

# CAMDEN LGA DESTINATION MANAGEMENT PLAN

February, 2016



THE STAFFORD GROUP





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# Table of Contents

<b>1.</b>	<b>EXECUTIVE SUMMARY .....</b>	<b>1</b>
1.1.	OVERVIEW.....	2
1.2.	PURPOSE.....	2
1.3.	ISSUES AND GAPS .....	2
1.4.	THE OPPORTUNITIES .....	3
1.5.	GOING FORWARD.....	7
<b>2.</b>	<b>INTRODUCTION .....</b>	<b>8</b>
2.1.	OVERVIEW.....	9
2.2.	METHODOLOGY .....	9
<b>3.</b>	<b>SITUATION ANALYSIS .....</b>	<b>11</b>
3.1.	PLAN CONTEXT .....	12
3.2.	THE CAMDEN LGA .....	12
3.3.	POPULATION .....	14
3.4.	VISITATION TO THE CAMDEN LGA .....	14
3.5.	SWOT ANALYSIS .....	15
<b>4.</b>	<b>PRODUCT &amp; INFRASTRUCTURE AUDIT ...</b>	<b>17</b>
4.1.	ATTRACTION AUDIT .....	18
4.2.	ACCOMMODATION AUDIT.....	18
4.3.	FOOD & BEVERAGE AUDIT.....	19
4.4.	PRODUCT GAP ANALYSIS .....	19
<b>5.</b>	<b>IDENTIFIED ISSUES .....</b>	<b>21</b>
5.1.	PRODUCT AND SUPPORTING INFRASTRUCTURE.....	22
5.2.	MARKETING AND PROMOTION.....	25
5.3.	OTHER ISSUES .....	27
<b>6.</b>	<b>THE OPPORTUNITIES.....</b>	<b>30</b>
6.1.	TOURISM PRODUCT DEVELOPMENT & PARTNERSHIPS.....	31
6.2.	MARKETING & PROMOTION .....	42
6.3.	INDUSTRY SUPPORT .....	45
6.4.	VISITOR SERVICING .....	46
6.5.	OPPORTUNITIES MATRIX.....	48
<b>7.</b>	<b>TOURISM PLACE MAKING.....</b>	<b>53</b>
7.1.	BOUTIQUE HOTEL .....	54
7.2.	BOUTIQUE CIDER HOUSE/MICRO BREWERY/GOURMET BAKERY.....	56
7.3.	STRENGTHENING CIVIC CONNECTIONS .....	57
7.4.	HUBS AND NODES.....	59
7.5.	THE EQUESTRIAN PARK.....	61
<b>8.</b>	<b>ECONOMIC OUTCOMES .....</b>	<b>62</b>
8.1.	ASSESSMENT OF THE NET ECONOMIC BENEFIT.....	63
8.2.	VISITOR SPEND.....	64
8.3.	GROWTH IN THE NET ECONOMIC BENEFIT .....	65
8.4.	TOURISM MULTIPLIERS.....	65
<b>9.</b>	<b>TOURISM MARKETING ACTION PLAN ...</b>	<b>67</b>
<b>10.</b>	<b>SUPPORTING DOCUMENTATION .....</b>	<b>74</b>



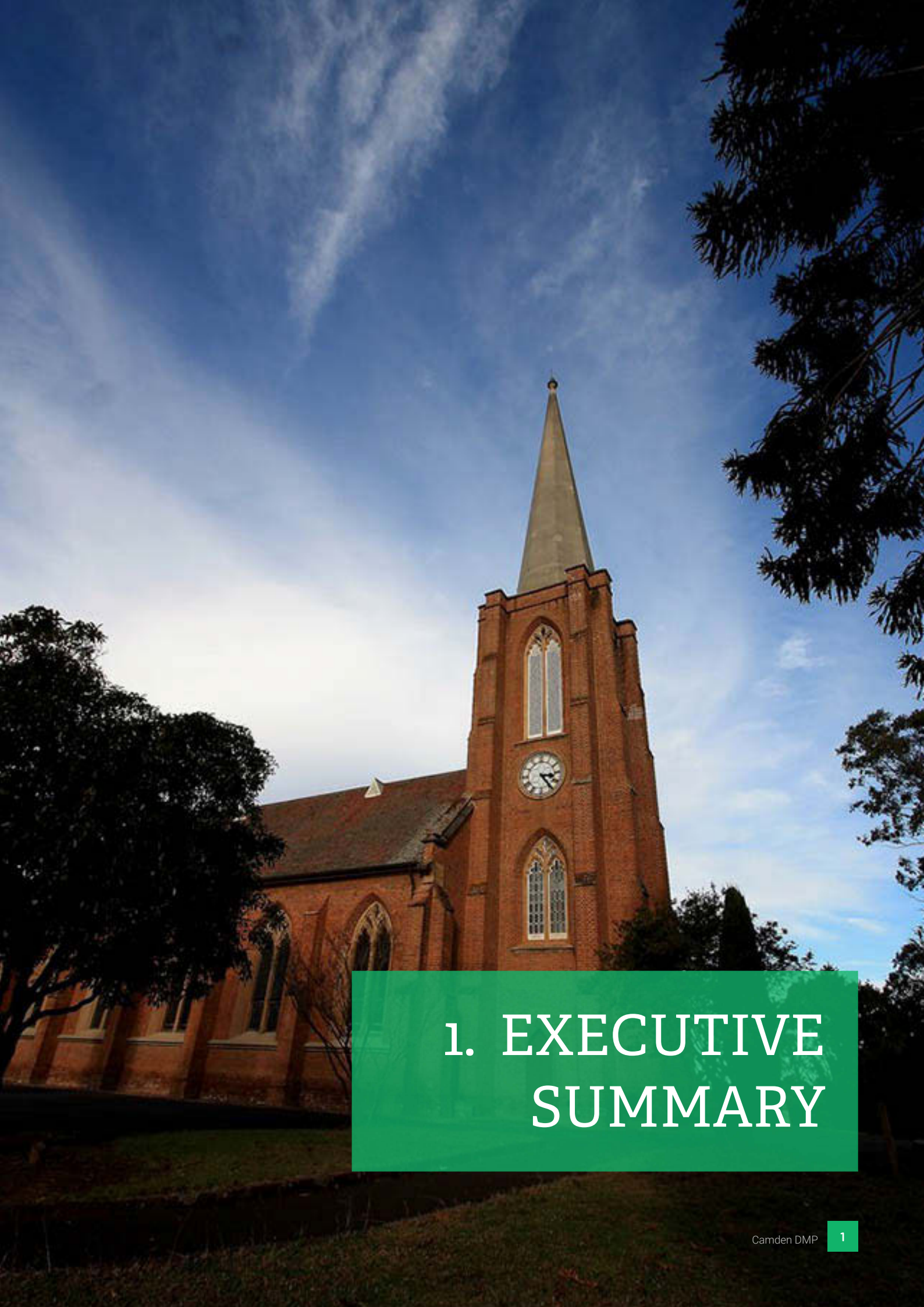
# List of Tables & Figures



TABLE 1: AVERAGE LENGTH OF STAY (4 YEAR AVERAGE YE SEPT 2014) .....	15
TABLE 2: SWOT ANALYSIS .....	16
TABLE 3: CAMDEN LGA TOURISM PRODUCT AUDIT SUMMARY .....	18
TABLE 4: CAMDEN LGA ACCOMMODATION AUDIT SUMMARY .....	18
TABLE 5: CAMDEN LGA F&B AUDIT SUMMARY .....	19
TABLE 6: MAJOR EVENTS HELD IN CAMDEN .....	44
TABLE 7: TOURISM PRODUCT DEVELOPMENT & PARTNERSHIPS .....	49
TABLE 8: MARKETING & PROMOTION .....	51
TABLE 9: INDUSTRY SUPPORT .....	51
TABLE 10: VISITOR SERVICING .....	52
TABLE 11: VISITOR SPEND BREAKDOWN .....	64
TABLE 12: KEY PERFORMANCE AREA 1 .....	68
TABLE 13: KEY PERFORMANCE AREA 2 .....	71
TABLE 14: KEY PERFORMANCE AREA 3 .....	72
TABLE 15: KEY PERFORMANCE AREA 4 .....	73
TABLE 16: ESTIMATED VISITOR FORECAST SCENARIOS .....	80
TABLE 17: ESTIMATED GROWTH IN VISITOR SPEND .....	81
TABLE 18: ESTIMATED TOURISM MULTIPLIERS .....	82

FIGURE 1: ISSUES .....	3
FIGURE 2: LOCATION MAP OF THE CAMDEN LGA WITHIN GREATER SYDNEY .....	12
FIGURE 3: DISTANCE FROM SYDNEY CBD .....	13
FIGURE 4: HISTORIC POPULATION AND FORECASTED GROWTH .....	14
FIGURE 5: VISITORS TO THE CAMDEN LGA (4 YEAR AVERAGE YE SEPT 2014) .....	15
FIGURE 6: CAMDEN FORECASTED POPULATION GROWTH .....	23
FIGURE 7: DNSW TOURISM REGIONS .....	25
FIGURE 8: TRADITIONAL CARAVAN PARKS .....	33
FIGURE 9: DESTINATION HOLIDAY PARKS .....	33
FIGURE 10: SPOOKERS HAUNTED ATTRACTION .....	34
FIGURE 11: EQUINE FACILITIES WITHIN THE BROADER SOUTH WEST REGION .....	35
FIGURE 12: BICENTENNIAL EQUESTRIAN PARK .....	35
FIGURE 13: SOUND AND LIGHT SHOW EXAMPLES .....	38
FIGURE 14: NARELLAN SPORTS HUB MASTERPLAN .....	39
FIGURE 15: OUTDOOR AMPHITHEATRE EXAMPLES .....	40
FIGURE 16: GLAMPING EXAMPLES .....	41
FIGURE 17: CAMDEN BRAND ELEMENTS .....	42
FIGURE 18: MOBILE APP TOUR & AUGMENTED REALITY EXAMPLES .....	43
FIGURE 19: THE IMPORTANCE OF TOURISM .....	45
FIGURE 20: OUTDOOR INFORMATION TOUCH SCREENS .....	48
FIGURE 21: REUSE AND PRESERVATION OF UNUSED HERITAGE BUILDINGS .....	55
FIGURE 22: CAMDEN VALE MILK FACTORY .....	56
FIGURE 23: SCHEMATIC 10 - CAMDEN HUBS AND NODES .....	60
FIGURE 24: CAMDEN BICENTENNIAL EQUESTRIAN PARK VIEWING POINT SCHEMATIC .....	61
FIGURE 25: TOURISM INDUSTRY OUTPUT/SALES .....	63
FIGURE 26: EMPLOYMENT GENERATED VIA THE TOURISM INDUSTRY .....	63





# 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
<ul style="list-style-type: none"> <li>▪ Lack of Commissionable Product</li> <li>▪ Growing Region – Inadequate Infrastructure to support the level of growth</li> <li>▪ Narellan Road traffic congestion</li> <li>▪ Location of the Camden VIC</li> <li>▪ Lack of Accommodation in Camden</li> <li>▪ Inadequate Signage (interpretation and directional)</li> <li>▪ Need to Upgrade the Civic Centre</li> </ul>
MARKETING & PROMOTIONAL ISSUES
<ul style="list-style-type: none"> <li>▪ Strong competition from destinations such as Sydney and Surrounding Areas</li> <li>▪ Inclusion in the Sydney and Surrounds Region makes it hard to be seen and heard</li> <li>▪ Brand Differentiation</li> <li>▪ Lack of Cooperative Marketing</li> <li>▪ Market Perception</li> </ul>
OTHER TOURISM RELATED ISSUES
<ul style="list-style-type: none"> <li>▪ Tyranny of Distance perception</li> <li>▪ Parramatta Centric Focus by State Government</li> <li>▪ Balancing Housing and Tourism Needs</li> <li>▪ Lifestyle Operators</li> <li>▪ Lack of Industry Cohesion</li> <li>▪ Lack of Tourism Investment</li> <li>▪ Lack of Understanding of the Importance of the Tourism Industry</li> <li>▪ Retail Trading Hours</li> </ul>



## 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 huge 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.

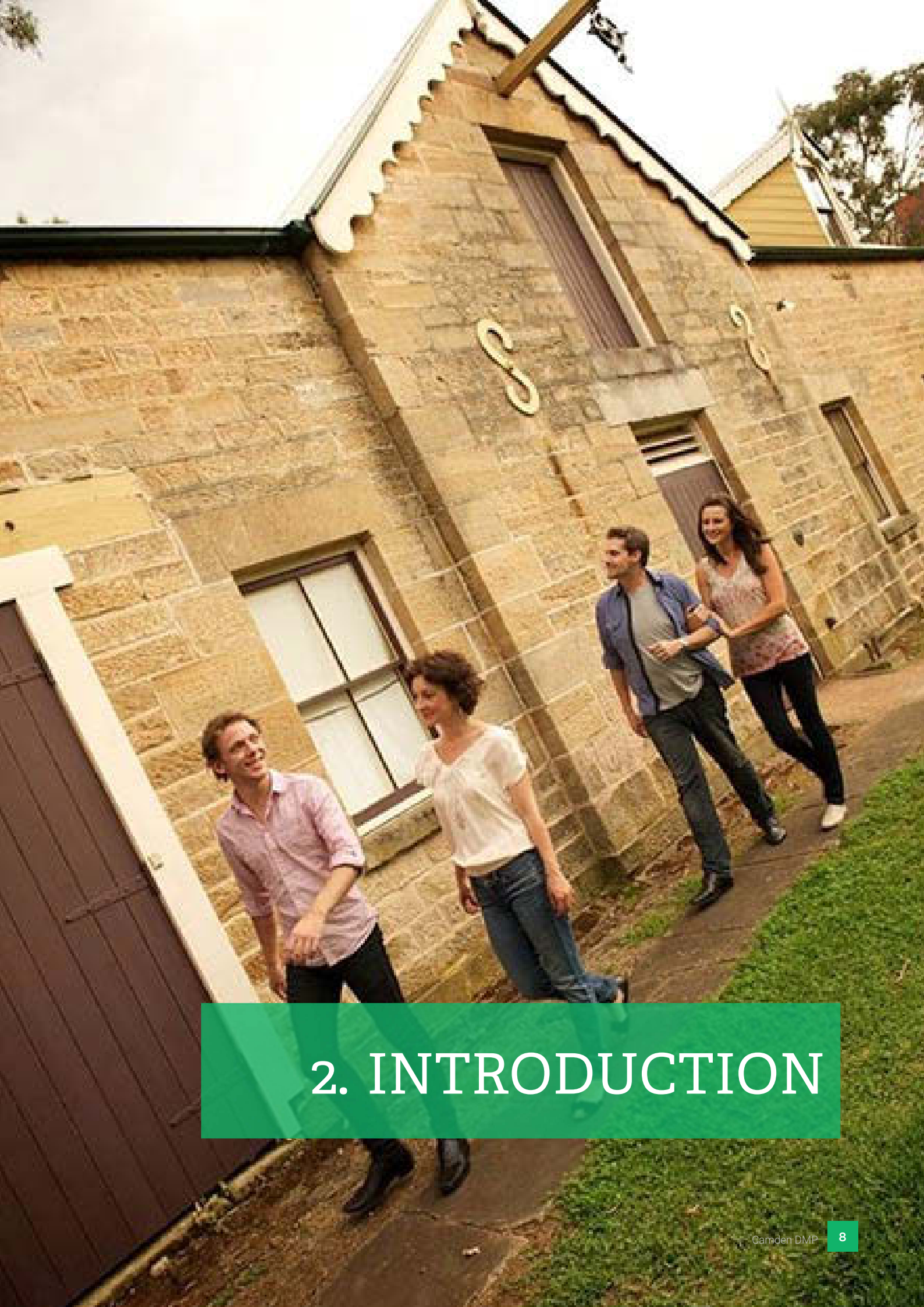
## 1.6. Going Forward

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.



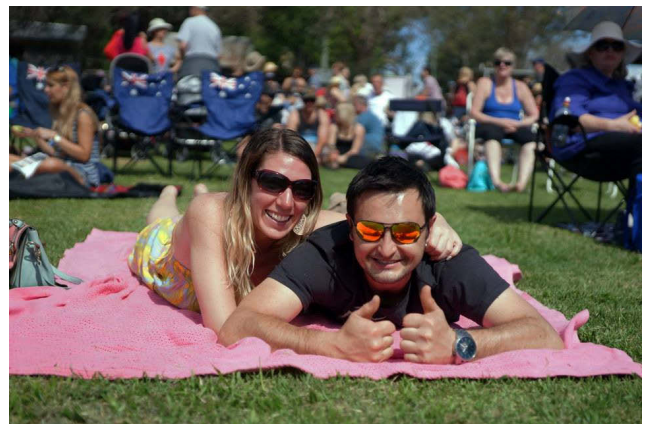
### 2.2. Methodology

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.







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### 3. SITUATION ANALYSIS

## 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<sup>1</sup>, 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 subdivision areas as well as associated commercial and industry hubs.

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



<sup>1</sup> <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.

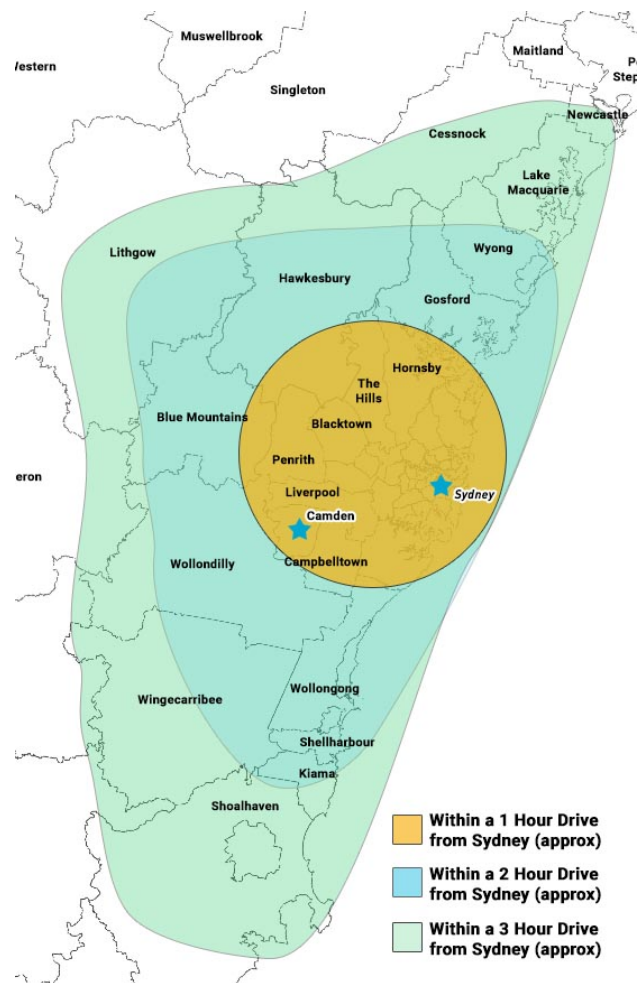
Furthermore, being near by a number of popular destinations (such as the Southern Highlands and the Blue Mountains) which Sydney short break visitors can choose from, makes it more challenging to position and sell Camden as a short break destination.

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<sup>2</sup>**



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.

<sup>2</sup> Driving distances determined via Google Maps.



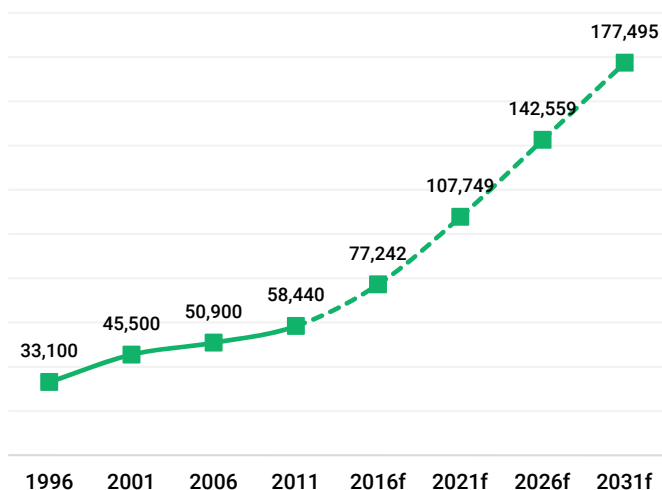


### 3.3. Population

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<sup>3</sup>**



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

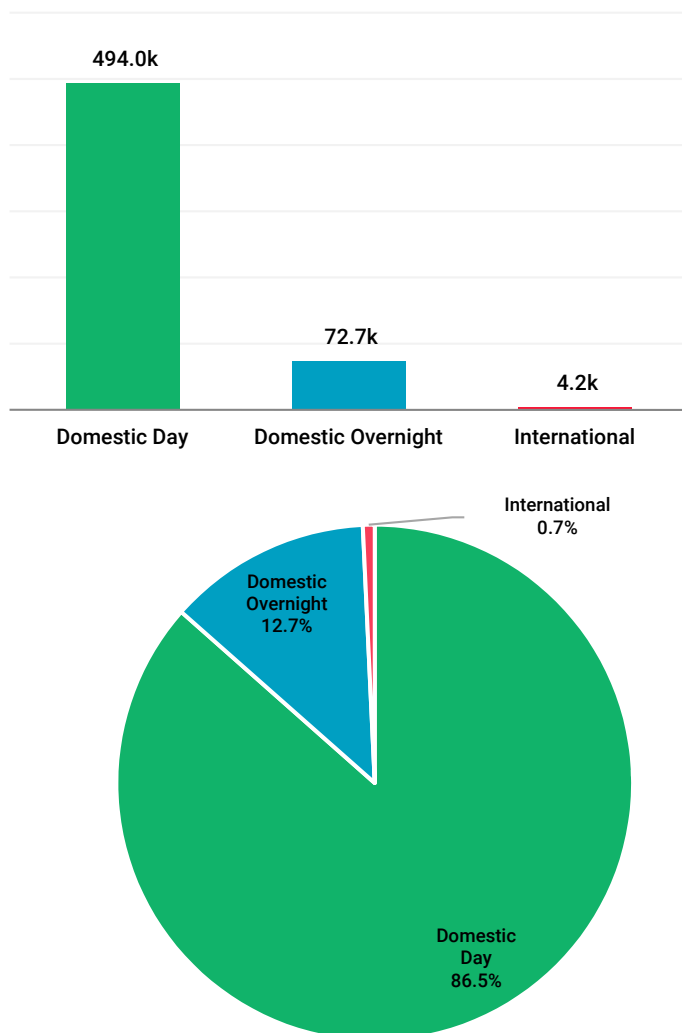
Due to the small sample sizes and inconsistencies that can result, visitor data down to an LGA level is not readily available for all LGAs throughout NSW. Special data requests to the State tourism body, Destination NSW however yielded visitor data for the Camden LGA which is based on a four year period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

<sup>3</sup> <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)<sup>4</sup>**



<sup>4</sup> Special data request to DNSW

### 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.

TABLE 2: SWOT ANALYSIS

STRENGTHS	<ul style="list-style-type: none"> <li>Close proximity to key markets, especially Greater Sydney</li> <li>Council is actively pro tourism</li> <li>Variety of experiences within a rural setting</li> <li>Good access to major road and rail networks</li> <li>Availability of land for development</li> <li>A number of significant heritage sites</li> <li>A range of sporting and shopping facilities</li> <li>The Australian Botanic Garden and the new mountain biking trails</li> <li>Its historic village style and café culture</li> <li>Open space – surrounded by a rural setting and the Nepean River</li> <li>Camden airport as a tourism hub and potential commercial hub</li> <li>Strong relationship with Campbelltown City Council and alignment with tourism vision going forward</li> <li>Camden is the most intact Macarthur heritage town on the Cumberland Plain</li> </ul>	WEAKNESSES	<ul style="list-style-type: none"> <li>Tyranny of distance from Sydney CBD</li> <li>Limited accommodation availability in Camden LGA to cater for large scale events</li> <li>Perceptions and image of the LGA as a dormitory residential area</li> <li>Inability to activate the major rivers for recreation or tourism due to environmental restrictions</li> <li>Lack of interpretation and directional signage</li> <li>Lack of marketing budget for tourism promotion</li> <li>Confusion over what tourism actually is</li> <li>Retailers closed on the weekend</li> <li>Location of Camden VIC</li> <li>Lack of tourism welcome signage on key highways</li> <li>Relatively small number of significant attractions</li> <li>Not currently perceived as a destination by visitors to Sydney</li> <li>Lack of operators following branding guidelines on promotional material and websites</li> <li>Some businesses looking tired and run down and lack funding to make improvements</li> <li>Consumer perception of Camden as a major residential urban growth area in a rural setting</li> <li>No regional tourism entity to leverage off</li> <li>Lack of product packaging</li> </ul>
OPPORTUNITIES	<ul style="list-style-type: none"> <li>Create Camden town centre into a strong heritage precinct through clever place making initiatives</li> <li>Capitalise on the strength of the equine sector, possibly through the development of an equine interpretation centre</li> <li>Introduction of new forms of accommodation (boutique hotel, glamping, rural retreats)</li> <li>Partnerships with surrounding LGAs and tourism regions</li> <li>Introduction of evening experiences to encourage vibrancy throughout the region</li> <li>Development of cooking schools and enhancement of food trails to leverage off the emerging boutique food sector</li> <li>Capitalise on the air sports activity currently taking place at Camden Airport</li> <li>Development of a brand identity for the LGA (as part of a broader Macarthur destination brand)</li> <li>Leverage off the heritage and history of Camden via sound and light shows, walking tours, augmented reality apps etc.</li> <li>Greater promotion and profiling of Camden Town Farm possibly via events</li> <li>Improving transport connectivity (rail-bus links)</li> <li>Introduce new festivals and events</li> <li>Assess boutique heritage hotel for Camden</li> <li>Reuse existing heritage buildings in Camden township for commercial accommodation, art gallery, expanded food experience, cooking school etc.</li> <li>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</li> </ul>	THREATS	<ul style="list-style-type: none"> <li>Introduction of inappropriate facilities or infrastructure which weakens Camden town centre's heritage value</li> <li>Local residents' attitude ambivalent to tourism</li> <li>Competition from other nearby destinations</li> <li>Nearby mature and rejuvenated destinations with greater marketing budgets</li> <li>Downturn in the economy – reducing disposable income used for travelling and day trips</li> <li>Urbanisation compromising rural / scenic feel to the LGA</li> <li>Lack of support from State Government to be recognised as a region or as offering a tourism proposition</li> </ul>





## 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
<b>Recreation</b>	17	27%
<b>Active / Adventure</b>	10	16%
<b>Tour Operator</b>	10	16%
<b>Arts, Cultural, Heritage</b>	6	10%
<b>Parks &amp; Reserves</b>	6	10%
<b>Market</b>	5	8%
<b>Brewery/Winery</b>	4	6%
<b>Food Experience</b>	4	6%
<b>Entertainment</b>	1	2%
<b>TOTAL</b>	<b>63</b>	<b>100%</b>

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
<b>Motel</b>	4	44%
<b>B&amp;B/Guesthouse/Farmstay</b>	3	33%
<b>Camping/Caravan Park</b>	1	11%
<b>Student Accommodation/Schools Camps</b>	1	11%
<b>Serviced Apartments</b>	0	0%
<b>Total</b>	<b>9</b>	<b>100%</b>

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
<b>Café</b>	16	20%
<b>Ice Creamery / Dessert</b>	3	4%
<b>Pub / Club</b>	12	15%
<b>Restaurant</b>	42	53%
<b>Takeaway</b>	7	9%
<b>TOTAL</b>	<b>80</b>	<b>100%</b>

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



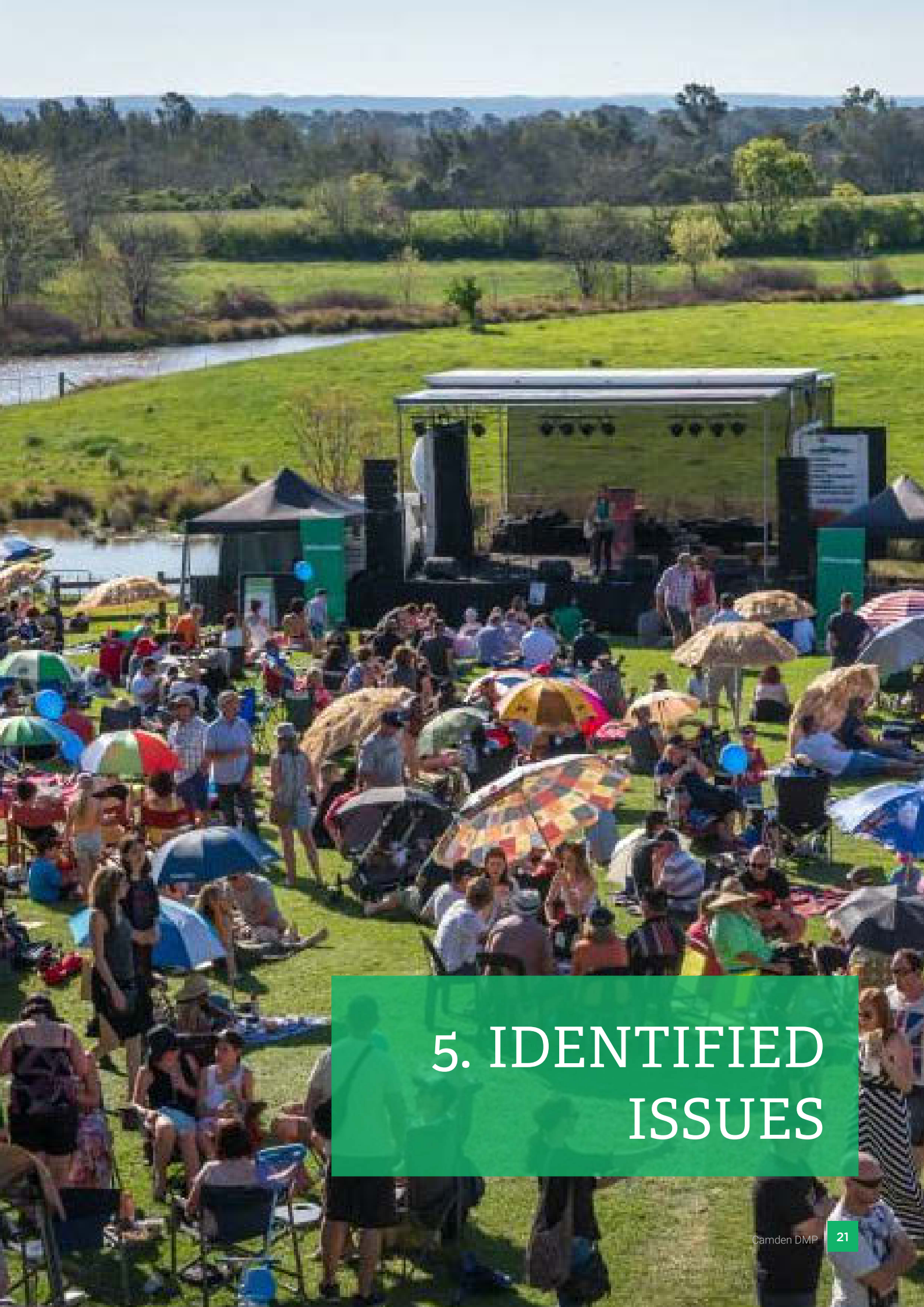
and caravan market and the lack of holiday park sites in and around greater Sydney;

- 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<sup>5</sup>;
- 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.



<sup>5</sup> 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.

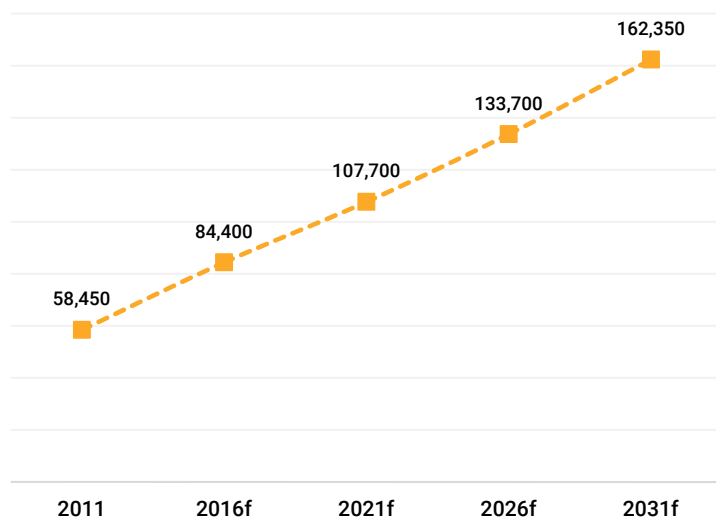
#### 5.1.2. Growing Region – Inadequate Infrastructure Support

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<sup>6</sup>**



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.

<sup>6</sup> 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.<sup>7</sup>

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.

<sup>7</sup> 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.

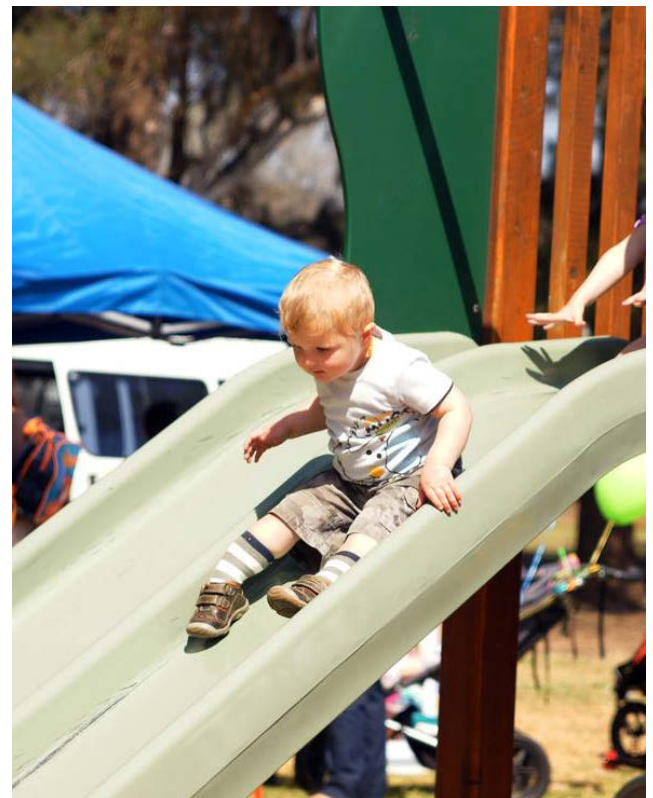
#### 5.3.2. Parramatta Centric Focus

There is currently a very strong focus by the NSW State government to develop and position Parramatta as Sydney's second CBD.<sup>8</sup> 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.



<sup>8</sup> 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;

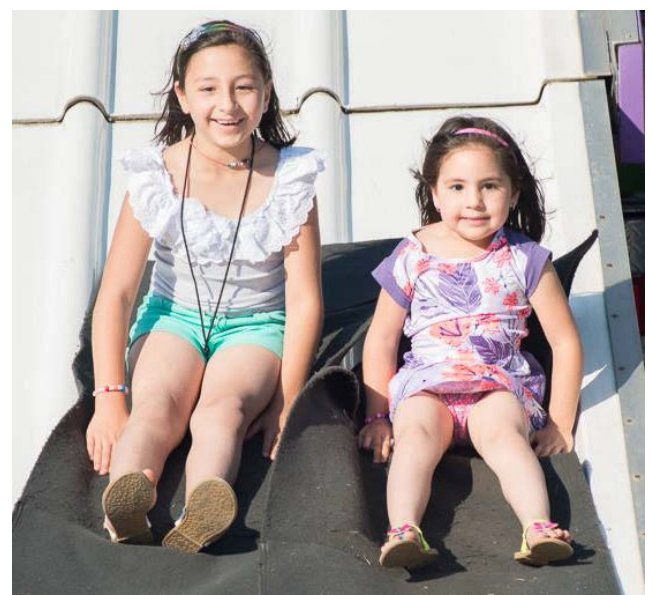
- The estimated value of tourism via direct, indirect and induced spending impacts; and
- To help support why Council/rate payer funding is required to maximise the total returns to Camden LGA as demonstrated via economic benefits, social and infrastructure improvements and higher quality environmental 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<sup>9</sup> 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

<sup>9</sup> 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**

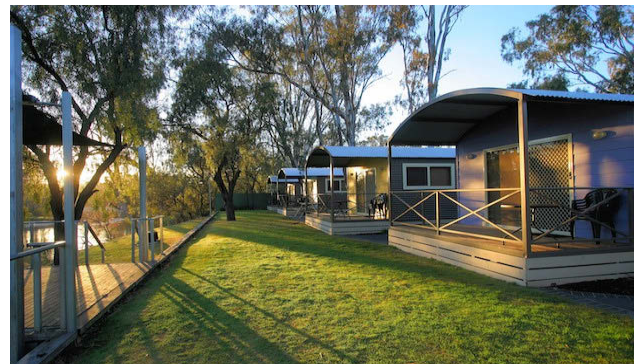


**Goomalling Caravan Park, WA**

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.

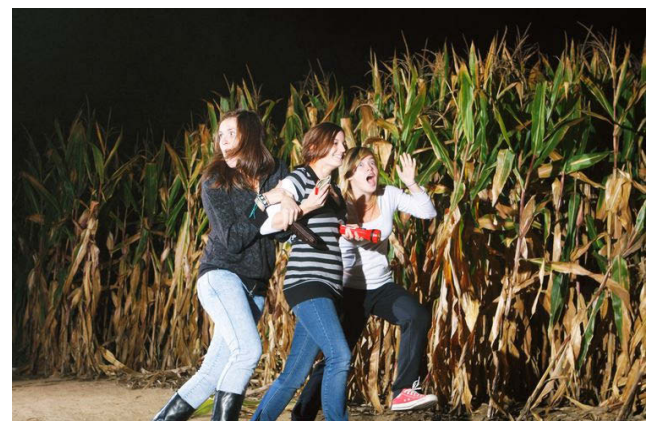
#### 6.1.2. Haunted Attraction and Festival

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](http://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 attracts 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**





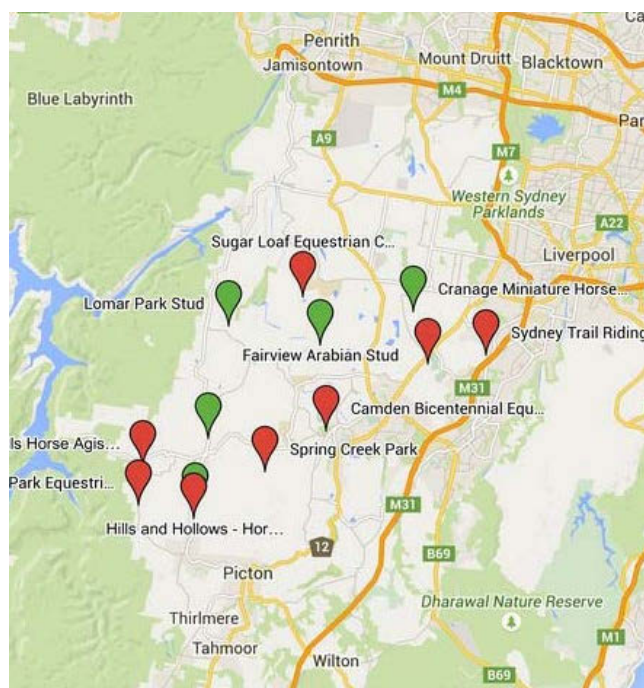
### 6.1.3. National Equine Interactive Centre



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.

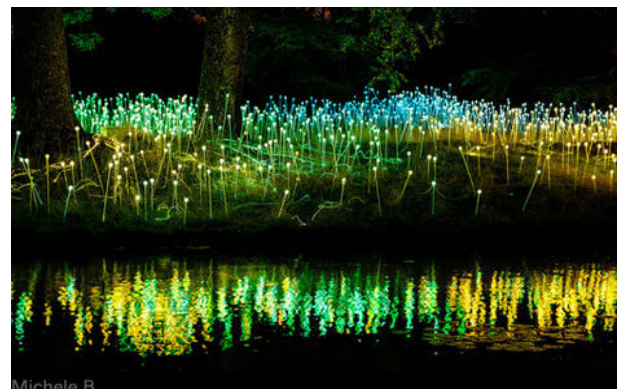
**FIGURE 13: SOUND AND LIGHT SHOW EXAMPLES**



**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**





#### 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.



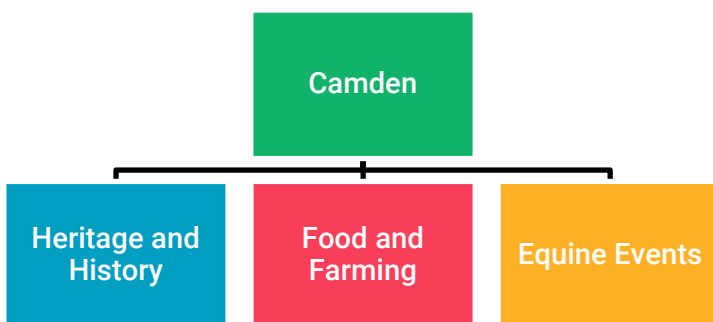
## 6.2. Marketing & Promotion

### 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**



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).

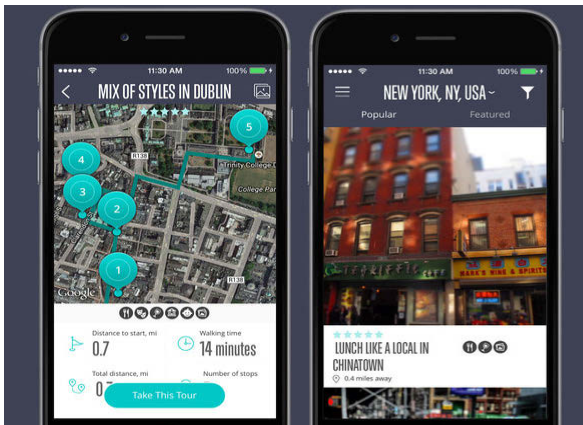
Additionally, The Group considers several enhancements could be undertaken to the existing regional site, including:

- 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<sup>10</sup> 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;

<sup>10</sup> 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<sup>11</sup> is valued at just under \$332m<sup>12</sup> and accounts for over 2k jobs<sup>13</sup> in the LGA.<sup>14</sup>

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:

<sup>11</sup> Note this incorporates both tourism and hospitality

<sup>12</sup> Direct and Indirect Output

<sup>13</sup> Direct and Indirect Employment

<sup>14</sup> <http://economy.id.com.au/macro/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 if it 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 streetscapes 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 <sup>15</sup>	Possible Location/Site	Est. CAPEX Requirement for Total Project	Level of Risk	Commercial or Public Project	Lead Stakeholder
<b>Holiday Park Development</b>	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	<ul style="list-style-type: none"> <li>■ Council and Tourism Industry Taskforce for Feasibility</li> <li>■ Commercial developer experienced in holiday park development</li> </ul>
<b>Haunted Attraction and Festival</b>	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	<ul style="list-style-type: none"> <li>■ Tourism Industry Taskforce for Feasibility</li> <li>■ Commercial developer experienced in haunted attractions creation</li> </ul>
<b>Food Trails and Cooking Schools</b>	Medium	Food and wine visitors, cruise ship visitors, short break visitors, over 55s travellers	Throughout the region	\$50k	Low - Medium	Commercial	<ul style="list-style-type: none"> <li>■ Tourism Industry Taskforce and industry operators</li> </ul>
<b>Heritage and nature-based stories through a sound and light show</b>	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	<ul style="list-style-type: none"> <li>■ Tourism Industry Taskforce with assistance from the ABG<sup>16</sup></li> </ul>
<b>Civic Centre Upgrade</b>	Medium	Local and broader regional market	Camden Civic Centre	n/a (subject to feasibility)	Medium	Public	<ul style="list-style-type: none"> <li>■ Council</li> </ul>
<b>Botanic Gardens Amphitheatre and Sculpture Garden</b>	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	<ul style="list-style-type: none"> <li>■ Tourism Industry Taskforce with assistance from the ABG</li> </ul>

<sup>15</sup> 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.

<sup>16</sup> Australian Botanic Garden Mount Annan



Opportunity	Priority	Visitor Markets to Capture <sup>15</sup>	Possible Location/Site	Est. CAPEX Requirement for Total Project	Level of Risk	Commercial or Public Project	Lead Stakeholder
<b>Boutique Glamping in National Parks or Reserves</b>	Medium	Nature visitors (including eco-tourists, bird watchers) and the family market	National parks and reserves within the Macarthur	< \$300k	Medium	Commercial	<ul style="list-style-type: none"> <li>Both Councils with NPWS for feasibility</li> <li>Commercial operator experienced in luxury glamping for development</li> </ul>
<b>Aviation Business Park</b>	Medium	Fly-in visitors	Camden Airport	> \$2m	Medium – High	Commercial	<ul style="list-style-type: none"> <li>Camden Council and Airstrip operator/land owner for feasibility</li> <li>Commercial business park developer for development</li> </ul>
<b>Stimulate Investment into Camden LGA and the Macarthur region</b>	Medium	n/a	n/a	\$30k (to develop memorandum)	Low – Medium	Public	<ul style="list-style-type: none"> <li>Both Councils</li> </ul>
<b>Narellan Sports Hub</b>	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	<ul style="list-style-type: none"> <li>Camden Council</li> <li>Sporting bodies</li> </ul>
<b>Arts Trail</b>	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	<ul style="list-style-type: none"> <li>Tourism Industry Taskforce, art community and industry operators</li> </ul>
<b>National Equine Experience Centre</b>	Low – Medium	Domestic (and international) sporting market, local market	Various (determined as part of feasibility)	< \$12m	Medium - High	Commercial	<ul style="list-style-type: none"> <li>Tourism Industry Taskforce for feasibility</li> <li>Equine industry within the region to support the development</li> </ul>
<b>Riverside Walks</b>	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	<ul style="list-style-type: none"> <li>Tourism Industry Taskforce and NPWS</li> </ul>
<b>Aviation Museum</b>	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	<ul style="list-style-type: none"> <li>Tourism Industry Taskforce for feasibility</li> <li>Camden Council for the development of the museum</li> </ul>

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
<b>Brand Identity</b>	High	n/a	n/a	\$40k	Low	Public	<ul style="list-style-type: none"> <li>Each Council and the Tourism Industry Taskforce</li> </ul>
<b>Website and Augmented Reality Mobile App</b>	High	n/a	n/a	\$70k	Low	Public	<ul style="list-style-type: none"> <li>Camden Council and web/app developer</li> </ul>
<b>Event Calendar</b>	Medium - High	n/a	n/a	n/a - integrate into new website	Low	Public	<ul style="list-style-type: none"> <li>Tourism Industry Taskforce and event coordinators</li> </ul>
<b>Event evaluation</b>	Medium - High	n/a	n/a	n/a	Low	Public	<ul style="list-style-type: none"> <li>Tourism Industry Taskforce and Council economic development personnel</li> </ul>
<b>Packaging of Product</b>	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	<ul style="list-style-type: none"> <li>Tourism Industry Taskforce and Macarthur tourism industry</li> </ul>
<b>Tourism Awareness Campaign</b>	Medium	Local market	n/a	\$15k for promotion	Low	Public	<ul style="list-style-type: none"> <li>Tourism Industry Taskforce</li> </ul>
<b>Bird Watching Profiling</b>	Medium	Nature visitors	Australian Botanic Garden and Riverside Reserves	\$15k (marketing) \$40k (hides)	Low	Public	<ul style="list-style-type: none"> <li>Tourism Industry Taskforce with assistance of the ABG</li> </ul>

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
<b>Industry Taskforce Creation</b>	High	n/a	n/a	< \$30k (marketing) < \$20k (development)	Low - Medium	Public	<ul style="list-style-type: none"> <li>Each Council</li> </ul>

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
<b>Review of Visitor Information Services</b>	Medium - High	n/a	n/a	\$35k	Low	Public	<ul style="list-style-type: none"> <li>Each Council and the Tourism Industry Taskforce</li> </ul>
<b>Feasibility to Assess Location of Camden VIC</b>	Medium - High	n/a	n/a	< \$5k (if bundled with above Review)	Low	Public	<ul style="list-style-type: none"> <li>Camden Council</li> </ul>
<b>Free Wi-Fi at the VICs</b>	Medium - High	n/a	Camden and Campbelltown VICs	n/a	Low	Public	<ul style="list-style-type: none"> <li>Tourism Industry Taskforce and each Council</li> </ul>
<b>Gateway Landscaping Strategy</b>	Low	n/a	Gateway locations to the region	\$40k (strategy)	Low	Public	<ul style="list-style-type: none"> <li>Camden Council</li> </ul>
<b>Signage Program</b>	Medium - High	n/a	n/a	\$20k for signage strategy and \$75k for new signs/skins	Low	Public	<ul style="list-style-type: none"> <li>Tourism Industry Taskforce with assistance from relevant personnel from each Council</li> </ul>
<b>Roving Ambassador Program</b>	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	<ul style="list-style-type: none"> <li>Tourism Industry Taskforce</li> </ul>





## 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 an 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.

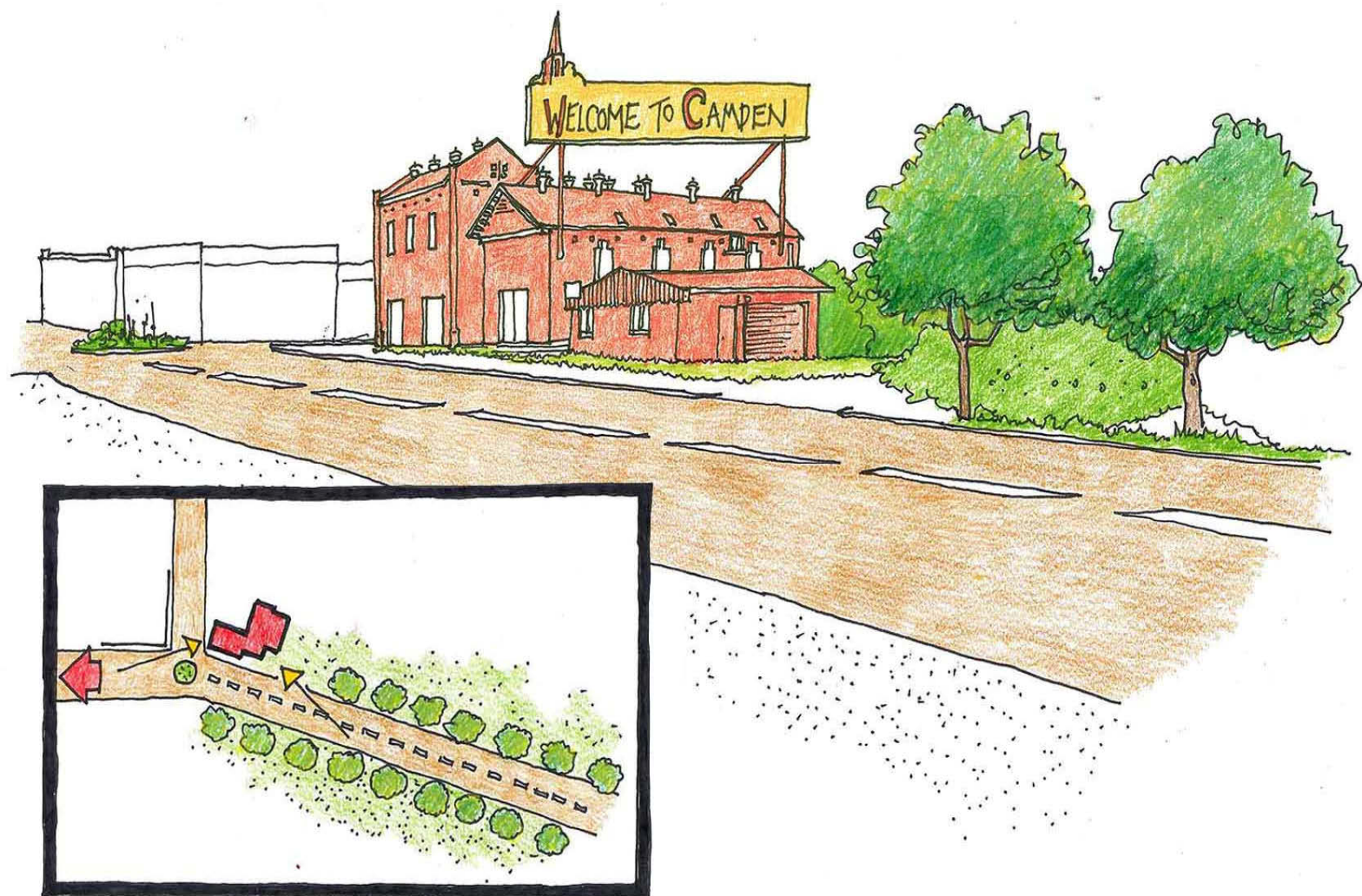
Ideally, the building (if able to be re activated) could be a prominent site for a boutique cider house, microbrewery or gourmet bakery which its size and site offer potential for. Its use as a semi industrial beverage centre maintains its historic past (albeit with a different beverage use) and could 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 epicentre;
- 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:

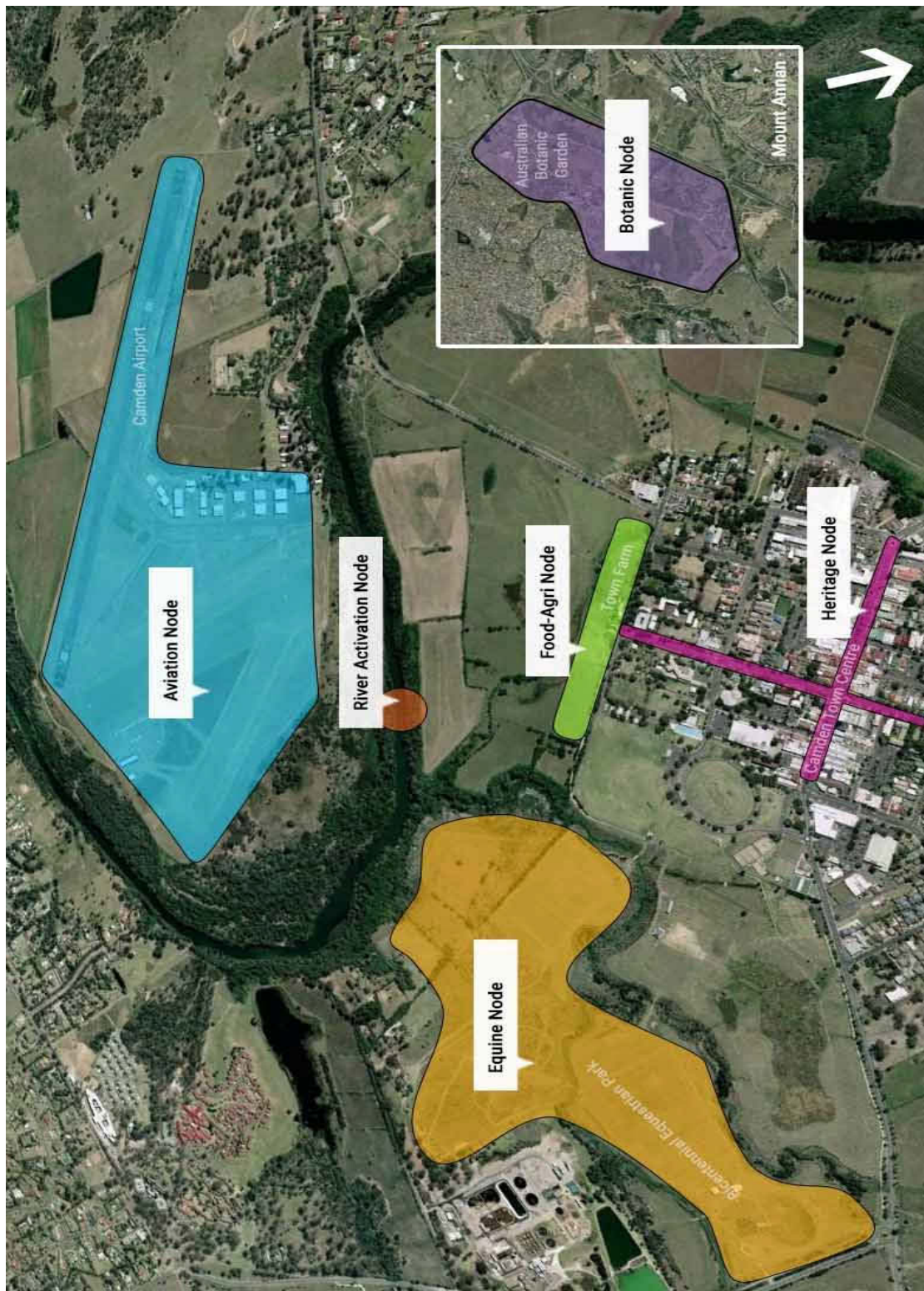
- The Town Farm (6 - 7 minute walk to the town centre) as an agri-food node with a strong focus on healthy eating, locally grown produce, an event under cover venue, a venue for weddings

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



17

<sup>17</sup> 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.

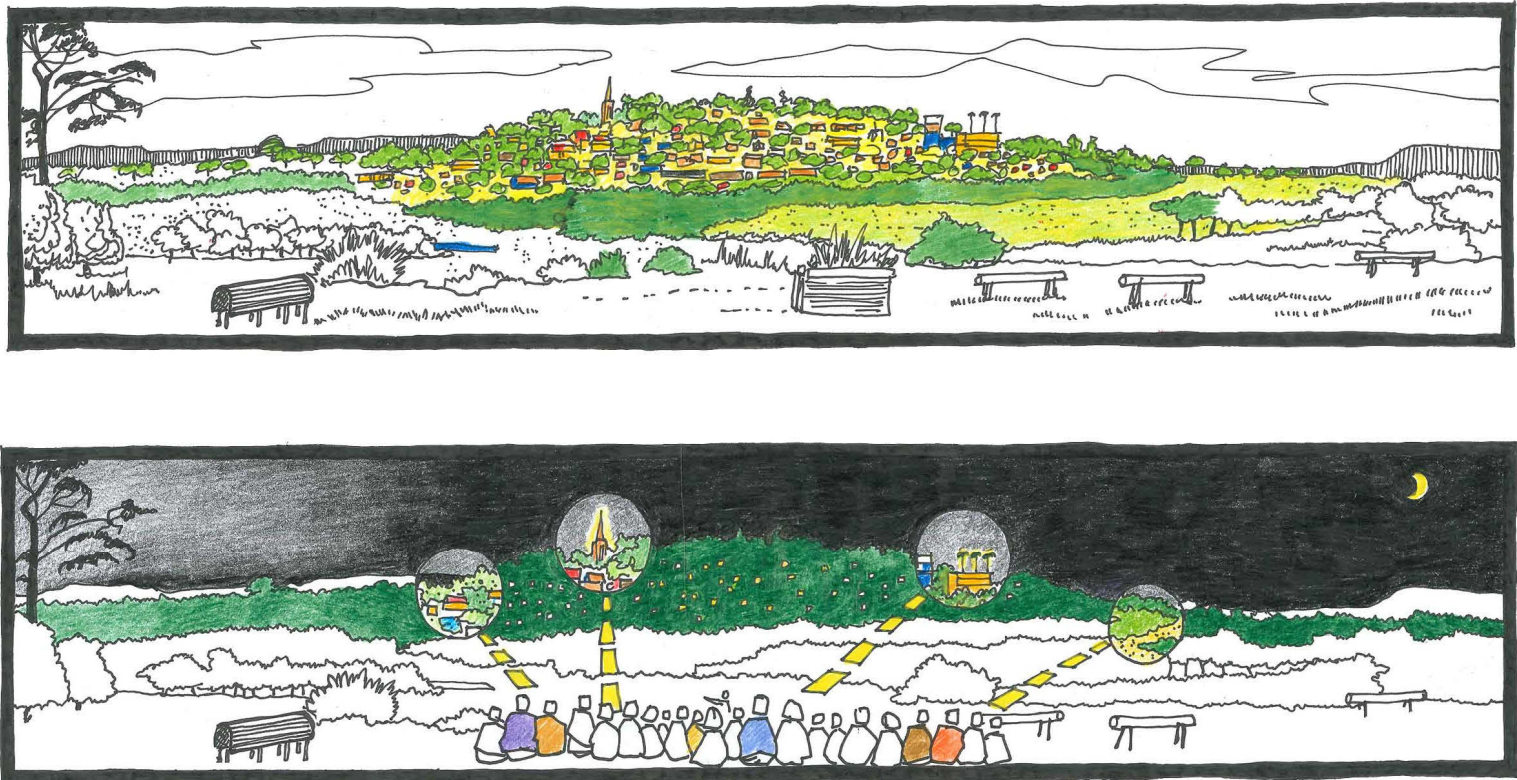


## 7.5. The Equestrian Park

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

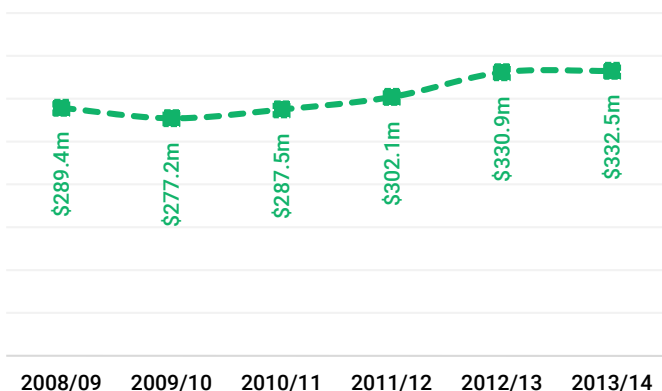
The following section provides an overview of the likely benefits that could be generated as a result of the implementation of this DMP and the opportunities identified within it.

#### 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<sup>18</sup>**



<sup>18</sup> Value of Tourism and Hospitality, Economy ID (National Economics (NIEIR) - Modelled series)

<sup>19</sup> Direct employment is people who are directly employed in tourism and hospitality related jobs within the area.

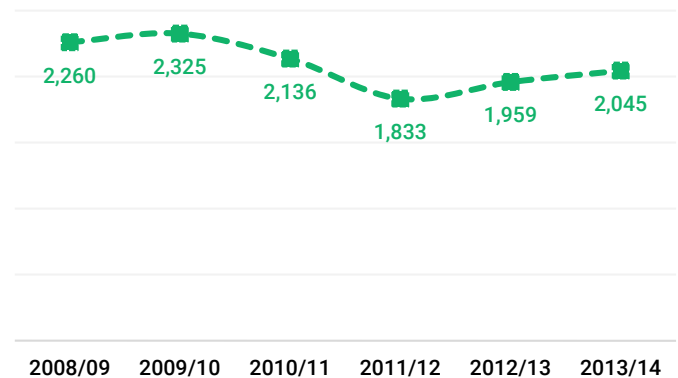
<sup>20</sup> Indirect employment is people who are employed as a result of the flow-on effects of employment in tourism and hospitality to other

#### 8.1.2. Employment

Tourism related employment accounts for just under 9% of total employment in Camden, generating just over 2k direct<sup>19</sup> and indirect<sup>20</sup> 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<sup>21</sup>**



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

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.

<sup>21</sup> 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<sup>22</sup>, The Group has averaged visitor spend in the LGAs of Penrith, Blue Mountains, Wingecaribbee 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<sup>23</sup>**

Visitor Segment	Total	Per Visitor	Per night
<b>Domestic Day Visitors</b>	\$43.6m	\$88	n/a
<b>Domestic Overnight Visitors</b>	\$29.1m	\$400	\$161
<b>International Visitors</b>	\$5.7m	\$1,355	\$82

<sup>22</sup> Discussions with DNSW revealed that this data is not available due to a small sample size and a large margin of error

<sup>23</sup> 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.<sup>24</sup> 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<sup>25</sup>, being that for every dollar spent

<sup>24</sup> At the time of this writing, no existing visitor forecasts for the Macarthur region were available.

<sup>25</sup> 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 (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.

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.

TABLE 12: KEY PERFORMANCE AREA 1

Tourism Product Development & Partnership Opportunities						
Action	Tasks	Regional Initiative or Camden specific	Responsibility	Budget	Timeframe	KPIs
<b>Tourism Place Making</b>	<ul style="list-style-type: none"> <li>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.</li> </ul>	Camden specific	Council 		Short Term (Review)  Short to Medium Term (Implement changes suggested)	<ul style="list-style-type: none"> <li>Review street improvements by December 2016</li> <li>Implement street improvements by December 2017</li> </ul>
<b>Holiday Park Development Feasibility Assessment</b>	<ul style="list-style-type: none"> <li>Council to investigate possible land sites it has which could be used and zoned for the development of the destination park</li> <li>Feasibility assessment undertaken to indicate viability of the destination park</li> <li>If viable, Council to put opportunity out to tender for reputable park operators (including current operators of Poplar Tourist Park)</li> </ul>	Camden specific	Council (for feasibility) 	\$30k for feasibility	Short Term (feasibility)  Medium – Long Term (project development)	<ul style="list-style-type: none"> <li>Land assessment to be undertaken by August 2016</li> <li>Make contact with destination park operators by January 2017 to determine potential costs associated and revenue generating opportunities</li> <li>Undertake feasibility by February 2017</li> <li>If a positive outcome then solicit destination park investor interest in development at the site.</li> </ul>

### Tourism Product Development & Partnership Opportunities

Action	Tasks	Regional Initiative or Camden specific	Responsibility	Budget	Timeframe	KPIs
<b>Haunted Attraction and Festival Feasibility Assessment</b>	<ul style="list-style-type: none"> <li>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</li> <li>Undertake discussions with similar attractor operators to gauge interest for developing/operating the attraction</li> </ul>	Regional	Macarthur Tourism Industry Taskforce 	\$30k for feasibility	Short – Medium Term (feasibility)  Medium – Long Term (project development)	<ul style="list-style-type: none"> <li>Feasibility to be undertaken by June 2017</li> <li>Discussions with similar attractor operators to be undertaken by October 2017</li> </ul>
<b>Solicit Heritage Hotel Developer Interest</b>	<ul style="list-style-type: none"> <li>Identifying a quality heritage hotel developer and investor to work with Council to create an integrated heritage precinct which effectively links the three buildings</li> </ul>	Camden specific	Council 	n/a	Short Term (solicit interest)  Medium – Long term (project development)	<ul style="list-style-type: none"> <li>Undertake discussions with heritage hotel developers by December 2016</li> </ul>
<b>Food Trails and Cooking Schools Feasibility Assessment</b>	<ul style="list-style-type: none"> <li>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</li> <li>Work with industry to develop and market a range of food trails (possibly tied in with art trails) throughout the Macarthur region</li> </ul>	Regional	Macarthur Tourism Industry Taskforce 	\$15k for feasibility	Medium Term (feasibility)  Medium – Long Term (project development)	<ul style="list-style-type: none"> <li>Feasibility to be undertaken by June 2018</li> <li>If positive outcome, then solicit operator interest by December 2018</li> <li>Introduce by July 2020</li> </ul>
<b>Civic Centre Upgrades</b>	<ul style="list-style-type: none"> <li>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</li> </ul>	Camden specific	Council 	\$12k for feasibility	Medium Term (feasibility)  Medium – Long Term (project development)	<ul style="list-style-type: none"> <li>Feasibility to be undertaken by December 2018</li> </ul>
<b>Australian Botanic Garden Sound and Light Show Feasibility Assessment</b>	<ul style="list-style-type: none"> <li>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</li> </ul>	Camden specific	Camden representatives from the Tourism Industry Taskforce with assistance from the ABG 	\$20k for feasibility	Short Term (feasibility)  Medium Term (project development)	<ul style="list-style-type: none"> <li>Feasibility to be undertaken by June 2017</li> <li>If positive outcome, then solicit operator interest by December 2017</li> <li>Introduce by June 2019</li> </ul>
<b>Botanic Gardens Amphitheatre and Sculpture Garden Feasibility Assessment</b>	<ul style="list-style-type: none"> <li>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</li> </ul>	Camden specific	Camden representatives from the Tourism Industry Taskforce with assistance from the ABG 	\$30k for feasibility	Short Term (feasibility)  Medium Term (project development)	<ul style="list-style-type: none"> <li>Feasibility to be undertaken by June 2017</li> <li>If positive outcome, then solicit operator interest by December 2017</li> <li>Introduce by June 2019</li> </ul>

### Tourism Product Development & Partnership Opportunities








Action	Tasks	Regional Initiative or Camden specific	Responsibility	Budget	Timeframe	KPIs
<b>Boutique Glamping in National Parks / Reserves Feasibility Assessment</b>	<ul style="list-style-type: none"> <li>Council to investigate possible land sites it has which could be used and is suitably zoned for the development of glamping</li> <li>Feasibility assessment undertaken to indicate viability of the glamping operation, including number required to operate viably.</li> <li>If viable, Council to put opportunity out to tender for reputable glamping operators</li> </ul>	Regional	Camden and Campbelltown Councils 	\$15k for feasibility	Short Term (feasibility)  Medium Term (project development)	<ul style="list-style-type: none"> <li>Land assessment to be undertaken by October 2017</li> <li>Feasibility assessment to be undertaken by December 2017</li> <li>Tender put out by February 2018</li> </ul>
<b>Development of Macarthur Arts Trails</b>	<ul style="list-style-type: none"> <li>Work with industry to develop and market a range of art trails (possibly tied in with food trails) throughout the Macarthur region</li> </ul>	Regional	Macarthur Tourism Industry Taskforce, a community and industry operators 	\$15k for marketing	Short Term	<ul style="list-style-type: none"> <li>2 trails developed and marketed by December 2017</li> <li>A further 2 trails developed and marketed by June 2019</li> </ul>
<b>National Equine Experience Centre Feasibility Assessment</b>	<ul style="list-style-type: none"> <li>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</li> </ul>	Camden specific	Camden representatives from the Tourism Industry Taskforce 	\$25k for feasibility	Short Term (feasibility)  Medium - Long Term (project development)	<ul style="list-style-type: none"> <li>Feasibility to be undertaken by February 2017</li> </ul>
<b>Creation and Marketing of Riverside Walks</b>	<ul style="list-style-type: none"> <li>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.</li> </ul>	Regional	Macarthur Tourism Industry Taskforce and NPWS 	\$15k for marketing	Short – Medium Term	<ul style="list-style-type: none"> <li>Riverside walks profiling and packaging to commence by June 2017</li> </ul>
<b>Aviation Museum Feasibility Assessment</b>	<ul style="list-style-type: none"> <li>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</li> </ul>	Camden specific	Camden representatives from the Tourism Industry Taskforce 	\$25k for feasibility	Medium Term (feasibility)  Long Term (project development)	<ul style="list-style-type: none"> <li>Feasibility to be undertaken by June 2019</li> </ul>
<b>Aviation Business Park Feasibility</b>	<ul style="list-style-type: none"> <li>Feasibility study to assess potential to develop an aviation business park/precinct at Camden</li> </ul>	Camden specific	Council and Airstrip operator/land owner 	\$15k for feasibility	Medium Term (feasibility)  Long Term (project development)	<ul style="list-style-type: none"> <li>Feasibility to be undertaken by December 2020</li> </ul>
<b>Creation of Camden Investment Memorandum</b>	<ul style="list-style-type: none"> <li>Create an investment memorandum to stimulate investment by developers into Camden LGA</li> <li>Investment memorandum should indicate the types of development in tourism which Council will actively support</li> </ul>	Regional (if developed as a Macarthur Investment Memorandum) – Camden specific (if developed as an LGA specific Memorandum)	Macarthur Tourism Industry Taskforce with assistance of Council economic development personnel 	\$20k for investment memorandum  \$10k for graphic design and promotion	Short term	<ul style="list-style-type: none"> <li>Memorandum drafted and approved by October 2016</li> </ul>



TABLE 13: KEY PERFORMANCE AREA 2

Marketing & Promotion Opportunities						
Action	Tasks	Regional Initiative or Camden specific	Responsibility	Budget	Timeframe	KPIs
<b>Creation of a Tourism Brand Identity for Camden (as part of the broader Macarthur destination branding)</b>	<ul style="list-style-type: none"> <li>Development of regional Macarthur destination identity, as well as potential sub-brands for Camden and Campbelltown in consultation with the tourism industry</li> <li>Creation of an EOI for the development of a brand for the Macarthur region (and its two LGAs as sub-brands)</li> <li>Selection of a brand designer</li> </ul>	Regional with sub-brand input by each Council	Macarthur Tourism Industry Taskforce 	\$40k for workshops and identity design	Short term	<ul style="list-style-type: none"> <li>Undertake workshops with tourism industry to discuss identity concepts by July 2016</li> <li>Have identities drafted by August 2016</li> <li>Have identities confirmed by October 2016</li> </ul>
<b>Development of Updated Website and Integrated Augmented Reality Mobile App</b>	<ul style="list-style-type: none"> <li>Once identity is developed, commission developer to design a website and integrated mobile app (or mobile accessible site) for Camden</li> </ul>	Camden specific (but leveraging off and supporting regional website)	Council 	\$90k	Short Term	<ul style="list-style-type: none"> <li>Commission web developer by end of November 2016</li> <li>Have draft website and app/mobile accessible site ready by end of February 2017</li> <li>Launch website and app by March 2017</li> </ul>
<b>Packaging of Product</b>	<ul style="list-style-type: none"> <li>Identify product which could be packaged and promoted including accommodation, transport, activities etc.</li> <li>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</li> </ul>	Regional with LGA specific packages managed by tourism industry in each LGA	Macarthur Tourism Industry Taskforce and Macarthur tourism industry 	\$20k for promotion	Ongoing	<ul style="list-style-type: none"> <li>Tourism Industry Taskforce to work with Macarthur tourism industry to develop 3 packages by October 2016</li> <li>Packages to be promoted from October 2016</li> <li>A further 3 packages to be developed and promoted by June 2017</li> </ul>
<b>Development of a Community Tourism Awareness Campaign</b>	<ul style="list-style-type: none"> <li>Develop a community tourism awareness program which demonstrates the contribution of tourism to the Macarthur economy</li> </ul>	Regional	Macarthur Tourism Industry Taskforce 	\$15k for promotion	Medium Term	<ul style="list-style-type: none"> <li>Community awareness program rolled out by June 2018</li> </ul>
<b>Greater Profiling of Bird Watching</b>	<ul style="list-style-type: none"> <li>Greater profiling of bird watching experiences through promotion in bird watching/wildlife magazines, via social media, product packaging etc.</li> </ul>	Camden specific	Tourism Industry Taskforce Camden  Representatives with assistance of the ABG	\$15k for marketing \$40k for hides	Ongoing	<ul style="list-style-type: none"> <li>Start increased profiling of these experiences by June 2018</li> </ul>
<b>Development of an Events Calendar</b>	<ul style="list-style-type: none"> <li>Development of events calendar, to be available via the destination website</li> </ul>	Regional calendar with LGA-based events managed by applicable Council/personnel	Macarthur Tourism Industry Taskforce and event coordinators 	n/a – integrate into new website	Ongoing	<ul style="list-style-type: none"> <li>Collation of all future events (next 1 – 2 years) and roll out on new website (to be developed by February 2017)</li> <li>Ongoing updating of events calendar</li> </ul>

Marketing & Promotion Opportunities						
Action	Tasks	Regional Initiative or Camden specific	Responsibility	Budget	Timeframe	KPIs
<b>Creation and Application of an Event Evaluation Criteria</b>	<ul style="list-style-type: none"> <li>Tourism Industry Taskforce, working with economic development personnel at each Council, to develop a criterion to assess proposed events and their likely benefit.</li> <li>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</li> <li>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</li> </ul>	Regional with evaluation of LGA specific events evaluated by applicable Council	Macarthur Tourism Industry Taskforce and Council economic development personnel 	n/a	Short Term and Ongoing	<ul style="list-style-type: none"> <li>Event success criterion to be developed by December 2016</li> <li>Criterion to be applied to all new events ongoing</li> <li>Events success criterion applied to current events by June 2017</li> </ul>

TABLE 14: KEY PERFORMANCE AREA 3










Industry Support Opportunities						
Action	Tasks	Regional Initiative or Camden specific	Responsibility	Budget	Timeframe	KPIs
<b>Creation of an EOI and Selection of Tourism Industry Taskforce</b>	<ul style="list-style-type: none"> <li>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.</li> <li>The selection panel for the EOI should consist of internal Council personnel and an external stakeholder</li> <li>Skill base required includes: digital/technology skills, innovation/forward thinking skills and finance skills</li> <li>The taskforce should meet every 3 months to discuss progress</li> </ul>	Regional	Camden and Campbelltown Councils 	<\$30k (marketing) <\$20k (development)	Short term	<ul style="list-style-type: none"> <li>Develop EOI by July 2016</li> <li>Tourism Industry Taskforce to be selected by December 2016</li> </ul>
<b>Development of the Terms of Reference for the Taskforce</b>	<ul style="list-style-type: none"> <li>Develop the "Terms of Reference" for the Taskforce</li> </ul>	Regional	Camden and Campbelltown Councils 	n/a	Short term	<ul style="list-style-type: none"> <li>Terms of reference to be developed by October 2016</li> </ul>
<b>Review the Composition of the Taskforce</b>	<ul style="list-style-type: none"> <li>The Taskforce will be a term commitment determined by both Councils including a timeframe for reviewing its composition.</li> </ul>	Regional	Camden and Campbelltown Councils 	n/a	Ongoing	<ul style="list-style-type: none"> <li>Review composition of the Taskforce according to timeframe determined by both Councils</li> <li>Resubmit the EOI if the composition of the Taskforce needs to change</li> </ul>

TABLE 15: KEY PERFORMANCE AREA 4

Visitor Servicing Opportunities						
Action	Tasks	Regional Initiative or Camden specific	Responsibility	Budget	Timeframe	KPIs
<b>Review of Visitor Information Services</b>	<ul style="list-style-type: none"> <li>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</li> </ul>	Regional	Camden and Campbelltown Councils 	\$35k	Short – Medium Term	<ul style="list-style-type: none"> <li>Undertake investigation by December 2017</li> <li>Implement changes by June 2019</li> </ul>
<b>Feasibility to Assess Location of Camden VIC</b>	<ul style="list-style-type: none"> <li>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</li> </ul>	Camden specific	Council 	< \$5k (if bundled with above Review)	Short Term	<ul style="list-style-type: none"> <li>Undertake feasibility study concurrently with above review by December 2017</li> </ul>
<b>Investigate Free Wi-Fi at the VICs</b>	<ul style="list-style-type: none"> <li>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</li> </ul>	Regional	Camden and Campbelltown Councils 	n/a	Medium Term	<ul style="list-style-type: none"> <li>Undertake investigation by June 2018</li> </ul>
<b>Development of a Regional Signage Program</b>	<ul style="list-style-type: none"> <li>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</li> <li>The signage strategy should also assess the need and appropriate location for directional signage across the region</li> </ul>	Regional	Camden and Campbelltown Councils and DNSW 	\$20k for signage strategy and \$75k for new signs/skins	Short – Medium Term	<ul style="list-style-type: none"> <li>Signage strategy to be developed by June 2018</li> <li>Designs for new signage completed and tested by December 2018</li> <li>New signage submitted for State Govt. approval by January 2019</li> <li>New signage is installed no later than 4 months post State Govt. approval</li> </ul>
<b>Development of a Roving Ambassador Program</b>	<ul style="list-style-type: none"> <li>Development of volunteer-based, roving ambassador program, particularly during peak visitor periods.</li> </ul>	Camden specific	Macarthur Tourism Industry Taskforce 	\$15k for establishment of program and roster management	Medium Term	<ul style="list-style-type: none"> <li>Establish and implement program by December 2018</li> <li>Sign up 20 volunteers at program start date</li> <li>Increase volunteer base by 10% per annum from program start date</li> </ul>
<b>Gateway Landscaping</b>	<ul style="list-style-type: none"> <li>Develop a landscape strategy for gateway points into the Macarthur region and LGA</li> </ul>	Regional and Camden specific	Council 	\$35k (strategy development)	Medium – Long Term	<ul style="list-style-type: none"> <li>Develop landscape strategy by June 2019</li> <li>Implement landscape strategy by June 2020</li> </ul>





## 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%
<b>Total</b>	<b>570.98k</b>		<b>587.47k</b>	<b>604.44k</b>	<b>621.90k</b>	<b>639.89k</b>	<b>658.40k</b>	<b>677.46k</b>	<b>697.07k</b>	<b>717.27k</b>	<b>738.06k</b>	<b>759.46k</b>	<b>172.00k</b>	<b>29%</b>
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%
<b>Total</b>	<b>570.98k</b>		<b>598.88k</b>	<b>628.16k</b>	<b>658.88k</b>	<b>691.11k</b>	<b>724.92k</b>	<b>760.40k</b>	<b>797.63k</b>	<b>836.69k</b>	<b>877.67k</b>	<b>920.68k</b>	<b>321.79k</b>	<b>54%</b>
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%
<b>Total</b>	<b>570.98k</b>		<b>615.29k</b>	<b>663.06k</b>	<b>714.57k</b>	<b>770.12k</b>	<b>830.01k</b>	<b>894.60k</b>	<b>964.26k</b>	<b>1.04m</b>	<b>1.12m</b>	<b>1.21m</b>	<b>592.47k</b>	<b>96%</b>

## 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%
<b>Total Visitor Spend</b>		<b>\$78.4m</b>	<b>\$80.5m</b>	<b>\$82.8m</b>	<b>\$85.1m</b>	<b>\$87.4m</b>	<b>\$89.9m</b>	<b>\$92.4m</b>	<b>\$95.0m</b>	<b>\$97.7m</b>	<b>\$100.4m</b>	<b>\$103.3m</b>	<b>\$22.8m</b>	<b>28%</b>
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%
<b>Total Visitor Spend</b>		<b>\$78.4m</b>	<b>\$82.1m</b>	<b>\$86.0m</b>	<b>\$90.1m</b>	<b>\$94.5m</b>	<b>\$99.0m</b>	<b>\$103.7m</b>	<b>\$108.7m</b>	<b>\$114.0m</b>	<b>\$119.5m</b>	<b>\$125.2m</b>	<b>\$43.1m</b>	<b>53%</b>
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%
<b>Total Visitor Spend</b>		<b>\$78.4m</b>	<b>\$84.2m</b>	<b>\$90.4m</b>	<b>\$97.1m</b>	<b>\$104.3m</b>	<b>\$112.1m</b>	<b>\$120.5m</b>	<b>\$129.5m</b>	<b>\$139.2m</b>	<b>\$149.7m</b>	<b>\$160.9m</b>	<b>\$76.8m</b>	<b>91%</b>

## 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%
<b>Multiplier</b>	<b>0.92</b>	<b>\$72.1m</b>	<b>\$74.1m</b>	<b>\$76.1m</b>	<b>\$78.3m</b>	<b>\$80.5m</b>	<b>\$82.7m</b>	<b>\$85.0m</b>	<b>\$87.4m</b>	<b>\$89.9m</b>	<b>\$92.4m</b>	<b>\$95.0m</b>	<b>\$841.4m</b>	
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%
<b>Multiplier</b>	<b>0.92</b>	<b>\$72.1m</b>	<b>\$75.5m</b>	<b>\$79.1m</b>	<b>\$82.9m</b>	<b>\$86.9m</b>	<b>\$91.1m</b>	<b>\$95.4m</b>	<b>\$100.0m</b>	<b>\$104.9m</b>	<b>\$109.9m</b>	<b>\$115.2m</b>	<b>\$941.0m</b>	
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%
<b>Multiplier</b>	<b>0.92</b>	<b>\$72.1m</b>	<b>\$77.4m</b>	<b>\$83.2m</b>	<b>\$89.3m</b>	<b>\$96.0m</b>	<b>\$103.2m</b>	<b>\$110.9m</b>	<b>\$119.2m</b>	<b>\$128.1m</b>	<b>\$137.7m</b>	<b>\$148.1m</b>	<b>\$1.09b</b>	



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