimated Spend P/Trip | 2013/14 Est. Total Visitor Spend | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | Growth 2015 - 2024 | % Growth 2015 - 2024 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Total Visitor Spend | - | $78.4m | $82.1m | $86.0m | $90.1m | $94.5m | $99.0m | $103.7m | $108.7m | $114.0m | $119.5m | $125.2m | $43.1m | 53% |
| **Multiplier** | **0.92** | $72.1m | $75.5m | $79.1m | $82.9m | $86.9m | $91.1m | $95.4m | $100.0m | $104.9m | $109.9m | $115.2m | $941.0m | |

| High Growth | 2013/14 Estimated Spend P/Trip | 2013/14 Est. Total Visitor Spend | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | Growth 2015- 2024 | % Growth 2015 - 2024 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Total Visitor Spend | - | $78.4m | $84.2m | $90.4m | $97.1m | $104.3m | $112.1m | $120.5m | $129.5m | $139.2m | $149.7m | $160.9m | $76.8m | 91% |
| **Multiplier** | **0.92** | $72.1m | $77.4m | $83.2m | $89.3m | $96.0m | $103.2m | $110.9m | $119.2m | $128.1m | $137.7m | $148.1m | $1.09b | |

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