WOLLONDILLY DESTINATION MANAGEMENT PLAN

STAFFORD STRATEGY

Wollondilly Shire Council

Prepared For Wollondilly Shire Council | July 2018

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GLOSSARY

ALOS	Average Length of Stay
ATDW	Australian Tourism Data Warehouse
B&B	Bed and Breakfast
CBD	Central Business District
DMP	Destination Management Plan
DNSW	Destination New South Wales
DSSN	Destination Sydney Surrounds North
DSSS	Destination Sydney Surrounds South
F&B	Food and Beverage
FIT	Free Independent Traveller
GWoA	Great Walks of Australia
LGA	Local Government Area
NPWS	NSW National Parks and Wildlife Service
NSW	New South Wales
RV	Recreational Vehicle
TAG	Tourism Advisory Group
VIC	Visitor Information Centre
VFR	Visiting Friends and Relatives
WHA	World Heritage Area

Berrylicious Strawberries, Thirlmere NSW

1. Executive Summary

1.1. Introduction

Stafford Strategy (Stafford) was commissioned by Wollondilly Shire Council (Council) to complete a Destination Management Plan (DMP) for Wollondilly Shire (the Shire). The purpose of the DMP is to guide sustainable growth and to help ensure the viability and resilience of the tourism industry in the Shire.

1.2. Definitions

Who is a visitor?

For the purpose of this DMP, a visitor includes all those travelling to Wollondilly, either for a day trip or staying overnight, for a variety of reasons, including for:

- leisure/holiday purposes;
- events (including sports and events);
- business-based travel;
- visiting friends and relatives (VFR); and
- educational purposes.

What is the visitor economy?

The visitor economy accounts for the fact that visitor activity does not occur in isolation, but rather, contributes to investment in jobs across a broad range of industry sectors. This includes all industries that directly and indirectly serve visitors, ranging from including accommodation and tourism operators and attractions, to broader goods and services such as retail, food and beverage industries, etc.

As tourism is not a defined industry sector on its own, but rather the amalgamation of a variety of industry sectors including accommodation, food and beverage etc., the full extent of what comprises the visitor economy and its reach across many elements of the broader economy is often not fully understood.

What is a DMP?

Destination management is about planning for sustainably managing and building the visitor economy. Unlike traditional tourism strategies which tend to be focused on marketing, a destination management plan is much broader and focuses on product development, planning requirements, industry development as well as marketing. Destination management is, therefore, far more comprehensive than destination marketing. Because of this, destination management does not happen in isolation; it involves a wide range of sectors, stakeholder groups and delivery partners — such as government agencies (local, state and federal), communities and business groups — working collaboratively.

1.3. Key Findings

The following reflects the key findings from the consultation and analysis undertaken to craft this DMP.

- Wollondilly does not have strong brand recognition; towns within it such as Picton and Warragamba have stronger awareness.
- The importance of the visitor economy amongst the broader community is not always well understood.
- A significant proportion of the Shire is national park, water catchment or Crown-owned land; visitors do not differentiate between Council, Water NSW or NPWS owned/managed land and infrastructure.
- Wollondilly has two World Heritage Areas within its boundaries but is yet to effectively leverage off this.
- Easy access to Wollondilly from Sydney CBD is an opportunity and a challenge to become an overnight destination.
- The vast majority of tourism-related infrastructure is concentrated around major towns/villages in the Shire.
- The tourism industry is characterised by a high percentage of smaller operators who are often undercapitalised.
- While the Shire is part of the Destination Sydney Surrounds South (DSSS) network (as defined by Destination NSW), it should also look to play with Penrith, the Blue Mountains and the Hawkesbury as these destinations offer complementary product to Wollondilly and have already formed into a strategic alliance for this purpose.
- The Shire would benefit from sustainable "game-changing" initiatives - smaller-scale initiatives are likely to struggle to have an adequate impact to address many of the challenges identified. Finding a medium sized game changer would be ideal.
- Spreading tourism activity more widely (and more equitably) throughout the Shire is particularly challenging unless supporting public infrastructure (trails, signage, parking, picnic sites etc.) is able to be provided on a parallel basis as part of this.
- Potential exists to grow niche sectors such as agri-tourism, boutique accommodation and unique sporting events to offer a greater diversity of product and experiences.
- The opportunity exists to leverage off opportunities from Western Sydney Airport as well as activating tourism via the City Deal (medical tourism, agri-tourism etc.).
- Importantly, Wollondilly cannot stand still and remain both competitive and sustainable. Enhancements are required to existing product, to encourage new product and for investment into supporting infrastructure to benefit both the local community and the growing visitor markets.

1.4. Wollondilly's Visitor Economy

Figure 1 on the following page provides a graphical summary of Wollondilly's visitor economy. Importantly, it demonstrates that while visitation to the Shire has been growing, a large proportion of the visitor market (83%) are domestic day trippers. While the domestic day tripper market is an important sector, visitor spend data demonstrates that the domestic and international overnight visitor markets are far higher yielding and, while only representing 17% of total visitation to the Shire, generated 55% of all spend.

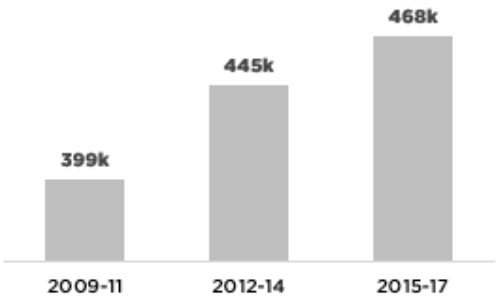
This DMP, therefore, deliberately focuses on initiatives to increase overnight visitation to the Shire and to grow the average length of stay as these will deliver far higher economic benefits including local jobs and investment.

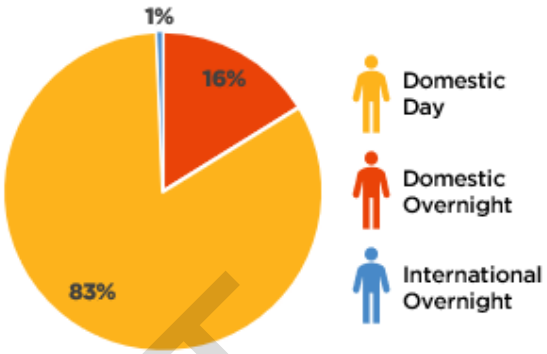
Figure 1: Wollondilly's visitor economy (summary)[1]

WOLLONDILLY'S VISITOR ECONOMY

VISITOR NUMBERS & TYPE

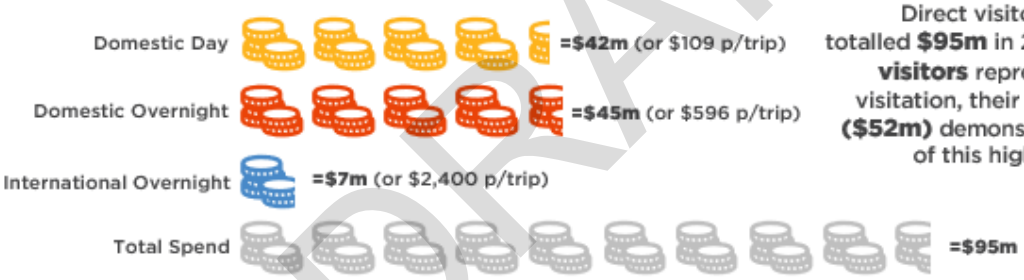
Based on three year averages, visitation to Wollondilly has grown by **+17%** (69k visitors)





The majority of visitors to Wollondilly are **domestic day trippers**, representing **83%** of all visitation.
(based on three year average from 2015-17)

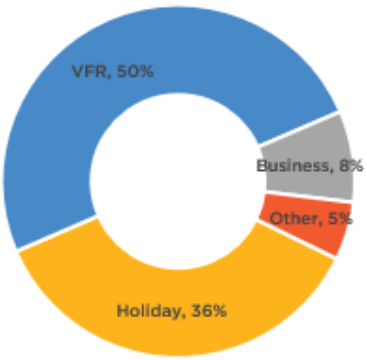
VISITOR SPEND



Direct visitor spend in Wollondilly totalled **$95m** in 2017. While **overnight visitors** represent only **17%** of total visitation, their spend represents **55% ($52m)** demonstrating the importance of this higher yielding market for Wollondilly.

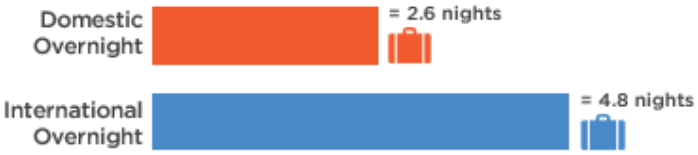
WHY VISITORS COME & HOW MANY JOBS ARE GENERATED

The majority of visitation to Wollondilly is leisure-based travel (holiday & VFR) comprising **86%** of visitation.



In 2015/16, the visitor economy generated **270** jobs (up from 200 jobs in 2010/11) – **78%** of which were full time positions.

AVERAGE LENGTH OF STAY



[1] Note, the international average length of stay is skewed by those international visitors who are working in the Shire. The international leisure average length of stay is likely to be closer to 1-2 nights.

1.5. Barriers to Growing Wollondilly's Visitor Economy

This section sets out the key challenges which are considered barriers to growth for Wollondilly's visitor economy. They will impact Wollondilly's ability to sustainably grow its visitor economy if they are not adequately addressed. They range from product development and supporting infrastructure challenges to those associated with governance within the sector. Table 1 provides a summary of these barriers.

Importantly, to resolve these requires the active participation of both Council and industry who have both expressed their desire to grow Wollondilly's visitor economy.

Table 1: Barriers to growing Wollondilly's Visitor Economy

Product & Supporting Infrastructure

- Freedom camping is not free to Council (it costs)
- Majority of operators are small businesses
- Lack of evening activities
- A limited number of family-friendly experiences
- Lack of room capacity and higher quality accommodation stock
- Lack of new investment
- Restricted retail trading hours
- Limited signage
- Challenges in activating national park areas
- Waterway access constraints
- Lack of public transport

Marketing & Destination Awareness

- Lack of awareness of the importance of the visitor economy
- Lack of brand awareness
- Lack of tourism-focused events calendar
- Lack of product packaging
- Digital-savviness of operators
- The tyranny of distance (proximity to Sydney is a strength, but can also be a challenge in promoting the area as an overnight destination)
- Limited profiling (currently) by Destination NSW (DNSW)
- Competing with major destination brands (the Blue Mountains, Southern Highlands, Wollongong)
- Lack of Council funding

Governance & Industry Collaboration

- Lack of strong tourism sector coordination, collaboration and structure
- Many lifestyle operators
- Alignment with DSSS as well as Penrith, Hawkesbury and the Blue Mountains who are in Destination Sydney Surrounds North (DSSN)

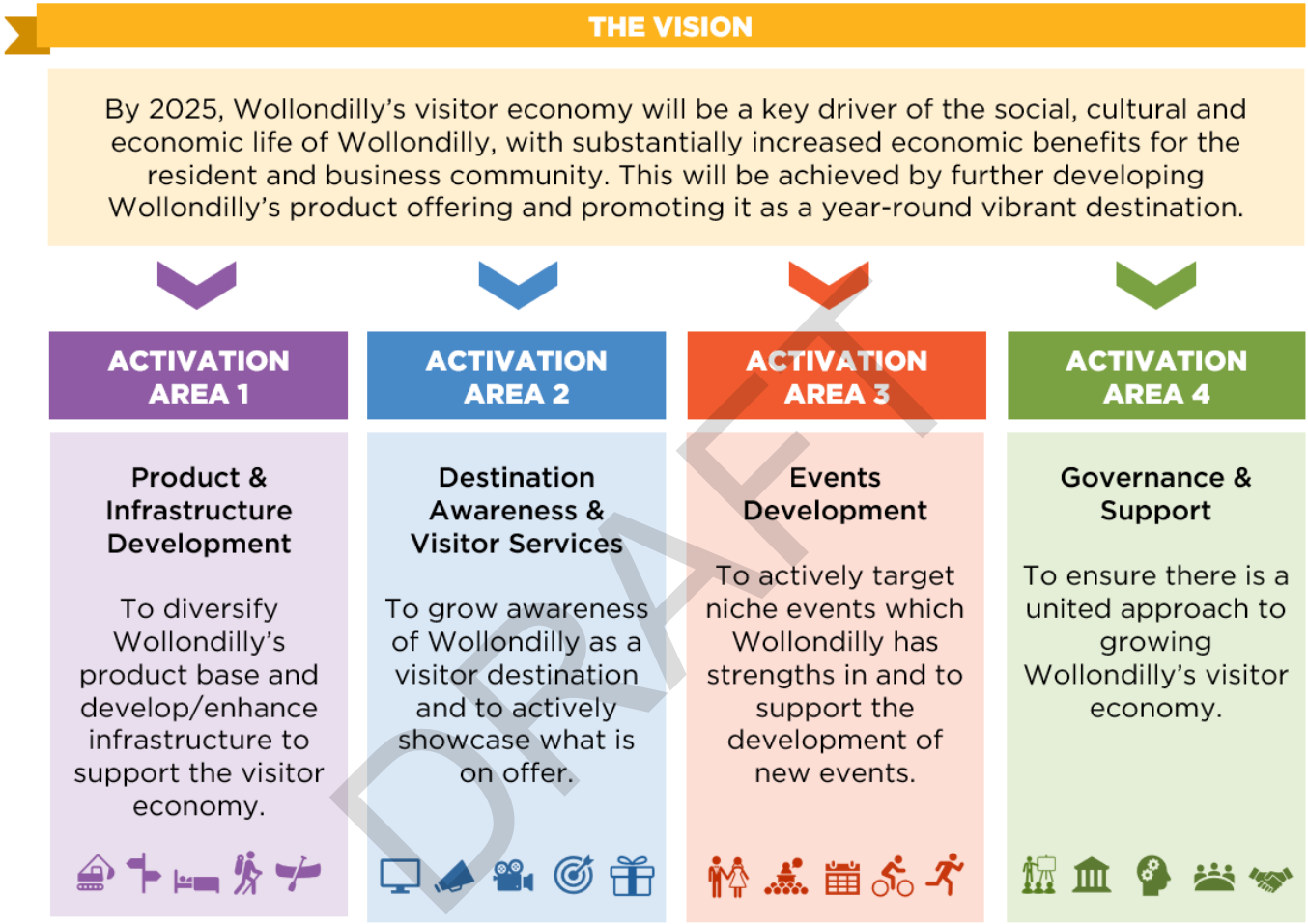
Other Challenges

- Significant day trip visitor market rather than overnight
- Balancing housing and tourism needs
- Concentration versus dispersal of tourism
- Council and State Government planning instruments
- Limited access to NPWS and NSW Water land
- Currently, the Local Environmental Plan (LEP) provides a limited framework for tourism and tourism development opportunities

1.6. The Vision

To guide the development of Wollondilly as a destination and to strengthen the visitor economy, it is essential that a destination vision is created which industry buys into and supports. The destination vision proposed is outlined in Figure 2 below, along with four activation areas to achieve the vision. The opportunities summarised in section 1.7 are categorised under these activation areas.

Figure 2: DMP vision and activation areas



1.7. Opportunities for Activating Wollondilly's Visitor Economy

To activate Wollondilly's vision for its visitor economy, a number of opportunities have been identified (see Figure 3). These have been developed through input and ideas received from numerous stakeholders during the consultation for this DMP. Their ideas and suggestions have been evaluated and crystallised in light of the various challenges identified for Wollondilly.

This DMP and the recommendations provided recognise that Wollondilly cannot solely focus on marketing but, rather, needs to shift its focus to managing the destination in order to grow the visitor economy. As part of this, there is a need for strong governance and partnerships, with a more cohesive and collaborative approach adopted.

Figure 3: DMP opportunities summarised

1. Product & Infrastructure Development

- Biking experience hub
- Destination holiday park and servicing centre
- Diversifying the NSW Rail Museum experience
- Evening-based activities
- Food tourism strategy
- Function/conference centre
- Great walk experience in collaboration with the Blue Mountains
- High-end eco-lodge(s) with associated wellness centre/spa
- Indigenous tours
- Nature photography experiences and tours
- Kayaking and trekking at Thirlmere Lakes
- Rail trail from Thirlmere to Mittagong
- Recreational attraction(s) for locals and visitors
- Revitalisation of town centres
- Signage (directional and interpretive) strategy
- Small-scale aviation business hub
- UNESCO World Heritage gateway signage
- Warragamba Dam Visitor Centre as a function venue
- Wollondilly planned infrastructure projects

2. Destination Awareness & Visitor Services

- Destination brand for Wollondilly
- Digital media for Wollondilly's trails
- Growing filming and film tourism in the Shire
- Tourism photo library and media database
- Positioning Wollondilly as a medical tourism recovery hub
- Visitor economy awareness campaign
- Visitor information services review

3. Events Development

- Destination events calendar for major events
- illuminARTe expansion
- Sport and adventure-based tourism events
- Update Council's event toolkit

4. Governance & Support

- Advocating for Wollondilly in the NSW visitor economy
- Business development programs and upskilling
- Investment prospectus
- Separating the Tourism and Heritage Community Advisory Committee
- Set up a Tourism Advisory Group (TAG)
- Tourism industry networking event

1.8. The Game Changer Projects

The game changer projects (Figure 4)[2] are provided to help create a strong focus and prioritisation of tasks. These are noted as the following:

- introduction of a major nationally branded destination holiday park;
- encourage the development of a higher-end eco-lodge(s) with an integrated wellness centre/day spa;
- investment prospectus to entice investors to invest in the Shire;
- development of a visitor economy awareness campaign to encourage the host community to be advocates for the Shire and to expand community understanding of the broad-ranging benefits generated through the visitor economy; and
- development of an overnight guided Great Walk experience, in collaboration with the Blue Mountains.

These projects are referred to as "game changers" because of their potential to have a major impact on the Shire's visitor economy through: increased visitor yield, growing visitor average length of stay, shifting visitation from day trips to overnight, the generation of new investment into the Shire as well as ensuring the community are advocates for the visitor economy.

Figure 4: The game changers for Wollondilly

[2] These were selected after presentation and discussions with Councillors, council personnel, industry operators and independent assessment by the consultant team.

1.9. Summary

Wollondilly is a relatively youthful tourism destination, advantageously situated amongst a number of destinations with large visitor markets. The opportunities identified in this DMP focus in on selective product areas – such as boutique, higher quality accommodation, sports/adventure-based tourism activity and agri-tourism – to focus on, rather than replicating what is available in surrounding areas and to avoid positioning the Shire as a traditional mainstream holiday destination.

Activating many of the opportunities identified, and, shifting Wollondilly's position from being a day trip destination (currently 83% of visitors are day trippers) to an overnight one, hinges on the development of new accommodation and visitor attractions and experiences. It is considered that the development of such product will not take away market share from existing operators, but rather, will "grow the pie" by enabling Wollondilly to attract a more diverse visitor and higher yielding visitor market.

Achieving the goals of this DMP will require the active participation of a range of stakeholders, including Council, industry, State and Federal Government. There is a need for greater stakeholder collaboration and participation if the visitor economy is going to be successfully activated in Wollondilly. While this DMP has identified over 30 opportunities to pursue, these have been prioritised (as part of the implementation plan) to ensure outcomes are generated and to prevent the DMP from merely being a "wish list".

Creating a sustainable level of activity is, therefore, seen as the key, rather than trying to attempt too much with too few (current) industry players and limited resourcing. Often the temptation is to try and take on too much, too quickly and as a result, resources are often spread far too thinly to achieve desired results. The game changer projects have been identified at the request of Council to act as the catalysts for moving into the other opportunities listed. These game changers need to be focused on, even though the steps leading to their introduction may be complex and take time to activate.

Finally, while there are various other project opportunities to activate over time, most are seen to have a lower impact (than the game changers) on addressing the challenges and growing the visitor economy for Wollondilly in a realistic time frame.

Image: Wollondilly Shire Hall, Picton NSW

2. Situation Analysis

2.1. About the DMP

Stafford Strategy (Stafford) was commissioned by Wollondilly Shire Council (Council) to develop a Destination Management Plan (DMP) for Wollondilly Shire (the Shire). The primary purpose of the DMP is to guide sustainable growth and to help ensure the viability and resilience of the tourism industry in the Shire.

2.2. Methodology for Completing the DMP

The development of the DMP has involved the following:

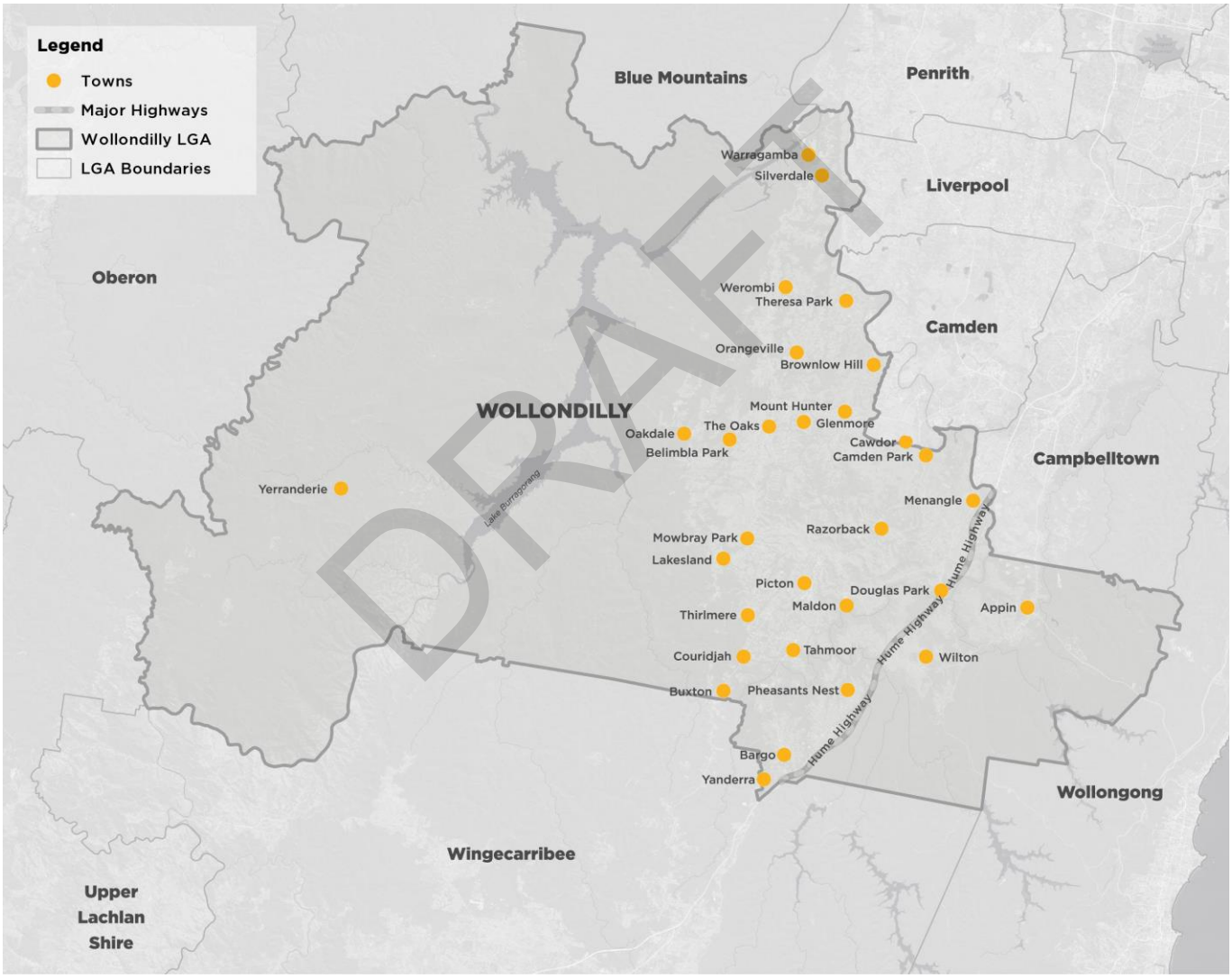
- initial liaison with Council to gather background information and to discuss the consultation program for the DMP;
- an ongoing literature review to build a quality context for the DMP and to fully understand projects and strategies as well as relevant government policies affecting the region;
- consultation with Council as well as tourism industry stakeholders (as advised);
- desktop research, including a full audit of tourism product within the Shire;
- collation of historic visitor data for the Shire (based on the National and International Visitor Survey);
- multiple visits to the Shire to review product, meet with operators and assess new opportunities and development sites;
- discussions with National Parks and Wildlife Service (NPWS) to review the extensive national park product within the Shire;
- liaison with industry operators (accommodation providers, food and beverage providers, farm operators, attraction operators, transport providers etc.);
- site visits to view events operating on weekends etc.;
- structured meetings with Council to discuss the vision for tourism, infrastructure, development and discussion around related projects;
- prioritisation of the opportunities identified, based on follow up discussions with Council, DNSW, NPWS and tourism industry stakeholders etc.;
- refinement and further detail regarding the challenges and opportunities;
- development of an action plan based on the confirmation of the opportunities and recommendations identified.
- compilation of findings into a DMP document to highlight issues and opportunities which have been considered by Council; and
- completion and presentation of the final DMP based on any changes requested (if any) by Council.

2.3. About Wollondilly

Wollondilly Shire is located on the south-western edge of Sydney, approximately a 1 to 1.5-hour drive from the Sydney CBD. The Shire covers approximately 2,500 square kilometres, with Picton being the main centre of administration, and is home to around 48,500 residents[3].

Between 2006-2016, the Shire has experienced significant population growth, increasing by 18% (or 7,500 residents). This growth is expected to continue in the future, particularly as western Sydney's population continues to grow (having increased by 27% from 2006-2016[4]), based on urban sprawl, State Government growth areas[5] and major infrastructure projects such as the Western Sydney Airport. This population growth has significant implications for economic growth, including the visitor economy.

Figure 5: Map of Wollondilly and surrounding LGAs



[3] Australian Bureau of Statistics, Regional Population Growth, Cat. 3218.0
[4] Australian Bureau of Statistics, Regional Population Growth, Cat. 3218.0
[5] Such as the South West Growth Area and Western Sydney Airport Growth Area

2.4. Demographics

2.4.1. Population

Wollondilly is home to just under 50,000 residents. Over the last 10 years, the Shire's population has grown by 20% (8,200) residents – increasing from 41,600 residents in 2007 to 49,700 in 2016.

Figure 6: Historic Population (2007-16)[6]

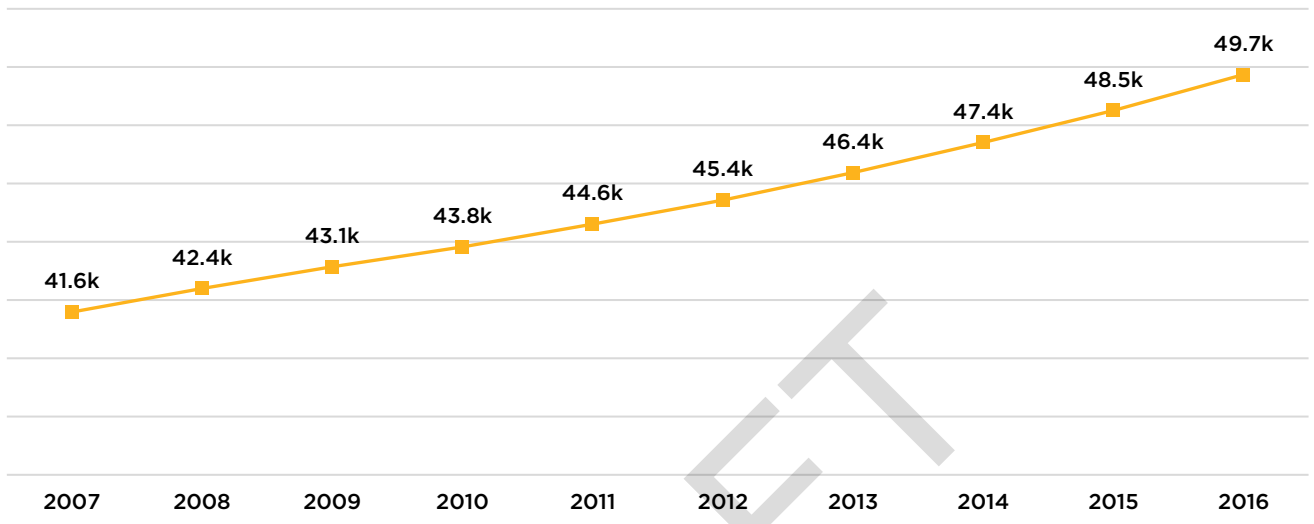
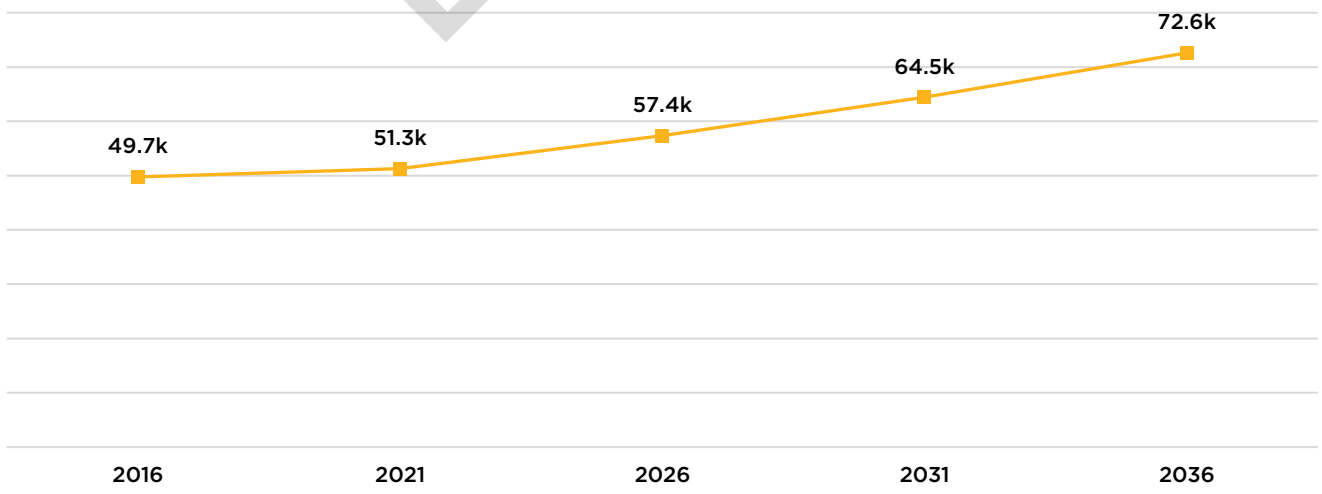


Figure 7 provides a summary of population forecasts for the Shire over the period 2016 to 2036. While these forecasts demonstrate that the Shire's population may grow by 46% (23k residents) to reach just under 73k residents by 2036, they do not appear to take into account the full impact of growth which is now forecast as a result of the significant residential development at the Wilton Priority Growth Area[7]. According to the NSW Department of Planning and Environment, this Growth Area is anticipated to introduce 15,000 homes for about 50,000 people over the next 20 to 30 years.[8]

Figure 7: Population Forecasts (2016-36)[9]



[6] https://profile.id.com.au/wollondilly/population-estimate
[7] As referred to by the NSW Department of Planning and Environment
[8] http://www.planning.nsw.gov.au/Plans-for-your-area/Priority-Growth-Areas-and-Precincts/Wilton
[9] http://www.planning.nsw.gov.au/Research-and-Demography/Demography/Population-projections

Understanding the level of population growth is an important consideration in tourism planning because of the potential to provide a variety of tourism-based services and facilities which also have strong appeal to a local market as well as the potential to generate jobs.

2.4.2. Age of Residents

Table 2 provides a summary of the age structure of Wollondilly's residents, compared with the greater Sydney average. It demonstrates the following.

- The majority of the Shire's residents are in the "parents and homebuilders (35-49)" age bracket – the same as the greater Sydney average.
- The Shire does, however, have a higher proportion of residents under the age of 17 than the greater Sydney average (26% compared to 22%).
- The Shire has a lower proportion of those in the "tertiary education & independence (18-24)" and the "young workforce (25-34)" age brackets than greater Sydney (20% compared to 26%) indicating there may currently be a shortage of job and education opportunities for residents in this age bracket. Because the visitor economy cuts across many sectors (transport, logistics, arts, education and training etc.) and is not just contained to traditional tourism sectors (such as accommodation), it provides the opportunity to generate a variety of job opportunities.

Table 2: Age of residents

	2011			2016			Wollondilly Change	
	#	%	Greater Syd	#	%	Greater Syd	2011-16	
Babies & pre-schoolers (0-4)	3.2k	7%	7%	3.3k	7%	6%	141	4%
Primary schoolers (5-11)	4.8k	11%	9%	5.2k	11%	9%	421	9%
Secondary schoolers (12-17)	4.0k	9%	7%	4.3k	9%	7%	279	7%
Tertiary education & independence (18-24)	3.9k	9%	10%	4.2k	9%	10%	302	8%
Young workforce (25-34)	4.7k	11%	15%	5.7k	12%	16%	1.1k	23%
Parents & homebuilders (35-49)	9.7k	22%	22%	10k	21%	21%	367	4%
Older workers & pre-retirees (50-59)	5.9k	14%	12%	6.5k	13%	12%	561	9%
Empty nesters & retirees (60-69)	4.2k	10%	9%	5.2k	11%	10%	1.0k	25%
Seniors (70-84)	2.5k	6%	7%	3.4k	7%	8%	905	36%
Elderly aged (85 & over)	463	1%	2%	652	1%	2%	189	41%
Total	**43k**	**100%**	**100%**	**49k**	**100%**	**100%**	**5.3k**	**-**

2.4.3. Journey to Work

Out of six local government areas (LGAs) assessed[10], Wollondilly has the highest proportion of residents who work outside the LGA in which they live (i.e. 65.7% of residents work outside the LGA). This is followed closely by Camden (65.6%), Fairfield (65.4%), Campbelltown (61.8%), Penrith (56.4%) and Sutherland (54.8%).

Journey to work is an important economic factor to assess because longer journey to work times impacts residents through higher costs, stress, health and fatigue.[11] Growing the visitor economy in Wollondilly may present new job opportunities for residents across a range of sectors (as tourism cuts across many sectors and positions, including managerial) and thereby assist in reducing journey to work times.

[10] Wollondilly, Camden, Fairfield, Campbelltown, Penrith, Sutherland. These LGAs were assessed because they are situated near Wollondilly and had Economy ID data which enabled this comparison.
[11] Rachel Talbot, Lucy Rackliff, Colette Nicolle, Martin Maguire & Rebecca Mallaband (2015) Journey to work: Exploring difficulties, solutions, and the impact of aging, International Journal of Sustainable Transportation, 10:6, 541-551, DOI: 10.1080/15568318.2015.1014529

Table 3: Residents who live in LGA but work outside, 2016[12]

LGA	#	%
Wollondilly	15,769	65.7%
Camden	26,205	65.6%
Fairfield	46,979	65.4%
Campbelltown	42,489	61.8%
Penrith	53,491	56.4%
Sutherland	61,796	54.8%

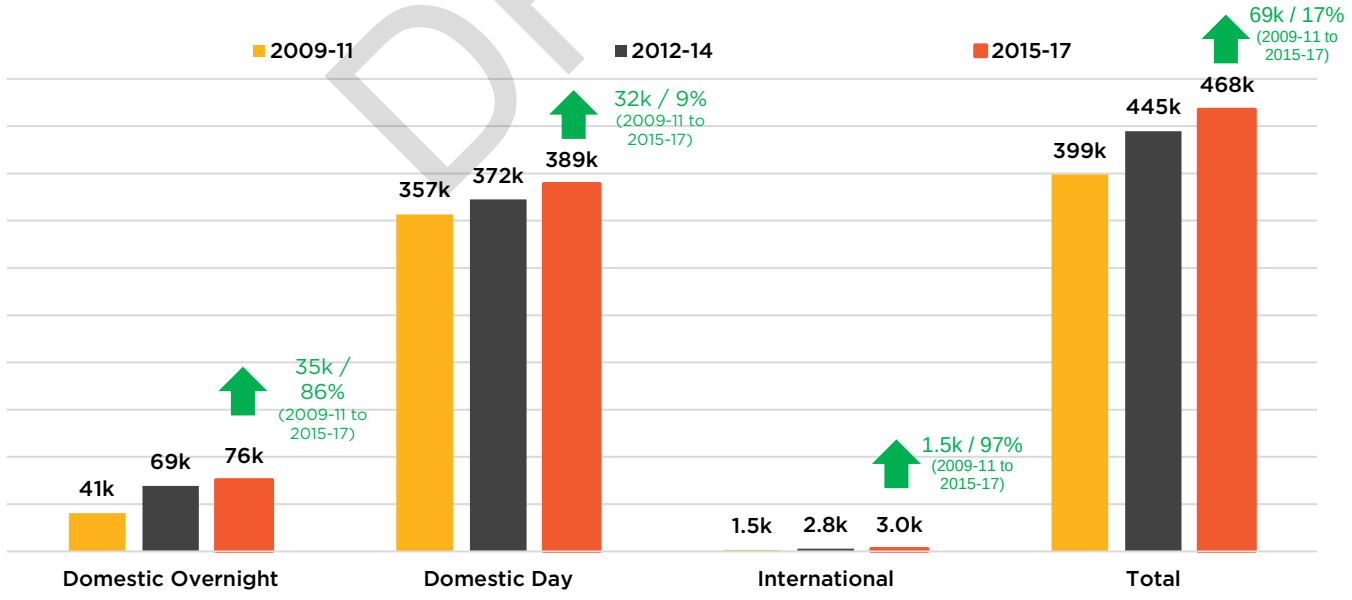
2.5. Visitation to Wollondilly

2.5.1. Historic Visitation

Visitation to the Shire has been assessed based on three-year averages over the period 2009 to 2017 due to small sample sizes. Figure 8 demonstrates that over this period, total visitation to the Shire has grown by 17% (or an additional 69k visitors). This growth has been generated primarily through growth in the domestic overnight market (increasing by 35k, or, 86%) and the domestic day tripper market (growing by 32k, or, 9%). The growth in the domestic overnight market is significant given many LGAs around NSW and Australia generally are experiencing far stronger growth in their domestic day tripper market (as opposed to overnight markets).

While the day tripper market is an important one, overnight visitors tend to generate stronger economic benefit because of the additional spend through accommodation, food and beverage etc. This DMP, therefore, investigates a range of opportunities which focus on continuing to grow increased visitation particularly by overnight (domestic and international) visitors.

Figure 8: Historic visitation to Wollondilly LGA by segment (3-year averages, September YE)[13]



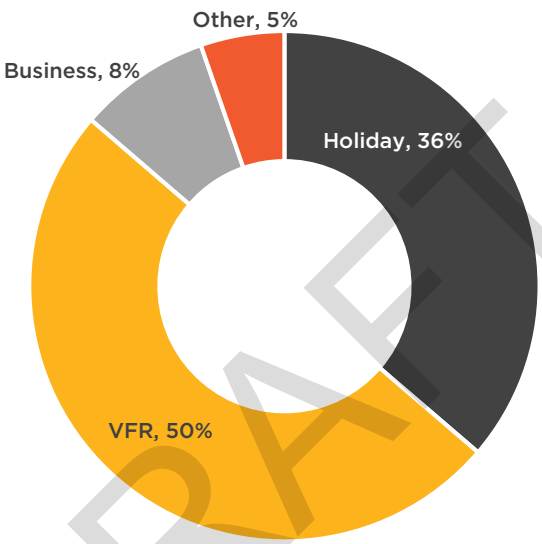
[12] Based on Economy ID Data for each respective LGA
[13] Tourism Research Australia, IVS and NVS, September YE data.

2.5.2. Purpose of Visit

The majority of visitors (50%) travel to the Shire to visit friends and relatives (VFR), followed by those holidaying (36%), those travelling for business (8%) and other reasons (5%).[14] This demonstrates that the Shire is primarily currently a leisure-based destination where visitors come to undertake various experiences, events and to see friends and family.

The strength of the VFR market is important to recognise as the opportunity exists to introduce and market a variety of experiences in the Shire to locals who then, in turn, would potentially take their visiting friends and relatives to visit these attractions/experiences.

Figure 9: Purpose of visit[15]



2.5.3. Visitor spend

Table 4 demonstrates that visitors spent an estimated $95m in the Shire. Most importantly, it shows that while domestic overnight visitors represent 16% of visitors to the Shire, they account for the largest proportion of spend (48%), and, similarly, while international overnight visitors represented 1% of visitation, they generated 8% of spend. This demonstrates the higher yielding nature of the overnight visitor markets.

Table 4: Visitor spend analysis[16]

	Est. Spend p/visitor ($)	Visitation (2015-17)	Visitation Split (%)	Total Spend ($)	Total Spend Split (%)
Domestic Overnight	$596	76k	16%	$45m	48%
Domestic Day	$109	389k	83%	$42m	45%
International Overnight	$2.4k	3k	1%	$7m	8%
Total	**-**	**468k**	**100%**	**$94.8m**	**100%**

[14] Based on average visitation from 2009-2017. Tourism Research Australia, IVS and NVS. September YE data.
[15] Based on average visitation from 2009-2017. Tourism Research Australia, IVS and NVS. September YE data.
[16] Direct visitor spend data for the LGA is not available. This is, therefore, based on an estimated average spend per visitor (based on visitor spend data for the greater Sydney region as per REMPLAN's methodology).

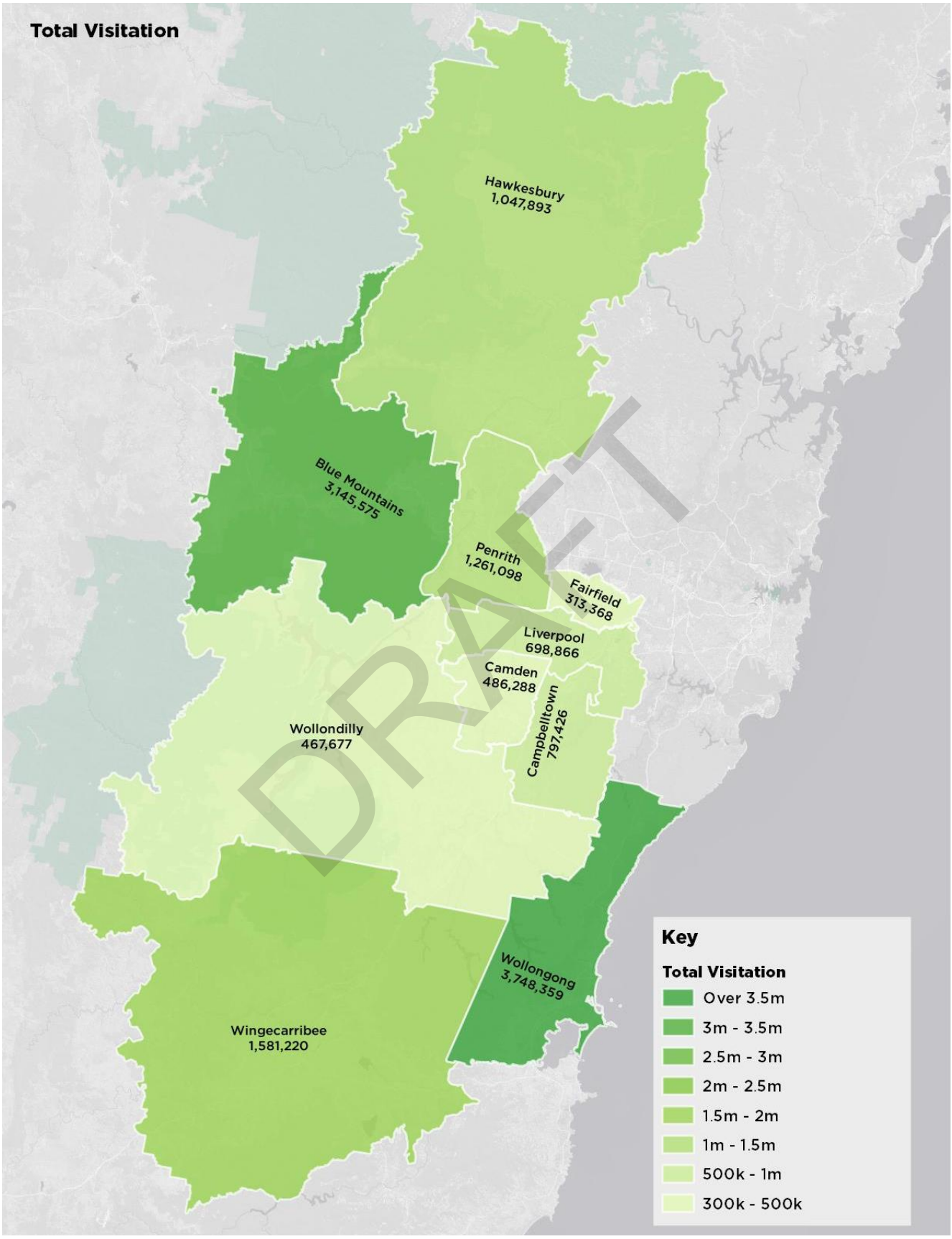
2.5.4. Comparison with Surrounding LGAs

Figure 10 - Figure 13 provides a comparison of visitation to the Shire as well as nine other LGAs which are situated either nearby the Shire, or, is an LGA within the greater Sydney region. The heatmapping demonstrates total visitation, domestic day trip, domestic overnight and international visitation based on a three-year average from 2015 to 2017.

The comparison demonstrates:

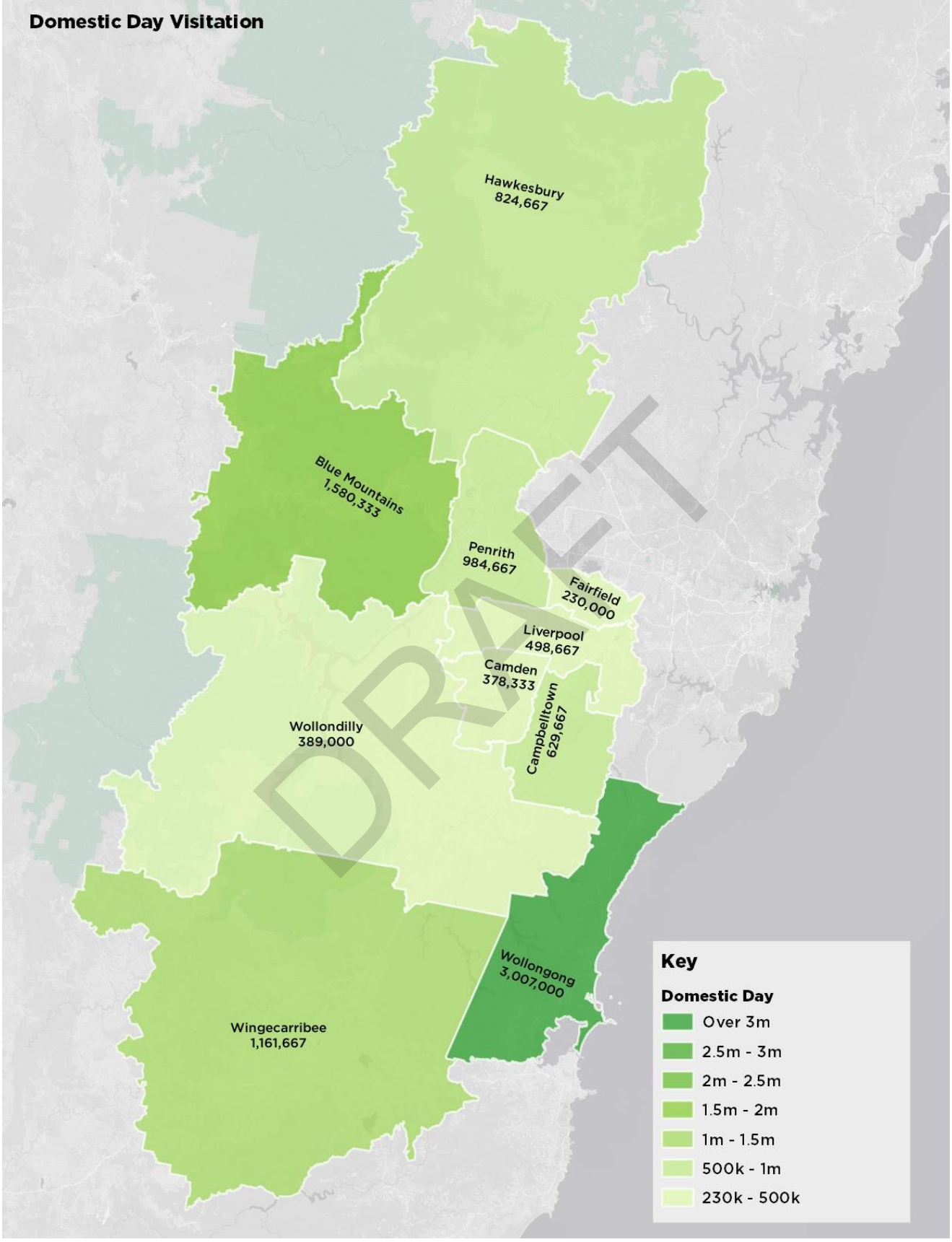
- The Blue Mountains and Wollongong – both of which are mature tourism destinations and very well known – received the highest level of visitation across all categories.
- The Blue Mountains has a strong international visitor market primarily driven by tour buses which travel up to Echo Point for the day and deliver an estimated 650k day coach tourists each year. If the right product is introduced in Wollondilly, the potential exists to leverage off this large market.
- Wollongong has a strong domestic market primarily because of the Sydney market which travels down for beach day trips, events and the recreation product available.
- Across all visitor category types, as well as total visitation, Wollondilly ranks within the bottom three LGAs, which is expected given it is a relatively new tourism destination, particularly when compared to the mature destinations of the Blue Mountains and Wollongong. However, given the Shire is located between major visitor destinations, this presents significant opportunity to leverage off these markets and grow Wollondilly's visitor economy.

Figure 10: Total Visitation Comparison (3-year average, 2015-17)[17]



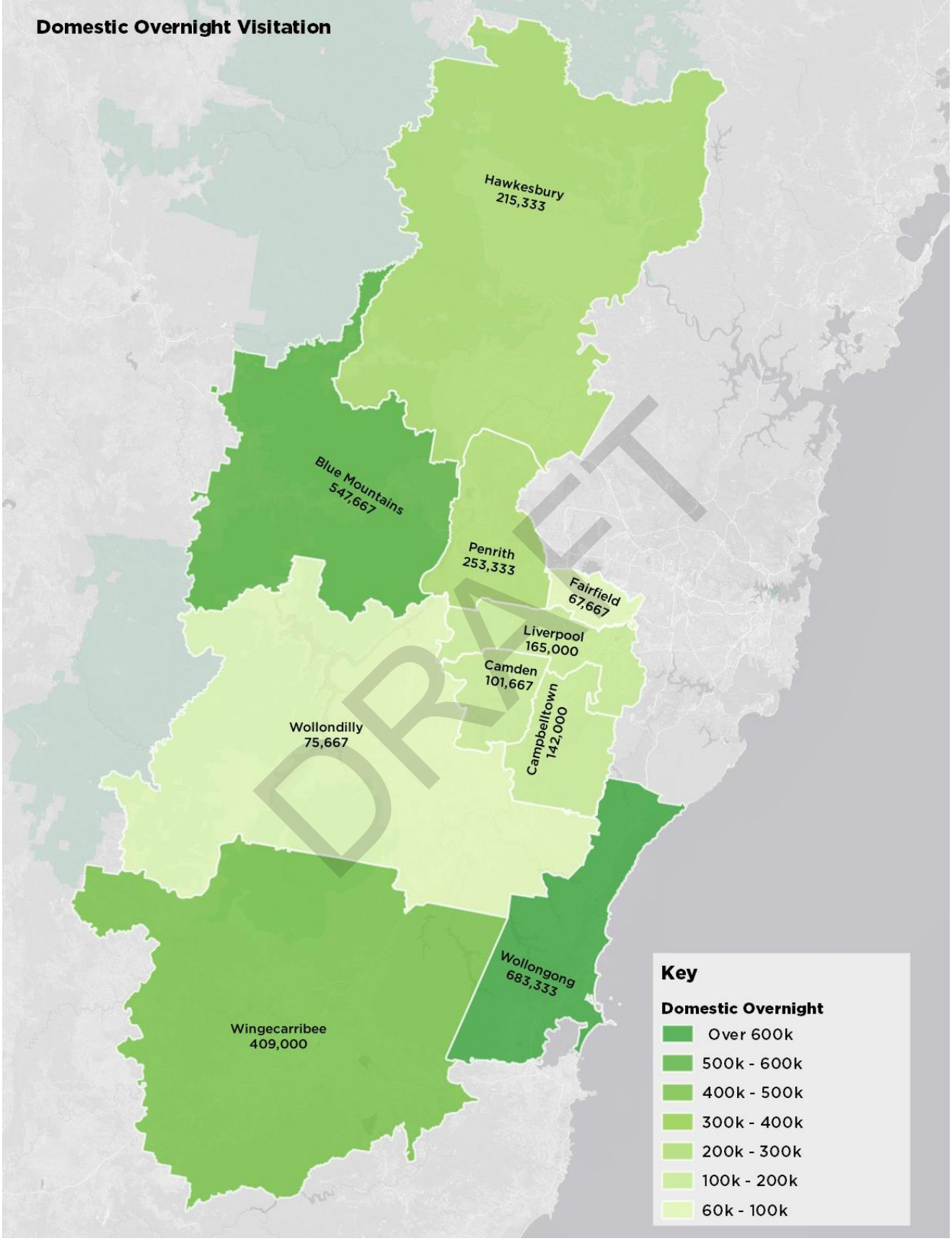
[17] Tourism Research Australia, IVS and NVS, September YE data.

Figure 11: Domestic Day Visitation Comparison (3-year average, 2015-17)[18]



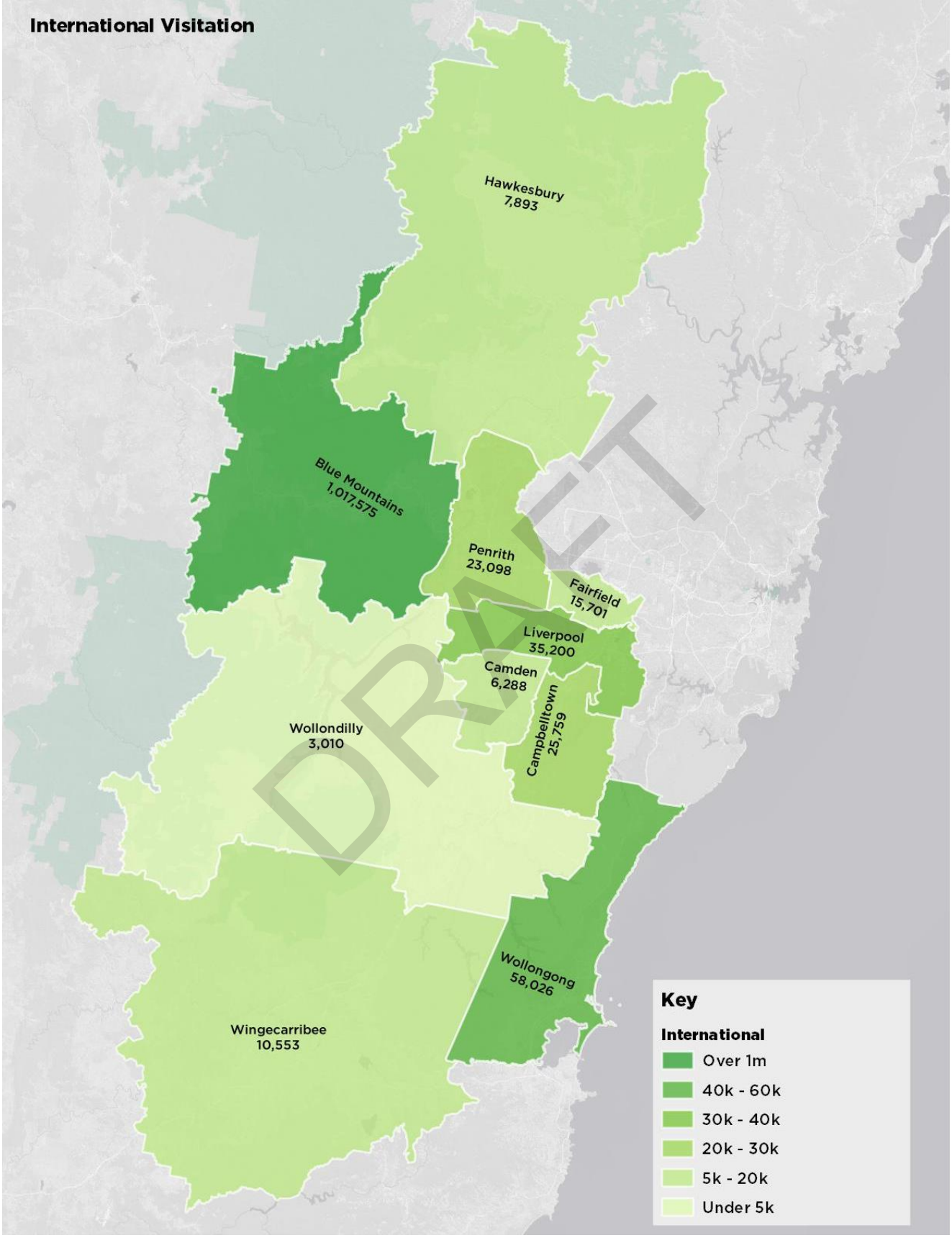
[18] Tourism Research Australia, IVS and NVS, September YE data.

Figure 12: Domestic Overnight Visitation Comparison (3-year average, 2015-17)[19]



[19] Tourism Research Australia, IVS and NVS, September YE data.

Figure 13: International Visitation Comparison (3-year average, 2015-17)[20]



[20] Tourism Research Australia, IVS and NVS, September YE data.

Image: Mowbray Park Farmstay, Mowbray Park NSW.

3. Product Audit

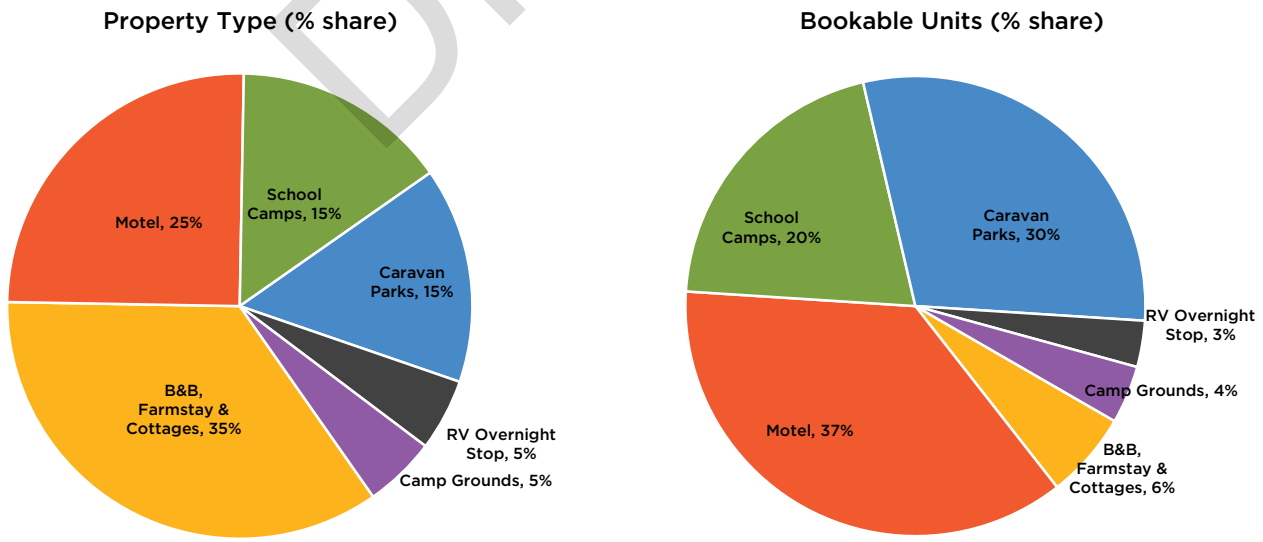
3.1. Accommodation Audit

3.1.1. Summary of audit findings

Figure 14 below and Table 14 on the following page provides a summary of the Wollondilly accommodation audit[21]. It is important to note this is a top line audit completed via a desktop research exercise. It, therefore, may exclude those properties which are not currently listed on major accommodation and destination websites. The audit demonstrates the following.

- There are 20 accommodation properties in Wollondilly (note: the audit excludes Airbnb/holiday home properties). Of these, the majority are classified as B&Bs/farmstays/cottages (35% of properties), followed by motels (25%).
- In terms of bookable units[22], the most common form is motel stock – comprising 37% of stock, followed by caravan parks (30%).
- The Shire also has a large number of beds in school camp style accommodation, equating to approximately 538 beds[23], as well as a large number of unpowered camping sites at Cataract Scout Gorge[24]. These are primarily rented by school groups rather than being for the leisure-based visitor market.
- The Shire has no larger-scale or branded accommodation properties.
- There are three caravan/recreational vehicle (RV) sites within the Shire which provide an estimated 62 sites (a mixture of powered and unpowered). The RV Overnight Stop also provides 8 unpowered RV/caravan sites and there is one formalised NPWS camping ground which provides 10 unpowered sites.

Figure 14: Share of property type



[21] Please note the full findings of the audit are in Supporting Documentation 2.
[22] Units are the number of unique bookable "rooms" able to be booked by visitors. A two-bedroom apartment would therefore equate to 1 unit as this can only be booked by one unique visitor party. This also includes caravan/RV and camping sites and each site is counted as 1 unit.
[23] Exact numbers were unable to be ascertained so this provides an estimate based on information available online.
[24] The number of unpowered camping sites at Cataract Gorge was unable to be ascertained through desktop research.

Table 5: Accommodation audit[25]

Property Type / Name	Number of Properties	Bookable Units	Bookable School Camp Beds	Powered & Unpowered Sites[26]
B&B, Farmstays & Cottages	**7**	**15**	**-**	**-**
Appin Homestay Bed & Breakfast	1	0	-	-
Fullcircle Farm Bed and Breakfast	1	2	-	-
Le Petit Palais Bed and Breakfast	1	2	-	-
Pepper Tree Ridge	1	5	-	-
Post Office Lodge (NPWS)[27]	1	3	-	-
Slippery Norris Cottage (NPWS)[28]	1	2	-	-
The Bank Room (NPWS)[29]	1	1	-	-
Camp Grounds	**1**	**10**	**-**	**10 (unpowered)**
Private Town campground (NPWS)[30]	1	10	-	10 (unpowered)
Caravan Parks	**3**	**73[31]**	**-**	**62**
Avon Caravan Village	1	28	-	17 (7 powered, 10 unpowered)
K Ranch Arena[32]	1	45	-	45 (powered)[33]
Oakdale Caravan Park	1	0	-	-[34]
RV Overnight Stop	**1**	**8**	**-**	**8 (unpowered)**
Warragamba RV Short Stay Site	1	8		8 (unpowered)
School Camps	**3**	**50**	**538**	**-**
Cataract Scout Park	1	8	358	-
Kiah Ridge[35]	1	27	140	-
Mowbray Park Farm	1	15	40	-
Motel	**5**	**90**	**-**	**-**
Bargo Motor Inn	1	11	-	-
Camden Valley Inn	1	40	-	-
Picton Valley Motel	1	25	-	-
Tahmoor Inn Hotel Motel	1	14	-	-
The Oaks Hotel	1	0	-	-
Grand Total	**20**	**246**	**538**	**80**

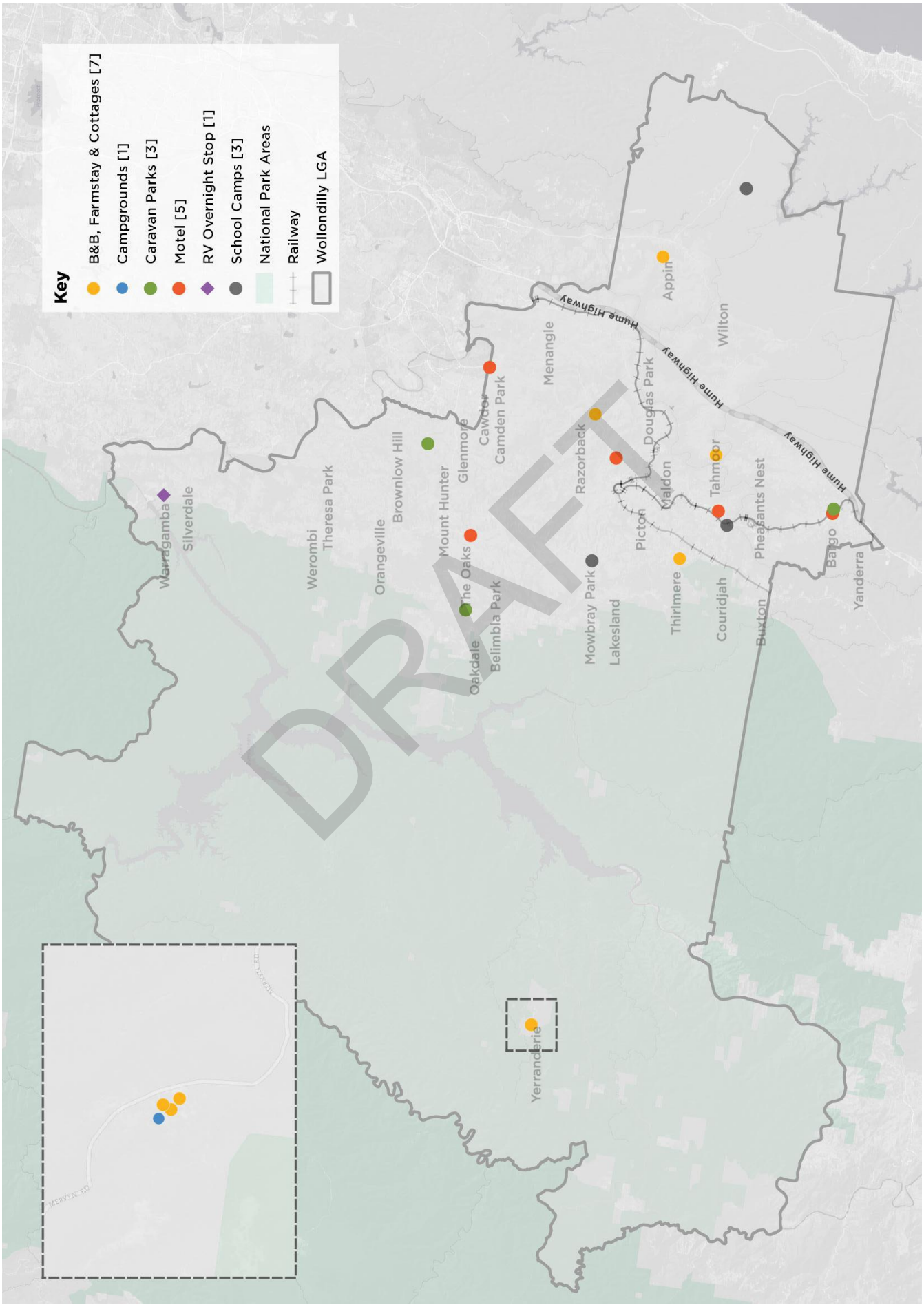
3.1.2. Accommodation spatial audit

Figure 15 on the following page spatially maps Wollondilly's accommodation. It illustrates that the vast majority of accommodation, particularly motel-style accommodation, is situated along or within close proximity to the Old Hume Highway and clustered around the towns of: Picton, Tahmoor, Bargo, and The Oaks.

It also demonstrates that there is an absence of accommodation available within the national park areas of the Shire. While we understand the constraints of development within these areas, there are national park and World Heritage Areas throughout Australia and New Zealand which have successfully developed sustainable and eco-friendly accommodation within their boundaries.

[25] Unit numbers, bed numbers and caravan sites are estimates only based on information available online. As part of a more comprehensive audit, contact would need to be made with each property owner to verify this data. Undertaking this is not in the scope of this DMP.
[26] RV and caravan sites.
[27] Note, this property, while being located in the Wollondilly LGA, is not currently accessible from the LGA. Access is through surrounding LGAs. This is noted as a challenge in this DMP (see section 4.4.1).
[28] Ibid
[29] Ibid
[30] Ibid
[31] Mixture of cabins and unpowered and powered sites.
[32] Note this is event specific accommodation and not available at this time for general bookings
[33] Note these are only available during events held at the facility.
[34] Unable to be determined via desktop audit
[35] Note this is event specific accommodation and not available at this time for general bookings

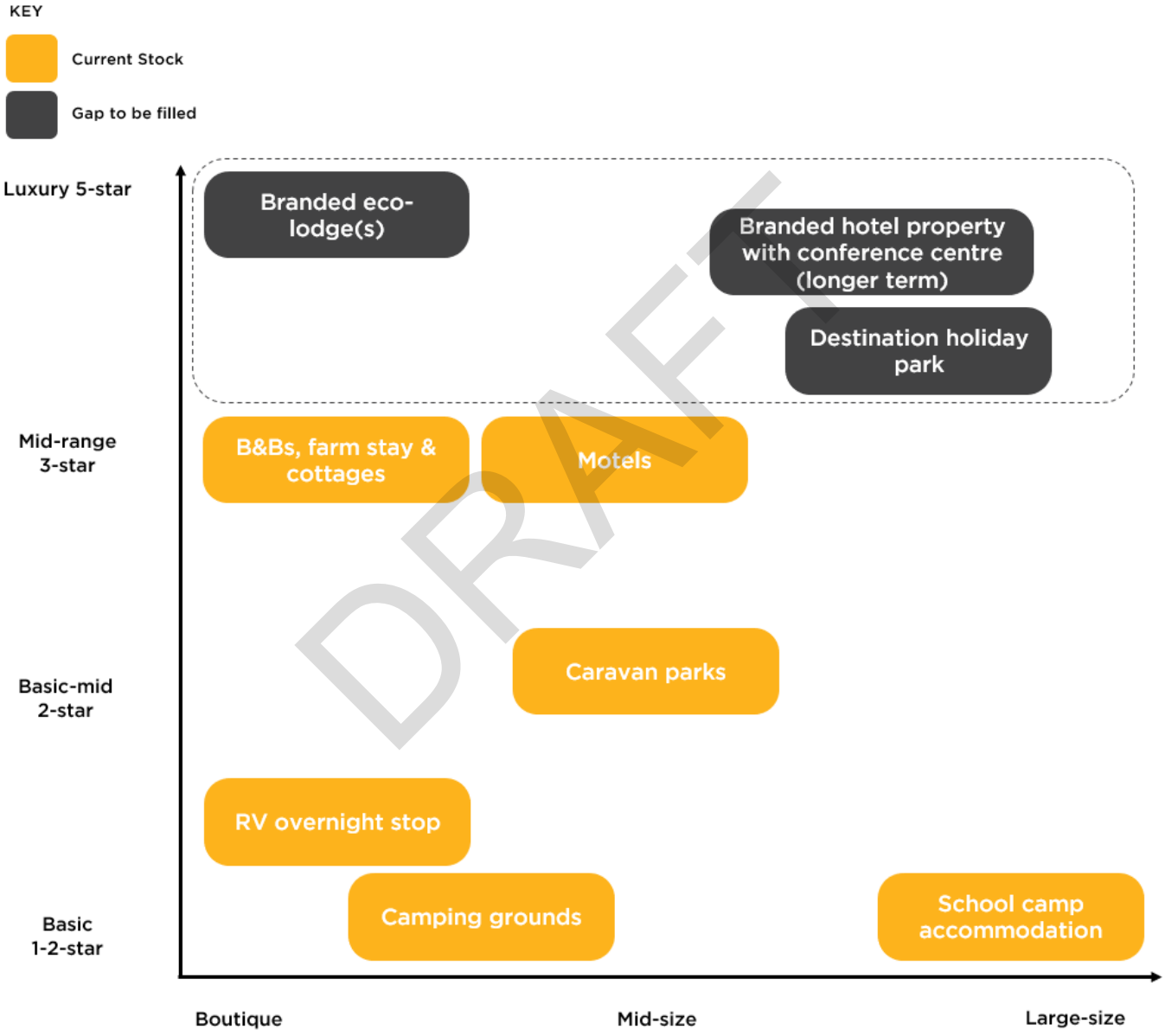
Figure 15: Accommodation spatial audit



3.1.3. Accommodation gap assessment

Figure 16 demonstrates that while Wollondilly currently has a range of accommodation options available at the 1-3-star quality category, there are gaps in the higher-quality accommodation segment (3.5-star plus) as well as a lack of branded accommodation stock. The opportunity exists to consider introducing higher-end product of a more boutique scale initially as well as a destination holiday park, with consideration to introducing a higher-end mid-size property (80+ rooms) in the medium-longer term with an associated conference venue if demand is proven.

Figure 16: Accommodation gap assessment



3.2. Attractions & Experiences Audit

3.2.1. Summary of audit findings

Table 6 provides a supply-side audit of tourism assets and product in Wollondilly[36]. The audit identified 42 tourism attraction related experiences[37].

Based on this audit, Wollondilly's tourism assets/product is primarily distributed amongst:

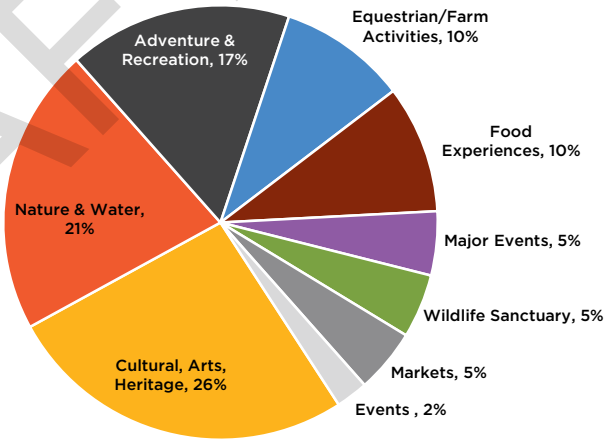
- cultural/heritage product: 26% of the total product identified;
- nature and water-based product: 21% of total product;
- adventure and recreation product: 17% of total product; and
- equestrian/farm experiences and food experiences[38]: 10% each of the total product.

Importantly, of the 61 experiences/assets identified, more than two-thirds are free experiences (69%). While having free things for visitors to do is an important part of any visitor economy, there is a balance required. To grow visitor yield in Wollondilly requires introducing more commissionable tourism product which could be in the form of paid tours, admission prices, packaged product etc.

Table 6: Attractions & experiences audit[39]

Type	#
Cultural, Arts, Heritage	11
Nature & Water	9
Adventure & Recreation	7
Equestrian/Farm Activities	4
Food Experiences	4
Major Events	3
Wildlife Sanctuary	2
Markets	2
Total	**42**

Figure 17: Share of product type

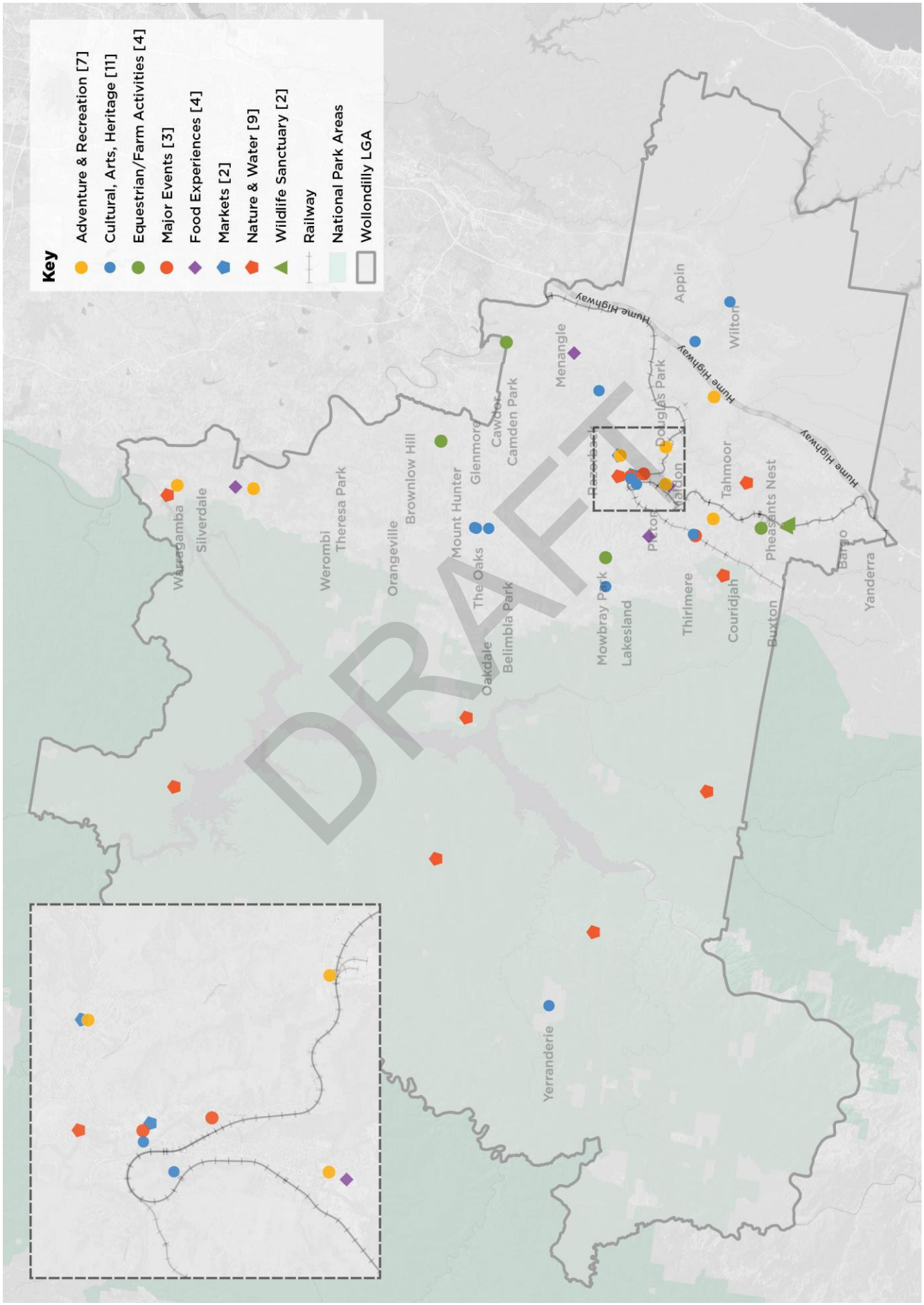


3.2.2. Attractions/experiences spatial audit

Figure 18 on the following page spatially maps the attractions and experiences available in the Shire. It again demonstrates the limited product, other than natural assets, available in the national park areas of the Shire and that the vast majority of built experiences are clustered around major town centres.

[36] Please note the full findings of the audit are in Supporting Documentation 3.
[37] The product audit captures those operators who are listed in Council's visitor guide and on the ATDW for Wollondilly. Stafford also provided the audit to Council to add in those operators who may not be listed on Google.
[38] Note this does not include all F&B providers in the Shire but rather includes unique food experiences.
[39] Note food experiences does not include all F&B within the LGA, but rather, focuses on those food-based experiences which are unique and which visitors can undertake (such as pick your own, orchards, unique produce stores etc.)

Figure 18: Attractions & experiences spatial audit



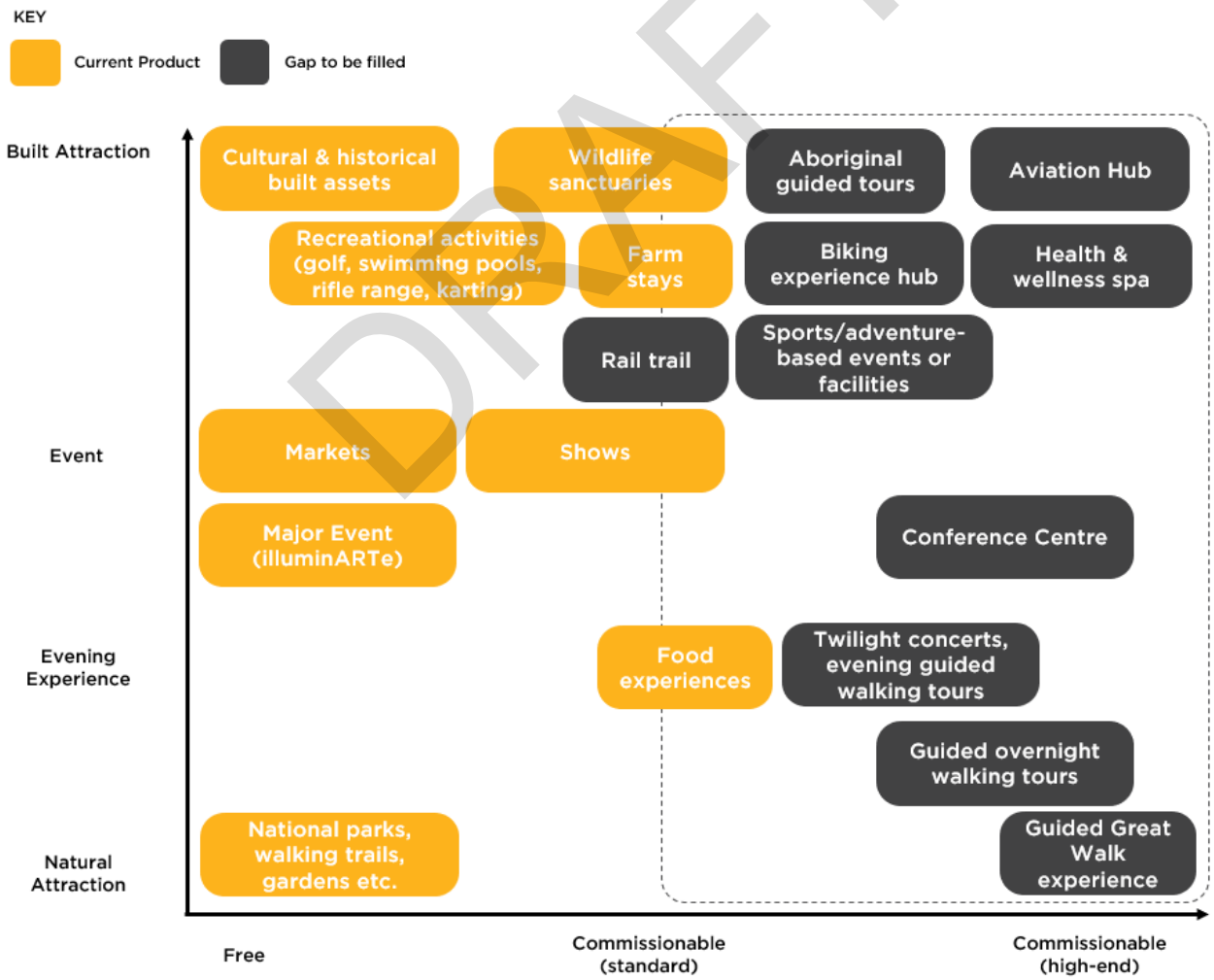
3.2.3. Attractions and experiences gap assessment

Figure 19 provides a gap assessment of the attractions/experiences sector in Wollondilly. It demonstrates that:

- there is free and self-guided product focused on Wollondilly's natural and cultural assets;
- there are limited evening-based experiences to encourage a longer length of stay and to provide experiences which locals can enjoy rather than having to travel out of the Shire to undertake evening-based activities;
- there are limited eco and adventure tourism product, despite a significant proportion of the Shire being natural areas; and
- while there is an evening event, illuminARTe, potential may exist to grow this into a multi-day event to grow average length of stay (ALOS) and yield.

The opportunity exists to introduce a range of product[40] which grows the amount of commissionable product available at both a standard[41] price range and high-end range. This includes (but is not limited to) guided overnight walking tours (possibly linking in with the Blue Mountains to achieve this), a Great Walk, a biking experience hub as well as a rail trail from Thirlmere to Mittagong (catching the train down to Mittagong and biking back to Thirlmere), a health and wellness spa as part of a boutique lodge and a conference centre.

Figure 19: Product gap assessment



[40] Please note this figure only includes a sample of product development opportunities. The full list of opportunities is included in section 6 of this DMP.
[41] Standard commissionable product refers to the price of product (rather than the quality).

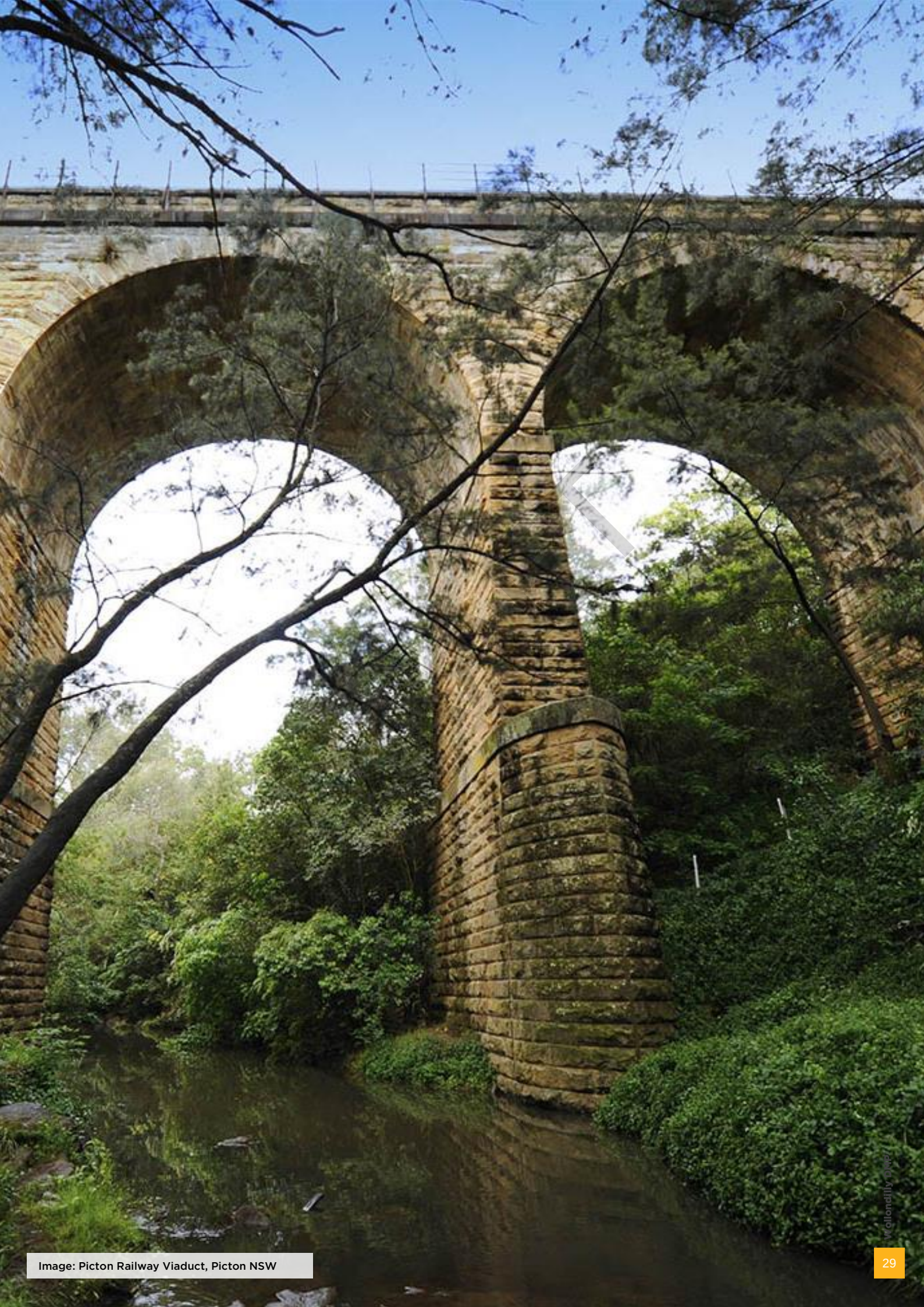


Image: Picton Railway Viaduct, Picton NSW

4. Barriers to Growth

The following section outlines the barriers to growth (in alphabetical order) which were identified during the consultation and analysis undertaken for this DMP. They have been segmented according to the following categories.

- Product and supporting infrastructure barriers
- Marketing and destination awareness barriers
- Governance and industry collaboration barriers
- Other barriers

Section 6 of this DMP highlights opportunities which provide further detail on how many of these barriers can be mitigated and positive outcomes achieved.

4.1. Product & Supporting Infrastructure

4.1.1. Freedom camping is not free (cost to Council)

The new Warragamba RV Short Stay trial site is recognised as a major asset for Wollondilly and is popular with the grey nomad market in particular. It offers eight free camping sites (for self-contained motorhomes, caravans and campervans) for a maximum of 48 hours. While the RV Short Stay Site is great for users because it is "free", one must be careful to recognise that it comes at a significant cost to Council to maintain. There is a need to ensure that value is being derived from these users through purchasing retail, supplies/provisions, food and beverage (F&B) as well as tourism experiences.

4.1.2. Majority of operators are small businesses

Wollondilly has limited large-scale commissionable (i.e. pay for) as well as export-ready tourism product which can be marketed domestically and internationally. While the boutique nature of operators in the Shire may offer a more personalised experience for visitors, there is a balance required as larger-scale operators tend to bring with them larger marketing budgets which not only markets their product but also the broader Shire.

For stronger profiling by DNSW and Tourism Australia, there is a need for more export-ready product within the Shire.

4.1.3. Lack of evening activities

Wollondilly has a lack of evening activities for visitors and locals. This makes it challenging to convince the day tripper market to convert their trip into an overnight visit and can also mean that residents, particularly families, travel outside of the Shire to engage in evening activities.

4.1.4. Limited number of family-friendly experiences

While the Shire has a range of natural recreational experiences, these are not always suitable for the family market with children under 10 years of age. There is a need to investigate the introduction of experiences for younger children. This could include the development/marketing of family-friendly walking and cycling trails or other commercial initiatives, such as high ropes and aerial courses, outdoor mazes and indoor fun parks etc. Indoor family product would also be of benefit to local families.

4.1.5. Lack of room capacity and higher quality accommodation stock

The majority of Wollondilly's accommodation stock comprises smaller-scale B&Bs/farm stays/cottages and motels, equating to approximately 55% of accommodation properties in the Shire. During peak periods, such as during major events, there is a lack of larger accommodation properties that can cater to demand. This impacts on the ability to convert day trippers to overnight visitors, to encourage a longer length of stay and to support conferences and events.

4.1.6. Challenges in activating national parks

Approximately 90% of the Shire is national park, bushland, Crown land, water catchment or rural land.[42] The inability to activate commercial opportunities in these areas is noted as a significant challenge not only in Wollondilly but other major tourism destinations in NSW such as the Blue Mountains and the Hawkesbury. With NPWS keen to explore revenue generating opportunities and commercial partnerships, the potential exists to introduce appropriate in-park experiences.

4.1.7. Lack of new 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.

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.

4.1.8. Limited retail trading hours

Feedback received during consultation indicated that many stores close early at weekends and some do not operate on days over the weekend. This creates the perception that Wollondilly is not open at night or at weekends.

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. Greater community commitment to growing and promoting tourism will lead to greater word of mouth advertising for the Wollondilly.

4.1.9. Limited 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 Wollondilly's natural and built attractions which could potentially encourage visitors and the community to make better use of these facilities for walking, cycling and picnicking etc.

[42] http://visitwollondilly.com.au/destination/dams-and-national-parks/

There is also a lack of interpretative signage when entering Wollondilly and at attractions. What should be considered are attractive gateway signs on major access roads into Wollondilly, highlighting the key experiences and branding of the Shire. As the area is steeped in history, the potential exists to use signboards, 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.

4.1.10. Waterway access constraints

Warragamba Dam is a key asset situated within the Shire. While there are a number of tourism initiatives which could leverage off the Dam, access to it is very restricted for a variety of reasons, including water security.

4.2. Marketing & Destination Awareness

4.2.1. Lack of awareness of the importance of the visitor economy

While the visitor economy is not Wollondilly's largest industry, it does play a key role in the Shire's economy, employing 270 people and generating just under $57m in economic output.[43]

Additionally, what these statistics do not demonstrate is that the visitor economy is not just confined to one traditional economic sector, but rather, comprises many sectors (such as transport, education, accommodation, training, food and beverage etc.). Growing the visitor economy, therefore, can generate broad-ranging benefits across a range of sectors.

There is a need for Wollondilly's residents to understand that a diverse economy will play a key role in the Shire's future success and sustainability. While mining and agriculture etc. will likely always be important sectors for the Shire, the visitor economy provides many opportunities to diversify the Shire's economy and many of these opportunities have strong synergy and complementarity.

4.2.2. Lack of brand awareness

The Wollondilly brand does not have strong brand recognition. Town brands such as Picton and Warragamba have stronger brand awareness. There is a need to undertake a branding exercise to position Wollondilly strategically and to provide clarity on what "Wollondilly" is as a destination. It is important that a consistent brand is developed by a destination brand specialist, along with all associated collateral (taglines, brand values, vision and design etc.).

Importantly, however, the development of a destination brand for the Shire is not a panacea; it must be developed in conjunction with the introduction of new (or upgrade of existing) product/infrastructure as well as other marketing initiatives.

[43] https://economy.id.com.au/wollondilly/tourism-value

4.2.3. Lack of tourism focused calendar for major events

Wollondilly has a diverse community event portfolio and these are outlined on the events page of Wollondilly's destination website[44]. There is a need, however, for the destination website to focus primarily on destination events rather than community events. Destination events are those which draw a tourism visitor market rather than a local market.

4.2.4. Lack of product packaging

There is limited product packaging available on destination-based websites for the Shire and existing operators comment that finding suitable product to package is challenging. As additional new, marketable product is introduced, there is a need to develop packages which visitors can book, rather than providing suggested itineraries. Packages could include accommodation, transport, guided walks/cycling, food and beverage etc.

There is also a need for industry training and up-skilling to identify opportunities for packaging product of a similar quality.

4.2.5. Digital-savviness of operators

While there are some operators in Wollondilly who have an up-to-date digital presence, there are some who lack the tools for developing this.

There is a need to ensure that all tourism operators in the Shire are listed on the Australian Tourism Data Warehouse (ATDW) which is used as a product database by Tourism Australia, DNSW as well as likely by DSSS (as the Shire's Destination Network).

4.2.6. Limited profiling (currently) by DNSW

Aside from the coverage which Wollondilly has received for its highly successful illuminARTe event as well as for the NSW Rail Museum, there is limited profiling of the Shire by DNSW. In order to achieve greater profile, there is a need to develop new and/or reinvigorated product and associated marketing collateral which DNSW can use to feature and showcase the Shire.

4.2.7. Competing with a major destination brand (the Blue Mountains)

Wollondilly's proximity to the Blue Mountains (and having the Greater Blue Mountains World Heritage Area within its boundaries) is also a double-edged sword. On one hand, Wollondilly is competing against a very strong and mature destination, and, on the other, there is a large visitor market already travelling to the Blue Mountains which Wollondilly can leverage off. The same can be said for Wollongong and the Southern Highlands. There are, therefore, a variety of opportunities identified in this DMP which require a partnership approach between Blue Mountains and Wollondilly Shire Councils and which will likely "grow the pie" rather than cannibalise the visitor economies of each LGA.

[44] http://visitwollondilly.com.au/

4.2.8. The tyranny of distance

Wollondilly's proximity to Sydney is also a double-edged sword; while it is easily accessible, it has created a perception that it is merely a day trip destination.

The region is fortunate in being able to leverage off the significant national and international visitor growth into the Sydney CBD and into neighbouring areas such as the Blue Mountains and the Southern Highlands. In saying this, however, Wollondilly is challenged by the fact that it is, at times, perceived to be too close to Sydney which makes it particularly challenging to position it as an overnight destination in its own right.

Additionally, this proximity means that the region also has a number of major competitor destinations nearby which Sydney short break visitors can choose from including the Blue Mountains, the Southern Highlands and the South Coast.

4.3. Governance & Industry Collaboration

4.3.1. Lack of tourism sector coordination, collaboration and structure

Operator feedback has indicated that Wollondilly's visitor economy:

- has had limited coordination;
- lacks a unified approach to delivering marketing outcomes and encouraging tourism development; and
- is highly fragmented, without a strong unity of purpose.

Concerns were also expressed regarding the level of communication between industry groups and Council and that a clear demarcation is required on areas where Council should take the lead role and where industry should take the lead to avoid overlap, duplication and disagreement.

Achieving a cooperative model which gets the buy-in of key stakeholders is an important outcome going forward. Council has a key role to play as "the honest broker" and enabler/facilitator for tourism, helping to drive change and bringing parties together to invest. Council also has a key role in seeking funding and related support from State and Federal Government to help activate tourism opportunities rather than expecting to be the investor.

4.3.2. Lifestyle operators

There is a proportion of the Wollondilly'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. This is a major limitation for the area going forward in developing as a tourism destination.

4.3.3. Alignment with DSSS as well as Penrith, Hawkesbury and the Blue Mountains who are in DSSN

Wollondilly is in a fortunate position given that it has been included within the DSSS network; many other LGAs in greater Sydney, including Camden, Campbelltown, Liverpool etc. have not been included within a Destination Network. As a consequence, access to funding by these LGAs is often difficult. However, Wollondilly is also unique in that while it certainly has synergies with the DSSS network, and, in particular, with Wingecarribee Shire, Wollondilly also has strong synergies with the Blue Mountains, Penrith and Hawkesbury (situated in the Destination Sydney Surrounds North network). These three LGAs are currently working together across a variety of initiatives under a strategic alliance and are keen to explore tourism-based opportunities with Wollondilly. How Wollondilly

divides its resources and positions itself between the DSSS network and a potential relationship with these three LGAs needs to be explored.

4.4. Other Challenges

4.4.1. Access to Yerranderie

Yerranderie is currently the only place in the Shire which visitors can freedom camp in and which offers valuable heritage attractions such as silver mining relics, a 'forgotten ghost town'[45] as well as several NPWS-run cottage accommodation. There are, however, access restrictions to the site, with the only FIT (free independent traveller) access being from the east of the Shire (through Oberon LGA). Access via the western side of the Shire (which is where all the major towns of the Shire are situated) is only available with the special permission of Water NSW and having a NPWS escort, so access is highly restricted.

There is a need to "open the door" to the conversation for how improved access to Yerranderie can be provided through the western side of Wollondilly Shire. This is also important if a great walk is to be activated for the Shire (see section 6.1.7) as the walk is likely to require this route.

4.4.2. Significant day trip visitor market

85% of all visitors to Wollondilly are domestic day trippers. While the importance of the day trip market should not be discounted, there is a need for more balance between overnight and day trip visitors. The overnight market generates far more yield as a consequence of being in a region for multiple days and spending on accommodation, food and beverage, transport and experiences.

4.4.3. Concentration versus dispersal of tourism

There is a desire by some stakeholders to spread tourism evenly throughout Wollondilly. While this, in principle, is a good theory, it needs to be recognised that the vast majority of tourism-related infrastructure in Wollondilly is concentrated around major towns/villages (and particularly around Picton). The cost to provide this level of infrastructure throughout the Shire is likely to be cost prohibitive. Wollondilly is, therefore, more likely to benefit from a "hub and spoke" model for tourism which involves initially clustering tourism product and infrastructure near major town centres and using clever signage, visitor information, promotion and trails to encourage visitors to explore the Shire.

4.4.4. Council and State Government planning instruments and support for tourism

Wollondilly's planning instruments (and the interpretation of these) are considered by some stakeholders as being restrictive and inflexible. Feedback from Council indicates that various State Government policies limit the ability of Council, at times, to offer greater flexibility for development approvals because of standard planning instruments and the tight interpretation required of these.

It may be necessary for Council and industry to lobby State Government to allow for greater flexibility of state planning instruments. Industry, Government and Council need to determine solutions for relaxing certain planning constraints where strategic and timely outcomes are being unduly constrained.

[45] https://www.nationalparks.nsw.gov.au/visit-a-park/parks/yerranderie-regional-park

It is noted that various State Government policies limit the ability of councils, at times, to offer greater flexibility for tourism development approvals because of standard planning instruments and the often-tight interpretation of these.

4.4.5. Balancing tourism and housing needs

Tourism growth in Wollondilly is challenged by trying to achieve a balance with State Government targets for new housing lands.

State Government targets on employment growth are also having an impact. While they are not contrary to the needs of the tourism sector, other industry sectors, where the employment ratios are thought to be higher, are being actively encouraged. The introduction of more housing estates and the lack of sufficient open space areas and buffer zones is likely to limit tourism potential in a variety of locations within or near urban centres in particular.

Image: Warragamba Dam Viewing Platform, Warragamba NSW

5. The Vision

To guide the development of Wollondilly as a destination and to strengthen the visitor economy, it is essential that a destination vision is created which industry buys into and supports. The destination vision proposed is outlined in Figure 20 below, along with four activation areas to achieve the vision. The opportunities outlined in section 6 are categorised under these activation areas.

Figure 20: Wollondilly's destination vision and activation areas

THE VISION

By 2025, Wollondilly's visitor economy will be a key driver of the social, cultural and economic life of Wollondilly, with substantially increased economic benefits for the resident and business community. This will be achieved by further developing Wollondilly's product offering and promoting it as a year-round vibrant destination.

ACTIVATION AREA 1

Product & Infrastructure Development

To diversify Wollondilly's product base and develop/enhance infrastructure to support the visitor economy.

ACTIVATION AREA 2

Destination Awareness & Visitor Services

To grow awareness of Wollondilly as a visitor destination and to actively showcase what is on offer.

ACTIVATION AREA 3

Events Development

To actively target niche events which Wollondilly has strengths in and to support the development of new events.

ACTIVATION AREA 4

Governance & Support

To ensure there is a united approach to growing Wollondilly's visitor economy.

Image: Bargo River, Tahmoor NSW

6. Activating the Vision

The following outlines a range of opportunities identified through the consultation, research and analysis. The opportunities have been listed alphabetically according to the activation areas outlined in the vision (section 5).

6.1. Activation Area 1: Product & Infrastructure Development

6.1.1. Biking experience hub

The opportunity exists to investigate the introduction of a biking experience in the Shire. This is based on:

- the naturally undulating and hilly landscape which the Shire offers;
- the relatively undeveloped footprint of the Shire;
- the large population growth forecast for the Shire – many of whom are anticipated to be young families who will be looking for recreational activities to undertake;
- the proximity of the Shire to major population bases who are looking for new recreational activities to participate in;
- the success of previous mountain biking events held at Mowbray Park Mountain Bike Track, such as the Shimano MTB Grand Prix; and
- the growing promotion of active and healthy lifestyles and the ability of biking to assist in increasing physical activity.

There has been significant investment in Wollongong into mountain biking infrastructure. It is considered that this biking experience hub would complement this, rather than compete, as this would have more of a youth focus while Wollongong's infrastructure caters to a more advanced mountain biking market.

The central biking experience hub could be used for recreational biking and events (both on a pay-for basis), including biking-related events as well as for other adventure/active related events including orienteering competitions, trail and cross country running events etc. The central hub could include:

- a variety of trails with varying degrees of difficulty from beginner to advanced;
- a mountain bike jump park with two courses (one for beginners/younger riders and a more advanced facility);
- a biking skills park (see Figure 21) which could be used for bike and road rules education purposes and which could be well-lit to offer an evening riding experience;
- a sealed bicycle racing circuit;
- a pop-up café to operate during peak periods and for events, including a learn to ride track adjacent to the café for families to supervise children on learn to ride track (see Figure 21);
- a small-scale pop-up shop selling and hiring mountain bikes and related equipment/gear;
- an information facility to provide information on tracks and trails throughout the Shire;
- a bike repair/maintenance facility;
- toilets and related amenities;
- a gold coin or similar bike wash facility; and
- a commercial operator to provide mountain bike lessons, training courses and guided tours.

It is suggested that the biking experience hub be a paid facility because the cost of maintaining trails, associated signage and other supporting infrastructure is generally high. The entry fee may, therefore, ensure the facility remains a high-quality and well-maintained experience.

Figure 21: Example of a bike skills park[46]

Figure 22 provides two examples of biking hubs, both situated within the UK. Both of these parks offer a mix of free and paid elements, including bike rentals (including electric bike rental), biking tuition, bike wash facilities as well as bike-related gear for purchase.

Figure 22: Examples of bike hubs/centres[47]

The development of the commercial hub, with a variety of tracks, may assist in reducing the level of unsanctioned trail usage by mountain bike riders, particularly throughout the Blue Mountains World Heritage Area. This will help to: protect sensitive landscapes; reduce conflict with other land uses and decrease risk and liability for landowners and managers.

The potential also exists to create a series of biking trails, promoted at the central biking hub, but situated at safe, strategic places within the Shire. The trails could potentially be focused on food, arts, culture or heritage and could encourage exploration and visitor dispersal. By way of example, Launceston and Hobart offer ARTBIKES which is a bike borrowing service which takes participants on an easy access tour to the city's cultural hubs including galleries and museums (Figure 23).

[46] Gallagher Bike Skills Park, Waikato (NZ), clustered next to Avantidrome (velodrome). Images owned by Avantidrome and Kids Waikato.
[47] Swinnerton Cycles Forest Centre at Cannock Chase Forest Mountain Biking Trails, UK (image owner: https://www.flickr.com/photos/williamhook/11966635505) ; and Dalby Bike Barn and Café at Dalby Forest, UK (image owner: Pace Cycles)

Figure 23: ARTBIKES[48]

6.1.2. Destination holiday park and servicing centre

While Wollondilly does have two caravan parks, these are traditional transit style[49] caravan parks (see Figure 24 for examples of traditional caravan parks) which appear to have a permanent resident focus rather than a visitor focus. Often transit-style caravan parks have basic facilities and are used as transit parks by travellers (i.e. overnight accommodation when travelling between two destinations, rather than as a destination in their own right).

Figure 24: Traditional caravan park examples[50]

Lane Cove River Tourist Park, NSW

Tuncurry Beach Holiday Park, NSW

Figure 25 shows pictures of destination holiday parks. These parks tend to be operated by major operators (including BIG4, Discovery Parks, NRMA and Ingenia) and they offer a mix of facilities to guests such as: swimming pools, aquatic parks, kids clubs, camp kitchens, mini-golf, group entertainment and shops etc. These parks often attract a family market who use the parks as a base for day excursions to surrounding regions.

[48] lpwea.org
[49] i.e. often having basic facilities and are used primarily as a place to stop when travelling between two destinations, rather than a destination in their own right.
[50] Image owners: NSW NPWS and Caravan Park Photos

Figure 25: Destination holiday park examples[51]

Deniliquin Holiday Park, NSW

North Star BIG4 Holiday Park, NSW

BIG4 Nambucca Beach Holiday Park, NSW

Port Fairy Holiday Park, VIC

There are currently no branded destination holiday parks within the Shire and there is an absence of these in greater Sydney[52]. Based on discussions with major destination holiday park operators, the potential exists to introduce one of these into Wollondilly's accommodation mix.

Over the past 15 years, the domestic caravan, motorhome and camping industry has been fast growing. Caravan and RV registrations have increased by more than 250%[53]. The industry is worth $19 billion nationally and generates 11m overnight trips.[54] Savvy operators are responding to consumer demand for better standards and facilities by transforming traditional transit parks into holiday/destination parks.

From discussions with major operators, the following provides a basic list of criteria for destination holiday parks:

- land area of 8 ha. or greater (able to be leased ideally for a minimum of 40 years + or purchased);
- capacity for 80+ powered sites, 60+ non-powered sites and 25-30 cabins/chalets;
- a focus on visitors rather than permanent residents;
- a family-friendly focus to attract the family market and to convert day trips into overnight stays;
- best practice design of facilities;
- amenities such as a heated pool, spa, BBQ facilities, camp kitchen, tennis court, bike hire/loan, kids' playground, daily children's activities, a café and a convenience store; and
- easy access to major roads and highways.

[51] Image owners: DriveNow.com.au; Escape.com.au; BIG4 Nambucca Beach Holiday Park; and Port Fairy Holiday Park.
[52] Many of the caravan parks in greater Sydney are either traditional transit-style parks or cater primarily for permanents.
[53] http://www.caravanningnews.com/penrth.htm
[54] http://www.smh.com.au/small-business/growing/australias-caravan-industry-worth-19-billion-and-growing-20160722-gqbgp5.html

It is suggested that the holiday park is developed and managed by a major operator within the sector to ensure that appropriate infrastructure is introduced, especially in areas not easily linked to town supply facilities. Additionally, this reduces the burden on ratepayers and Council through a commercial user pays model.

In addition to developing a destination holiday park, the potential exists to investigate introducing an RV and caravan service centre and storage facility as part of a cluster. This could include:

- a mechanical servicing facility for RVs and caravans;
- a rental centre for those looking to hire an RV or caravan; and
- a storage facility providing RV and caravan owners with a safe place to store their RVs/caravans and have them serviced as required.

A feasibility and site assessment exercise should be undertaken to determine the most appropriate sites for a destination holiday park and potential service centre within the Shire.

6.1.3. Diversifying the NSW Rail Museum experience

The NSW Rail Museum at Thirlmere is a significant asset, offering a collection of national significance, and one of the Shire's major attractions.

Discussions with the Museum indicate a desire to diversify the focus of the Museum from being primarily about the preservation/restoration of trains to having a stronger focus on visitor experience and interaction.

The potential exists to leverage off events to activate the Museum and draw a broader cohort of visitors to the attraction. The events held at the Museum have been successful and we understand one of the most popular events for the Museum is the "Day out with Thomas" which is held several times each year and sells out, demonstrating the pent-up demand for family-friendly experiences. The potential exists to introduce a new major hallmark event at the Museum which could include a Harry Potter themed event leveraging off the prominence of trains and platform 9¾ in the narrative. Harry Potter is one of those products which is likely to be a major drawcard, attracting interest from children through to adults and all age ranges.

We note the Harry Potter exhibition which was held at the Powerhouse Museum (NSW) was the most popular paid exhibition in NSW's exhibition history, attracting approximately 383k visitors. This exhibition boosted the Powerhouse's annual visitation to its highest on record, more than 44% higher than average annual visitation over the last 10 years. [55]

Operational models which could be tested include the following.

- The Museum facilitating the introduction and development of the exhibition with the license holder for Harry Potter (Warner Bros). This would require the Museum to pay an event license fee (which would need to be determined through a business case), however, all profit generated from the exhibition would be attributed to the Museum (less the license fee).
- Developing the event as part of a joint venture with an existing experience operator. Depending on the level of investment which the Museum would be prepared to offer, the license holder may take a percentage of turnover as its return from the project.
- An alternative licensing or funding arrangement.

[55] http://www.powerhousemuseum.com/media/?p=231

Other initiatives which could be explored include expanding illuminARTe to run throughout the Museum, leveraging off the trains as a unique canvas for light effects as well as introducing a rail trail (as explored in section 6.1.12).

6.1.4. Evening-based activities

There is a need to offer more evening activities to grow Wollondilly's visitor economy and to offer additional experiences/attractions for locals to undertake. The success of illuminARTe demonstrates the pent-up demand for family-friendly, evening experiences, not only in Wollondilly but across greater Sydney.

To grow the Shire's night time economy, the following experiences could be investigated, including:

- twilight concerts, moonlight cinema and cultural shows potentially at the amphitheatre in the Picton Botanic Gardens;
- extending the illuminARTe event to run over 2 days;
- evening walking tours (heritage tours etc.);
- summertime outdoor dining experiences including a potential long-table dinner event; and
- food and wine events and night markets offering food stalls etc.

While the community may be uncomfortable at the notion of opportunities which create night-time entertainment, a careful and balanced approach should meet their concerns and ensure that the Shire is not perceived as a "closed shop" after 5 pm.

Figure 26: Evening Activities[56]

[56] Sounds of Silence, NT (Ayers Rock Resort); Brisbane Night Noodle Markets (The Weekend Edition); Thanksgiving Point Evening Summer Concerts, Salt Lake City (TripSavvy.com) and Port Arthur Ghost Tour, TAS (Expedia).

6.1.5. Food tourism strategy

Wollondilly is an important agricultural region in NSW, producing fresh and perishable produce to Sydney Markets and accounting for up to 12% of NSW's total agricultural production (combined Sydney Basin output).[57] The type of agriculture produced in the Sydney Basin "is intensive when compared to the NSW as a whole, with an average farm gate value (i.e. the value of produce when it leaves the farm) of $5,433 per hectare compared to the State's average of $136 per hectare).

While the Shire, therefore, has the raw product required to position it as a food tourism destination, there is limited ready-to-market food tourism product including farm gate trails, cooking schools, fruit/veggie picking experiences, food events and paddock to plate dining experiences etc.

There is, however, a desire to grow the Shire's positioning as a foodie destination. In order to do this, there is a need to develop a food tourism strategy (which could lead to the development of a food network) led and developed by a potential culinary tourism group of growers, producers and food/beverage operators. The food tourism strategy could include the following.

- "The ingredients" which make the Shire and its surrounding areas a foodie destination.
- A "foodie SWOT" which demonstrates the strengths, weaknesses, opportunities and threats of the Shire's and the surrounding areas' culinary offering.
- A "sampling plate" of the Shire and its surrounding areas most appealing/unique food experiences. This could include a produce calendar which interactively demonstrates what produce is available during each season.
- "The recipe" which outlines:
  - the regulatory environment, including red-tape reduction initiatives which limit the regulatory burden on food tourism operators;
  - the liquor control laws as they specifically apply to food tourism operators;
  - how operators can facilitate access to fresh, local produce as food tourism visitors indicate that the key priority is that they are given the opportunity to sample and purchase authentic local produce;
  - a potential brand framework for the Shire's food sector which leverages off the tourism/destination brand but which is tailored for food tourism and food product;
  - how operators can be upskilled to provide higher standards and quality, particularly with respect to service standards;
  - an audit of food tourism product and the stage of market readiness the product is at;
  - an audit of festivals and events which are food-related which occur in the Shire and surrounding areas; and
  - promotion and marketing initiatives to grow food tourism, including identification of primary and secondary markets within the food tourism niche market and how specific experiences will appeal to these markets.
- A "regional flavours" section which ties in the food tourism strategy with regional initiatives occurring outside of the Shire and how it can leverage off these.
- A "putting the recipe together" section which provides an action plan for growing food tourism in the Shire and the surrounding region, including key actions, stakeholders involved, budgets, timeframes, priorities and KPIs to measure the success of each action.

[57] https://www.wollondilly.nsw.gov.au/assets/Documents/Council/Council-Documents/Information-Sheets/Governance/Fact-Sheet-No-1-Welcome-to-Rural-Wollondilly-What-to-Expect.pdf

In addition to the food tourism strategy, industry should work together to promote the use of local produce in cafés and restaurants throughout the Shire. It is important that visitors to the region are able to sample local fruit (such as at Cedar Creek Orchard), vegetables, dairy (such as Country Valley Milk), meat and other local produce. This will reinforce to visitors that locals take pride in their region's produce and that the Shire is a foodie destination.

The food tourism strategy will ensure that a planned approach is followed for growing the food tourism sector as opposed to a "scattergun" method, which, while well-intended, may not lead to focused development in the sector.

6.1.6. Function/conference centre

With a lack of conference facilities and higher-quality conference facilities within the Shire, the opportunity exists to investigate introducing a new conference facility (or redeveloping/repurposing an existing facility), for a mixture of functions, conferences and events. This may provide the opportunity to actively encourage more overnight visitors especially and potential may exist to introduce other recreation activities around the golf course including, where possible, walking and cycling trails, a ropes adventure and confidence course etc.

6.1.7. Great walk experience in collaboration with the Blue Mountains

While the Shire has a stunning natural environment (with approximately 90% of land being national park, Crown land, bushland, water catchment or rural land) there are limited formalised/official walking trails which are well signposted, maintained and promoted. While there are a number of "unofficial" trails, these are not always well maintained for a variety of reasons.

There is a strong desire to formalise a number of trails to offer half and day walks, as well as to investigate the potential to create a multi-day guided walk, linking in with Blue Mountains Council (who also have a desire to develop a similar walk[58]). The walk, if it offers the following, could potentially be branded as a "Great Walk of Australia" (GWoA) which is a collection of signature multi-day guided walks throughout Australia:

- offer views of the Shire's best scenery;
- have tracks which are maintained to a high standard;
- offer guided and semi-self-guided tours;
- have accommodation along the walk or within close proximity to it;
- have strict environmental guidelines regarding the use of tracks and the disposal of rubbish etc.;
- have clever marketing and promotion;
- be within a national park/World Heritage Area;
- have an easy-to-medium gradient for 80% of its length and a hard gradient for the balance of the walk;
- accommodate a guided group of between 10 – 20 participants;
- visit sites of significance not otherwise accessible;
- avoid roads/highways;
- take no longer than 3 – 6 days (2 - 5 nights maximum) to complete; and
- be developed in close collaboration with Traditional Owners.

[58] Based on discussions with Council and the Blue Mountains' DMP.

Research that was undertaken for the development of great walk experiences in Tasmania[59] found:

- commercial bushwalkers[60] tend to prefer 3-4-day walks, while independent bushwalkers[61] prefer 5 to 6-day walks;
- a high portion of commercial bushwalkers have very high incomes ($150k+);
- commercial bushwalkers like creature comforts: no heavy rucksacks and good quality tent, cabin or lodge accommodation;
- commercial bushwalkers like to combine "other experiences" with their bushwalk: eco-boat cruises, helicopter rides and spa treatments etc;
- commercial bushwalkers avoid large groups, opting for the intimacy of smaller groups; and
- independent bushwalkers place a premium on experiencing the wilderness, a sense of escape, solitude and a challenge while commercial bushwalkers place a premium on experiencing wildlife and nature with creature comforts.

While there is a GWoA multi-day trek listed for Blue Mountains National Park (called the Blue Mountains Grand Traverse), this trek does not offer a fully immersive experience as walkers have to stay in accommodation situated in the villages of the Blue Mountains rather than being able to stay in chalets/lodges within or in very close proximity to the national park. Following the best practice NZ, European and North American models, a true great walk should allow visitors to be entirely immersed in the natural environment, rather than having to re-enter populated areas each night.

The next step in the development of a high yield great walk for Wollondilly and the Blue Mountains is the preparation of a feasibility study to:

- initiate discussions with Blue Mountains Council to understand the potential for collaboration;
- identify potential trails which could offer the preferred great walk trail;
- undertake discussions with Water NSW and NPWS as to how access to Yerranderie from the western part of the Shire can be improved/opened (if this route is required for the walk);
- identify qualitative (e.g. growing awareness of the environment and the historic and cultural importance of the Blue Mountains World Heritage Area) and quantitative (e.g. employment growth and direct and indirect economic benefits etc.) benefits; and
- test the commercial viability of the concept via actual visitor numbers needed to do it, package price offered and supporting infrastructure required.

[59] Based on confidential data provided by industry operators
[60] Includes those undertaking a guided multi-day experience
[61] Includes those not undertaking a guided experience

6.1.8. Higher-end eco-lodge(s) with associated wellness centre/spa

With Wollondilly's desire to attract a higher yielding visitor market (focusing of value over volume), the opportunity may exist to develop a string of high-quality boutique eco-lodges (Figure 27), noting the size of the Shire and the many high-quality locations which could accommodate such a facility. This could offer a clear point of difference for the Shire, particularly considering the future development of Western Sydney Airport and that the majority of surrounding LGAs are focused on developing large scale hotel-style accommodation product.

The lodge(s) could:

- offer a lodge as well as a glamping component;
- offer a wellness centre which includes a high-quality day spa and yoga studio;
- offer medical recuperation facilities (noting the significant focus on the South West as a major health precinct);
- offer a high-quality dining experience which can be used by guests as well as casual diners; and
- potentially be positioned at the staging post for major walkways and potential for the great walk suggested in this DMP (see section 6.1.7).

Figure 27: Examples of high-quality eco lodges[62]

It is important that an international brand is introduced to ensure that marketing networks can be targeted quickly and efficiently rather than having to wait some time for this to occur. An international operator also brings high levels of service standards which are essential. Every effort, however, should be made to encourage the employment of locals provided they have had the benefit of the training programs (i.e. intense education programs and on-the-job training).

For Wollondilly to grow its visitor economy and particularly visitor yield, the move must be away from traditional forms of motels and pubs toward accommodation which adds value to the natural landscape and the more boutique scale of development befitting of the LGA.

[62] Maya Ubud, Bali; &Beyond Phinda Rock Lodge, South Africa

6.1.9. Indigenous tours

We understand there while there is a desire to introduce an Aboriginal tour product within the Shire, this needs to be done in close consultation with Traditional Owners. The potential may exist to investigate the introduction of these tours to sites of significance and offering a bush tucker component over the medium term.

In the short term, it is recommended that Council continue to foster discussions regarding this opportunity with Traditional Owners.

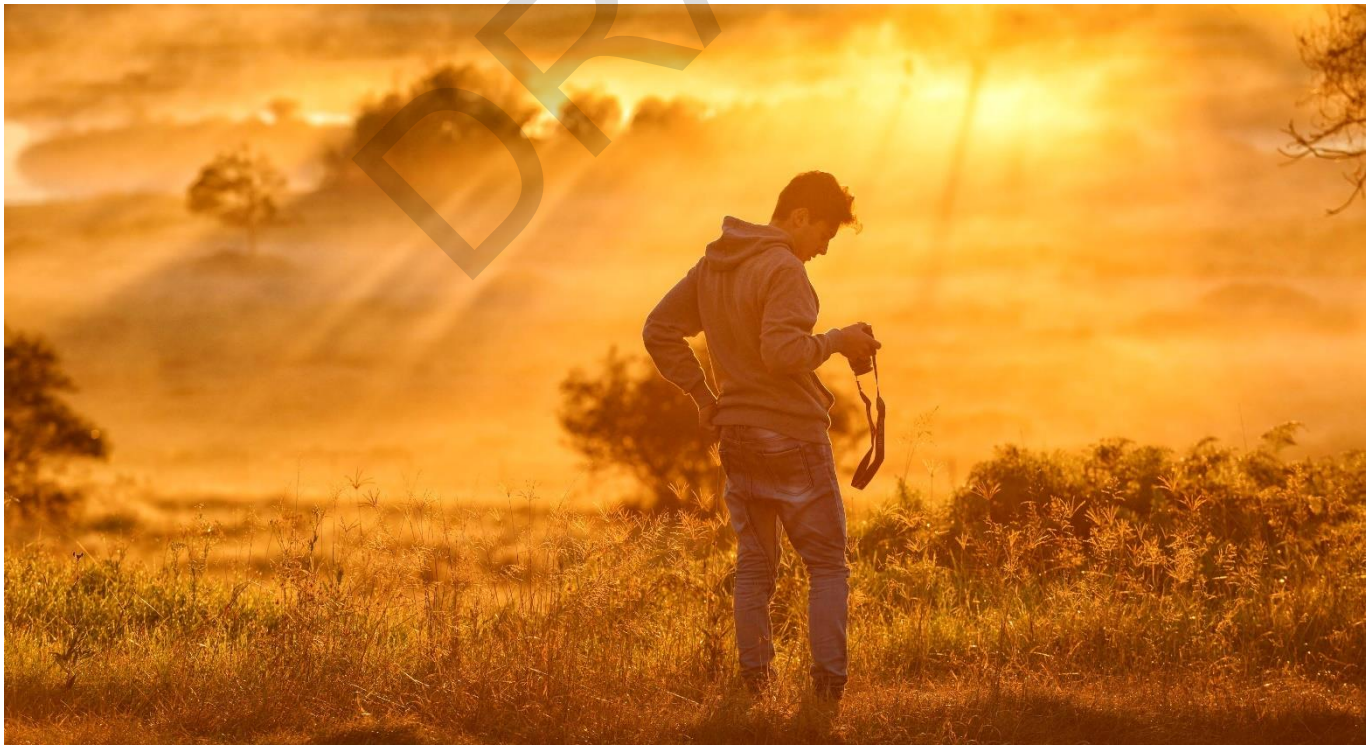
6.1.10. Nature photography experiences and tours

The Shire is very scenically attractive and has a broad diversity of flora and fauna. The potential exists to capitalise on this and promote the Shire as a destination for photography. This could include:

- group photography tours for beginners to advanced photographers;
- setting up a trail of photography booths/points throughout the Shire;
- organising photography tours focused on niche markets, including the high yielding "twitcher" or bird watching market; and
- extending tours to painting workshops and targeting groups such as the friends of the Art Gallery of NSW (which has 30,000 members[63]).

While promoting the Shire as a place for independent photography by the FIT (free independent traveller) market should also be considered, far greater economic benefit is likely to be generated for the Shire if packaged photography tours can be established.

Figure 28: Photographer in Burragorang (near Warragamba Dam)



[63] https://www.artgallery.nsw.gov.au/members/

6.1.11. Kayaking and trekking at Thirlmere Lakes

Thirlmere Lakes National Park offers five freshwater lakes (Lake Gandangarra, Lake Werri Berri, Lake Couridjah, Lake Baraba and Lake Nerrigoran) and is a World Heritage Site. Current visitor interaction with the site is limited primarily to passive walking and picnicking experiences.

While NPWS has indicated they are keen to expand access and appropriate use of the site, we understand they have limited budgets and a plethora of sites they are keen to focus on. Over the medium to longer term, we consider the opportunity may exist to investigate working with NPWS to offer:

- formalised trekking experiences, with the potential for guided tours;
- non-motorised on-lake activities such as kayaking and paddle boarding; and
- guided birdwatching tours with appropriate birdwatching infrastructure (such as bird watching hides).

6.1.12. Rail trail from Thirlmere to Mittagong

Discussions with the NSW Rail Museum indicated the potential to leverage off the existing (and predominantly unused) rail corridor from Thirlmere to Mittagong and introduce a heritage rail trail which offers a composite rail and riding experience. This could include catching a train down to Mittagong and then cycling back down to Thirlmere as a guided or self-guided experience.

A feasibility study would need to be undertaken, potentially in conjunction with Wingecarribee Shire (as we understand they are interested in this concept) to determine:

- potential demand for the rail trail and willingness to pay;
- the cost of extending the rail line from Buxton to Mittagong[64] as well as any other capital costs involved; and
- whether any grant funding programs exist which could assist in the development of the trail.

This could be potentially a public-private partnership with a third party. The feasibility study would need to include all stakeholders.

6.1.13. Recreational attraction(s) for locals and visitors

Development of a recreational attraction e.g. zip line, treetop canopy walkway, Sky Zone-style centre, luge experience or an outdoor adventure playground. This would also provide an activity attraction for locals as well as an all-weather and evening attraction.

The Shire currently lacks "things to do" for local families as well as visitors as well as all-weather and evening attractions. The potential exists to investigate introducing a cluster of pay-for recreational attractions (Figure 29).

The cluster could include any of the following, offered as examples only;

- a treetop canopy walkway and high ropes adventure course;
- a Sky Zone-style trampoline and recreation centre (an indoor, all-weather and evening attraction);
- a luge experience;
- a major outdoor adventure playground including significant slides, zorbing etc.

[64] We note that from Thirlmere to Buxton a rail line exists, from Buxton to Hill Top a trac exists but it is for light rail only and from Hill Top to Mittagong there is a corridor but no track.

The development of these experiences would not only encourage people to stay longer and generate more demand for overnight stays but would also support Council's desire to provide activities for residents, employment generation, healthy lifestyles and new business development.

Figure 29: Examples of Recreational Attractions[65]

6.1.14. Revitalisation of town centres

While Wollondilly has a stunning natural environment, its built environment requires some enhancement. While Council already has a well-developed program to enhance and revitalise townscapes, there is a need to ensure there is focus on tourism enhancements, including:

- gateway signage and wayfinding;
- encouraging retailers to open for longer periods, particularly at weekends;
- outdoor seating and congregation areas and enhanced outdoor civic centre spaces;
- visual enhancements including theming (via a "paint the town" competition to encourage retail and other buildings to be refreshed and painted in an agreed palette of colours which adds to the town or villages uniqueness) and street lighting; and
- addressing car parking constraints (i.e. bus, RV and large vehicle parking bays).

[65] Valley of the Giants, WA (NationalParkTraveller.com.au); South Yundernup, Perth, NZ (Kids-Around-Perth.com); Thunderbird Park, Queensland (Discovertambourine.com.au); Sky Zone Trampoline Parks (Skyzone.com.au).

6.1.15. Signage (directional and interpretive) strategy

The lack of signage (interpretive and directional) was noted by many as a challenge for the Shire. This includes gateway entry signage to create a sense of entrance into the Shire as well as signage to guide visitors to points of interest throughout Wollondilly.

There is a need for a signage strategy to be developed to ensure a consistent approach to signage is applied throughout Wollondilly and which can, in turn, support drive circuits and other trails across the LGA.

6.1.16. Small-scale aviation business hub

With the need for Camden Airport to close in the lead up to Western Sydney Airport's development and the ongoing congestion at Bankstown Airport, the potential exists to investigate expanding airfield facilities in Wollondilly, including a potential small-scale business hub.

It is understood there are a number of existing airfields in the Shire, however, a preliminary assessment indicates that The Oaks Airfield may offer the greatest potential. A feasibility study/business case would need to be undertaken to investigate:

- demand for such a facility;
- the types of activities which could take place (including recreation-related flying activities as well as business related);
- the most ideal location within the Shire;
- the capital costs required;
- a financial model for the facility; and
- potential Civil Aviation Safety Authority restrictions in the area.

6.1.17. UNESCO World Heritage gateway signage

Australia has 19 UNESCO World Heritage Areas[66]. There is a need to highlight to visitors when they are entering the "Greater Blue Mountains Area - a UNESCO World Heritage Site". Signage should promote the uniqueness of the area, possibly highlighting attributes such as the fact that the Greater Blue Mountains Area is ten times older than the Grand Canyon and that it covers one million hectares etc.

There has previously been a desire to develop gateway signage, however, there are challenges in achieving sign off from State Government agencies to allow for this. If Council is unable to place signage on roads, it should consider placing gateway signage at Council-owned locations, where possible.

[66] http://www.australia.com/en/articles/world-heritage-sites-australia.html and http://whc.unesco.org/en/statesparties/au

Figure 30: Examples of Destination Gateway Signage[67]

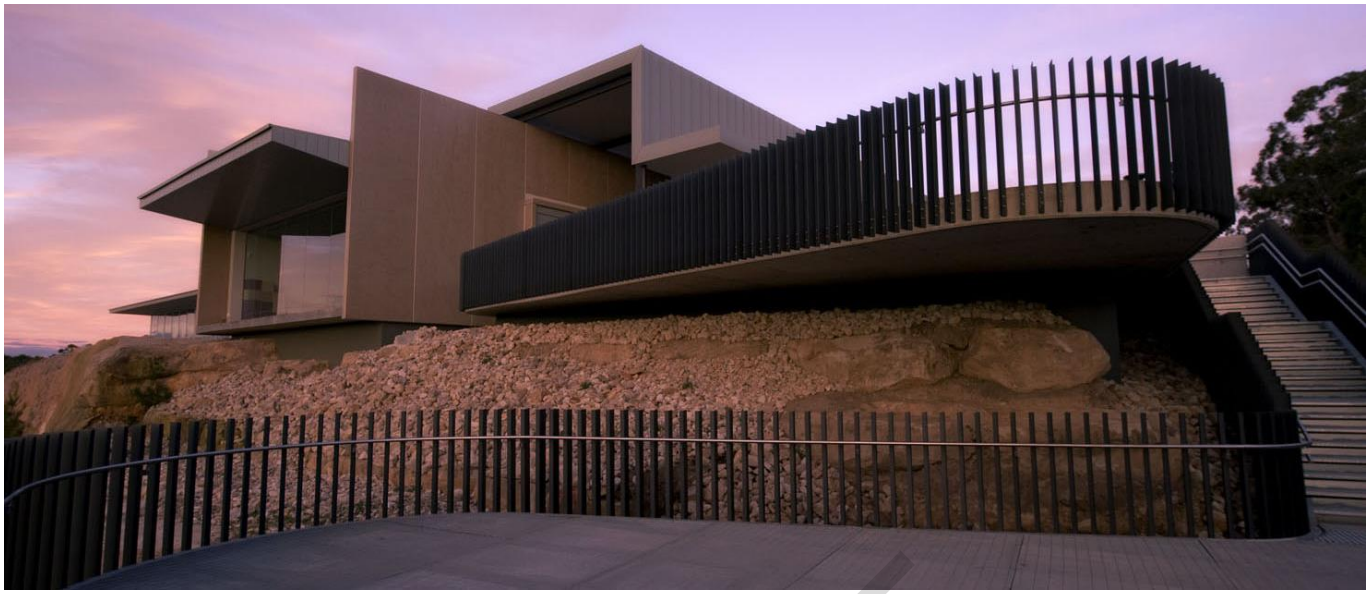
6.1.18. Warragamba Dam Visitor Centre as a function venue

Water NSW has recently redeveloped the Warragamba Dam Visitor Centre (Figure 31) which includes an interpretive component outlining the history and significance of the Dam and Sydney's water catchment as well as an education room/facility.

In addition to the potential to increase the profile of the Centre as a visitor attraction, the opportunity exists to discuss the potential with Water NSW to profile the Centre as a function venue for special events.

[67] UStravelia.com; greaksmokies.com; unknown; Petranighttours.com; Pulte.com; and The City of Temecula

Figure 31: The new Warragamba Dam Visitor Centre[68]



6.1.19. Wollondilly planned infrastructure projects

In addition to the infrastructure projects outlined in the proceeding sections, there are a number of other planned projects that Council is pursuing which, while not being direct tourism projects, have a correlation to the sector. This includes the following.

- review bicycle and pedestrian connections;
- advocate for agri-business opportunities linked to the new Western Sydney Airport through the Western Sydney City Deals initiative;
- developing a wayfinding signage strategy and adoption by Council;
- developing a Shire-wide Play Strategy to support Open Space Recreation Facilities Strategy;
- delivery of the Warragamba Inclusive Play Space – All abilities playground in Warragamba;
- developing a Master Plan for Dudley Chesham Oval at The Oaks;
- continue to maintain the amenity of public spaces and facilities;
- advocate for Regional Connectivity and Infrastructure projects that benefit the Wollondilly Community in the Western Sydney City Deal initiative;
- Public Arts Strategy exhibited and then adopted by Council;
- implement the Disability Inclusion Action Plan;
- work with Destination NSW to have illuminARTe recognised as part of the Sydney Vivid Festival;
- potential development[69] of a number of masterplans including Appin Park (Wonson Oval), Old Menangle School Site and Picton Botanic Gardens; and
- implementation of a Public Toilet Strategy and associated renewal of public amenities.

[68] Water NSW
[69] No funding is currently allocated for these masterplans.

6.2. Activation Area 2: Destination Awareness & Visitor Services

6.2.1. Destination brand for Wollondilly

New destination brand for Wollondilly to define "what" Wollondilly is and what is the unique selling proposition.

The consultation for this DMP focused on the lack of recognition (by those outside of the Shire) of where Wollondilly is situated and the lack of a clear destination brand. To elevate the tourism profile of the Shire, consideration needs to be given to:

- developing a destination brand for the LGA;
- recognising that for many people, merely pronouncing Wollondilly (let alone spelling it) is tricky (particularly noting that one of the reasons the Southern Highlands created its brand was to move away from Wingecarribee as a brand for similar reasons);
- defining the brand and the Shire's position based on the LGA's unique geographic position between Sydney metro and regional-fringe Sydney; and
- using the brand to help market the LGA as a highly attractive location for tourism and liveability and making sure that all collateral (public and private) uses the brand and actively promotes it.

It is important to note, however, that the development of a brand is not a panacea; it must be supported by product and infrastructure development initiatives as recommended in this DMP. Visitors do not travel to destinations simply because of a nice brand, they travel for experiences and attractions.

6.2.2. Digital media for Wollondilly's trails

Wollondilly trails digital media (possibly a mobile-friendly website) to provide reliable, up to date information on Council and NPWS managed walking and cycling trails throughout Wollondilly. This could be done as a joint initiative between Wollondilly, Hawkesbury and the Blue Mountains councils.

While there are a range of Council-managed and NPWS walking and cycling trails throughout Wollondilly[70] and surrounding council areas (including the Blue Mountains, Wingecarribee, Penrith and the Hawkesbury), there is a lack of easily sourced data and reliable information on these trails: how to access them, the difficulty of the trail and the conditions of the trails etc.

The potential exists to introduce a mobile-friendly website which provides residents and visitors with this information. The potential exists to develop this as a regional initiative in conjunction with Blue Mountains, Wingecarribee and Hawkesbury councils (by way of example).

Figure 32 provides images from a best practice walking trail app, Pocket Ranger, which was developed for Washington State Parks. The app provides:

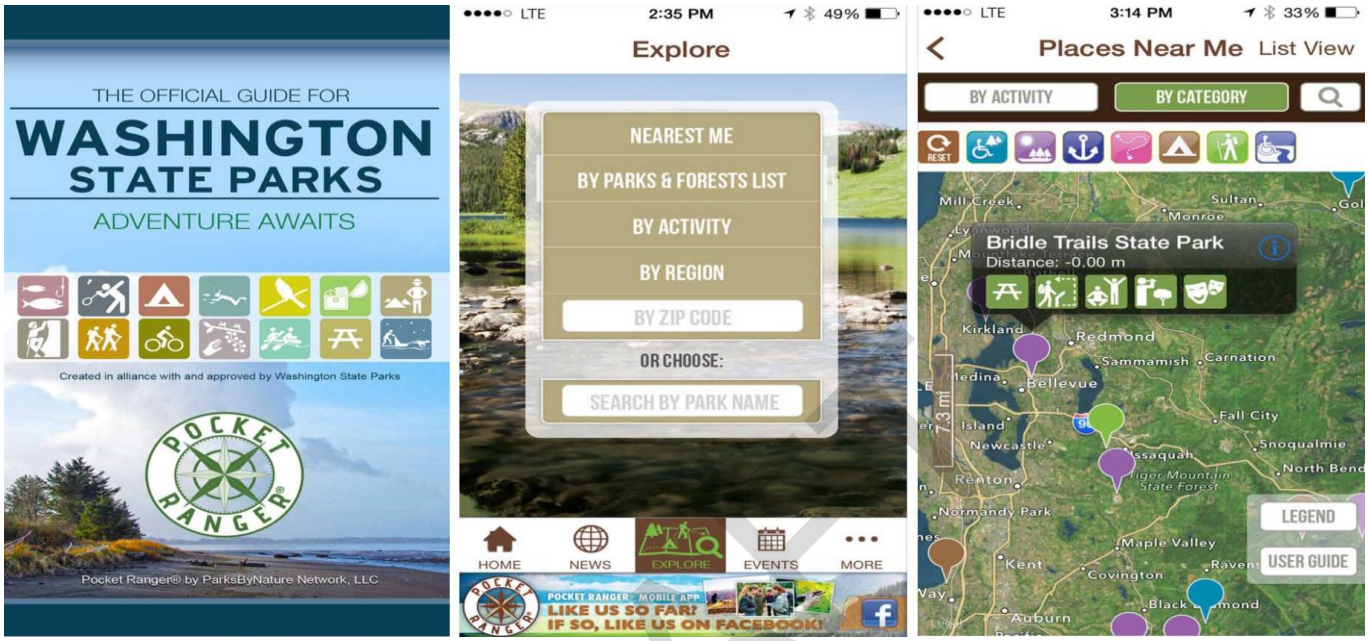
- track/trail information including mode (hiking, walking, cycling, horseback riding etc.), description, distance, accessibility and weather conditions;
- current alerts for each trail;
- photo galleries for each of the trails;
- information on events occurring throughout the Washington State Parks network;
- an alert button which, when pressed, sends for assistance; and

[70] Such as the Canyon Walk, Wedderburn Circuit Walk and walks around Thirlmere Lakes.

- links to other apps, such as Pocket Ranger Bird Feed, which is a sharing app for bird watchers.

The app offers the ability for users to make online reservations for each park/trail. By way of example, users can book camping, RV, cabin, yurt and vacation houses. The app also provides a telephone link to book other commercial activities such as tours.

Figure 32: Best Practice Walking Trail App - Pocket Ranger (Washington State Parks)



6.2.3. Growing filming and film tourism in the Shire

Picton, and the broader Wollondilly Shire, has been featured in a number of major films (such as Wolverine) as well as TV shows and commercials. Picton – specifically the town centre and rail bridge - was also recently featured by Create NSW in its promotional campaign to international film producers for potential locations.

The potential exists to leverage off this niche strength which the Shire has and further promote the Shire as a destination for filming, to develop a more proactive (rather than reactive) approach to film requests, and, as more films are shot in the area to look to develop film tours.

As the film sector relies on building relationships and having a firm understanding of its needs, it is imperative that an ongoing proactive approach is taken by Council to continue to grow the screen industry within the Shire and to continue to pick up on the significant opportunities which the sector can generate.

While the Shire has had a reputation as a film-friendly LGA[71], this relationship is one that needs to be continually nurtured. To continue to promote this, the opportunity exists to develop a Shire film brochure which details:

- the wide variety of locations which the Shire has to offer which are easily accessible and close to Sydney (including high-quality images of these locations);
- the process for applying for film permits within the Shire; and
- outlining key contacts in Council, especially those who have history and background within the film industry.

[71] Based on the films and commercials which have been filmed in the Shire

A good example of film promotion collateral is the Gold Coast. Not only do they have an official "Gold Coast Film Factsheet" and a separate "Film Location Guide" which provides a full audit of locations by location type (studio, natural, resort, city etc.) but they also have an entire website dedicated to filming in the Gold Coast and which details the City's Film Incentive Program.

Figure 33: Film Gold Coast website[72]

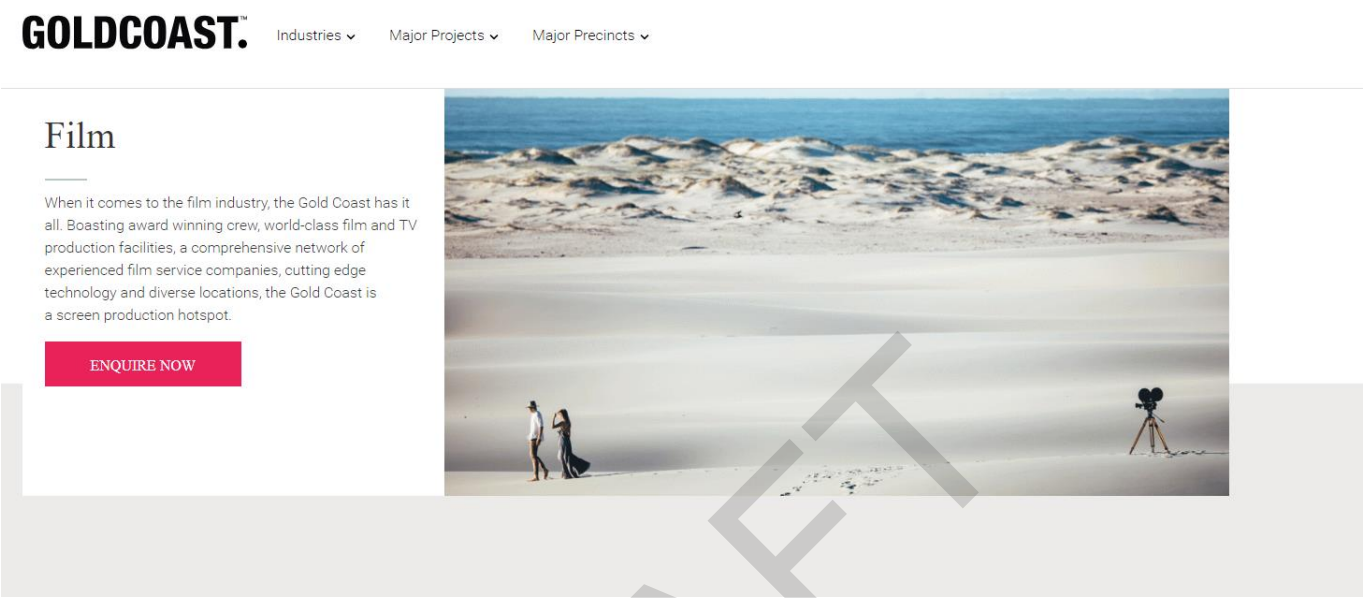
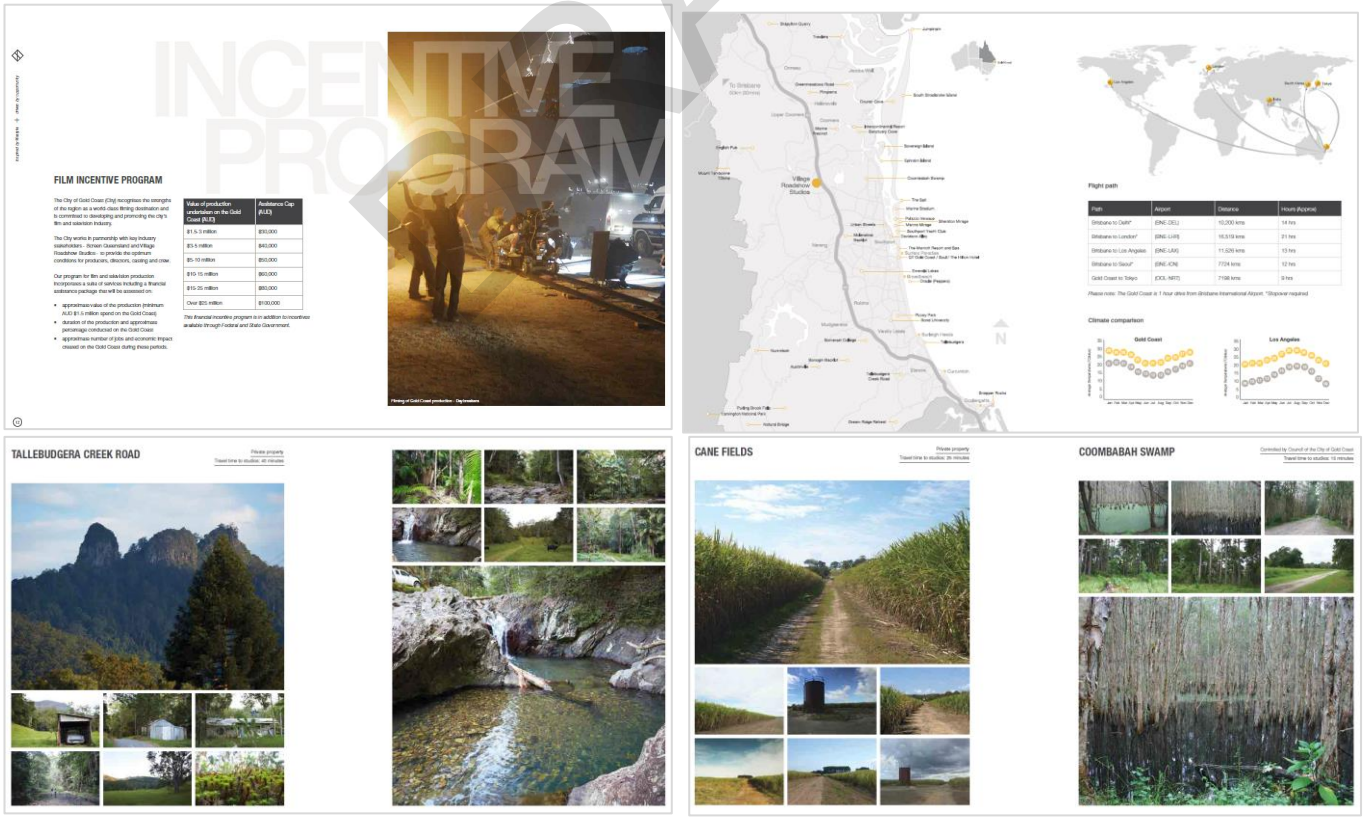


Figure 34: Film Gold Coast Location Guide (selection of pages)[73]



[72] https://wearegoldcoast.com.au/invest/film/
[73] http://wearegoldcoast.com.au/wp-content/uploads/2017/03/Gold-Coast-Film-Guide-1.pdf

6.2.4. Tourism photo library and media database

In order to promote the Shire as a tourism destination, there is a need for a high-quality media library. The media library images should feature professionally taken images of attractions and experiences available within Wollondilly which can then also be shared with the DNSW media library as currently there is a very limited selection in this database of the Shire.

The potential also exists to run a quarterly photography competition (with clear guidelines on the quality and type images which can be submitted) which locals and visitors can submit their best photos of the Shire with a chance to win a prize. These high-quality photos can then be utilised in the Shire media database.

6.2.5. Positioning Wollondilly as a niche medical tourism hub

The opportunity exists to investigate to position Wollondilly as a niche medical tourism hub. Wollondilly is well located to existing and new proposed major extensions to south west hospitals in Campbelltown and Liverpool, as well as in Penrith in the north west corridor.

The niche medical tourism hub could focus on the following.

- Recuperation accommodation and wellness facilities - as a highly attractive, relaxed and easily accessible area, Wollondilly is close enough to major teaching hospitals in South West Sydney especially, to offer high-quality recuperation facilities once inter-state and international patients are out of hospital but needing to fully recover before travelling.
- Accommodation for families caring for family/friends in hospital - this opportunity also could extend to patient's families who often travel with them for surgery and recuperation.
- The potential for aged care - The medical tourism opportunity also links well to the need for major aged care facilities in greater Sydney, as the ability to combine medical tourism recuperation facilities and aged care/convalescent facilities is compatible from staff services and management.

With a large increase in its resident population planned due to the urban development at Wilton, designing and planning for the future, is an important consideration. Coupled with medical tourism, this could spur a whole new economic sector for Wollondilly focused on health and medical tourism combined.

6.2.6. Visitor economy awareness campaign

There is insufficient understanding of the important role the visitor economy plays in Wollondilly and why it needs strong support.

There is also a lack of awareness of how the tourism dollar spreads throughout the economy.

Wollondilly's visitor economy: is valued at $57.3m (output)[74], with total direct visitor spend estimated at $95m[75]; and accounts for 270 jobs, with 210 of these being full-time positions[76].

Council should consider developing and implementing a tourism awareness campaign to show:

- how the tourism dollar disperses through the local economy (the direct and indirect impact of visitor spend);

[74] https://economy.id.com.au/wollondilly/tourism-value
[75] Direct visitor spend data for the LGA is not available. This is, therefore, based on an estimated average spend per visitor (based on visitor spend data for the greater Sydney region as per REMPLAN's methodology).
[76] https://economy.id.com.au/wollondilly/tourism-value

- what businesses benefit from tourism including cafés, retailers, service stations, bars and transport providers etc;
- how extended trading hours (even seasonally) can benefit the community;
- what the estimated value of tourism is via direct, indirect and induced spending impacts (this could be demonstrated in terms such as how many loaves of bread, cups of coffee and litres of fuel etc. are purchased by visitors on any given day: a large figure such as $95m does not provide the information needed to illustrate its impact on local businesses and their suppliers); and
- why Council/ratepayer funding is required to maximise returns to Wollondilly's community via economic, social and infrastructure benefits.

6.2.7. Visitor information services review

The nature of visitor information services is changing, driven by the strong growth of digital technology and media. The internet is the number one tool for accessing visitor information for all age groups now. The "internet age" is now being surpassed by the "mobile age", and with it, visitors' desire to access, download and upload information while on their trip is increasing.

Key findings from specific research[77] into visitor information services, and visitor information centres (VICs) specifically, highlights that:

- most VICs will continue to experience a decline in walk-in visitors as digital information improves and is used more widely across demographic groups;
- the cost to councils of delivering visitor information services through VICs is increasing, while VICs, at the same time, are experiencing a decrease in utilisation by visitors;
- most VICs struggle to have consolidated and up-to-date tourism product databases of all product available in their respective regions; and
- many VICs, especially in more rural/regional locations appear to service the local community rather than the visitor through offering community and council info, acting as a drop-in centre and a location for holding meetings.

National-based research recently released by Tourism and Events Queensland (Queensland's state tourism body) demonstrates that nationally, only **4.4%** of visitors in Australia actually use a VIC on their trip.[78] Wollondilly's VIC:

- currently captures only **0.3%** of visitation to the Shire (and, once local use – which accounts for approximately 41% of VIC usage[79] – is excluded, captures only **0.2%** of visitation) – this is well below the national average;
- furthermore, the VIC currently produces a net loss of **-$52.62** per visitor into the VIC. Again, once 'local use' of the VIC is excluded, this net loss increases to **-$89.19 per visitor**.

The vexed question, therefore, is how is the Shire servicing the other 99.97% of visitors who are visiting each year?

Council needs to undertake a comprehensive review of the VIC and visitor information services generally which takes into account current research and analyses future trends to ensure it is achieving the best ROI for visitor information services.

[77] Conducted by Stafford over the last 20 years
[78] Queensland Visitor Information Centres, Snapshot of the year ending September 2017, Tourism and Events Queensland
[79] Based on visitation data captured by the VIC over the period July 2017 – December 2017. Over this period, locals accounted for 356 visits to the VIC while visitors accounted for 505 visits. This equates to a split of 41% locals, 59% visitors.

6.3. Activation Area 3: Events Development

6.3.1. Destination events calendar for major events

While Wollondilly has a very comprehensive events calendar available on the Shire's destination website[80], it is difficult to ascertain which events are major destination events (i.e. those which draw a large number of visitors from outside the Shire) and those community events (which are primarily focused on a local market).

There is a need to develop a separate (in addition to the existing calendar) major events calendar/promotional tool which clearly demonstrates to visitors which are the Shire's "hallmark" or major events.

6.3.2. illuminARTe expansion

The illuminARTe event has been a huge success for Wollondilly and has attracted patrons from outside of the Shire as well as profiling by Destination NSW. With the event moving into its fifth year (first held in 2015), the potential exists to diversify its offer and potentially investigate alternative operational models for the event.

There is a need for a business case assessment on the future of the event, looking at:

- expanding the event to operate over multiple days;
- diversifying the offer to potentially include a ticketed long table dinner feature amongst the lights;
- moving management of the event to a professional event company (given the size and scale of the event);
- expanding the event beyond Picton to potentially other towns within the Shire; and
- linking in with Sydney's Vivid festival.

6.3.3. Sport and adventure-based tourism events

Though the LGA has limited formal sporting amenities, it may be able to grow specific school-based and niche sporting events (rather than mainstream sports) as well as adventure-based events (e.g. Spartan, ROC Race, Thumper Nats) which do not require a significant amount of built infrastructure to attract a broad visitor market of participants and viewers.

Leveraging off the region's noted strengths as well as successful major events which have been held in the region (such as the Spartan Race), the potential may exist to focus on:

- mountain biking;
- cross country running;
- events able to use permissible waterways for kayaking and canoeing;
- orienteering courses;
- equestrian events and horse trials as well as bridle paths; and
- paragliding and parachuting etc. (if a recreational aviation precinct is able to be established as per section 6.1.16).

[80] http://visitwollondilly.com.au/events/

6.3.4. Update Council's event toolkit

To grow the events sector in the Shire requires actively seeking out events and promoting to event organisers that the Shire is "open" for events. The opportunity exists for Council to update its event toolkit which can be provided to event organisers which:

- demonstrates that Council has a number of pre-approved event locations ready to go so that red tape for event organisers is minimal;
- has an overview of the pre-approved locations including their capacities, types of events they can support, the hours of operation permitted etc.;
- includes a simple summary of the events approval process as well as an overview of insurance required;
- has information on waste management required (based on the size of the event) as well as toilets;
- has a summary of applicable fees and how these are to be paid; and
- includes contact details for event management personnel at Council.

Figure 35 provides some sample pages from the Wollongong City Council Events Toolkit which is a best practice example of a proactive events promotion tool.

Figure 35: Wollongong Events Toolkit (sample pages only)[81]

MAJOR EVENTS

Looking to host an event? Wollongong's got you covered with eight pre-approved sites ready to go!

With a warm temperate climate, picturesque foreshore, and local businesses ready to work with you, Wollongong is the ideal location for your next event. Plus, Wollongong's just an hour south of Sydney Airport.

This information pack provides you with everything you need to know about choosing the right site for your event, Wollongong City Council's streamlined process, the permits required and how much it's going to cost.

With generic site plans, event notification plans and traffic management plans available, event organisers are already a step ahead in the planning process.

SITES

Our eight pre-approved event sites are: Stuart Park, Lang Park, Wollongong Foreshore, The Arts Precinct, MacCabe Park, Osborne Park, Dalton Park, and Wollongong Botanic Garden. All sites are accessible by the Free Gong Shuttle and also easily reached from Wollongong and North Wollongong Stations.

Each site comes with its own parameters including the types of events that can be hosted and the capacity of each site. We encourage you to please check site details carefully when making your selection. Changing sites during lodgement could cause significant delays in the assessment process or, in a worst case scenario, your application could be refused.

This application covers all of Wollongong City Council's requirements. However, there are cases/sites where additional approvals from other agencies are required. Ascertaining these additional permits is the sole responsibility of the event organiser.

- STUART PARK
- LANG PARK
- WOLLONGONG FORESHORE (INCLUDING THE BLUE MILE)
- THE ARTS PRECINCT
- MacCABE PARK
- OSBORNE PARK
- DALTON PARK
- WOLLONGONG BOTANIC GARDEN

[81] Available at: http://www.wollongong.nsw.gov.au/city/events/toolkit/Documents/Events%20Toolkit.PDF

THE PROCESS

1. **Read this information pack** and make sure you understand everything you need to provide. If things are missing when you submit your application, delays could result and additional fees may be incurred.
2. **Consult with Council events staff:** We strongly advise that you speak with our events team before starting your application. They will talk you through the required documentation, and provide some additional helpful hints to make your application better, and the process smoother.
3. **Prepare your documentation:** This information pack outlines what you need to consider when preparing the event application. Make sure you provide as much information as possible when filling out the forms. Any missing information could result in delays or additional fees.
4. **Lodgement:** The easiest way to apply for an event on one of our pre-approved sites is through our online lodgement portal. Simply register as a user and fill out the online application form, upload the appropriate supporting documents, pay the applicable fee/s and you're away. Note: by lodging your application you are not guaranteed to receive an event permit.

THINGS TO CONSIDER WHEN PREPARING YOUR APPLICATION

EVENT LOCATION

Council has identified eight sites which are pre-approved for a variety of events. Each site comes with its own limitations, including the types of events that can be hosted and the capacity at each site. It's very important you pay attention to this information as applying for an event permit at a site that isn't suitable for your event could cause significant delays in the assessment process of your application, or in a worst case scenario, could mean your application may be refused.

Please refer to the event information on each of the eight sites in the early part of this toolkit.

PREFERRED DATES

The application form will ask you for your preferred date, but we also require two alternate dates. With our picturesque locations and a busy schedule of events, there's a chance your preferred location and date may not be available. We'll let you know if that's the case, and also tentatively book your alternate date if available.

If your preferred date is available, we will book it and automatically continue the progression of your event application. If the alternate date is required we will wait for your confirmation before progressing your application. With seven other pre-approved sites, we may also be able to relocate your event to a different venue or site if required.

Please ensure you allow time for bump in and out, and include this in your application. This would include the time taken to return the site back to its original condition. Please note that additional fees may be payable.

EVENT NUMBERS

The larger your event, the more requirements you may have to meet, such as additional toilets, waste facilities and security. Please think carefully about your event numbers prior to lodgement and be specific as to how many people you expect to attend, both overall and at any one time.

INSURANCE

It is paramount that you have all the right insurance information ready to go. Please ensure your event has Public Liability Insurance to the value of $20 million with Wollongong City Council noted as an interested party on your policy. We will need to see a copy of your Certificate of Currency which can be uploaded at lodgement.

Ultimately it is the responsibility of the event organiser to ensure the right insurances are in place for your event - we advise you look at the following insurances in addition to the public liability insurance for the event itself:

- Public Liability Insurances of sub-contractors
- Volunteers' insurance
- Workers compensation
- Professional indemnity.

POWER

Council has power available at each event site. Use of Council's power will incur additional fees. It is important when preparing your site plan that you are aware of Council's power connection location so that you can plan your event accordingly.

Power generators can be used to service your event and are a great way to structure your event exactly how you need it.

Any generators to be used must be included on your site plan. In addition, consider residents when positioning such equipment and ensure it is properly secured.

Please see the Overview of Existing Facilities table on page 19 of this toolkit to find out what's available at each site.

6.4. Activation Area 4: Governance & Support

6.4.1. Advocating for Wollondilly in the NSW visitor economy

There is a need to ensure Council, on an ongoing basis, is advocating for Wollondilly in the NSW visitor economy. This includes attending major tourism events as well as lobbying politicians to encourage investment in Wollondilly.

6.4.2. Business development programs and upskilling

The vast majority of operators in the tourism sector in the Shire generally are micro to small operators. To grow its visitor economy and to achieve many of the recommendations outlined in this DMP, there is a need to offer upskilling and business development programs for these micro to small operators.

The types of support required are likely to include (but not be limited to):

- programs focused on social media and how to correctly utilise the various social media tools available (including what tool is best for specific types of marketing);
- assistance in storytelling and experience development;
- help in clustering and bundling experiences to make itineraries interesting and appealing;
- visibility and assistance in helping to stand out;
- networking with other businesses to understand what is in the area;
- help in participating in additional programs to develop product offering;
- understanding how to value-add to existing product;
- providing the opportunity to network along the value chain to develop relationships with other suppliers.
- training on getting listed on the ATDW to ensure their product is listed on the appropriate state government tourism websites;

- customer service upskilling; and
- programs on understanding the difference between start-up, market ready, accredited and export-ready tourism product (Figure 36).

Figure 36: Market readiness stages

6.4.3. Investment prospectus

To encourage investment in the Shire's visitor economy, there is a need to apply a proactive approach and develop an investment memorandum which it can provide to investors and developers which includes the following.

- An overview of Wollondilly as a tourism destination including its main attractions.
- Historic visitation numbers to Wollondilly, broken down by market segment.
- Forecast visitation numbers to Wollondilly.
- An audit of product currently available within Wollondilly.
- A summary of the type of product and development Council is looking to encourage, including the quality Council is looking for.
- A list of potential sites which are appropriately zoned for tourism development.

6.4.4. Separating the Tourism and Heritage Community Advisory Committee

The Shire currently has a Tourism and Heritage Community Advisory Committee. Although tourism and heritage have synergies, the strategic priorities of the industry members involved in the tourism sector and the heritage sector differ. While heritage members tend to focus on the important areas of the preservation and conservation of historical assets, tourism industry members tend to have a far more diverse focus. There is a need to separate these groups into two separate committees to ensure they each get the focus they deserve.

6.4.5. Creation of a Tourism Advisory Group

Once the committees are separated (see 6.4.4) it is recommended that the tourism component is restructured as a Tourism Advisory Group (TAG) to assist Council. This need not be a committee of Council.

The TAG needs to be representative of industry. To ensure this, and to guarantee a good composition of skills, Council should advertise for the positions via an expression of interest, requesting CVs from interested parties. A very specific set of criteria for choosing candidates should be developed to ensure that those selected are proactive and progressive members of the tourism sector.

The composition of the TAG could include the following stakeholders:

- a Council staff member(s);
- an accommodation sector representative;
- a cultural sector (but who has a tourism-focus) representative;
- an attraction/experience operator;
- an events sector representative;
- a Water NSW representative;
- a NPWS representative;
- a representative from the Shire's Chambers of Commerce;
- a representative from the investment and development community;
- a representative from DSSS; and
- a member from the LTO (local tourism organisation).

For specific projects, there should be the ability to second others if specialised skills or knowledge is needed (such as IT expertise).

Other points to consider for the TAG include the following.

- Importantly, the Chair of the TAG should be a representative from Council.
- Each non-Council member should have a maximum serving term of 2 – 3 years to ensure continuity is achieved and other tourism industry stakeholders are given the chance to be on the TAG.
- The TAG should meet 4-6 times per year and be focused on monitoring and advising the initiatives outlined in this DMP.
- Council should provide a secretariat and facilitate all TAG meetings.
- The TAG should liaise with DSSS, the Blue Mountains, Penrith and Hawkesbury (potentially via their Regional Strategic Alliance) to find synergy for joint promotions, funding opportunities and experiences etc.
- To ensure the TAG is communicating with the tourism industry generally, there is a need for regular updates via the Shire's destination website.

Importantly, the TAG is established to provide a holistic industry view to support Council and to enable Council to be well informed of industry areas of mutual support and agreement and where potential areas of disagreement may exist.

6.4.6. Tourism industry networking events

The consultation undertaken for this DMP highlighted that, currently, there is limited collaboration amongst industry operators within the tourism sector. The opportunity exists to set up quarterly industry networking events where:

- Council can provide industry with an update on the state of the sector;
- industry can discuss with Council any issues they are facing collectively as an industry (rather than focusing on issues individual operators are experiencing);
- industry can network and get to know other operators in the sector; and
- Council and industry can discuss updates and the progress of implementing the opportunities identified in this DMP.

The sessions could potentially be hosted at different businesses throughout the Shire to increase awareness of the product available.

Image: Thirlmere Lakes National Park, Lake Werri Berri, Thirlmere NSW

7. The Game Changers

7.1. The Game Changer Projects

The game changer projects (Figure 37)[82] are noted as the following:

- introduction of a major nationally branded destination holiday park;
- encourage the development of a higher-end eco-lodge(s) with an integrated wellness centre/day spa;
- investment prospectus to entice investors to invest in the Shire;
- development of a visitor economy awareness campaign to encourage the host community to be advocates for the Shire and to expand community understanding of the broad-ranging benefits generated through the visitor economy; and
- development of an overnight guided Great Walk experience, in collaboration with the Blue Mountains.

These projects are referred to as "game changers" because of their potential to have a major impact on the Shire's visitor economy through: increased visitor yield, growing visitor average length of stay, shifting visitation from day trips to overnight, the generation of new investment into the Shire as well as ensuring the community are advocates for the visitor economy.

Figure 37: The game changers for Wollondilly

[82] These were selected after presentation and discussions with Councillors, council personnel, industry operators and independent assessment by the consultant team.

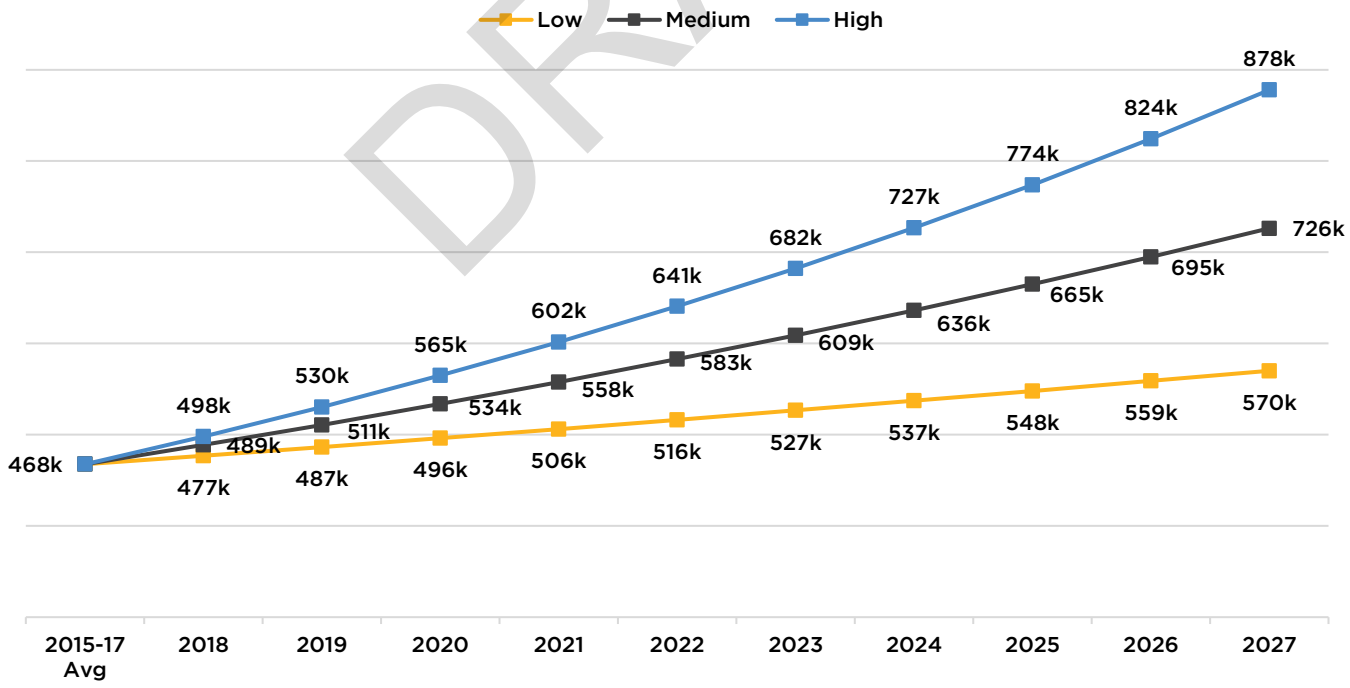
7.2. Visitor Forecasts

The implementation of the game changer initiatives (as well as a number of smaller-scale opportunities noted in this DMP) is likely to drive greater visitation to the Shire, greater visitor spend, as well as a shift in the types of visitors coming to the Shire (i.e. greater overnight visitation). The following subsections provide forecasts, based on a low, medium and high scenario.

Visitor forecasts for the Shire are based on three scenarios - low, medium and high growth. The forecasts demonstrate the following (see Figure 38).

- Under the low growth scenario, visitation is anticipated to grow by 20% (93k visitors) over a 10-year period assessed. This level of growth reflects natural growth in visitation to the Shire with minimal new product development or new marketing initiatives.
- Under the medium growth scenario, visitation is anticipated to grow from 489k visitors in 2018 to 726k visitors by 2027 – total growth of 49% (or 238k visitors). This growth is driven by the development of the overnight Great Walk (assumed operational by 2020), the destination holiday park (assumed operational by 2021) as well as a variety of smaller-scale development and marketing initiatives resulting in growth in the domestic and international overnight market to the Shire as well as the day tripper market.
- Under the high growth scenario, visitation is anticipated to grow by 76%, increasing from 498k in 2018, to 878k by 2025. This high growth scenario assumes the introduction of a higher-end eco-lodge (with associated wellness centre/spa) by 2022 as well as the overnight Great Walk and destination holiday park as per the medium scenario. This results in stronger overnight visitation to the Shire under this scenario.

Figure 38: Visitation forecasts (2018 – 2027)[83]



[83] Based on historic visitation trends and Stafford estimates for uplift based on the implementation of the catalyst projects.

Table 7 provides a detailed breakdown of visitation to the Shire by market type. It demonstrates that while under the status quo (low) scenario the types of visitors coming to the Shire is anticipated to remain constant (i.e. the day trip market will continue to dominate the visitor mix at approximately 83% of visitation), the medium and high scenarios, which include the development of the game changer projects, see an uplift in overnight visitation. This uplift is strongest in the high scenario (where domestic overnight visitation increases from comprising 16% of total visitation to 26% by 2025) as it includes the development of the higher-end eco-lodge with a wellness centre.

Table 7: Visitor split forecasts (2018-2027)[84]

	Current	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
Low - Status Quo											
Visitor Split	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**
International %	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Domestic O/night %	16%	16%	16%	16%	16%	16%	16%	16%	16%	16%	16%
Domestic Day %	83%	83%	83%	83%	83%	83%	83%	83%	83%	83%	83%
Total Visitors (Low)	**468k**	**477k**	**487k**	**496k**	**506k**	**516k**	**527k**	**537k**	**548k**	**559k**	**570k**
International #	3.0k	3.1k	3.1k	3.2k	3.3k	3.3k	3.4k	3.5k	3.5k	3.6k	3.7k
Domestic O/night #	76k	77k	79k	80k	82k	84k	85k	87k	89k	90k	92k
Domestic Day #	389k	397k	405k	413k	421k	429k	438k	447k	456k	465k	474k
Medium				*	**						
Visitor Split	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**
International %	1%	2%	2%	2.5%	2.5%	2.5%	2.5%	2.5%	2.5%	2.5%	2.5%
Domestic O/night %	16%	17%	18%	19%	21%	21%	22%	22%	23%	23%	23%
Domestic Day %	83%	81%	80%	79%	77%	77%	76%	76%	75%	75%	75%
Total Visitors (Medium)	**468k**	**489k**	**511k**	**534k**	**558k**	**583k**	**609k**	**636k**	**665k**	**695k**	**726k**
International #	3.0k	9.8k	10k	13k	14k	15k	15k	16k	17k	17k	18k
Domestic O/night #	76k	83k	92k	101k	117k	122k	134k	140k	153k	160k	167k
Domestic Day #	389k	396k	409k	419k	427k	446k	460k	481k	495k	518k	541k
High				*	**	***					
Visitor Split	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**
International %	1%	2%	2%	2.5%	2.5%	2.5%	2.5%	2.5%	2.5%	2.5%	2.5%
Domestic O/night %	16%	17%	18%	19%	22%	24%	24%	25%	26%	26%	26%
Domestic Day %	83%	81%	80%	79%	76%	74%	74%	73%	72%	72%	72%
Total Visitors (High)	**468k**	**498k**	**530k**	**565k**	**602k**	**641k**	**682k**	**727k**	**774k**	**824k**	**878k**
International #	3.0k	10.0k	11k	14k	15k	16k	17k	18k	19k	21k	22k
Domestic O/night #	76k	85k	95k	107k	132k	154k	164k	182k	201k	214k	228k
Domestic Day #	389k	403k	424k	443k	454k	471k	502k	527k	553k	589k	628k

* Great Walk experience commences
** Destination holiday park opens
*** Higher-end eco-lodge with wellness centre opens
Note: all subject to LEP, statutory requirements and approvals.

[84] Based on historic visitation trends and Stafford estimates for uplift based on the implementation of the catalyst projects.

Image: Thomas the Tank Engine, NSW Rail Museum, Thirlmere NSW

8. Implementation Plan

The following provides the Implementation Action Plan to assist Council and industry in delivering the various initiatives identified in this DMP. Importantly, it highlights specific actions, the various tasks required, the primary organisation responsible (which may include a group of agencies), an indicative time frame, an estimate only of the budget required (where possible) and a series of key performance indicators. It is important to note that the budget estimates are purely indicative to assist Council in allocating a level of resource to deliver the specific action identified and where required, to determine if funding support from NSW State Government is required.

Table 8: Action Plan – The Game Changers

Action	Tasks	Responsibility	Timeframe	Budget Estimate	KPIs
Destination holiday park and servicing centre	▪ Engage consultant with expertise in destination holiday parks to undertake a feasibility study investigating the potential for a holiday park in the Shire (including potential sites, land ownership, financial viability) ▪ If proven viable, work with a consultant to identify and engage with potential major destination holiday park operators to identify a preferred operator	Council	2019-2020	$10k-$12k for feasibility assessment	▪ To engage consultant by 31 March 2019 ▪ For feasibility to be completed by 30 June 2019 ▪ If feasibility demonstrates viability, liaise with the NSW Caravan and Camping Industry Association to determine potential investors and operators by 30 October 2019. ▪ To liaise with property owners (assuming Council land is unavailable) and to ensure that operators/investors are linked to property owners by 30 November 2019. ▪ To actively pursue a new destination holiday park to commence development by no later than December 2020.
Great walk experience in collaboration with the Blue Mountains	▪ To identify a number of routes to allow for a great walk overnight walking experience through the world heritage national parks and other reserve lands which exist in the Shire.	Council, BMCC, NSW National Parks and other major landowners	2018-2020	$20k for feasibility assessment	▪ To work with local industry and national parks to identify possible overnight walking trails by 30 June 2019. ▪ To liaise with other State Government agencies (Water NSW and others) by 30 June 2019. ▪ To assess viability for a two-day (one night) and a three-day (2 nights) series of walks by 30 December 2019. ▪ Assuming viability, develop a proposal for interested, professional parties to develop a great walk experience which can either start or end in Wollondilly by 30 June 2020.
Higher-end eco-lodge(s) with associated wellness centre/spa	▪ To identify sites for higher quality eco-lodges.	Council and industry	2018-2020	$5k to identify potential sites and liaise with local landowners	▪ To work with local property specialists to identify potential sites for a higher end eco-lodge by 30 March 2019. ▪ To liaise with local landowners on the level of interest to sell or lease land by 30 June 2019. ▪ To work with development companies and investors with experience in higher end eco-lodges, to link landowners and investors by 30 December 2019. ▪ To aim to have a development application in front of Council no later than 30 December 2020.

Action	Tasks	Responsibility	Timeframe	Budget Estimate	KPIs
Investment Prospectus	▪ To create a succinct quality document which highlights the various investment opportunities and to use this to market tourism development potential for Wollondilly.	Council	2018-2019	$20k for the investment prospectus	▪ To identify a professional advisory firm to develop a draft investment prospectus by 30 June 2019. ▪ To review and assess any changes by 30 September 2019. ▪ To publish the investment prospectus and provide it online by 30 December 2019. ▪ To facilitate a tourism development investment forum in Wollondilly by 30 June 2020 to further support new investment
Visitor economy awareness campaign	▪ To raise awareness through a publicity campaign within Wollondilly, so all members of the community better understand the benefits and opportunities.	Council	2018-2019	$15k for the creation of awareness campaign	▪ To engage an appropriate firm to develop the metrics to explain how the visitor dollar filters through the local economy by 30 June 2019. ▪ To develop an online and print media awareness program throughout Wollondilly by 30 December 2019. ▪ To assess the level of wider community interest in new forms of tourism development including various events by 30 June 2020.

Table 9:Action Plan - Activation Area 1 - Product & Infrastructure Development

Action	Tasks	Responsibility	Timeframe	Budget Estimate	KPIs
Diversifying the NSW Rail Museum experience	▪ To expand opportunities including the potential for more events and a rail trail experience (rail one way and cycle back).	NSW Rail Museum, Council and industry	2019-2021	$5k for event promotion including online promotion and marketing collateral	▪ To work with the Thirlmere Heritage Railway Museum to identify new events and experiences by December 2019 ▪ To assess the potential for a rail/cycle product from Thirlmere to Mittagong with rail up and cycle back options by June 2020 ▪ If proven viable, market the rail/cycle experience by December 2020 ▪ To reassess heritage rall events and their economic benefits annually and to expand the product mix on an ongoing basis
Food tourism strategy	▪ To develop a working group to guide the development of a food tourism strategy and food tourism product to the Shire	Council and TAG	2019-2021	$20k (food tourism strategy)	▪ To develop a working group to assess food tourism opportunities including cooking schools, farmgate trails and paddock to plate dining experiences etc. by 30 June 2019. ▪ To develop a succinct tourism food tourism strategy to build opportunities in food tourism throughout the Shire by 30 December 2019. ▪ To facilitate at least one new food tourism product opportunity (potentially a pop-up or pilot event etc.) by 30 December 2020. ▪ To develop marketing collateral which supports visitation to various food tourism specific initiatives within the Shire by 30 June 2021.

Action	Tasks	Responsibility	Timeframe	Budget Estimate	KPIs
Function/conference centre	▪ To develop and enhance a function and conference venue, either using existing facilities or the creation of a new one.	Council and TAG	2019-2022	$25k for a feasibility study	▪ To undertake a feasibility study on the size, scale and potential venues (existing or new) by 30 December 2019. ▪ To market the potential to operators, developers and investors by 30 June 2020. ▪ To aim to obtain a preferred expression of interest for a function and conference centre by 30 December 2021.
Indigenous tours	▪ To work with the local indigenous community to develop specific cultural tour and other product opportunities.	Council, DSSS, DNSW and the indigenous community	2019-2021	$5k per day tour is run (with a group of approximately 60 students)	▪ To facilitate meetings with the local indigenous community, to assess interest in a variety of indigenous tours etc., particularly to sites within open space, reserve and park areas by 30 October 2020. ▪ If viable, to work with all interested parties including landowners to create the series of indigenous trails or related experiences by 30 October 2021. ▪ To develop a series of marketing collateral to promote indigenous cultural experiences in the Shire by 30 December 2022.
Nature photography experiences and tours	▪ To develop a series of nature/eco-based product opportunities.	Council and TAG and DSSS	2019-2021	$5k for promotion	▪ To facilitate a workshop with key industry players and other stakeholders to determine the potential for various nature photography tours, by 30 June 2019. ▪ If viable, to work with local businesses to create tour options (walking tours to see specific natural features, wildlife etc.) by 30 December 2019. ▪ To develop marketing collateral to promote a series of photography experiences and related self-guided tours as well as guided experiences by 30 December 2020.
Kayaking and trekking at Thirlmere Lakes	▪ To assess the potential for nature-based experiences on and around Thirlmere Lakes.	Council and TAG and NPWS	2019-2021	$5k for feasibility and $10k for marketing collateral	▪ To facilitate an industry and broader stakeholder workshop to determine the potential for various on-water as well as trekking experiences around Thirlmere Lakes by 30 December 2019. ▪ If considered viable, to assess particular product development opportunities, either being self-guided or through a commercial operator by 30 December 2020. ▪ To develop marketing collateral to promote Thirlmere Lakes for specific tour experience driven by industry by 30 June 2021.
Recreational attraction(s) for locals and visitors	▪ To develop additional sports-based recreational attractions, particularly for the local community, including sports-based venues.	Council and sporting clubs	2019-2021	$150k (from infrastructure budget)	▪ To work with local sports groups to identify additional sporting and recreational facilities to support the local community and variety of sports-based events by 30 December 2019. ▪ To assess the potential for additional sports-based events to be held within the Shire by 30 June 2020. ▪ If viable, to facilitate at least one new sporting event (school-based or wider) by 30 December 2021.

Action	Tasks	Responsibility	Timeframe	Budget Estimate	KPIs
Revitalisation of town centres	▪ To work with retailers and other members of the business community to revitalise various towns within the Shire.	Council, local retailers and other businesses	2019-2021	$5k for grant funding application for town centre revitalisation	▪ To hold a series of forums in each town with local businesses to develop initiatives for town revitalisation by 30 December 2019. ▪ To develop a priority list of revitalisation strategies, particularly aimed at growing the visitor economy for each town by 30 December 2020. ▪ To apply for various government (State and Federal) grants to support town centre revitalisation development by 30 June 2021.
Signage (directional and interpretive) strategy	▪ To develop a signage strategy to encourage people to travel around the Shire and to stop and visit sites.	Council and TAG	2019-2021	$20k for strategy For implementation: approximately $500 per smaller reskinned sign; $1500 per larger reskinned sign; and $3k per new sign	▪ To undertake a signage audit of current signage, both directional and interpretive, by 30 June 2020. ▪ To determine where new and improved signage needs to be introduced by 30 December 2020. ▪ To develop a signage strategy with a prioritisation of both online and on road signage by 30 June 2021. ▪ To seek matching funding from government by 30 March 2022. ▪ To develop a signage guide instructing operators how they can apply for signage, the criteria they need to fulfil and the assistance in programs available by 30 June 2022.
Small-scale aviation business hub	▪ To identify a preferred aviation hub and encourage light aircraft support and activity. ▪ Engage specialist in aviation hubs to perform a feasibility assessment	Council and industry stakeholders	2020-2022	$15k for feasibility assessment	▪ Engage specialist to undertake a feasibility for expanding a preferred airfield site as an aviation business park for a variety of light aircraft support, including training, skydiving and other recreational pursuits by 30 January 2020. ▪ The specialist should work with industry to determine a preferred airfield noting the consolidation of sites within south west Sydney and the need for additional capacity. ▪ Feasibility to be completed by 30 June 2020 ▪ If proven viable, to work with key stakeholders to identify funding mechanisms for activating an aviation business hub by 30 December 2022.
UNESCO World Heritage gateway signage	▪ To identify potential for appropriate gateway signage to raise awareness in profile.	Council and NPWS	2020-2023	$120k ($20k per sign - 6 signs in total)	▪ To liaise with NPWS to determine the possibility for appropriate World Heritage gateway signage by 30 December 2020. ▪ To assess global World Heritage gateway signage and the options for Wollondilly, specifically, by 30 December 2021. ▪ To assess a priority list of appropriate gateway signage with the support of NPWS and to advocate for this by 30 December 2022.

Action	Tasks	Responsibility	Timeframe	Budget Estimate	KPIs
Warragamba Dam Visitor Centre as a function venue	▪ To encourage the expansion of the facilities as a stronger function venue for the Shire.	Water NSW, Council and industry	2020-2023	$2k for marketing and incorporating information into the destination website	▪ To liaise with Water NSW to determine their desire to expand function activity at the Warragamba Dam Visitor Centre by 30 December 2020. ▪ If receptive, to identify a marketing program to encourage the use of the facility for a range of function activity by 30 December 2021. ▪ To market the function venue as part of Wollondilly collateral by 30 December 2022.
Wollondilly planned infrastructure projects	▪ To develop a priority list of infrastructure projects which support the visitor economy.	Council	2019-2023	$250k for various infrastructure projects[85]	▪ To assess the potential for improved signage/wayfinding, public toilets, car parking and other supporting infrastructure, particularly, to encourage the visitor economy by 30 December 2019. ▪ To develop a program for prioritising projects and sourcing appropriate funding by 30 June 2020. ▪ To gain support from various State Government agencies to support infrastructure development where grant funding may be appropriate by 30 June 2021. ▪ To implement improved infrastructure support on a staged basis once funding is secure, commencing by 30 June 2023.

Table 10: Action Plan - Activation Area 2 - Destination Awareness & Visitor Services

Action	Tasks	Responsibility	Timeframe	Budget Estimate	KPIs
Destination brand for Wollondilly	▪ To address the lack of awareness of Wollondilly as a visitor destination.	Council, DNSW and DSSS	2021-2022	$20k for brand development $30k for marketing	▪ To undertake research into current brand awareness and potential opportunities by 30 June 2021. ▪ To engage a suitably qualified destination brand development company to work with the research already developed and to create a brand development series of options by 30 December 2021. ▪ To work closely with industry and the community to gain support for the destination brand by 30 June 2022. ▪ To roll out appropriate collateral by 30 December 2022.

[85] We understand Council has allocated $250k for various infrastructure projects. Funding for any other projects would come from Section 94 Contributions.

Action	Tasks	Responsibility	Timeframe	Budget Estimate	KPIs
Digital media for Wollondilly's trails	▪ To improve online collateral and information for various Wollondilly trail experiences which already exist.	Council and TAG	2019-2022	$10k plus the addition of a part-time staff member to manage the digital marketing of Wollondilly (across a range of projects as outlined in this DMP)	▪ To determine the marketability of existing trails and the potential for expansion by 30 December 2019. ▪ To create a digital platform to support self-guided and guided trail experiences by 30 December 2020. ▪ To introduce marketing collateral through digital online media only by 30 December 2021.
Grow filming and film tourism in the Shire	▪ To raise the profile of the Shire as a destination for film and advertising shoots.	Council and TAG in tandem with Screen Australia	2019-2021	$5k (including $2k for printing and $3k for design work)	▪ To liaise with Screen Australia to determine location opportunities and access requirements by 30 December 2019. ▪ To develop a film location guide for Wollondilly to distribute to relevant advertising and film production groups, including to Screen Australia by 30 June 2020. ▪ To promote the location of film shoots, etc. within the Shire as part of marketing collateral online by 30 December 2021.
Tourism database	▪ To create a robust database of tourism product and update this annually.	Council and TAG	2019-2021	$5k p/a for part-time digital staff (tourism digital marketing) to focus on this as a special ongoing project	▪ To establish an online database of product with industry responsibility for updating information and forwarding to Council by 30 December 2019. ▪ To work with operators to ensure they are listed in the ATDW on an ongoing basis. ▪ To review the database quarterly and to update on an ongoing basis. ▪ To identify the potential for industry to take over the tourism database by 30 December 2020.
Positioning Wollondilly as a medical tourism recovery hub	▪ To improve the destination positioning of Wollondilly within greater Sydney and the southwest region specifically.	Council and the DSSS	2019-2021	$5k for a position paper on activating the opportunity	▪ To liaise with major health sector organisations for the positioning of Wollondilly as a location for rest and replenishment as part of medical tourism by 30 June 2020. ▪ To identify opportunities to link into major hospital expansion at Campbelltown and Liverpool Hospitals for Wollondilly to offer a variety of low impact medical support, particularly for families supporting patients by 30 June 2020. ▪ To assess the demand and potential for niche medical facilities in Wollondilly, specifically by 30 December 2021.
Review of visitor information servicing	▪ Engage an experienced consultant to undertake a comprehensive review of visitor information services in the Shire to recommend the best pathway forward	Council	2019-2020	$12k for review	▪ To develop a brief for the review by 30 June 2019 ▪ To engage consultant by 31 August 2019 ▪ To have results of the review by 30 Jan 2020 ▪ To begin implementing review by 30 June 2020

Table 11: Action Plan - Activation Area 3 - Events Development

Action	Tasks	Responsibility	Timeframe	Budget Estimate	KPIs
Destination events calendar for major events	▪ To differentiate community events from destination events and to prioritise these.	Council and TAG	2019-2021	$10k for a part-time digital officer to focus on this as a special project	▪ To clearly differentiate community-based events from destination-based events and to develop a priority list of destination events by 30 December 2019. ▪ To establish an agreed calendar of annual events which avoids overlap and which offers certainty to event planners and organisers by 30 June 2020. ▪ To assess the need for new events to be introduced on an ongoing basis. ▪ To ensure that the benefits from destination events justify the level of expenditure and support by 30 June 2021 through economic evaluation.
illuminARTe expansion	▪ To assess the viability of expanding the event to two-three days.	Council	2019-2020	$250k	▪ Noting that this is a council-driven and operated event, to assess the potential to contract out the event by 30 March 2019. ▪ If proven viable, to look to an external operator to manage the event and on an expanded (two to three-day) program by 30 June 2019. ▪ To assess the ongoing cost to Council from contracting out the event by 30 December 2019. ▪ To look at additional activities prior to and post the event as part of an overnight visitor growth initiative by 30 December 2020.
Sport and adventure-based tourism events	▪ To identify opportunities to expand specific sport and related adventure-based events in the Shire.	Council and TAG and adventure and sport-based operators	2019-2021	$5k for marketing (any infrastructure upgrades would need to be applied for and allocated through the infrastructure budget)	▪ To assess the potential for enhancing current sporting and adventure-based tourism events as well as adding new ones by 30 December 2019. ▪ To introduce an enhanced program of sporting and adventure-based events, building on the success of existing events to raise the profile and to actively encourage overnight experiences by 30 December 2020. ▪ To test the economic and related benefits to Council and community from expanded sport and adventure-based tourism events by 30 December 2021.
Update Council's event toolkit	▪ To ensure that all interested parties looking for developing either community or destination-based events are provided with a robust event toolkit online.	Council	2019-2020	$10k for graphics, printing and desktop publishing	▪ To look to applying the successful Wollongong City Council event toolkit for use in Wollondilly and, if necessary, add to the components to make it Wollondilly-centric by 30 December 2019. ▪ To ensure that all event planners, organisers and community groups can access an event toolkit online through Council's website by 30 June 2020. ▪ Ensure that a standard format is applied to all event application's so Council can easily assess any request for funding and other support by 30 December 2020.

Table 12: Action Plan - Activation Area 4 - Governance & Support

Action	Tasks	Responsibility	Timeframe	Budget Estimate	KPIs
Advocating for Wollondilly in the NSW visitor economy	▪ To improve the profile of Wollondilly as a destination within Greater Sydney.	Council and TAG as well as DSSS	2019-2021	N/A	▪ To work with industry to ensure that the profile and awareness of Wollondilly is raised in all appropriate forums and at a regional and state level by 30 December 2019. ▪ To provide an ongoing advocacy support program as a partnership between industry and Council from 2020 onwards.
Business development programs and upskilling	▪ To ensure that industry operators have the requisite skills to be more competitive.	Council and TAG	2019-2021	N/A	▪ To work with industry operators to determine the specific skills (website development, digital marketing, being export ready, getting listed on the ATDW etc.) they need support with by 30 June 2019. ▪ To liaise with DSSS and DNSW to ensure that training programs are offered throughout the Shire by 30 December 2019. ▪ To ensure that online skills are created, including having product on the ATDW site, by 30 December 2020.
Separating the Tourism and Heritage Community Advisory Committee	▪ Acknowledging that the objectives and focus of tourism operators and Heritage community stakeholders is different.	Council	2019-2020	N/A	▪ To separate those members of the Tourism and Heritage Community Advisory Committee so that a separate tourism group (a Tourism Advisory Group - TAG) is established to better reflect the needs of the visitor economy and industry requirements by 30 June 2019.
Creation of a Tourism Advisory Group (post separation of the Tourism and Heritage Community Advisory Committee)	▪ To establish an appropriate tourism body, to deliver a consolidated view of industry requirements, particularly to support Council.	Council and TAG	2019-2020	$4k per year (includes costs for 4 meetings per year)	▪ To develop a memorandum of understanding for the TAG to follow, and to encourage industry to create an appropriate group by 30 June 2019. ▪ To provide initial administrative support to ensure it establishes and operates effectively by 30 July 2019.
Tourism Industry Networking Event	▪ To encourage stronger collaboration between industry players.	Council and TAG and DSSS	2019-2021	$4k per year for sponsorships and networking information events	▪ To determine a regular series of 3-4 networking events per annum for Wollondilly operators and those organisations who support them by 30 June 2019. ▪ To encourage industry to coordinate a series of industry networking events with the support of DSSS on an ongoing basis by 30 December 2019. ▪ To assess the success of industry networking activity by 30 December 2020. ▪ To encourage any enhancements to improve the active involvement of industry members on an ongoing basis.

Image: Local produce at Common Ground, Picton NSW

9. Supporting Documentation

Supporting Documentation 1: Visitor Data

Supporting Documentation 2: Accommodation Audit

Supporting Documentation 3: Product Audit

Supporting Documentation 1: Visitor Data

Table 13: Visitation Data

Annual Data	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Domestic Overnight	43.0k	36.0k	48.0k	38.0k	46.0k	58.0k	104.0k	71.0k	75.0k	81.0k
Domestic Day	324k	322k	373k	375k	370k	411k	336k	367k	361k	439k
International	1.6k	2.0k	.8k	1.7k	2.5k	4.0k	2.0k	2.5k	3.2k	3.3k
Total	**369k**	**360k**	**422k**	**415k**	**418k**	**473k**	**442k**	**441k**	**439k**	**523k**

Three Year Averages		2009-11	2012-14	2015-17	Change	% Change	Avg	Avg %
Domestic Overnight	-	41k	69k	76k	35k	86%	62k	14%
Domestic Day	-	357k	372k	389k	32k	9%	373k	85%
International	-	1.5k	2.8k	3.0k	1.5k	97%	2.5k	1%
Total	**-**	**399k**	**445k**	**468k**	**69k**	**17%**	**437k**	**100%**

Supporting Documentation 2: Accommodation Audit

Table 14: Accommodation audit – full findings

Type	Name	Units	School Camp Beds	Powered & Unpowered Sites
Motel	Bargo Motor Inn	11	-	-
Motel	Camden Valley Inn	40	-	-
Motel	Picton Valley Motel	25	-	-
Motel	Tahmoor Inn Hotel Motel	14	-	-
Motel	The Oaks Hotel	n/a	-	-
B&B, Farmstays & Cottages	Appin Homestay Bed & Breakfast	n/a	-	-
B&B, Farmstays & Cottages	Fullcircle Farm Bed and Breakfast	2	-	-
B&B, Farmstays & Cottages	Le Petit Palais Bed and Breakfast	2	-	-
B&B, Farmstays & Cottages	Pepper Tree Ridge	5	-	-
B&B, Farmstays & Cottages	The Bank Room (NPWS)[86]	1	-	-
B&B, Farmstays & Cottages	Post Office Lodge (NPWS)[87]	3	-	-
B&B, Farmstays & Cottages	Slippery Norris Cottage (NPWS)[88]	2	-	-
Caravan Parks	Oakdale Caravan Park	n/a	-	n/a
Caravan Parks	Avon Caravan Village	28	-	17 (7 powered)
RV Overnight Stop	Warragamba RV Short Stay Site	8	-	8 unpowered
Camp Grounds	Private Town campground (NPWS)[89]	10	-	10 unpowered
Caravan Parks	K Ranch Arena[90]	45	-	45 powered (event specific – not for general use)
School Camps	Mowbray Park Farm	15	40	-
School Camps	Kiah Ridge[91]	27	140	-
School Camps	Cataract Scout Park	8	358	-

[86] Note, this property, while being located in the Wollondilly LGA, is not currently accessible from the LGA. Access is through surrounding LGAs. This is noted as a challenge in this DMP (see section 4.4.1).
[87] Ibid
[88] Ibid
[89] Ibid
[90] Note this is event specific accommodation and not available at this time for general bookings
[91] Note this is event specific accommodation and not available at this time for general bookings

Supporting Documentation 3: Product Audit

Table 15: Product audit – full findings

Type	Name	Primarily Free or Paid
Adventure & Recreation	Tahmoor DNA Dirt Jump Park	Free
Cultural, Arts, Heritage	Mushroom Tunnel	Free
Cultural, Arts, Heritage	Bodhisaddha Forest Monastery	Free
Cultural, Arts, Heritage	Anthony Hordern's Tree	Free
Cultural, Arts, Heritage	St Mark's Anglican Church	Free
Cultural, Arts, Heritage	St Mary's Towers Retreat Centre, Douglas Park	Free
Cultural, Arts, Heritage	St Luke's Anglican Church	Free
Cultural, Arts, Heritage	St. Aloysius Catholic Church	Free
Cultural, Arts, Heritage	Yerranderie Silver Mine Village	Free
Markets	Antill Park Country Golf Club Markets	Free
Markets	Picton Markets	Free
Nature & Water	Thirlmere Lakes National Park	Free
Nature & Water	Burragorang Lookout	Free
Nature & Water	Warragamba Dam	Free
Nature & Water	Midigan - Bargo River Gorge	Free
Nature & Water	Picton Botanic Gardens	Free
Nature & Water	McMahon's Point Trail (to Wentworth Falls)	Free
Nature & Water	Yerranderie State Conservation Area	Free
Nature & Water	Nattai National Park	Free
Nature & Water	Blue Mountains World Heritage Area	Free
Adventure & Recreation	Picton Karting Track	Paid
Adventure & Recreation	Silverdale Rifle Range	Paid
Adventure & Recreation	Warragamba Swimming Pool	Paid
Adventure & Recreation	Sydney Skydivers Drop Zone	Paid
Adventure & Recreation	Antill Park Country Golf Course	Paid
Adventure & Recreation	Wollondilly Community Leisure Centre	Paid
Cultural, Arts, Heritage	NSW Rail Museum	Paid
Cultural, Arts, Heritage	Wollondilly Heritage Centre	Paid
Cultural, Arts, Heritage	Bell Bird Cottage	Paid
Equestrian/Farm Activities	K Ranch Arena	Paid
Equestrian/Farm Activities	Mowbray Park Farmstay	Paid
Equestrian/Farm Activities	Belgenny Farm	Paid
Equestrian/Farm Activities	Storybook Alpacas	Paid
Food Experiences	Razorback Ridge Wines	Free
Food Experiences	Cedar Creek Orchard	Paid
Food Experiences	Pheasants Nest Produce	Paid
Food Experiences	Ambrosia Olive Farm	Paid
Major Events	Thirlmere Festival of Steam	Paid
Major Events	illuminARTe	Free
Major Events	Picton Show	Paid
Wildlife Sanctuary	Wirrimbirra Sanctuary	Paid
Wildlife Sanctuary	Dingo Sanctuary	Paid