Hawkesbury City Council

attachment 1

to

item 52

Draft Hawkesbury Tourism Strategy

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HAWKESBURY TOURISM STRATEGY

Hawkesbury City Council

THE STAFFORD GROUP

Prepared for Hawkesbury City Council
March, 2015

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1. EXECUTIVE SUMMARY

The Stafford Group (The Group) was engaged by Hawkesbury City Council (Council) to prepare a Tourism Strategy (the Strategy) focused on the future directions and trends for tourism in the Hawkesbury LGA and to develop a management framework to guide Council's activities in its tourism program over the short, medium and longer term in line with the Hawkesbury Community Strategic Plan.

1.1. KEY FINDINGS

From the consultation and analysis, the key findings noted include:

- The primary challenge for the Hawkesbury is that it is located just over one hour's drive from the Sydney CBD. Whilst this makes the Hawkesbury highly accessible, it is not far enough away to be regarded as a destination in its own right for the greater Sydney visitor market;
- The Hawkesbury tourism sector primarily comprises small - medium sized tourism businesses with a number of these being lifestyle operators and as a result, many are not open all year round or all days of the week;
- The Hawkesbury tourism brand is associated primarily with the river. However, the river, whilst being an important natural feature, is only a very small component of the LGA and is not easily accessible. The tourism brand positioning of the Hawkesbury needs to be as a regional destination (not as part of Greater Sydney as currently) but being the most accessible regional destination to Sydney. To achieve this, the Hawkesbury may need to consider working with surrounding LGAs such as Penrith and the Blue Mountains via a possible tourism marketing alliance[1];
- Industry, despite best efforts, has struggled over some time to achieve a collective way forward through cooperative marketing campaigns, regional events and other initiatives;

[1] Already, a number of tourism operators within the Hawkesbury are members of the Blue Mountains, Lithgow and Oberon Regional Tourism Organisation (RTO)[1] and utilise the Blue Mountains tourism marketing message in their own marketing activities.

- Council will need to play a greater role to help focus industry efforts, provide enhanced visitor services and to support destination based infrastructure and desired outcomes within the context of the Hawkesbury LGA as a key area within the Sydney Regional Growth Plan;
- Whilst Hills, Hawkesbury & Riverlands Tourism (HHART)[2] have marketed the Hawkesbury as part of their broader destination marketing message, sufficient outcomes to enable the Hawkesbury to flourish as a tourism destination and to grow its visitor economy have been difficult to achieve. Stakeholder feedback indicates limited synergy between the Hills District and its tourism product and the Hawkesbury product. The relationship is the neighbouring geographic positioning of the Hills District and the Hawkesbury;
- Industry and Council need to form a far more effective working partnership to grow the visitor economy and support industry initiatives to a far greater extent;
- Council is not yet perceived as being sufficiently supportive of tourism. Council's more laissez faire approach however, has been adopted to allow industry to determine its own pathway forward. To maximise the value which tourism can provide to the local community, and to more effectively support a sustainable and growing tourism sector, Council needs to reengage and industry need to be prepared to work in partnership with Council going forward. This can only work if Council and industry are prepared to look forward rather than dwelling on past relationships or the lack of them;
- There is stakeholder expectation that unless Council takes a strong lead and plays an active role that opportunities will not come to fruition;
- NSW National Parks and Wildlife Service (NPWS), who controls a significant land parcel within the LGA, has limited resources to undertake product development and significant marketing activity. NPWS is highly reliant on forming partnerships with other stakeholders to encourage tourism activity within the National Parks in the area;
- Continued strong growth in residential housing and recognition by State Government that the Hawkesbury is part of Sydney's North West Growth Centre, makes it more challenging to position the Hawkesbury as a tourist destination with major surrounding urban expansion across North West Sydney being well promoted; and
- Whilst some local based events have managed to continue to grow organically, historically a number of events held in the LGA have struggled to maintain momentum and ongoing support.[3]

[2] HHART is a local tourism association for the Hills, Hawkesbury & Riverlands region.
[3] From stakeholder feedback, we note that historically, some events have struggled to maintain momentum because of a lack of financial return to encourage event organisers to stay motivated. Additionally, often the product isn't refreshed regularly enough to encourage current and new markets to attend and support the event.

1.2. OPPORTUNITIES

For tourism to flourish in the LGA the following key opportunities have been identified:

- **Hawkesbury Tourism Working Group:** The creation of a Tourism Working Group (TWG), involving a partnership between Council and the tourism industry, to drive and implement a number of initiatives to grow tourism in a more coordinated fashion. The TWG should be comprised of strategically minded representatives from the Hawkesbury tourism industry and who can be members of the TWG for a two year period;
- **Development of a tourism brand for the Hawkesbury LGA:** The name "Hawkesbury" alone is inadequate as it often is associated with the Hawkesbury River which some perceive as a gateway to the Central Coast. A branding exercise is a further step which Council should consider in order to create "Hawkesbury Experiences" and which can build on the arts and heritage themes, equine experiences, outdoor recreational experiences particularly within the national parks and lastly, the attractiveness of some of the small towns within the LGA which provide the LGA's character and can link to boutique events and festivals. The brand developed should also have application across other industry sectors for the promotion of the Hawkesbury LGA as a place to "live, work, invest and play";
- **Tourism positioning for the Hawkesbury LGA's nodes/hubs:** Council, as part of its place making/integrated planning, needs to integrate tourism marketing and development potential for key towns in the Hawkesbury LGA such as Richmond, Windsor and Kurrajong. Other towns in the LGA can also be developed once these specific towns identified are strengthened as tourism destinational nodes or hubs. Whilst the temptation is to develop tourism in each of the towns within the LGA at the same time, and on a similar basis, the opportunity exists to potentially start with Windsor as the primary hub and expand in a planned and strategic fashion. Each of the primary towns and villages within the Hawkesbury offer some point of difference and these need to be built on in order to strengthen them as tourism destination nodes. This could be undertaken through enhanced signage (directional and interpretive), encouraging specific themes for different towns and villages and linking events and festivals to specific towns and villages;
- **Development of a communication/digital platform**: Development of a digital platform for the Hawkesbury LGA should comprise a highly dynamic website including separate sub-portals for each of the Hawkesbury's main towns and booking/packaging capabilities, social media integration, a mobile app for the LGA with self-guided tours and the rollout of moveable 24/7 touch screens in key tourism hotspots. There is a growing expectation from visitor markets (including from younger experiential visitor markets through to grey nomads) that online

options[4] for obtaining information about a destination as well as booking accommodation, attractions, events, packages etc. are made available;

- **Technology solution for visitor services:** Visitor services funded by Council need to be continually strengthened through a stronger digital base to reflect the market preference for online information sharing and access. Potential may also exist to expand visitor information centres to offer a range of Council services such as paying registration fees, rate payments etc. This however needs to be assessed as part of a separate review of visitor services;
- **National orienteering course:** Council needs to consider developing a business case for a state or national orienteering course in partnership with NPWS utilising the vast network of surrounding national parks which comprise approximately 85% of the LGA[5];
- **Recognition of Council's role in tourism**: Recognition of the vital role which Council needs to play in sustainable tourism development is essential particularly as there are limited medium to larger size tourism players and a high percentage of lifestyle operators who will struggle, despite best efforts, to deliver broader tourism benefits. The opportunity is for Council to work closely with industry to implement opportunities identified in this Tourism Strategy. There is an important need for Council to particularly work with small-medium size operators who often have difficulty getting recognition through State and National tourism bodies[6];
- **Development of new experiences/attractions and events:** An important step to growing stronger overnight visitation is the creation of activities and experiences/attractions which necessitate the visitor/consumer to stay overnight in the LGA rather than come merely as a day visitor. The success of these activities and experiences will support the justification for expanding commercial accommodation opportunities which need stronger visitation numbers to support their financial viability. The vast majority of the visitor market over the next 5 - 10 year period is likely to remain a day visitor market with changes to the activities and experiences product mix along with strengthening of events being the catalyst to support stronger overnight visitation growth. One of the best prospects for visitor growth to the Hawkesbury LGA is likely to be centred on a small number of events to strengthen the appeal of the destination overall and to build greater awareness;

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[4] Via computers and mobile accessible websites/apps

[5] A major orienteering course is expected to generate significant visitation associated with participants, spectators and support crew. This is also expected to encourage greater overnight visitation through the development of all day and night eventing.

[6] Generally, there is a RTO for these small-medium sized operators to input into. This is not the case in the Hawkesbury (as there is no RTO for the LGA and its surrounds). Previous attempts to create a Sydney and Surrounds RTO have not been successful over a number of years.

- **Music festival:** Council needs to undertake further investigation regarding the development of a major music festival event over the next 3 year period. Music events can provide pathways to grow and develop other supporting local events;
- **Heritage sound and light show**: Opportunities exist to create a sound and light show event or series of events which could run on a seasonal basis (2 – 3 month peak visitor period). This event could utilise the historic buildings within the LGA (particularly Windsor and Richmond), to create evening vibrancy and to bring alive heritage themes and stimulate stronger market appeal. Importantly, the sound and light show will encourage a wide range of visitor markets allowing them to better appreciate the stories associated with the heritage buildings being utilised as the sound and light show's canvas;
- **Grow the equine industry:** The equine industry offers education and school based programs as well as major eventing which need to link more strongly with tourism. There is a need for Council and Industry to investigate greater synergies with the equine sector to grow events with wider market appeal and to investigate more horse based activities;
- **Pet Friendly Tourism:** The opportunity exists to market the LGA as offering pet friendly tourism[7] via visitor accommodation outlets (pets staying with owners), pet grooming and supply services and building on the number of kennels and catteries which already exist in the LGA;
- **Art/sculpture trails:** There are a number of artists, crafts people and artisans working within the area who can support and strengthen arts trails, sculpture trails and link to the regional gallery which can form a strategic hub for these walking and drive related art trails[8];
- **Packaging of product**: Opportunities exist to package product such as kayaking, rock climbing, horse riding, mountain biking which are all available within the LGA and the broader region (including the Blue Mountains Region and other nearby LGAs in the Sydney Region) with accommodation options, transport options, tours and food and wine experiences;
- **Marketing the value of tourism:** There is a need for far greater understanding within the broader community of the value of the visitor economy to the area. Council should consider a study to show the size of visitation to the LGA[9] as well as the value of the visitor economy and in the process, differentiate the specific benefits of tourism to each of the major towns within

[7] Australians have one of the highest ratios of pets per household globally. There is also growing demand for people who wish to travel with their pets. But there are relatively few LGAs where facilities exist to accommodate pets with their owners. And pet expenditure has often been seen as near recession proof.
[8] These types of initiatives require both product development and associated infrastructure support along with dedicated marketing and promotion budgets.
[9] As we note visitor statistics for LGAs provided by DNSW often contain a high margin of error because of small sample sizes.

the area. This will enable tourism to be better interlinked into the Hawkesbury's regional economy and will strengthen understanding and support for the sector. It is particularly important that local retailers, cafes and restaurants, art and craft outlets and others recognise the value of the visitor economy to their own businesses and the economic and social benefits which it brings to the LGA; and

- **Development of a major new visitor experience:** To help position the Hawkesbury LGA as an exciting destination for short overnight breaks, particularly from Sydney, a major new visitor experience should be explored (via a business case) and developed with industry and the community input. This need not be a major investment into a built product, but rather could be a cleverly themed event which aligns with the product offering of the Hawkesbury LGA, possibly held over a 2 - 3 week period, which utilises the heritage and historic nature of buildings and related infrastructure to possibly act as a backdrop. The themed event could then be repeated potentially to different niche markets at different times of the year allowing retailers, food and beverage operators and accommodation providers to benefit from stronger visitor numbers coming into the area.

1.3. PRIORITY TASKS

Whilst there are a number of short, medium and long term actions identified in the Action Plan at the end of this Tourism Strategy, the following are the recommended priority tasks to be focused on over the next 12 months:

- Establishment of the Tourism Working Group (TWG) as "leadership" for the industry and a partnership approach with Council going forward;
- Digital promotional platform to better market the LGA as a tourism destination and for profile raising;
- TWG and Council to agree a Vision and Mission to guide tourism in the Hawkesbury LGA;
- Review of visitor services including ways of enhancing the use of the visitor centre; and
- Development of a tourism brand (which can have application for Brand Hawkesbury as a generic brand for investment etc.).

These tasks have been identified as the building blocks to achieve the changes required for sustainable tourism growth.

1.4. CONCLUSION

The Hawkesbury LGA offers many attractive areas and products as a visitor destination. It has the potential to gain greater recognition as a visitor destination in its own right rather than being somewhat lost as just part of greater Sydney (which under sells the LGAs value). This outcome is achievable if Council and industry can work collaboratively to create and implement the structure and promotional platform required to allow this to occur.

Whilst there may be limited current funding to deliver all of the initiatives identified in this Strategy, the action plan provided offers a road map to stage these initiatives over a short, medium and longer term period. There are also likely to be opportunities to apply for State and Federal grant funding where Council (and possibly other parties) are able to offer matching funding.

It is also important that this Tourism Strategy be reviewed as part of the wider Community Strategy Plan[10] process (which the Tourism Strategy carefully aligns with).

In conclusion, Council now needs to step up its engagement in tourism and work with industry to achieve the sector's potential. Industry also will need to accept and support Council's more active role going forward.

[10] Hawkesbury Community Strategy Plan 2013 - 2032

2. INTRODUCTION

The Stafford Group (The Group) was commissioned by Hawkesbury City Council (the Council) to develop a Tourism Strategy for the LGA which aligns with the Hawkesbury Community Strategic Plan 2013 - 2032. The key requirements of the brief from Council were as follows:

- To verify the likely directions and trends for tourism within the Hawkesbury LGA for the future;
- To create a management framework for how best to develop a sustainable tourism sector for the future;
- To provide guidance on the types of activities which Council should undertake as part of its tourism program going forward;
- To identify best ways to respond to visitor markets over the next 5 - 10 year period focusing on trends and opportunities;
- To address concerns raised over the value of the Hawkesbury LGA tourism brand and the geographic positioning of the Hawkesbury so close to Sydney; and
- Ensuring that tourism was interlinked into the Hawkesbury's regional economy in order to maximise social, environmental, economic and cultural based benefits and opportunities.

2.1. METHODOLOGY

Based on agreement with Council the following approach has been followed:

- Structured meetings with the Project Steering Group in Council;
- Review of background reports and studies on tourism and related areas;
- Collation and review of relevant tourism and market data (Tourism Australia and Destination NSW) and a broader economic sector data (REMPLAN);
- Stakeholder consultation with operators within the LGA and broader region to discuss challenges and opportunities going forward;
- Stakeholder discussions with Destination NSW and other relevant agencies;
- Public workshop with over 55 stakeholders to discuss interim findings and opportunities;

- Creation of a draft Tourism Strategy and the facilitation of a workshop with the Project Steering Group to discuss key findings; and
- After appropriate feedback the finalisation of the Tourism Strategy.

The Group wishes to thank the Project Steering Group and key stakeholders for the time and effort put into this exercise. In addition, we wish to express our appreciation to operators and other stakeholders who have provided their time to us in determining the best outcomes for the Hawkesbury LGA and the broader region as a tourism destination.

3. CONTEXT

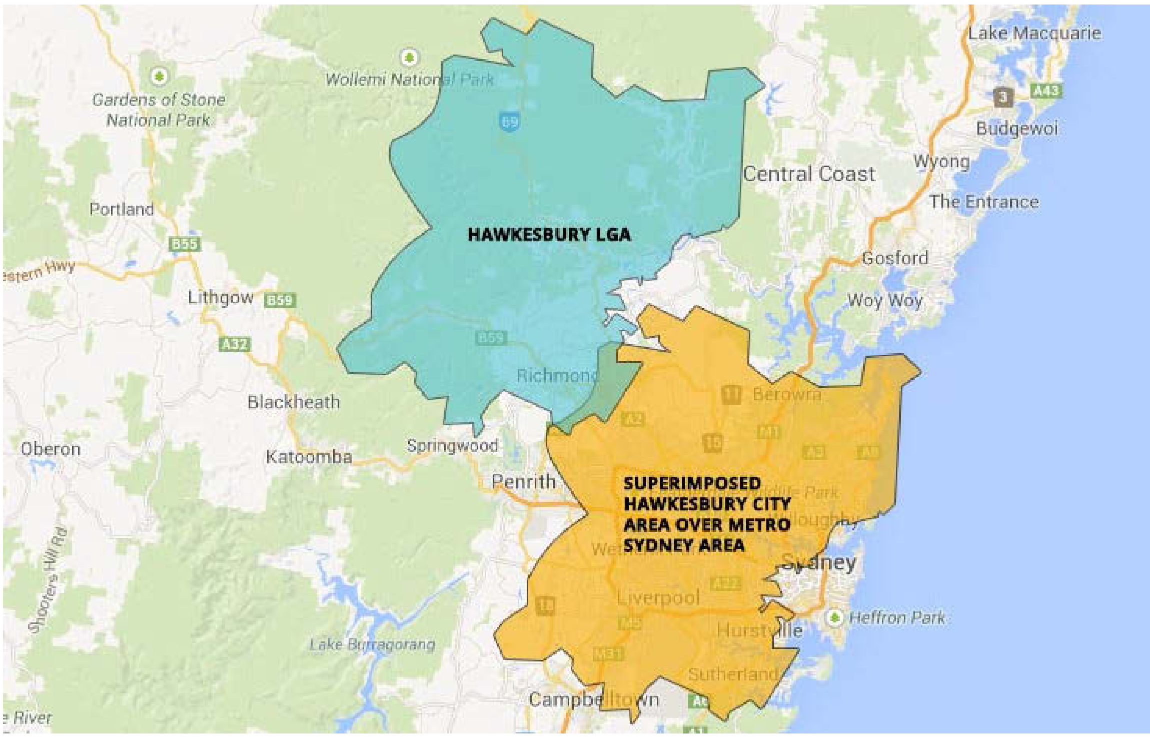
3.1. THE HAWKESBURY LGA

The Hawkesbury LGA is located approximately 50km north-west of Sydney CBD. The LGA covers more than 2,776 square kilometres and over 85% of the LGA is national parks.

The LGA is part of the Greater Sydney Region in terms of land planning, and the Sydney tourism region, in terms of tourism regions as defined by Destination NSW (DNSW). DNSW runs a Regional Tourism Organisation network across NSW, which is its way of working with tourism industry/operators, through a structure that has local tourism operator representatives primarily. The RTOs exist in regional NSW, with the closest RTO to the Hawkesbury LGA being the Blue Mountains Lithgow and Oberon RTO (BMLOT). There is no RTO for the Sydney Region at this point (though there was one historically).

The following map illustrates the size and scale of the Hawkesbury LGA within in the context of greater Sydney.

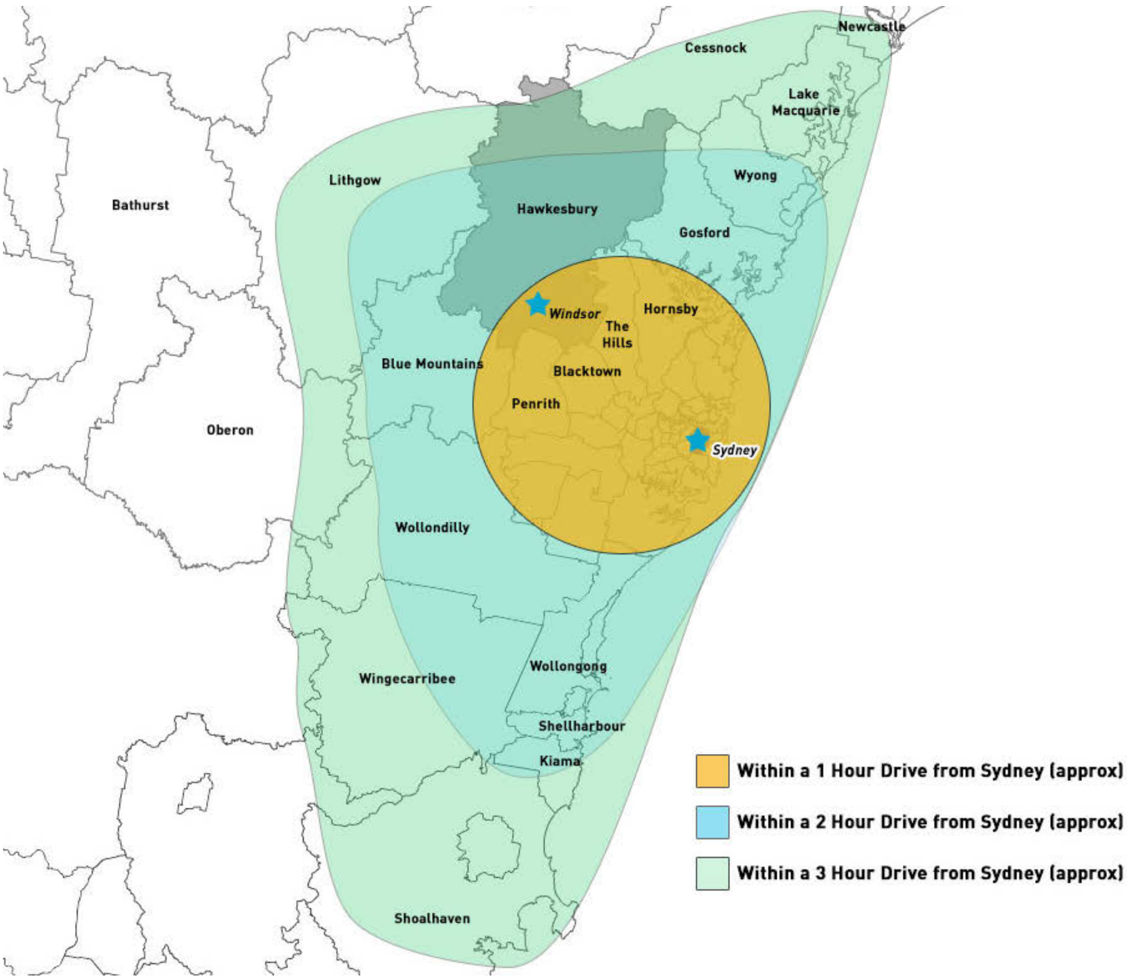
FIGURE 1: HAWKESBURY LGA



The Hawkesbury LGA is fortunate in being able to leverage off the significant national and international visitor growth into the Sydney CBD and into neighbouring LGAs such as the Blue Mountains. In saying this however, the Hawkesbury LGA is also 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 a destination in its own right.

Additionally, this proximity means that the LGA also has a number of major competitor destinations nearby which Sydney short break visitors can choose from. Figure 2 below reflects the distance from the Sydney CBD to the Hawkesbury and other nearby tourism destinations and illustrates that whilst the Hawkesbury is easily accessible, so are other major tourist destinations on Sydney's doorstep including the Blue Mountains and marginally further out to the Southern Highlands, the Central Coast and the South Coast.

FIGURE 2: HAWKESBURY LGA WITH TRAVEL TIMES OVERLAYED[11]



[11] Driving distances determined via Google Maps.

Whilst there are a number of visitor markets to focus on, the Sydney short break overnight visitor market and the significant day visitor market are expected to provide strong growth potential for the foreseeable future. The large international visitor markets (including the cruise market) are continually looking for interesting and exciting day excursion product opportunities out of the Sydney CBD. Whilst there is some opportunity to encourage overnight visitation to the Hawkesbury LGA from the international visitor markets, it is anticipated that the market preference for staying in a CBD location, whilst travelling out undertake experiences will continue.

Significant urban expansion out into parts of the Hawkesbury LGA for residential development has also impacted on the way the Hawkesbury brand is perceived (possibility more as a dormitory suburb for greater Sydney and less as a potential dedicated tourist destination in its own right). Nevertheless, being relatively so close to such a large urban catchment area makes the Hawkesbury highly accessible not only to the local domestic market but also the inbound international market which primarily flies into Sydney International Airport.

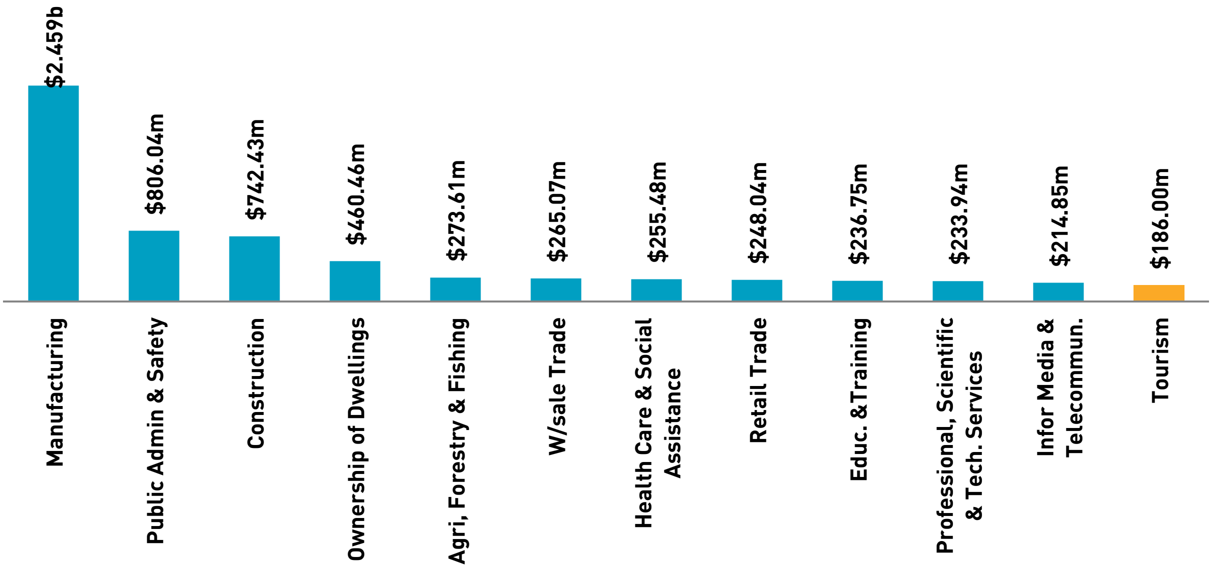
Whilst the need for expanding urban release areas to meet the needs of State Government housing growth targets is recognised, so must the need for preserving and safeguarding areas for tourism activity (both natural and built). Visitor markets are unlikely to be interested in participating in passive and active tourism activity, where tourism is merely seen as an adjunct to a greater urban development area or housing scheme. Tourism locations therefore need to be protected through introducing vegetated barriers which can block out both visual intrusion and noise from surrounding urban development.

Delineating areas specifically for tourism and zoning these accordingly is an important consideration to protect and grow the local visitor economy.

3.2. THE HAWKESBURY LGA ECONOMY

In terms of economic output, tourism is the 12th largest sector, contributing roughly $186m per annum to the Hawkesbury LGA economy and comprising 2.5% of total economic output. Major economic sectors within the LGA include manufacturing (worth over $2.4b), public administration and safety ($806m) and construction ($742m). Figure 3 on the following page illustrates this.

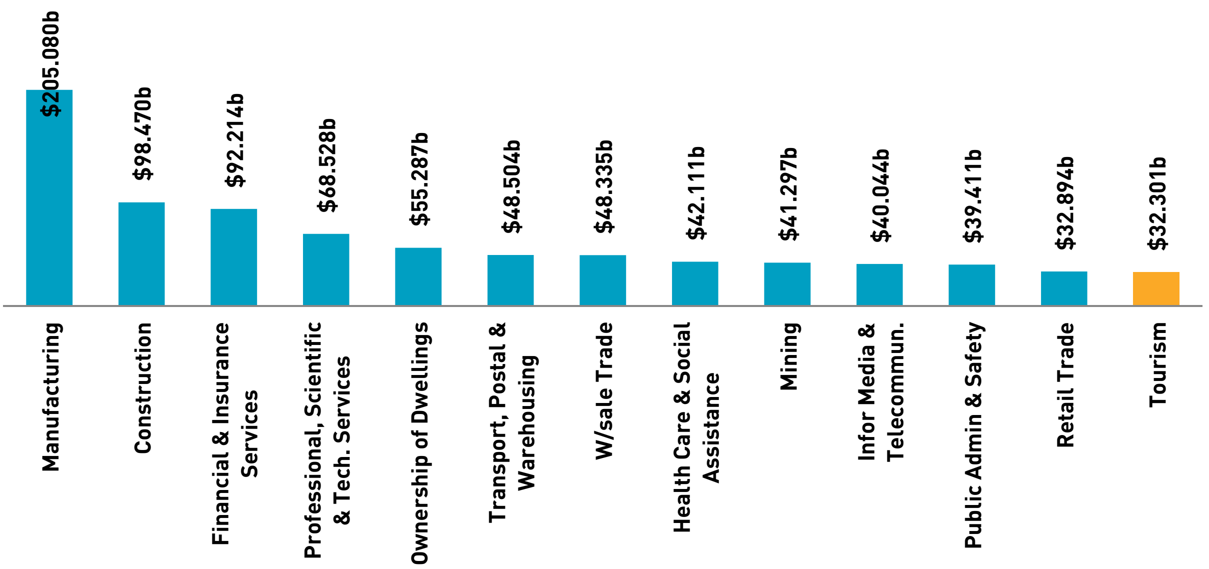
FIGURE 3: TOTAL OUTPUT BY TOP 12 ECONOMIC SECTORS IN THE HAWKESBURY LGA[12]



At a state level, tourism output comprises 3.2% ($32.3b) of total output, with manufacturing and construction comprising the two largest sectors at just under $205.1b and $98.5b respectively.

Whilst tourism only comprises 2.5% and 3.2% of economic output in the Hawkesbury LGA and NSW respectively, it is its growth potential (as seen through investment flows, employment generation etc.), which needs to be focused on. Furthermore, tourism is more likely to align with many community aspirations for improved quality of life, protection of open space areas and preservation of heritage sites and buildings.

FIGURE 4: TOTAL OUTPUT BY TOP 13 ECONOMIC SECTORS IN THE NSW STATE[13]



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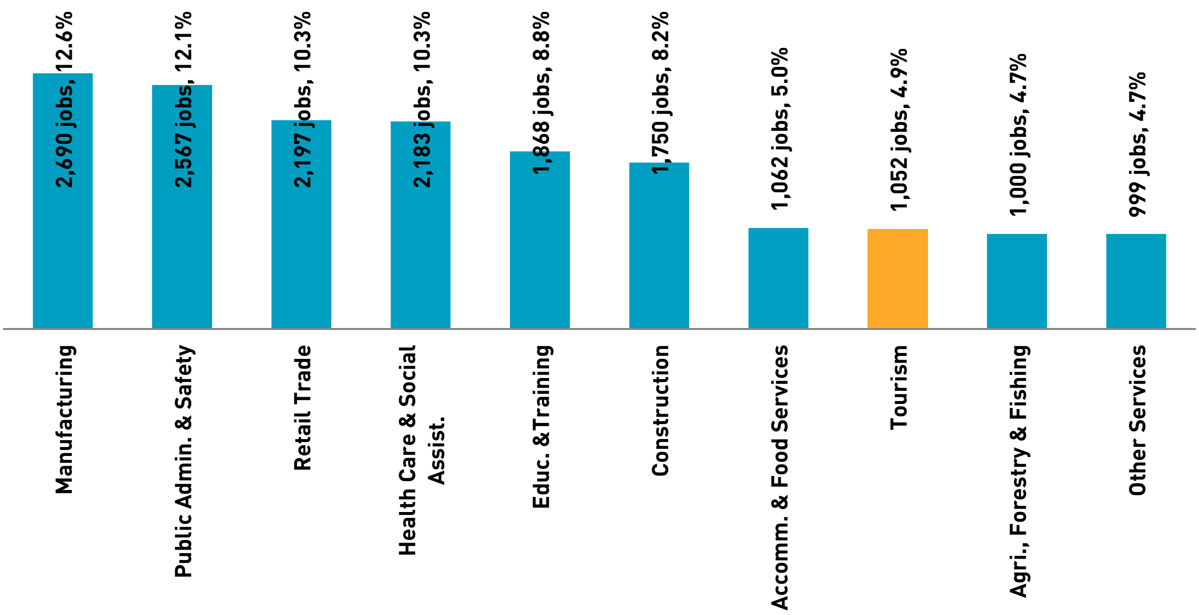
12 http://www.economicprofile.com.au/hawkesbury/economy/output - 2013-14, Australian Bureau of Statistics (ABS), Tourism Satellite Account

13 http://www.economicprofile.com.au/hawkesbury/economy/output - 2013-14, Australian Bureau of Statistics (ABS), Tourism Satellite Account

In terms of employment, tourism is the 8th largest sector[14], employing over 1k individuals and accounting for 5% of all jobs in the LGA. The top three employing sectors include manufacturing (13%), public administration and safety (12%) and retail trade (10%).

Tourism is viewed as an important growth sector but the significant number of smaller lifestyle operators and lack of larger players creates a perception of a lower level of importance. The introduction of new, larger ventures and events are important opportunities which may address this.

FIGURE 5: TOP 10 EMPLOYMENT SECTORS IN THE HAWKESBURY LGA[15]

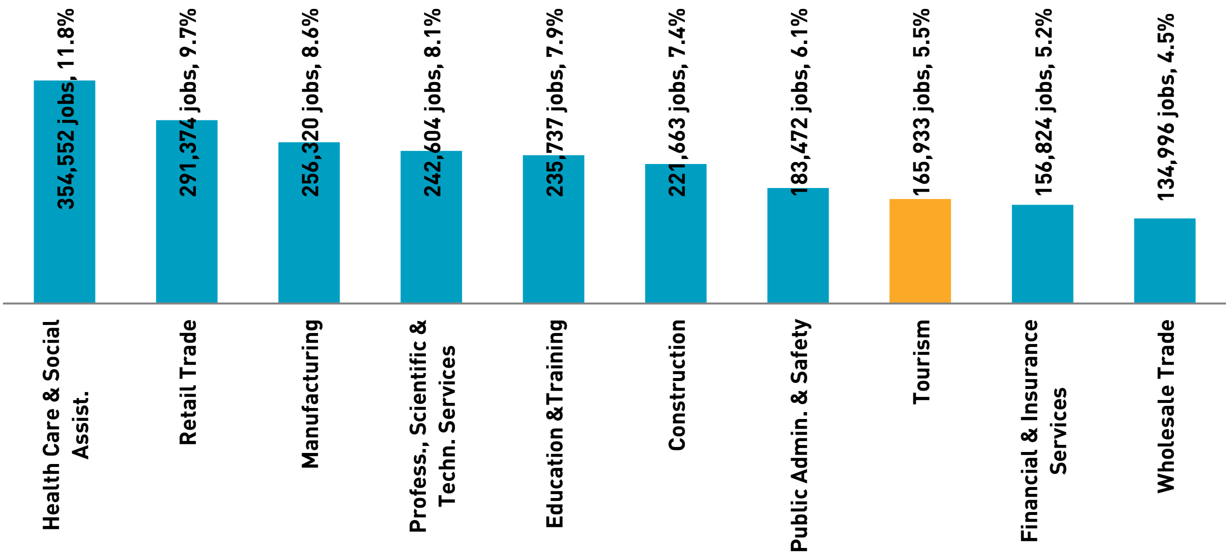


Looking at tourism's employment contribution on a more macro NSW level, demonstrates that tourism again is ranked as the 8th largest employment sector for NSW, employing 165.9k individuals throughout NSW.

[14] As tourism is not an industry sector as classified by the ABS and ANZSIC codes, but rather is an amalgamation of many of these ANZSIC industry sectors, REMPLAN use their own methodology to determine the percentage of employment in each of the ANZSIC industry sectors which is considered to be tourism-related employment. For example, within the "accommodation and food services" sector, there would be a percentage of these jobs which would be tourism related. These are therefore apportioned to the "tourism" sector as defined by REMPLAN. The remaining jobs in the "accommodation and food services" sector as shown in the graph (1,029 jobs) are not considered to be directly tourism related.

[15] http://www.economicprofile.com.au/hawkesbury/economy/employment based on 013-14, Australian Bureau of Statistics (ABS), Tourism Satellite Account.

FIGURE 6: TOP 10 EMPLOYMENT SECTORS IN NSW[16]

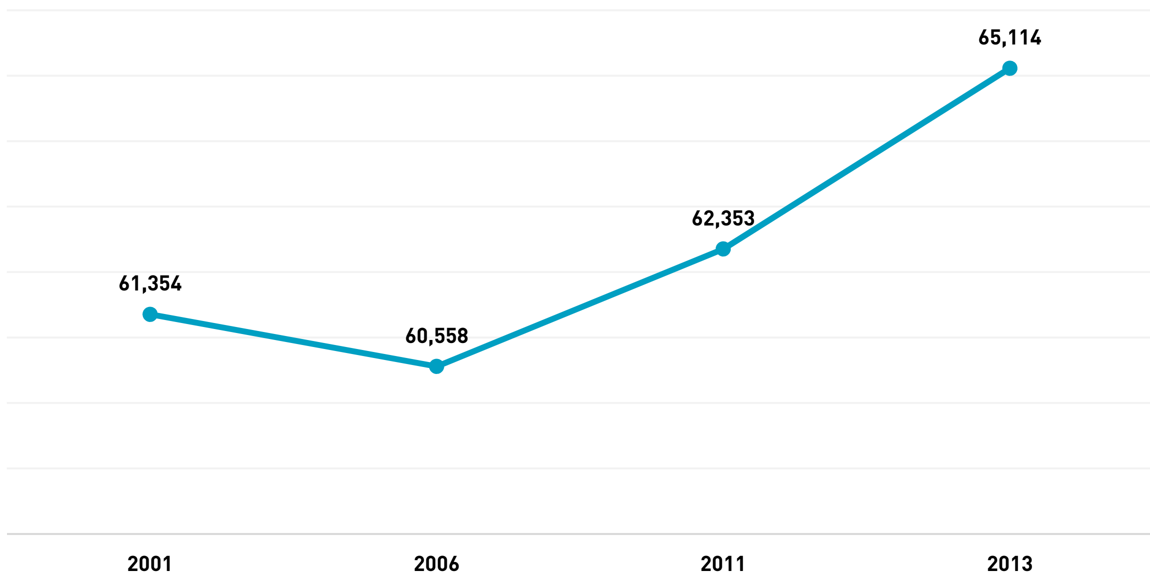


3.3. HAWKESBURY'S POPULATION

3.3.1. Historic Population Growth

The Hawkesbury LGA's population has grown by 6% (3,760 residents), increasing from 61,354 residents to 65,114 residents. The resident population of the Hawkesbury is heavily concentrated within Richmond, Windsor and Bligh Park.

FIGURE 7: 10 YEAR POPULATION GROWTH – HAWKESBURY LGA[17]

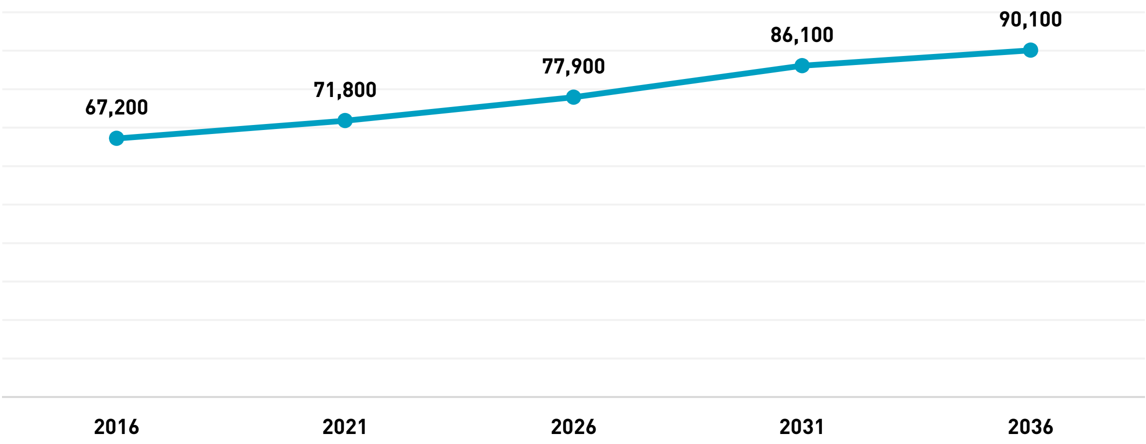


[16] http://www.economicprofile.com.au/hawkesbury/economy/employment based on 013-14, Australian Bureau of Statistics (ABS), Tourism Satellite Account.
[17] http://profile.id.com.au/hawkesbury

3.3.2. Projected population growth

By 2036, the population of the Hawkesbury LGA is anticipated to grow by 39% (25,508 residents), increasing from just over 67,200 residents to 90,100 residents.

FIGURE 8: POPULATION PROJECTIONS - HAWKESBURY[18]



It is important to note that the Hawkesbury is included within the NSW Government's North West Growth Centre, which also includes The Hills and Blacktown. This Growth Centre, comprises 16 Precincts, is roughly 10,000 hectares and is anticipated to contain approximately 70,000 new dwellings for 200,000 people over the next 30 years.[19]

3.3.3. The age of the resident population

A key issue facing Hawkesbury City is the increasing age of its resident population (see Figure 9 on the following page). Between 2001 and 2011, the following has been noted:

- The number of residents under the age of 18 has declined by 11% (1,953 residents);
- The number of residents considered to be part of the "young workforce" (those aged from 25 – 34) has declined by 21% (2k) which is a significant percentage decline;
- The number of residents aged 50 – 59 has grown by 18% (1.2k residents) which is a significant growth;
- Residents between the ages of 60 - 69 have increased by 65% (2.4k residents); and
- The number of residents aged over 70 increased by 36% (1.3k residents).

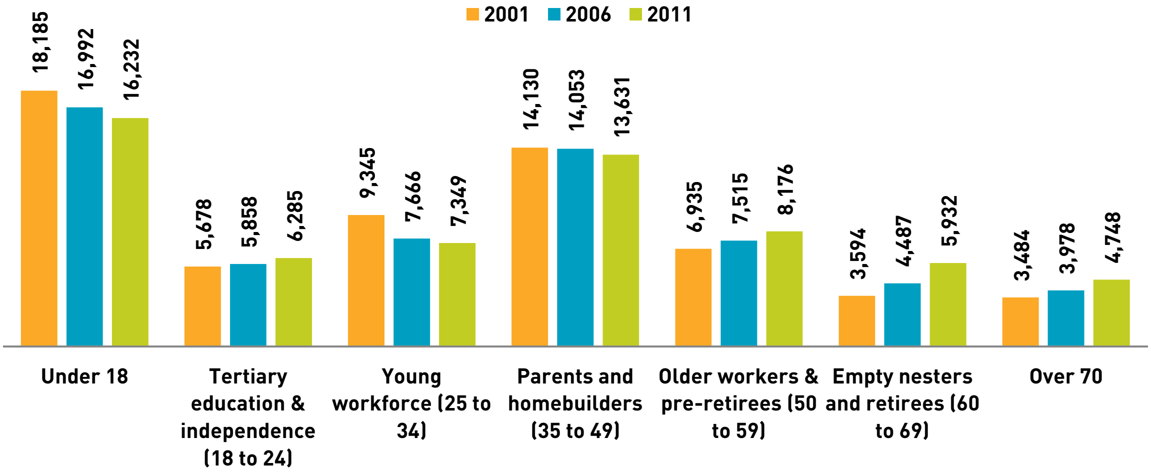
These population trends reflect a strongly ageing population. Whilst The Group does not discount the benefits which can be derived from a resident population with a greater proportion of elderly individuals, such as increased community spirit and participation in volunteer programs to

[18] Projected Population, SLAs in New South Wales, 2006 – 2036, NSW Department of Planning
[19] http://www.gcc.nsw.gov.au/the+growth+centres-5.html

support tourism, an ageing population generally is acknowledge to put greater pressure on public resources (primarily health related services and resources).

Tourism ventures have the potential to help encourage more Gen X and Y visitors, as well as offering employment opportunities to encourage more young people to potentially relocate to the Hawkesbury.

FIGURE 9: AGE OF THE POPULATION[20]



The implications of this ageing population for tourism are:

- Greater pressure to find skilled and semi-skilled workers;
- Fewer tourism business start-ups, unless more migration flows into the area can occur;
- Potential reduction in facilities (due to younger people moving away for employment); and
- Challenges in attracting younger families into the LGA, unless strong employment options can be provided.

Anecdotally, there is often a challenge with ageing populations being more resistant to change, partly due to familiarity with their current living scenario and partly due to financial pressures and income restrictions.

Utilising tourism development as an economic lever to help address these issues is an important consideration.

[20] http://profile.id.com.au/hawkesbury/service-age-groups

3.4. SYDNEY'S POPULATION

The North West Growth Centre (including Hawkesbury LGA) reflects the significant population growth out to areas in and around the Hawkesbury LGA. It is anticipated that 64% of the NSW State's total population by 2031 will be residing in the Sydney Metropolitan Area. The bulk of the population growth is expected to continue to be in Western Sydney where the need for greater tourism and associated recreational activities is going to be required.

3.5. SYDNEY METROPOLITAN PLANNING AND THE HAWKESBURY LGA

The continuing advance of urban development into the Hawkesbury LGA creates significant risk, including that the traditional identity of the LGA may start to get lost. The closer that urban development moves to traditional agricultural land, forest reserves, national parks and the major river systems, the greater the risk of this identity loss. Tourism therefore, has a vital role to play in helping to protect the identity of the Hawkesbury LGA and to ensure the quality of life requirements for residents and visitors are met.

3.6. HAWKESBURY CITY COUNCIL STRATEGIC PLANNING AND TOURISM

The overarching strategy which integrates with this Tourism Strategy is the Hawkesbury Community Strategic Plan (2013 - 2031). The extensive consultation undertaken for the Community Strategic Plan highlights community aspirations for looking after people and place via offering vibrant towns, supporting business and stimulating employment. This Tourism Strategy therefore strongly aligns to the community aspirations as outlined in the Community Strategic Plan.

3.7. VISITOR ECONOMY – GOVERNANCE AND REGULATION

The importance of the NSW visitor economy is outlined in the State Government's Visitor Economy Industry Action Plan (managed by Destination NSW[21]) which highlights the need for significant investment in order to maximise the economic benefits which tourism can offer. This is the guiding State Government strategy for tourism and which local and regional tourism plans and strategies needs to fit under.

Regional tourism organisations (RTOs), which cover a number of LGAs, are the next level down in setting direction for tourism growth. RTOs receive much of their funding from DNSW and act as the conduit between DNSW and local industry. In the case of the Hawkesbury LGA, there is no RTO providing this conduit (historically, this was covered by the Sydney and Surrounds RTO but

[21] Destination NSW (DNSW) is the NSW State's peak tourism body.

this has proven unsuccessful despite a number of attempts to make it more relevant). As a result, this Tourism Strategy encourages the Hawkesbury LGA to align both with the Blue Mountains RTO (BMLOT) as well as continuing to identify opportunities to work with other LGAs in Greater Sydney. For example, the Penrith LGA offers a number of synergistic opportunities such as the Great River Walk which extends through both the Penrith and Hawkesbury LGAs.

The ongoing challenge for the Hawkesbury LGA as part of Greater Sydney, is the marketing focus traditionally around the Sydney CBD, rather than outlying areas.

3.8. HAWKESBURY CITY COUNCIL AND TOURISM

Hawkesbury City Council has been involved in tourism since the mid-1980s. Council's tourism program is at an operational level and for some time a Board or committee oversaw operations. The principal activity has been the funding of Hawkesbury VIC (now in its second location), under various funding models (mainly external service provision).

The current approach to tourism management is visitor services for tourist and visitors to the LGA. Hawkesbury VIC has been in operation for over 25 years and is one of the longest serving VICs in NSW.

Local tourism operators and businesses make use of the VIC to varying degrees (and this has been influenced by the operating models and relationship with the local tourism groups, who are supporting other websites for the area). Local tourism businesses can display their brochures at the VIC at no cost. The VIC is a marketing channel option for local businesses.

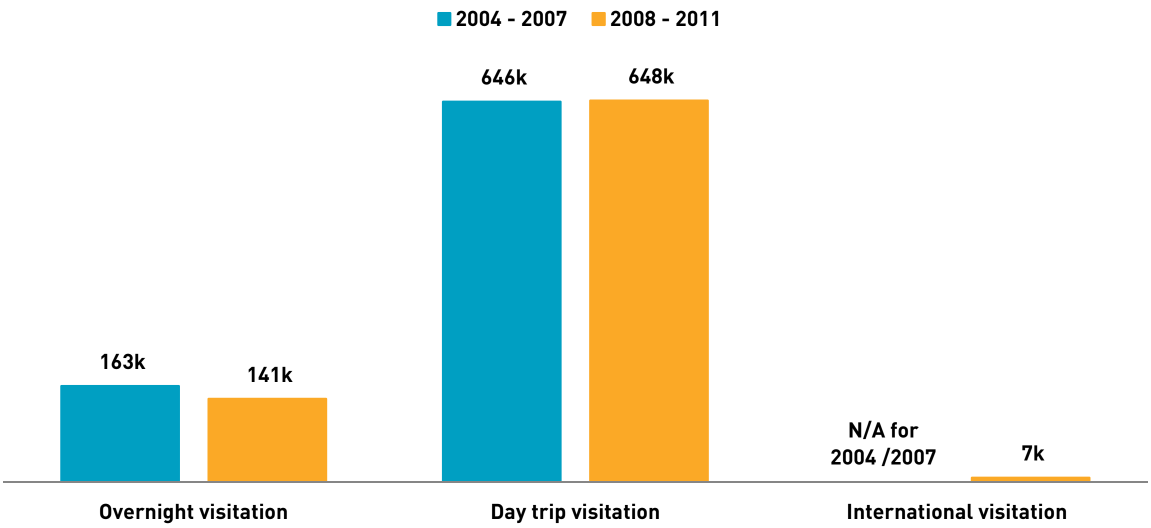
4. DEMAND & SUPPLY ANALYSIS

4.1. VISITATION TO THE HAWKESBURY LGA

Based on Destination NSW data, visitation[22] to the Hawkesbury LGA has been captured and averaged over two four year periods, 2004 – 2007 and 2008 – 2011. Over these two periods, visitation declined by 2%, falling from 809k to 796k (it is important to note however, that during the period 2004 – 2007, international visitation was not recorded, and although international visitation makes up a very small visitor market for the Hawkesbury, an accurate trend is unable to be determined).

As it is clearly illustrated in Figure 10 below, domestic day trip visitation is the primary visitor market to the Hawkesbury, comprising 81% of total visitation to the Hawkesbury, followed by domestic overnight visitation (comprising 18%) and international visitation, which makes up a very small share of the visitor market (1%).

FIGURE 10: FOUR YEAR AVERAGE ANNUAL VISITATION TO HAWKESBURY (2004 – 2007 AND 2008 – 2011)[23]



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[22] A visitor to the Hawkesbury LGA is classified by DNSW as those who live further than 25km from the Hawkesbury LGA and travel to the Hawkesbury LGA for a day trip or an overnight trip.
[23] Tourism Profiles for Local Government Areas in Regional Australia, NSW – City of Hawkesbury (Three or Four Year average to June 2007) and Travel to Hawkesbury Local Government Area – Four year average annual to September 2011, Destination NSW

Over the two four year periods assessed, visitation by domestic overnight visitors dropped by 13% (22k). The implication of this trend is serious for the sustainability of tourism businesses and associated employment within the LGA. While The Group do not discount the role day trippers play in the visitor economy, from a tourism perspective, day trippers are less likely to be regular users of visitor information services as they have limited time in the LGA, and are more likely to have predetermined what they will do in their limited time available. It may therefore be harder to influence their activities and spend patterns.

Day trippers are smaller contributions to the local economy when compared with overnight visitors, as evidenced by the most recent visitor spend data available for the Hawkesbury LGA[24] which indicates that overnight visitors spend, on average, $433 per visit in comparison to domestic day trip visitors who contribute, on average, $97 per visit.[25]

Whilst some retailers (including cafés and bars) will obviously be supportive of the day trip market (and importantly, The Group does not discount the role of the day trip market), the market can, at times, put excessive pressure on infrastructure and resources with what appears to be limited return. Measures need to be put in place to encourage extended length of stay and the conversion of day trippers into overnight visitors. Events and evening experiences are obvious examples to consider.

Without new major visitor experiences it will be increasingly difficult to grow the overnight visitor markets to the Hawkesbury. The expectation is that approximately 70-85% of total visitation from 2014 - 2022 will remain day trippers. In order to continue to grow the day visitor market there will also be a need for:

- Greater promotion of visitor experiences including market days, events etc. particularly via online sources and in weekend media;
- Greater management and/or provision for car parking in key towns will be required as we note that there is already congestion in some locations associated with strong day visitation from around Greater Sydney;
- A relocatable visitor information kiosk needs to be considered so it is possible to promote further events and experiences in the Hawkesbury when visitors come for existing events and experiences. This will allow the visitor information kiosk to be relocated in strategic locations visited more frequently by visitors; and

[24] This data is based on the period 2004 – 2007 as the most recent Destination NSW data does not provide a visitor expenditure breakdown.
[25] Tourism Profiles for Local Government Areas in Regional Australia, NSW – City of Hawkesbury (Three or Four Year average to June 2007)

- Industry needs to investigate specific promotions and discount packages to encourage repeat visitors particularly to entice the day visitor market to come overnight on their next experience.

4.2. VISITOR TRENDS IN GENERAL

One of the major challenges facing the Greater Sydney region, as well as the Blue Mountains, is the need for new product to encourage stronger visitor flows and higher spend patterns. As evidenced by the introduction of Wet'n'Wild, new major product offerings are able to stimulate significant visitor interest, resulting in attractive economic returns such as local employment.

For too long many tourism regions and LGAs have focused on marketing and promotion of existing product without actively encouraging new product to meet changing market needs. This can be seen in the Blue Mountains for example with significant growth in day visitation (increasing by 50% from 2005 – 2014)[26], which is attributed to the new Chinese market in particular visiting Echo Point as part of a tour.

Even though the official DNSW visitor statistics indicate modest visitor growth in overnight visitor trends, industry feedback[27] indicates a far more challenging scenario. The commercial reality is most likely to reflect a few properties, by way of example, capturing much greater market share whilst the vast majority of operators are struggling. In the case of the Blue Mountains, the significant number of B&B establishments may be skewing the visitor figures.

Industry feedback on a wider regional basis indicates constant growth in day visitation and modest to negative growth in overnight visitation. The locations where stronger visitor growth is seen is correlated to new products or significant enhancement of existing product. In addition, there is often a clear correlation between improving visitor growth trends and promotional packages where industry, councils and state government are working in unison.

4.3. AVERAGE LENGTH OF STAY

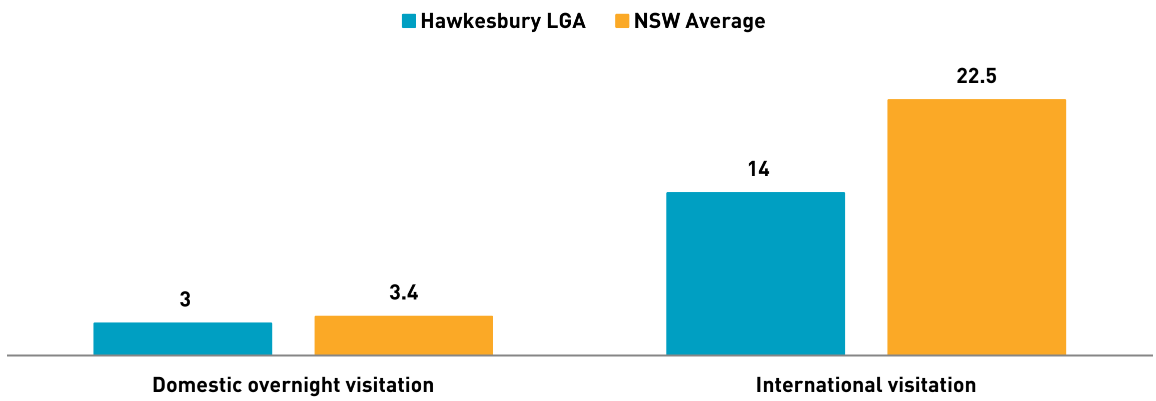
Based on Destination NSW data, Figure 11 demonstrates the four year average length of stay in the Hawkesbury LGA compared with the NSW average. For both overnight visitation and international visitation, the Hawkesbury LGA achieved lower than the NSW state average.

The official visitor data includes longer staying international students in particular and backpackers who significantly skew the average length of stay. As for domestic data, this is based on averaging over a four year period, so at an LGA level, the margin of error could be

[26] Travel to Blue Mountains Tourism Region, Year Ended September 2014, Destination NSW
[27] Based on work The Group has completed within the Blue Mountains and surrounding LGAs

significant. We consider that based on the feedback we have been given, that the average length of stay has tended to remain the same over the last 6 – 8 years and for many operators, is more likely to reflect more 2 day, 1 night stays.

FIGURE 11: FOUR YEAR AVERAGE LENGTH OF STAY IN THE HAWKESBURY LGA AND NSW (2008 – 2011)[28]



Providing that the Hawkesbury LGA can position itself as an attractive and highly accessible destination, the opportunity exists to grow a short break weekend market in particular. With its close proximity to the Sydney CBD the opportunity exists to encourage visitors to drive to the Hawkesbury LGA on a Friday and to stay overnight for 2 days before leaving on the Sunday.

The ability to attract more visitors to actually stay longer is likely to be linked to education based programs and courses as well as sporting and cultural based events. If it is possible to develop for example, a national orienteering course within the National Parks in the Hawkesbury and to create an orienteering centre to encourage training in the area, visitor length of stay may able to be increased out to 4 - 5 days.

4.4. VISITOR EXPENDITURE

The following table outlines visitor expenditure (based on DNSW data) in the Hawkesbury LGA for the 2012 FY and indicates that on a per night basis, domestic overnight visitors spend on average, the greatest out of all visitors to the LGA ($711 per trip). However, international overnight visitors spend the greatest per trip ($2,059 per night).

TABLE 1: TOURISM EXPENDITURE[29]

	DOMESTIC DAY	DOMESTIC OVERNIGHT	INTERNATIONAL
Average spend per trip	$112	$711	$2059
Average spend per night	n/a	$250	$98

[28] Travel to Hawkesbury Local Government Area – Four year average annual to September 2011, Destination NSW
[29] http://www.economicprofile.com.au/hawkesbury/tourism/visitor-expenditure

The introduction of a number of themed events and experiences is recommended in this strategy. This can be expected to lead to higher visitor expenditure associated with:

- Increased overnight visitor stays and associated accommodation bookings;
- More meals consumed by visitors in restaurants, cafes etc. in the Hawkesbury;
- Higher levels of merchandise sales associated with events and festivals as well as higher retail spend particularly associated with fresh fruit and processed food items; and
- The potential for ticketing fees for specific experiences as part of events.

4.5. VISITOR MARKETS TO THE HAWKESBURY LGA

With respect to the various visitor markets to attract, the Greater Sydney market needs to be carefully dissected and focused on because of its close proximity to the Hawkesbury LGA. The obvious product connection to Greater Sydney is the outdoor and food based experiences in particular which the Hawkesbury LGA can offer. With the extent of urban development in surrounding LGAs, the desire for more open space areas for recreation becomes an important selling feature of the Hawkesbury.

For the Sydney Metropolitan Area (and those suburbs closer to the CBD), the allure of food-based trails, markets and farm gate sales is likely to be an ongoing significant draw card. It is important therefore, not to treat the Sydney market as one homogenous market all wanting the same product and experiences.

The intrastate and interstate visitor markets will require new experiences to support stronger visitation from them. Many regional destinations have heritage and historic elements as well as local produce available. Hence, the need for other forms of visitor experiences which can appeal firstly to the Greater Sydney market and through word of mouth as well as active promotion, entice an inter and intrastate market to experience these new themed attractions and experiences as well.

A further market niche not to be forgotten is the VFR (Visiting Friends and Relatives) who need to be encouraged to visit particularly during periods when themed experiences and events are on so they can take advantage of local accommodation.

Approximately 51% of international visitors to Australia visit Sydney CBD (as opposed to other gateways in Australia).[30] Most of the international visitor activity in the Sydney LGA is strongly focused on the Sydney CBD and its various built and natural attractions. To entice the

[30] Travel to NSW, Year ended June 2013. Based on NSW's share of international arrivals to Australia.

international visitor market out of the Sydney CBD either for free independent travellers or as part of structured tour groups, requires a particularly compelling visitor experience. New visitor experiences would be required to encourage stronger international visitation and the various themed attractions and experiences suggested in this strategy for the Hawkesbury will eventually start to encourage international visitors wanting to experience the same.

4.6. SPECIFIC NICHE VISITOR MARKETS

There are a number of specific niche visitor markets which could provide significant growth for the Hawkesbury LGA. These include (but are not limited to):

- Overnight visitors who are looking to travel with their pets;
- Equine-based visitation centred around eventing and horse treks;
- Caravan and camping markets looking for higher quality holiday parks with pools, kids entertainment facilities, water parks etc;
- Cruise markets looking for day trip excursions outside the Sydney CBD and other than the Blue Mountains;
- Food tourism focused around authentic food experiences such as cooking schools, farm gate sales, famers markets, food trails and tours etc; and
- Working holiday visitors looking to stay in areas where they can pick fruit[31] etc.

4.7. IS THE HAWKESBURY LGA A DESTINATION?

Like many LGAs and tourism regions, the Hawkesbury has suffered from a highly fragmented tourism industry and a lack of an agreed pathway forward, including the active involvement of Council. Currently, the Hawkesbury LGA would struggle to be viewed as a destination in its own right. More aptly, it would be considered part of a broader Blue Mountains and surrounds region and a number of stakeholders outside of the Hawkesbury have commented on why the Hawkesbury, for tourism purposes, was not part of a broader Blue Mountains tourism region.

The Hawkesbury LGA can be a destination in its own right if the key stakeholders are prepared to work collectively to this end. Whilst Council has traditionally been seen to have taken a laissez faire approach to tourism, the need now is for Council to take a leadership role and form effective partnerships with industry and other stakeholders.

The Hawkesbury LGA will become a tourism destination when it is able to:

- Implement initiatives which industry are prepared to get behind and drive;

[31] By way of example, Bowen in Queensland receives thousands of mostly younger working holiday visitors coming to pick fruit and vegetables.

- Enhance existing product and generate new product, as identified in this Tourism Strategy;
- Develop a robust and high quality Hawkesbury LGA tourism brand which can work for the wider community as well;
- Implement a digital marketing platform including a high quality website (which is mobile accessible) which is managed and maintained through Council but with active industry input; and
- Effectively position itself as offering a clear point of difference to surrounding LGAs and forges effective joint marketing initiatives with them.

5. STAKEHOLDER CONSULTATION

A number of interviews have been undertaken with industry stakeholders not only within the Hawkesbury LGA but externally (including stakeholders from DNSW, NSW Trade and Investment, The Department of Planning, Blue Mountains Lithgow & Oberon Tourism, Penrith City Council, Hills Shire Council and Hills Hawkesbury & Riverlands Tourism Inc). Various challenges and opportunities have been noted by stakeholders who in turn, have assisted in setting the proposed direction for this tourism strategy for the future.

It is expected that the key findings, challenges and opportunities going forward will be further tested with industry and other stakeholders after the Tourism Strategy is supported as a management approach for the Hawkesbury LGA community by Council.

The following subsections indicates the key findings from the consultation with stakeholders.

5.1. LIFESTYLE OPERATORS

The vast majority of operators are smaller businesses with a number characterised as lifestyle operators in that their tourism based business is either not operational all year round, they require income from other sources to supplement revenue generated from these tourism enterprises or their tourism business is the secondary income to their primary employment. For many, there is a desire however to extend the commercial viability of their tourism businesses reflecting a desire to grow visitor numbers, occupancy and use of facilities and visitor yield.

5.2. NEED MORE PRODUCT

There is acknowledgement for the need for new product experiences in order to specifically grow overnight visitation to the Hawkesbury, The existing product base, whilst recognised as the key element of the tourism experience is not necessarily seen as sufficient to extend the visitor economy. Whilst many stakeholders commented on the need for stronger destination product marketing for the Hawkesbury, there was acknowledgement that new product needed to be introduced to achieve desired social and financial outcomes for community and the tourism industry overall.

5.3. FRAGMENTED INDUSTRY

Most industry stakeholders acknowledge there has been a lack of coordination and a lack of a unified approach to tourism over a number of years in the Hawkesbury. Feedback indicated that the sector is highly fragmented and without a clear unity of purpose. We understand that historically, there have been a number of business groups created in order to unify industry, but for a number of reasons, this unity has not been achieved.

What has been identified is a common concern amongst many industry players in the Hawkesbury over what they perceive as the lack of Council's support in particular for the sector.

5.4. COMMUNICATION ISSUES

From discussions with Council personnel as well as industry stakeholders there is clearly a need for improved communication and understanding of not only why things have not happened but more importantly how Council and industry will need to work together in the future to achieve desired outcomes.

5.5. MARKET POSITIONING

There was near uniform agreement amongst industry operators and other stakeholders in the Hawkesbury that positioning the Hawkesbury as part of the Greater Sydney region was a distinct disadvantage. Many stakeholders commented that the focus of DNSW's promotional efforts and activity within the Sydney region was strongly orientated towards the Sydney CBD and the mass of facilities, attractions and related infrastructure to leverage off. A number of industry stakeholders commented that they were members of BMLOT as they felt that the Hawkesbury LGA product mix and their own businesses were better aligned with comparable visitor experiences in the Blue Mountains region rather than Greater Sydney.

The Hawkesbury LGA is in the unique position of being able to play with BMLOT through joint marketing initiatives, where appropriate, and with DNSW through wider Sydney region marketing opportunities. The determination of where the Hawkesbury LGA is best placed to put its tourism resources should be based on the strength of new product development opportunities and marketing alliances.

5.6. REGIONAL ALIGNMENT

A number of stakeholders also questioned the value of the alignment with the Hills District as they saw little synergy between the tourism product in both LGAs. Many felt that linking with the Blue Mountains purely as part of a marketing alliance or partnership offered greater value to

Hawkesbury based tourism operators than continuing to try and extract value from an alignment with the Hills District. Discussions with stakeholders on the history of the alignment with the Hills District and previously with Hornsby included, indicated that the initial reasons for this alignment had changed overtime and it was timely to now reassess the value and ideally moving forward which many felt would need a separation from the Hills District.

Feedback indicates that the initial decision to align with HHART was industry driven, though over time, segments of the Hawkesbury LGA's tourism industry have questioned the value of this alignment. Council would appear, through its laissez faire approach, to have allowed industry to determine its own pathway forward without interference.

Despite the best efforts and acknowledged commitment of Hills, Hawkesbury & Riverlands Tourism (HHART) to drive opportunities many felt there was a lack of synergy and resourcing in particular. Without significant strengthening and resourcing, the preference of a number of stakeholders was to move to a new marketing alliance with Blue Mountains Tourism where the Hawkesbury could be seen as a value added gateway and also acknowledging that a number of operators in Bilpin, Mount Tomah and Kurrajong already have built strong relationships with the Blue Mountains.

Many operators were at pains to point out that the lack of positive outcomes was in no way a reflection of the tireless efforts of the executive from HHART, but rather a reflection on the lack of effective synergy between the Hills District and its tourism industry focus, and that of the Hawkesbury, which was seen as diametrically different. In addition, it reflected a high level of frustration in being part of the Greater Sydney tourism region with little headway achieved over quite some time.

5.7. COUNCIL SUPPORT

Feedback from stakeholders indicated that Council was perceived as not sufficiently supportive of tourism development or its economic value to the broader community in the Hawkesbury. The fact that Council has taken a step back to allow industry take the lead was generally not recognised or adequately understood by industry. There is a need for effective dialogue and communication going forward and a recognition by many stakeholders that Council would need to play a far more active role in delivering positive tourism outcomes for the LGA and motivating industry to take a more collegial approach to working with Council.

5.8. PLANNING ENVIRONMENT

The various Council planning regulations and instruments (DCP and LEP by way of example) were viewed by a number of stakeholders as problematic and too restrictive in allowing smaller scale tourism ventures to be possible in many parts of the LGA. An example was the RU2 Zone which was seen to effectively prohibit most forms of tourism accommodation. A need was seen to better align Council's planning instruments and the strategic direction of these with the need to more actively support appropriate tourism ventures which will enable tourism businesses to expand on a sustainable and financially viable basis and in the process allow for increased local employment opportunities and other economic benefits to be achieved.

It is important to note that there are constraints which are determined by the NSW State Government's planning rules and regulations which Council has to adhere to so the planning environment is not necessarily of Council's making. Nevertheless, it is important that the Hawkesbury LGA's planning instruments are far more supportive of tourism to encourage further product development and investment.

5.9. VISITOR INFORMATION CENTRES

Whilst there are some stakeholders who feel that the VIC in its current location (opposite Richmond Air Force Base) plays a role as an unofficial gateway centre to the Blue Mountains, many others questioned the current location and felt that if a VIC was to be retained for the future, there may be better value having it positioned in the primary visitor hub (Windsor) and aligned with a visitor experience to encourage greater numbers through such a facility.

Some stakeholders also commented that with the increasing move to online and web based as well as other technology solutions for offering visitor information, there was a far stronger need for technology based solutions to deliver what the market was looking for. This was also not seen as a criticism of the excellent efforts of personnel at the VIC but rather a reflection of changing market conditions and the need to recognise that only a small percentage of visitors actually venture into the VIC whilst there is a much stronger need to inform and encourage the vast majority of visitors through online solutions to come to the Hawkesbury and spend more time.

5.10. LEADERSHIP ROLE

Whilst Council came under a fair amount of criticism for what was not happening within the tourism sector in the Hawkesbury, there was an acknowledgement amongst a number of stakeholders that Council now needed to play a leadership role in partnership with industry if tourism was to be successful in growing on a sustainable basis. The fragmentation of industry in the Hawkesbury, the lack of traction of initiatives attempted through existing channels and the inability to sustain a number of events and festivals were all cited as examples of why it was valuable and necessary for Council "reengage in a far more active way".

5.11. TOURISM PROFILE

Windsor, as the largest town and with its strategic location was recognised as the primary gateway to the Hawkesbury LGA. However, many stakeholders felt it was in serious need of upgrading in order to provide an attractive location. The Mall was widely criticised and a need for greater effort placed into town landscaping overall, improved signage, improved street lighting and mechanisms found to entice building owners to upgrade shopfronts as a major economic development initiative.

Stakeholders also commented on the need to remove the existing Mall and provide vehicular access to reinvigorate the town centre. In order to cater for the current Sunday Windsor Mall Market, as well as future markets that may take place, there would need to be boom gates installed to close sections of the Mall during these market periods.

5.12. TOURISM DIFFERENTIATION

Stakeholders commented that each of the towns and villages within the Hawkesbury had a clear point of difference and this needs to be developed as part of the brand positioning going forward. Whilst there is an acknowledged strength in having the various towns and villages cleverly linked as part of tourism trails and experiences, there was also strong acknowledgement that the communities in the various towns and villages were quite different at times and needed to have a clear point of difference to leverage opportunities off.

5.13. WEBSITE

Stakeholders commented on the need for a single highly dynamic website to be created with individual portals which could link to the various towns and villages and the tourism products specifically in each of these. There was concern that a number of towns and villages (Bilpin and Richmond by way of example) were already starting to look at developing their own websites in the absence of a coordinated and higher quality overarching approach. It was felt that industry, in partnership with Council, should drive the development of a highly dynamic website and ideally, Council could assist with the ongoing maintenance of the website.

5.14. RESTAURANTS AND CAFÉS

Stakeholders also commented on the challenge of the lack of quality restaurants and cafes within the LGA and the challenge of keeping existing cafes and restaurants open. Feedback indicated a desire, with the assistance of Council, to look at pop-up attractions and restaurants which could offer a far more cost effective entry point for those wishing to try specific ventures and which could potentially encourage many building owners to allow new ventures to be tried on a short term basis (4 - 6 months) to test their viability before committing to longer term leases. Council was seen to need to play the key role in allowing pop-up facilities to be created and to ensure that town planning instruments (regulations, rules and strategic policy) were particularly supportive to enable a more innovative approach to generating new tourism based business ventures including retail, food and beverage outlets, small scale events and visitor experiences.

6. VISITOR INFORMATION SERVICES

6.1. OVERVIEW

The Hawkesbury Visitor Information Centre (VIC) is located on the Hawkesbury Valley Way in Clarendon NSW (directly opposite the Richmond RAAF Base). The Centre, which is a yellow i accredited VIC, is open 363 days per year (closed Christmas Day and Good Friday) with the following operating hours:

TABLE 2: VIC OPERATING HOURS

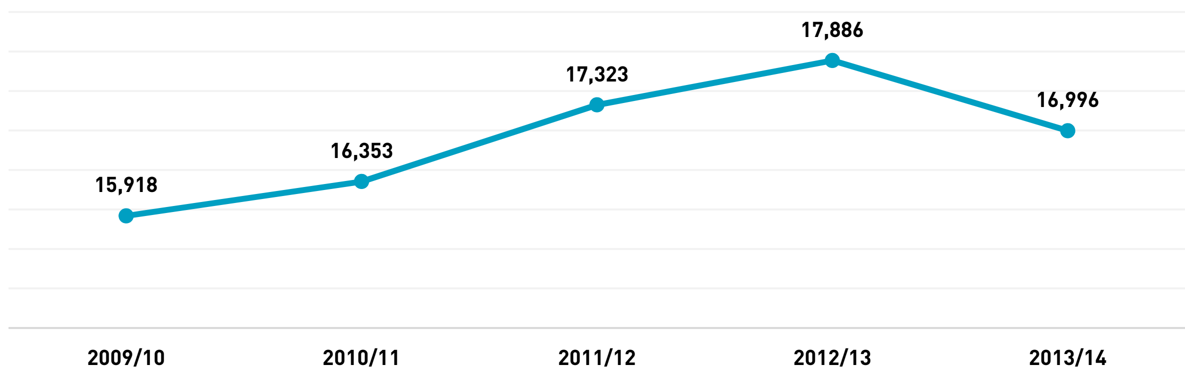
VIC OPERATING HOURS	
Monday – Friday	9am – 5pm
Saturday - Sunday	9am – 4pm
Public Holidays (ex. Christmas and Good Friday)	9am – 3pm

6.2. VISITATION TO THE VIC

Figure 12 below demonstrates visitation to the Hawkesbury VIC over the past 5 years. During this period, visitation has averaged just under 17k visits. The decline in visitation from 2013 – 2014 could potentially be a result of the closure of the café situated next door to the VIC.[32]

It is important to note that compared to many VICs throughout the State, the Hawkesbury VIC has seen a modest growth visitor trend.

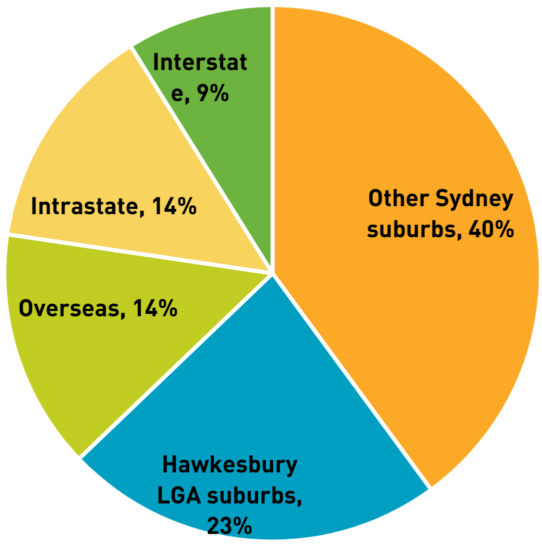
FIGURE 12: VISITATION TO THE HAWKESBURY VIC[33]



[32] We understand the café was closed from the 23rd February 2014.
[33] Visitation data to the VIC is based on data provided to The Group from Hawkesbury City Council.

The following figure provides a breakdown of visitor types to the Hawkesbury VIC over the three year period 2011 – 2013. This demonstrates that the majority of visitors to the VIC are those from "other Sydney suburbs", comprising 40% (17k) of total visitation, followed by those visitors who reside within the Hawkesbury LGA, totalling 23% (10k) of visitation to the VIC.

FIGURE 13: VISITATION TO THE HAWKESBURY VIC BY VISITOR TYPE: 2010 - 2013[34]



6.3. VIC PERFORMANCE

It is suggested that a detailed review be undertaken of visitor services and the VIC specifically in order to accurately capture all operating costs from various Council cost centres. This Tourism Strategy did not extend to a detailed analysis of the VIC but data provided has highlighted the need for a separate review.

The VIC review should take into consideration:

- The changing role of visitor services and the significant shift to the provision of visitor information via the web;
- The necessity to provide far better information, well in advance of a visit and to help motivate more visitors to consider the Hawkesbury LGA for day or overnight experiences;
- The cost to run various elements of operations;
- The ability to introduce mobile/flexible VIC facilities which can be located to support events and festivals etc; and

[34] Visitation data to the VIC is based on data provided to The Group from Hawkesbury City Council. This is a three year average of visitation to the VIC over the period 2011 – 2013 and does not include 2014 visitation.

- The ability to introduce additional revenue streams such as ATM facilities, stronger café and retail, Council services for rate payers and community.

Opportunities may exist in the future to identify alternative revenue streams through possibly offering a variety of council services such as paying rates etc. through the VIC. This could offset operating costs and provide a valued community service. This would need, however to be fully assessed as part of a more detailed review of visitor services generally.

6.4. COMPARATIVE ANALYSIS (OF OTHER VICS)

The table on the following page provides a comparative analysis of over 20 VICs around Australia and New Zealand including variables such as total VIC income and expenditure, the VIC's net surplus or net cost of service deficit, annual visitor numbers to the VIC, income and expenditure per visitor, the net surplus or net cost of service per visitor and the percentage of visitors who travel to the LGA/region who are also visiting the VIC which illustrates the penetration of visitors to each respective LGA/region that the VIC is capturing.

Key points to note include:

- The Hawkesbury VIC currently only generates $0.25 in revenue per visitor[35], which is one of the lowest revenue amounts per visitor out of all the VICs assessed though potential may exist to expand the level of services on offer and increase revenue streams;
- The Hawkesbury VIC currently generates the fourth highest expenditure per visitor, at $12.78 per visitor[36];
- Based on the number of visitors to the Hawkesbury LGA and the number of visitors the VIC receives annually, the Hawkesbury VIC captures one of the lowest penetration of visitors out of all the VICs assessed, capturing just 2.2% of total visitors to the LGA[37] which reflects walk in visitors but excludes phone and online enquiries;
- The question therefore must be asked, if the Hawkesbury VIC is only servicing roughly 2 - 3% of direct visitors to the LGA, what efforts are being employed to deliver information services to the other 97% of visitors to the LGA?

[35] Based on 2013 Financial Year data provided by Hawkesbury City Council
[36] Based on 2013 Financial Year data provided by Hawkesbury City Council
[37] Based on 2013 visitation data provided by Hawkesbury City Council

TABLE 3: VIC COMPARATIVE MATRIX (SORTED BY HIGHEST NET COST OF SERVICE OPERATING LOSS PER VISITOR)[38]

VIC COMPARISON MATRIX - BASED ON DOOR COUNT ONLY (ORDERED BY % OF VISITORS CAPTURED BY VICS)									
VIC Name	**Total VIC Income**	**Total VIC Expenditure**	**VIC Surplus or Net Cost of Service (-)**	**Annual Visitors to VIC**	**Income p/visitor**	**Expenditure p/visitor**	**Net Surplus/Loss p/visitor**	**Number of visitors to region**	**% of visitors VIC is capturing**
Childers VIC (Bundaberg, QLD)	$27,463	$348,968	-$321,505	20,649	$1.33	$16.90	-$15.57	158,880	13.0%
New Plymouth i-SITE (Taranaki, NZ)	$147,486	$754,524	-$607,038	46,321	$3.18	$16.29	-$13.11	1,224,000	3.8%
Hawkesbury VIC (Hawkesbury, NSW)	**$4,495**	**$228,545**	**-$224,050**	**17,886**	**$0.25**	**$12.78**	**-$12.53**	**796,000**	**2.2%**
South Taranaki i-SITE (Taranaki, NZ)	$63,000	$353,000	-$290,000	24,775	$2.54	$14.25	-$11.71	216,000	11.5%
Gin Gin VIC (Bundaberg, QLD)	$7,632	$74,100	-$66,469	8,360	$0.91	$8.86	-$7.95	39,720	21.0%
Stratford i-SITE (Taranaki, NZ)	$95,000	$364,000	-$269,000	39,036	$2.43	$9.32	-$6.89	360,000	10.8%
Wynyard VIC (Waratah-Wynyard, TAS)	$61,013	$273,569	-$212,556	35,483	$1.72	$7.71	-$5.99	90,700	39.1%
Devonport VIC (Devonport, TAS)	$186,550	$564,159	-$377,609	63,320	$2.95	$8.91	-$5.96	247,100	25.6%
Ulverstone VIC (Central Coast, TAS)	$34,934	$172,980	-$138,046	23,327	$1.50	$7.42	-$5.92	105,200	22.2%
Launceston VIC (Launceston, TAS)	$312,750	$737,250	-$424,500	75,000	$4.17	$9.83	-$5.66	558,400	13.4%
Burnie VIC (Burnie, TAS)	$109,880	$233,985	-$124,105	22,800	$4.82	$10.26	-$5.44	138,000	16.5%
Latrobe VIC (Latrobe, TAS)	$3,035	$64,773	-$61,738	12,394	$0.24	$5.23	-$4.98	108,000	11.5%
Cooma VIC (Cooma-Monaro, NSW)	$116,400	$319,800	-$203,400	60,000	$1.94	$5.33	-$3.39	218,000	27.5%
Clarence Coast VIC (Maclean, NSW)	$10,052	$149,085	-$139,033	44,882	$0.22	$3.32	-$3.10	1,013,750	4.4%
Clarence River VIC (Grafton, NSW)	$9,279	$137,617	-$128,338	42,035	$0.22	$3.27	-$3.05	1,013,750	4.1%
Stanley VIC (Circular Head, TAS)	$75,226	$115,292	-$40,066	15,651	$4.81	$7.37	-$2.56	81,800	19.1%
Orange VIC (Orange, NSW)	$126,000	$280,000	-$154,000	70,000	$1.80	$4.00	-$2.20	620,000	11.3%
Burra VIC (Burra, SA)	$60,543	$118,524	-$57,981	28,256	$2.14	$4.19	-$2.05	166,000	17.0%
Sheffield VC (Kentish, TAS)	$307,645	$402,679	-$95,034	51,666	$5.95	$7.79	-$1.84	123,500	41.8%
St Helens VIC (St Helens, TAS)	$85,706	$158,163	-$72,457	39,825	$2.15	$3.97	-$1.82	136,000	29.3%
Bundaberg VIC (Bundaberg, QLD)	$105,398	$156,214	-$50,817	40,408	$2.61	$3.87	-$1.26	1,125,400	3.6%
Strahan VIC (West Coast, TAS)	$837,878	$882,463	-$44,585	77,759	$10.78	$11.35	-$0.57	150,400	51.7%
Penguin VIC (Central Coast, TAS)	$52,994	$44,770	$8,224	19,442	$2.73	$2.30	$0.42	105,200	18.5%
Average	$123,494	$301,498	-$178,005	$38,229	$2.67	$8.02	-$5.35	$382,426	18%

[38] As data was collected over various projects in the last 3 year period, some statistical information refers to calendar years. Importantly however, all of this data is over a 3 year period which we consider is statistically comparable.

7. CHALLENGES

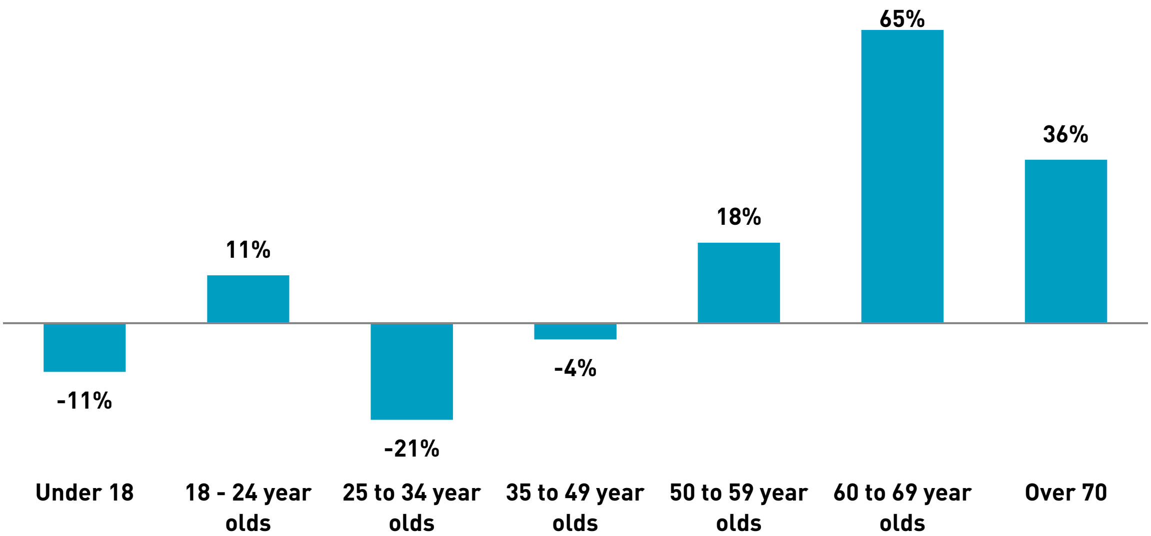
There are a number of challenges going forward which need to be adequately addressed if the Hawkesbury is to be positioned as a more viable visitor destination in its own right.

7.1. AGEING POPULATION

The following figure illustrates the change in key age groups within the Hawkesbury over the period 2001 – 2011.[39] The information highlights the ageing population which will impact on the Hawkesbury as a visitor destination as the ageing population is expected to put strain on public services such as healthcare and welfare services.

Growing the tourism industry provides a valuable opportunity for the Hawkesbury LGA to encourage young people to stay within or to relocate to the Hawkesbury LGA for employment. There is also a need to ensure that more entrepreneurial activity and investment occurs to support new tourism product. Traditionally, investment is more likely to come from younger and middle aged residents and others as older residents tend to be more risk averse and are less likely to be participants in tourism ventures (other than traditional B&Bs).

FIGURE 14: POPULATION AGE GROUP CHANGES FROM 2001 - 2011[40]



[39] Section 3.3.3 provides a more detailed assessment of the age of Hawkesbury's residents.
[40] http://profile.id.com.au/hawkesbury/service-age-groups

For example, whilst the area may provide opportunities for expanding nursing homes, convalescent homes, health facilities and associated retirement villages, this may in turn, make it challenging to position the Hawkesbury as a place for active recreation and tourism experiences unless a concerted effort is made to proactively encourage new tourism ventures and the expansion of existing ones

Furthermore, having a skilled and active workforce for the tourism hospitality sector will also be major considerations. As the tourism and hospitality sectors are often criticised for paying at the lower level of salary bands compared to other industry sectors, this may create challenges in finding skilled labour for the future. This in turn may impact on the ability to attract new investment into tourism specifically.

7.2. BALANCING HOUSING AND TOURISM NEEDS

Tourism growth in the Hawkesbury is challenged in trying to achieve a balance with State Government targets for new housing lands particularly in the North West Growth Centre of which the Hawkesbury is an important LGA. This also is factored in by State Government targets on employment growth which is not contrary to the needs of the tourism sector but it is certainly actively encouraging other industry sectors where the employment ratios are thought to be higher.

What may need to be considered is creating dedicated tourism and associated retail precincts which can act as sub nodes for tourism destination activity and which aim to protect the character of town centres so the recreational and heritage values are not compromised.

The introduction of significantly more housing estates and 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. It is important that tourism development is not pushed out into peripheral areas, making it harder to access etc.

7.3. UPGRADING TOURISM RELATED INFRASTRUCTURE

A major challenge going forward is the anticipated costs associated with upgrading a variety of community and visitor public infrastructure including jetties, wharves, walkways, national park facilities, overall streetscape etc. throughout the Hawkesbury LGA.

There is a need to explore opportunities for how the cost of these upgrades can be equitably met with support from different levels of Government. There is also a need to explore the different ways of potentially generating a variety of income/revenue streams or other economic benefits associated with upgrading these forms of public infrastructure.

Council needs to consider the ability to generate new revenue streams when reviewing sites which tourism can locate in. This could include heritage sites and buildings, pathways and trails, car parking facilities, banners and signage and public toilets.

To ensure that the upgrade/maintenance of such infrastructure in the Hawkesbury LGA is not neglected (which could impact negatively on growing tourism), Council needs to explore opportunities to work with State Government to find ways of offering revenue streams which in turn can support the ongoing maintenance and upgrading of jetties, wharves and walkways etc.

7.4. WATERWAYS AND ECOSYSTEMS

Similarly, NSW Roads and Maritime Services (along with other associated government agencies) are also struggling to meet the ongoing needs required to maintain waterways for their recreational and visitor amenities, including the Hawkesbury River.

The cost implications and potential legal liability continue to make it harder for commercial and private boat owners to access waterways and other natural ecosystems for recreation purposes. At times, the cost is transferred to commercial tourism operators, including those operating houseboats on the Hawkesbury River along with other water based activities.

Lack of access to the River and restrictions on the River will continue to limit tourism potential. Until such time that greater river access and activities are possible, there is little benefit in trying to promote river-based tourism.

7.5. LACK OF TRANSPORT SERVICES

The lack of sufficient regular public transport services (bus, train etc.) continues to generate a reliance on private vehicle use in order for visitors to access the Hawkesbury LGA. This is merely another factor which makes it difficult for various visitor markets (such as backpackers, international visitors in general and older visitor markets) to access the area, particularly for recreational activities. Although being relatively close to Sydney CBD that lack of public transport services effectively makes the Hawkesbury a more challenging area to access unless to a private vehicle.

Attracting certain visitor markets to travel to the LGA therefore may be difficult. By way of example, backpackers regularly use public transport as a mechanism for accessing areas for mountain biking, trekking etc. and may choose to travel to other destinations, such as the Blue Mountains, to undertake these activities unless they have a private vehicle or access to a shuttle/tour bus service.

In discussions with tourism related bus companies and smaller scale tourism operators particularly out of the Sydney CBD, the catalyst for increasing transport services is completely based on the level of demand. This level of demand is predicated on offering enhancements to the existing product mix in the Hawkesbury area as well as growing and increasing the variety of product available for both domestic and international visitors.

7.6. LACK OF TOUR OPERATOR INTEREST

As mentioned previously, transport operators and tour operators based in the Sydney CBD generally have indicated a lack of interest in developing tours for the Hawkesbury LGA. Feedback which was provided on a confidential basis indicates the following reasons for this:

- There is insufficient commissionable product in the Hawkesbury to enable packages to be created for the domestic and international markets;
- Whilst a number of towns and villages offer an attractive heritage/historic setting, their attractiveness, at times, is compromised by limited retail, limited shop trading hours, parking issues at some times of the day; and
- There is limited interested in some of the existing events which are seen to be more community based.

The greatest impediment to encouraging and motivating inbound tour operators and wholesalers to recognise the value and importance of the Hawkesbury as a visitor destination, is the lack of a major all-weather reasonably sized visitor attraction or experience. Stakeholder feedback indicates that if there was one unique visitor experience, this could act as a sufficient catalyst to encourage tours to be potentially trialled to scope interest.

7.7. LACK OF MARKET DAYS - PRODUCE MARKETS

Feedback from a number of stakeholders indicates the challenge which the Hawkesbury has had in establishing and maintaining produce/farmers' markets over the years. This feedback has indicated that many markets have started off and been particularly popular but have failed to be sustainable after a period of time.

The Hawkesbury is noted by DNSW and many visitor markets as being a food and produce growing region. There is therefore an expectation amongst visitors that the LGA would offer produce/farmers' markets and other food experiences.

Based on discussions with DNSW and research from the United Nations World Tourism Organisation (UNWTO), food tourism is a rapidly emerging sector. Additionally, there is noted demand for a variety of produce and related markets in the Greater Sydney region and market days. The creation of sustainable produce/farmers' markets and other food tourism product (such as farm gate and food trails) is therefore considered as a highly effective mechanism for encouraging greater visitation potentially for the Hawkesbury.

7.8. LOCATION OF THE VISITOR INFORMATION CENTRE

The official, yellow i accredited VIC for the Hawkesbury LGA is located opposite the Richmond Air Force Base.[41] While the VIC is on a major arterial route within the Hawkesbury LGA, feedback indicated that it is not seen by many stakeholders as a major gateway centre or a major information centre into the key hubs/nodes within the Hawkesbury LGA (Windsor or Richmond, by way of example).

A separate assessment needs to be undertaken looking at the performance of the VIC and possible alternative information mechanisms to ensure Council is obtaining the optimum return for its investment into visitor services. Many councils throughout Australia are performing similar assessments given the increasing reliance visitors have on technology prior to visiting and during their visit to a destination.

7.9. NEW TOURISM PRODUCT

Whilst the Hawkesbury does have a large number of smaller tourism operators, mostly in bed and breakfast and associated accommodation, there is a lack of experiences and attractions to entice a broader visitor mix to visit. Whilst the combined activities of many small to medium operators offers a number of product experiences, there is not a significantly large visitor experience or attraction which can act as a hub or a major tourism attractor. A broader product mix will entice and support stronger visitation from a variety of markets which in turn will help increase the level of GDP generated by tourism.

New product could include:

- Product associated with the numerous national parks and forest reserve areas for recreational purposes in particular;
- Further water based activities particularly on the Hawkesbury River (if improved access is possible) to expand the existing base of recreational activities possible and allow for more commercially orientated activity (waterfront kiosks cafes, expansion of kayaking and related water based activities);
- Creation of more heritage and art based experiences whether this be to link with artists and craft peoples studios;

[41] See Section 6 of this Strategy for a detailed overview of the VIC.

- Identifying additional events where sustainable; and
- Identifying activities which can be potentially associated with the Royal Air Force base at Richmond (gliding, small aircraft training etc.).

These concepts are explored in more detail in Section 9 of this report.

7.10. STRENGTHENED AVIATION HUB AT RICHMOND

The Richmond RAAF Base is noted as one of Australia's oldest and largest air force bases.[42] Previously, the RAAF Base used to have open day events where visitors could view aircraft and air shows etc. However, we note that insurance liabilities and risks and the cost of meeting this have made this prohibitively expensive to continue to operate these open days, despite what is perceived to be very strong interest from a number of visitor markets to attend air show/open days. There is a need to ascertain the potential for:

- Expanding light aircraft training opportunities;
- Expanding the opportunity for gliding, parachuting etc; and
- Ascertaining whether the opportunity exists to build a stronger relationship with the air force base to allow for guided tours through some of the maintenance and support facilities.

7.11. PARTNERING WITH NATIONAL PARKS AND WILDLIFE SERVICE

A significant amount of the LGA (roughly 85%) is controlled by the NSW National Parks and Wildlife Service. The future utilisation and value of these national parks should be a major consideration in supporting the Hawkesbury as a tourism destination with a strong recreational focus for the future.

Whilst NPWS has limited funding available for promotional purposes to encourage people to access its various national parks in the area, NPWS are now more actively encouraging partnerships with commercial operators who are able to provide sustainable recreational product which may be able to operate in the national parks. This opportunity alone could be a major stimulant for greater visitation into the Hawkesbury, providing that there is sufficient visitor interest and that commercial tour operators are able to find acceptable and profitable ways of working within the National Parks structure and policy framework.

[42] http://www.airforce-technology.com/projects/raafbaserichmond/

Other opportunities which could be explored include:

- The ability to access and utilise NPWS marketing collateral in the form of brochures and maps in particular for promotional purposes linked in with tourism industry in the Hawkesbury;
- To identify recreational activities which can be channelled into events such as orienteering, mountain biking, triathlons etc. if it is possible to access national park areas for this purpose;
- To identify unique aspects of fauna and flora which can be made far more accessible for the Greater Sydney market in particular; and
- Indigenous tourism associated with guiding and interpretation of specific sites of importance. The relatively easy driving time from the Sydney CBD to the Hawkesbury is something recognised by tourism industry operators in the Sydney CBD particularly but there needs to be a far stronger link to product to generate interest.

7.12. ACCOMMODATION OCCUPANCY LEVELS

One of the challenges noted for the Hawkesbury tourism industry, and in particular, the accommodation sector, is to grow current occupancy levels as well as the average room yield. Based on discussions with accommodation operators and data from the Australian Bureau of Statistics[43], we note average accommodation occupancy rates in the Hawkesbury LGA of between 50 – 60% and average visitor stays of up to two days. Whilst these occupancy rates are noted as reasonable, this needs to be seen within the context that for many smaller operators in particular, they only operate over weekend periods and if a full week was included, the average annual occupancy rates would be considerably lower. This also reflects the lifestyle nature of a number of smaller operators.

Larger commercial accommodation operators are also keen to actively encourage stronger occupancy rates and rely not only conferences and events to help stimulate this but also an expansion of product opportunities.

[43] ABS data indicated annual occupancy rates of 60% (2010), 66% (2011) and 58% (2012). This survey only included the analysis of 9 operators in 2010, 9 operators in 2011 and 5 operators in 2012. The ABS accommodation data has limitations because it only surveys accommodation facilities with 15 or more rooms. As the Hawkesbury LGA has a large number of B&Bs and smaller accommodation establishments, we consider that this data should not be relied on alone.

7.13. LIFESTYLE OPERATORS

A high proportion of industry operators within the Hawkesbury are noted as lifestyle rather than full commercial operators, this includes accommodation providers, food and beverage operators and general retailers. Several operators whom The Group spoke with indicated that if there were higher levels of market demand, they would be keen to expand their hours of operation to become full time operators (subject to DA approvals).

This also extends to the hospitality and retail sector where a number of cafés, restaurants and retailers are not open during the weekend periods (and on Sunday in particular). This creates the perception that the Hawkesbury is not open on the weekends. This is a major limitation for the area going forward.

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

7.14. COMMUNITY AWARENESS CAMPAIGN

A strategy which promotes the importance of the tourism industry for the Hawkesbury LGA is required. This strategy could include a community awareness campaign which demonstrates the following:

- How the tourism dollar disperses through the local Hawkesbury economy;
- What kind of businesses benefit from tourism;
- How extended trading hours could provide benefits to a wide cross spectrum of the community;
- What the estimated value is of tourism via direct, indirect and induced spending impacts; and
- To help support why Council/rate payer funding is required to maximise the total returns to the Hawkesbury as demonstrated via economic benefits, social and infrastructure improvements and higher quality environmental outcomes.

7.15. TOWN AND VILLAGE DIFFERENTIATION

There are numerous small towns and villages within the Hawkesbury which offer interesting points of difference for the visitor markets. It is important that the unique points of differences of each of these towns and villages be branded and promoted to establish each as a visitor destination.

The marketing of the towns and villages within the Hawkesbury needs to be included as much for tourism product development as place making. Where possible, opportunities need to be furthered to include:

- Enhancement of heritage characteristics and their ongoing maintenance;
- Consideration of colour schemes for smaller towns and villages;
- Introduction of gateway attractive signs which can help differentiate the Hawkesbury from other parts of the wider region and to strengthen towns and village uniqueness;
- Reassessing signage into the Hawkesbury particularly on main access roads and to create a point of difference; and
- Looking at aspects of street lighting, street furniture, and footpath and paving treatments etc. as simple but effective points of difference for heritage precincts, potential tourism precincts etc.

It is particularly important that the contribution which tourism can make to place making, town and village landscaping and beautification plans, signage and liveability for towns and village needs to be adequately recognised. There is still a perception that tourism reflects traditional hotel and motel accommodation by way of example, rather than the significant breadth of accommodation product which the Hawkesbury offers and which the markets are looking for (B&Bs, guesthouses, eco-retreats, quality glamping experiences).

7.16. THE IMPACT OF A LARGER VISITOR EXPERIENCE

One of the major challenges for the Hawkesbury is identifying new product which can act as a major drawcard for the LGA and a catalyst for growth. Whilst smaller product development opportunities are often easier to create because of the lower capital cost and because they can often be tagged onto an existing experience, their impact in encouraging tourism intermediaries (tour wholesalers, travel agents, inbound tour operators, etc.) to take notice is significantly harder to achieve.

Consideration therefore needs to be given to creating a far more extensive tourism experience which a number of other product opportunities can then leverage off. In some locations this is created by a major and/or regular event but this option is not currently available within the Hawkesbury. Options to consider may need to include the reuse of buildings or sites which may now be surplus to requirements. This could include old school sites or other public buildings etc. which attraction operators may be able to modify on a cost effective basis to create a new major visitor experiences.

Council needs to identify those sites within the LGA which could potentially meet this requirement. Council needs to assess its ability to offer sites at attractive rental rates initially, in order to attract the right form of visitor attraction and to help stimulate stronger economic benefit and growth particularly in the form of local employment.

7.17. LACK OF A MEDIA DATABASE

Feedback received indicated that there is a need for a media database to be developed which contains a range of high quality images and other media for the Hawkesbury LGA. This will allow businesses within the LGA to utilise these images for marketing and promotion, providing a high quality interpretation of the Hawkesbury LGA.

To fund the development of this media database, consideration could be given to:

- Applying for a grant from DNSW to develop a suite similar to their online image library (http://images.destinationnsw.com.au/)[44]; or
- Seeking support from HHART to assist with the creation of the media database using resources at their disposal.

In order to fill the media database with high quality images, the opportunity exists to hold an annual regional photography competition, with prize money being given for top selected images. All images entered into the competition would be able to be used by Council and local operators for marketing material, with photographer acknowledgement.

[44] We note currently, there are very few images of the Hawkesbury LGA included in this media database

8. VISION FOR THE FUTURE

The following outlines the potential vision, mission and objectives to enable tourism to develop on a sustainable basis in the Hawkesbury LGA. This deliberately builds on the existing tourism industry and expands in the areas which will offer sustainable social and economic benefits for the community for the future.

8.1. VISION

The suggested vision for tourism for the Hawkesbury is as follows:

> *That the Hawkesbury LGA will be recognised as a major recreational playground for the Greater Sydney region utilising its key strengths of its natural environment, heritage and cultural assets and leveraging off its close proximity to the Sydney CBD.*

Associated with this vision is the following Mission Statement:

> *"Hawkesbury City Council, in partnership with its tourism stakeholders, will position and develop the Hawkesbury as a highly attractive destination for a number of quality nature and cultural based experiences aimed at generating significant economic benefit for the local community."*

The vision and mission need to be read together and reflects the need for a strong partnership approach by Council in tandem with industry going forward. Tourism is unlikely to reach its potential without active Council support and industry needs to be actively encouraging all operators to participate in forums, marketing opportunities etc. The resources of the VIC play a key role in helping to drive this opportunity for the Hawkesbury.

In addition, Blue Mountains Tourism needs to be engaged with in order to create an effective marketing alliance with Hawkesbury operators. How formal this relationship needs to be, should be discussed in liaison with Blue Mountains Tourism.

Lastly, once the product offering has been strengthened and a solid marketing alliance with Blue Mountains Tourism has been created, Destination NSW and NSW Trade and Investment need to be engaged with to promote to the intra, inter and international visitor markets.

The key is creating a sufficiently strong product base to take to the market place via key intermediaries (Destination NSW as the state tourism organisation and others) rather than merely assuming that what the Hawkesbury currently has on offer is sufficient to warrant a strong marketing push by state and tourism entities in particular.

8.2. OBJECTIVES

The following set of objectives relate to the vision and mission statements above. Because this Tourism Strategy is for Hawkesbury City Council, the objectives relate to the needs of Council in developing a sustainable tourism industry going forward. The objectives therefore for Council in order to develop a robust and sustainable tourism sector are as follows:

- To recognise the need of Council to perform a coordination role in helping to build stronger links to industry, relevant state government agencies and regional tourism entities;
- To work in partnership with the state and regional bodies to build tourism industry knowledge and expertise;
- For Council to ensure that tourism related infrastructure (owned by Hawkesbury City Council) is developed and well maintained, including:
    - Signage for towns and villages;
    - Overarching website development and maintenance; and
    - The provision of quality visitor information services both through face to face facilities as well as a far stronger online presence.
- To identify and explore sites for major tourism experiences and attractions which can be packaged and presented to tourism developers and investors for consideration through an investment prospectus; and
- To form a strong partnership relationship with National Parks and Wildlife Service to explore the development of nature-based products within the Hawkesbury for a number of recreational and event based activities.

9. DESTINATION DEVELOPMENT

Whilst there are a number of benefits in improving the promotion and marketing of existing tourism enterprises within the Hawkesbury, industry feedback as well as separate research and analysis highlights the need for the development of new product, branding and governance structures (Council coordinated working group) in order to strengthen the destination capability of the Hawkesbury going forward. The following subsections provide an indication of the types of new product development initiatives as well as marketing initiatives which should be considered for the Hawkesbury LGA.

9.1. HAWKESBURY TOURISM WORKING GROUP

There is a need to develop a Tourism Working Group (TWG) to help drive and implement a number of initiatives to grow tourism in a more coordinated fashion within the Hawkesbury LGA. The TWG will need to involve a partnership approach between Council and the tourism industry.

It is important that the TWG be comprised of strategically minded representatives from the Hawkesbury tourism industry. Skills required on the TWG should include finance, digital/technology and innovation/forward thinking. If some of these skills are not available within the Hawkesbury LGA, there may be an opportunity to involve those who may reside outside the LGA, but who have a strong passion for the LGA.

Given the community interest in the Tourism Strategy, and the desire of the tourism industry to sustainably grow, there may be significant interest in the TWG. To ensure the TWG has the most appropriate representatives with the desired skill sets, the TWG should be formed via an EOI. Council should investigate having an external representative on the selection committee to ensure that the selection process is as transparent as possible.

Other points to note regarding the TWG include:

- The TWG members should be selected for a set term as determined by Council;
- A percentage of the TWG members should be allowed to reapply for a further term to allow for continuity;

- The TWG should meet on a quarterly basis at Council to discuss current project progress as well as future projects which need to be undertaken and to review progress; and
- The TWG should run one workshop every 3 months in different towns/suburbs throughout the LGA. The workshops could cover a range of topics such as education on technology initiatives, updates regarding the progress of TWG projects and allow for community input which is essential to build trust and support.

Projects for the TWG to lead could include:

- Assessment of the lead area (Windsor or Richmond) to focus on as the primary gateway into the Hawkesbury LGA and the elements needed to strengthen the gateway;
- Assist in the development of a new tourism brand for the LGA, particularly to run meetings with the local community to workshop branding concept ideas;
- With Council as the lead, assist in the development and promotion of the LGA's digital platform (including possible website, mobile app etc.); and
- The identification of a lead event for the LGA and how this should be developed and resourced.

9.2. NEW TOURISM BRAND FOR THE LGA

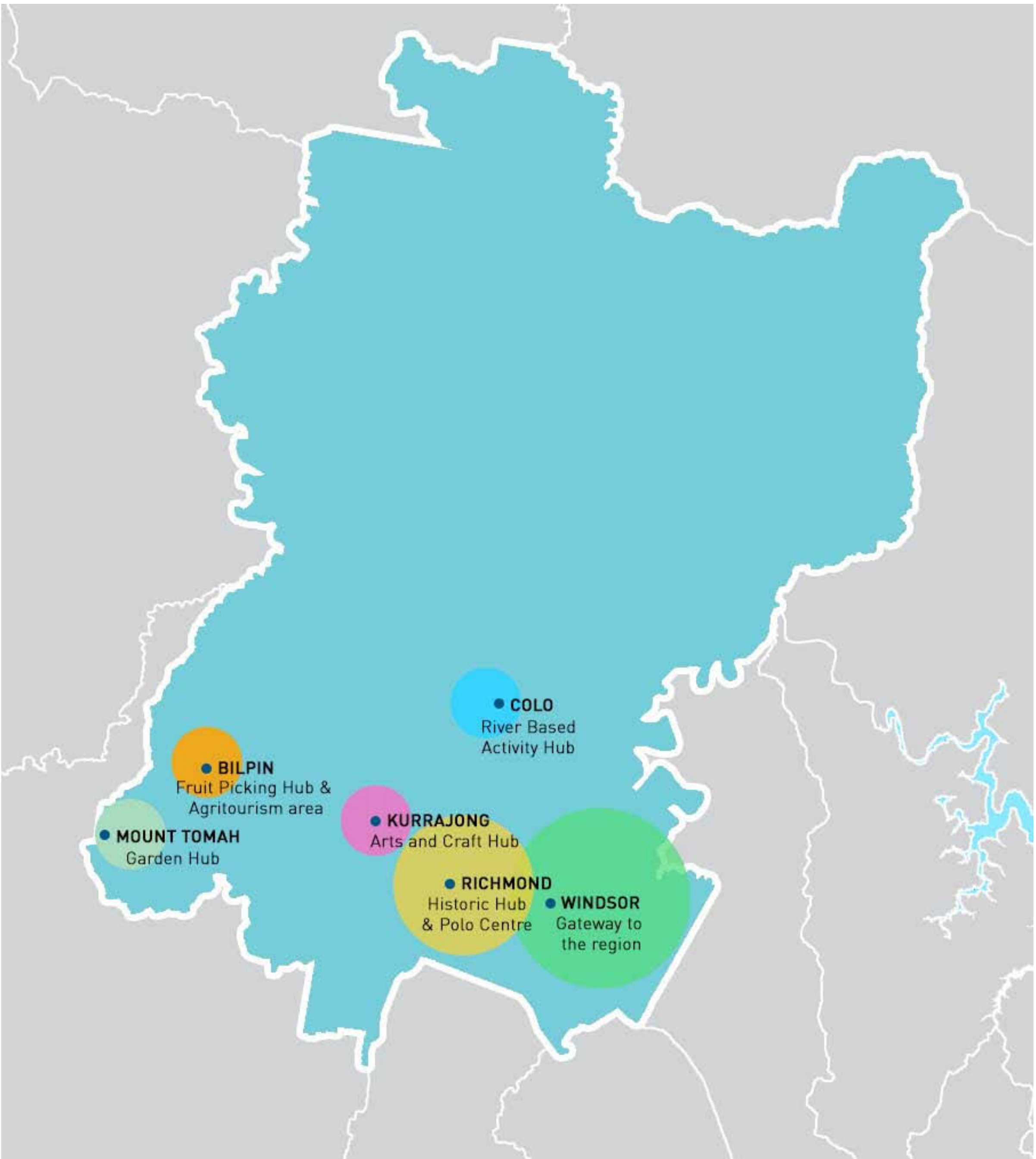
It is understood that a tourism branding exercise for the Hawkesbury is planned for 2015 and is noted as a strategy included in the Hawkesbury Community Strategic Plan.[45] As a precursor to this exercise, and to reflect the needs of industry stakeholders in particular, there is value in creating a clear separation between the various key towns and villages within the Hawkesbury.

It is important that sub area tourism brand positioning be tested with local communities as part of the separate branding exercise to be undertaken in 2015. A bottom up village/town approach is also likely to generate a number of potential wider brand positioning options for the LGA. This is needed to move on from the current brand name focus, Hawkesbury, which as previously stated, is more often associated with the Hawkesbury River and as a gateway to the Central Coast.

Based on the research and analysis for this tourism strategy the following figure illustrates attributes which could be considered to help the branding process.

[45] "Differentiate, brand and promote the Hawkesbury as a tourism destination" – Page 12 of the Community Strategic Plan.

FIGURE 15: POTENTIAL HUBS / BRAND POSITIONING FOR THE HAWKESBURY LGA



9.3. DEVELOPMENT OF A COMMUNICATION / DIGITAL PLATFORM

Visitors are increasingly utilising websites and mobile apps to discover information about a destination, to book accommodation and activities and to download maps etc. Websites are now being perceived as initial gateways into what a destination is about and what it has to offer. It is therefore crucial that the Hawkesbury LGA develop a new consumer friendly website which showcases the LGA in a highly attractive and consistently updated format.

For the provision of digital/online visitor information services, the following indicates what a successful best practice digital platform model might look like:

- A highly dynamic website which is attractive and functional, including:
    - Separate sub-portals for each of the key towns within the Hawkesbury LGA which follows the overarching Hawkesbury branding but which showcase each of the towns' separate unique features[46];
    - Booking capability for accommodation, activities/experiences, transport and restaurants etc;
    - A dynamic map indicating the various experiences (commissionable and free), accommodation and other points of interest;
    - Shopping cart packages which can be custom developed by consumers online;
    - Current up to date events/what's on calendar which allows exporting events to the visitor's own calendar;
    - Social media integration, including for example, providing the most recent Facebook posts on the front page of the website. Additionally, the top TripAdvisor reviewed properties and experiences could feature on the website;
    - Possibly integrate a review section which showcases the "top things to do" by celebrities, chefs and other famous individuals who love the Hawkesbury LGA;
    - Development of the platform as a content management system (CMS) which will allow operators to log into the system and update information about their product. This would then be reviewed by a website content manager prior to publication; and
    - The website should be accessible and optimised for smart phones.[47]

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[46] It is important to note however that visitors do not recognise local government areas but rather identify with a destination and its brand. Careful consideration must be given to this when designing a digital platform for the Hawkesbury.

[47] Note having a website which is accessible and optimised for smartphones is different from having a mobile app. Having a smart phone accessible website means all website features display on smartphones and are optimised for the smartphone's smaller screen.

- A mobile application or mobile accessible website for the LGA which includes walking/cycling audio/augmented reality tours of the destination, booking functionality, list of top things to do within the destination and a clean and attractive user interface which is easy to navigate;
- The development of a mobile application for the Hawkesbury LGA could be considered to encourage drive tourism between the different towns and villages and sites of significance and interest and to better inform visitors of specific industry product (cafes, art trails etc.). The app could allow visitors to book accommodation, travel and activities as well as offering a range of pre-built and user-designed packages. Additionally, the app could include self-drive and self-walk tours (such as the Vancouver's Visible City app) providing visitors with information on sites of significance through photo's, videos, audio-guides and augmented reality tours;
- The implementation of innovative and moveable 24/7 digital touch screens. These touch screens can be placed in high traffic areas and during major events, can be moved to event areas in order to provide visitors with a range of information. These touch screens can be designed to allow for the display of information as well as the booking of accommodation, transport and activities and the potential could exist to have these touch screens sponsored as advertisements can be placed on the screen when they are not in use. The opportunity may exist to identify sponsorship opportunities for 24/7 information kiosks as a revenue generating opportunity and more importantly, as a mechanism to cover the ongoing cost of maintaining 24/7 information kiosks; and
- The development of a centralised database for the storage of all content to be utilised on the website, mobile app and touch screens. This will ensure that only one source of data needs to be kept updated.

The figure on the following page provides some best practice examples of visitor centres, information kiosks, smartphone apps and websites all focused on destination marketing and promotion.

FIGURE 16: BEST PRACTICE DIGITAL PLATFORMS FOR VISITOR INFORMATION

9.4. TECHNOLOGY SOLUTION FOR VISITOR SERVICING

From work The Group has undertaken on visitor information centres in numerous locations (Clarence Valley, Cradle Coast, Byron Bay, Cooma-Monaro, Sunshine Coast, and Launceston), we understand that councils generally, are looking for more effective and cost-efficient ways to deliver information to visitors. In most cases, VICs run at significant net cost of service deficit and visitor utilisation of VICs nationally, is trending downward.

In order to ensure that the Hawkesbury VIC is operating to its most effective capacity, The Group recommends that a VIC review be considered. The review should look at:

- Identifying opportunities to increase efficiencies for those responsible for the delivery of visitor information services;
- To increase the effectiveness of those visitor services delivered within the LGA;
- To confirm the roles and responsibilities for those involved in the provision of visitor information services;
- To highlight technology solutions which may provide alternative and broader access to information for consumers and more cost effectively;
- To identify opportunities for developing a greater shared approach to the delivery of visitor information services throughout the Hawkesbury LGA; and
- To assess opportunities to deliver visitor information services on a broader regional basis, possibly incorporating the needs of operators and other stakeholders in surrounding LGAs.

9.5. PRODUCT DEVELOPMENT

9.5.1. Haunted Attraction and Festival

Something to be explored could be the possibility to bring alive the heritage and living stories of the Hawkesbury through an attraction and events/festival program which could be centred on the concept of "Hawkesbury Horrors". The concept could involve:

- A 2 - 4 week series of horror based events and experiences commencing with Halloween and concluding over the month of November each year;
- Bringing alive the historic stories associated with individual sites and towns in the Hawkesbury which are of national significance but are not well known;
- Identifying companies interested in creating a themed backed haunted attraction in similar fashion to www.spookers.com and possibly using redundant facilities within the LGA; and

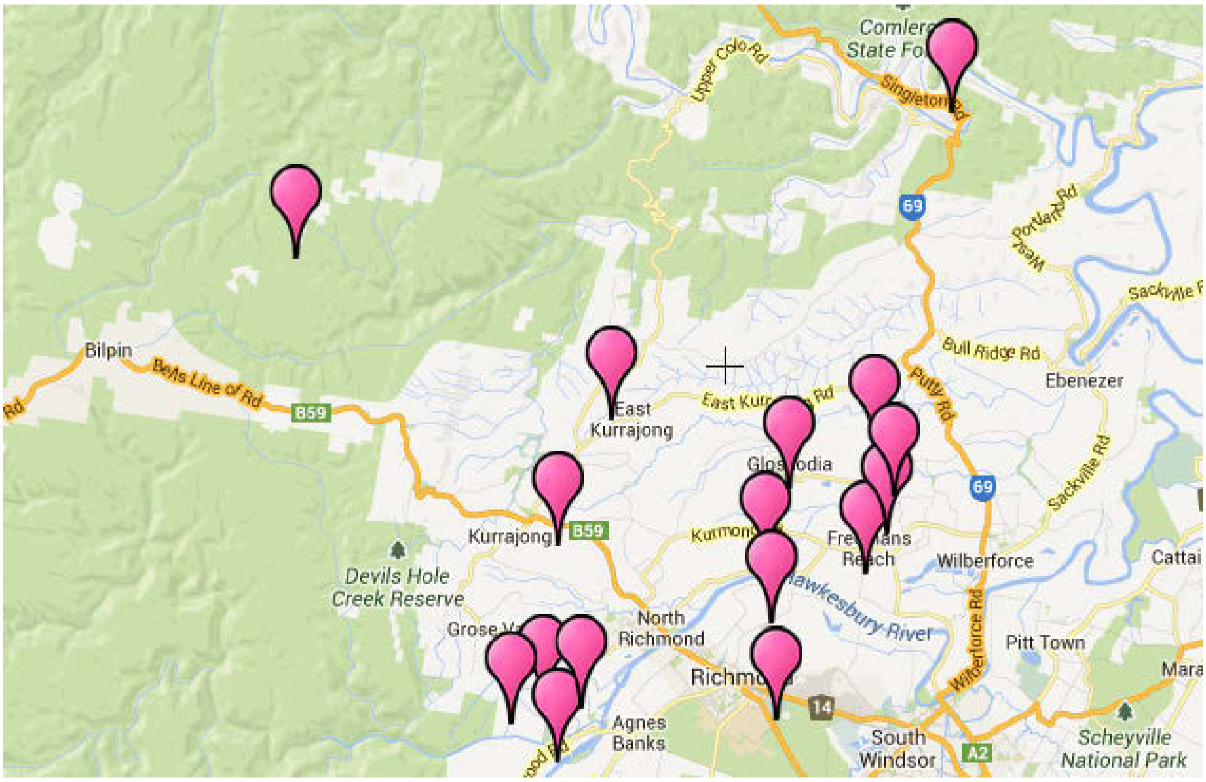
- The creation of a dedicated horror film festival utilising the Richmond Cinema and through social media, encouraging people to nominate the best horror movies so interested parties can help select the program.

9.5.2. Equine Hub (Including Schools Program and Major Eventing)

The Hawkesbury is recognised as a major equine hub with a number of horse studs and significant international investment. Potential exists to expand education/school based programs with links to TAFE to expand employment opportunities particularly for young people into the sector as well as leveraging off major equine eventing.

The following figure demonstrates an overview of the location of horse studs and facilities which exist in the Hawkesbury LGA.

FIGURE 17: HORSE STUDS AND FACILITIES IN THE HAWKESBURY LGA[48]



[48] All operators have been identified via their listing in the Yellow Pages and/or their individual websites.

Table 5 below provides a summary of equestrian-based events that are held in the Hawkesbury LGA. Council and industry need to partner to leverage opportunities from existing equine events to encourage greater profile and to grow length of visitor stay.

TABLE 4: EQUESTRIAN-BASED EVENTS

EVENT NAME	WHERE	DATE
NSW Arabian State Titles Show	Hawkesbury Showground	September
State Titles Associate Snaffle Bit Open Dressage	The Vines Pony Club Oakville	August
NSW Amateur Show / NSW AHA Foal Show / Ruth Dalton Memorial Challenge	Hawkesbury Showground	July
Mini Crabbet Arabian Show	Hawkesbury Showground	August
NSW AHA Associate Snaffle Bit Open Dressage	The Vines Pony Club Oakville	May
NSW AHA Associate Arabian Breed Seminar	Richmond TAFE	May
DNSW Clarendon - Dressage	Hawkesbury Showground	October
NSW Squad School	The Tinney Eventing Centre	November
NSW Horse of the Year Show	Hawkesbury Showground	October
Bates Equestrian Ultimate Training Series	Willow Park Wilberforce	October
Show Horse Magazine Australia All Breeds Show	Hawkesbury Showground	November
YH Qualifier	Hawkesbury Showground	January

9.5.3. Major Music Festival

The opportunities exists to develop a major musical event in similar fashion to Splendour in the Grass or Coachella and determining appropriate venues and supporting infrastructure. The Group understands that interest has been presented previously by a major music festival company to hold a Coachella-style festival in the Hawkesbury.

Opportunities for major music festivals and other similar events should be assessed by the proposed Tourism Working Group who, as part of this process, can gather community feedback.

The following table provides an overview of music events/festivals in the Hawkesbury and surrounds region.

TABLE 5: EVENTS/MUSIC FESTIVALS IN THE HAWKESBURY AND SURROUNDS REGION

HAWKESBURY AND SURROUNDS MUSIC FESTIVALS		
Hawkesbury Music Festivals:	Suburb	Date
St Albans Folk Festival	St Albans	April
Hawkesbury Food Wine & Music Raceday	Clarendon	October
Sydney Blues & Roots Festival	Windsor	October
Out of region:	Suburb	Date
Jazz at The Pines	Dural	November
Bitter & Twisted International Boutique Beer Festival	Hunter Valley	November
Glenbrook Spring Festival	Glenbrook	November
Peats Ridge Sustainable Arts & Music Festival	Glenworth Valley	December
Blue Mountains Ukulele Festival	Lawson	February
Blue Mountains Music Festival	Katoomba	March
Elvis Festival	Katoomba	August
The Roaring 20s and all that Jazz	Katoomba	February
A Day on the Green	Pokolbin	February
Groovin the Moo	Hunter Valley	April

Council and industry need to assess the potential for a major music festival in the Hawkesbury with specific attention given to:

- Desirable venues;
- Supporting infrastructure needs;
- Approval processes and streamlining these, where appropriate;
- Linkages to accommodation providers;
- Linkages to food and beverage extended experiences; and
- Marketing and promotional initiatives required.

9.5.4. Food Trail Cruise

With the Hawkesbury being noted as a food production hub, the potential exists to create a food trail utilizing the river for accessing sites and/or a dining cruise experience, leveraging off the stunning Hawkesbury River. The concept could be similar to the popular Swan Valley wine cruise in Perth which provides passengers with a food tastings, a full gourmet lunch, onboard entertainment, wine tasting and behind the scenes tour and commentary of wineries. Obviously however for the Hawkesbury, the focus would be on the food experiences available within the LGA.

9.5.5. Cooking Schools

The upper reaches of the Hawkesbury River are noted as the foundation for NSW's food provision during the period of colonisation. As a result, the Hawkesbury LGA is often noted as Australia's first food bowl. Whilst the growth of the agricultural industry in the Hawkesbury may be plateauing, it is still considered an important agricultural region in NSW, contributing to roughly 8% ($214m) of total agricultural exports from NSW ($2.745b).[49]

The potential exists to leverage off this profile and introduce an integrated gourmet cooking school program throughout the LGA, helping to grow the position that the Hawkesbury was Australia's first food bowl.

The cooking schools could also act as a showcase for the unique products that the Hawkesbury produces. Participants could learn how to cook with the produce, enjoy their meal and purchase any of the produce they used throughout their class. The potential also exists for cooking competitions.

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

The educational programs could follow the produce life cycle including the cultivation and harvesting of fruits and vegetables, how this produce is prepared for use in the kitchen, the creation of meals and finally allowing the children to eat what they have made. Children's cooking classes have proven to be highly successful elsewhere, enabling children to learn, explore, experiment and discover a new passion involving good food and eating well.

9.5.6. Heritage Stories through Interactive Sound and Light Shows

Heritage tourism is seen to be a major potential component of the Hawkesbury, strengthened by the extensive selection of historic buildings and the nationally important stories associated with the area in Australia's history. Opportunities to create interactive experiences to show case this history need to be investigated and could include developing a seasonal evening heritage experience that capitalises on the historic architecture that the Hawkesbury LGA has to offer.

[49] The total value of agricultural exports from the Hawkesbury was $214m and total NSW agricultural exports were $2.745b - http://www.economicprofile.com.au/hawkesbury/economy/regional-exports#table

FIGURE 18: ADELAIDE FRINGE FESTIVAL (NORTH LIGHTS TERRACE SHOW) AND VIVID SYDNEY

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

For the Hawkesbury, the following experiences could be investigated:

- Light shows on historic buildings (Figure 18 below provides best practice examples of these); and
- The "Hawkesbury after dark" trail experience which links a number of heritage properties and a food experience together offering visitors a progressive dinner. Essentially, visitors could complete different meal courses at a range of eateries (including pop-up eateries) around a specific part of the LGA whilst also stopping at historic properties on their way to the next course. Each stop would be clearly marked and could provide an interactive historic experience either via a guide or via a short audio visual experience (5-10 minutes).

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

9.5.7. Packaging of Product

There are a number of visitor attractions and experiences available throughout the Hawkesbury LGA, however, currently there is generally, very limited synergy between these attractions, experiences, accommodation, food and beverage and transport options. In order to grow the Hawkesbury tourism industry, connections between these elements need to be developed and offered online to the consumer so that a composite visitor experience can be offered, whilst also helping support interest in longer visitor stays in the Hawkesbury LGA and higher visitor spend.

Additionally, clustering experiences and attractions together with accommodation and dining options will help promote and showcase what the Hawkesbury has to offer, with packages created that can specifically cater for the LGA's targeted visitor markets.

Whilst some industry feedback indicates a struggle in achieving clustered product packages historically, it needs to be pushed to offer easier packages for the consumer to link to. Whether it is packages centred round fishing, rafting, trekking, arts trails, cooking schools etc. having these connected to competitive accommodation offers and also food and beverage experiences will strengthen the product offering for the LGA and boost its desirability as a visitor destination.

The Hawkesbury LGA needs to note it is too hard at times to find good food and beverage offerings, particularly during evening periods, so packaging which can include some if not all evening dining experiences will offer far greater certainty and lead to more overnight stays.

9.5.8. Pet Friendly Hawkesbury

Recent national surveys indicate that roughly 20% of visitors/travellers would bring a pet with them to stay at a pet friendly location. Pet friendly tourism opportunities could be a significant focus and opportunity for the Hawkesbury. Evidence indicates that those taking pets are prepared to pay a premium for allowing their pet to travel with them and stay in commercial accommodation.

Positioning the Hawkesbury as a pet friendly destination for visitors could provide the LGA with a unique selling point and present an excellent opportunity for stimulating tourism, particularly because pet tourism is a relatively new concept and has not been adopted by a large number of destinations yet. Considering the large number of catteries and boarding kennels in the Hawkesbury this may be an area of opportunity to leverage off.

Whilst the Hawkesbury LGA does have a number of national parks and reserve areas where pets (dogs) cannot be taken, the LGA does have many other recreational areas which pet owners can take their dogs. For those wishing to visit a national park an opportunity exists to create a dog minding service whilst the owners go into national parks etc. This of course could extend into a variety of other pet friendly services including pet health checks, grooming, purchase of pet merchandise etc.

Pet tourism is seen as an increasingly important tourism sector for the following reasons:

- Australia has one of the highest pet ownership levels in the world, with an estimated 40% of households having at least one dog[50];
- The baby boomer generation is said to spend the largest proportion of their discretionary income on two sectors, those being entertainment and pets[51]; and
- Global studies have found that despite the recession, individuals are still spending significant amounts on their animals.[52]

In order to position the Hawkesbury as a pet friendly destination, the following needs to be considered:

- The development of new or the conversion of selected existing accommodation to pet-friendly accommodation. This does not mean the entire motel/hotel needs to be dedicated to animals, but rather a designated number of rooms could offer facilities for owners and their accompanying pets;
- The development of a marketing campaign which actively encourages pet owners to visit with their pets; and
- To encourage a number of operators to incorporate pet-friendly accommodation options into their current product, operators need to be aware of the potential benefits which can be gained.

Research indicates that although there is demand for pet tourism in Australia, insufficient numbers of operators are interested to take up pet tourism because they are unaware of the potential benefits. The promotion of the economic benefits of pet tourism to Hawkesbury accommodation providers would need to be undertaken first.

9.5.9. Expand Recreational Aviation Activity

The potential exists to explore opportunities for possible recreational aviation activity (gliding, small aircraft training, micro lights etc.) which could be potentially linked to the RAAF base at Richmond. Whilst the ability to hold air shows and events is unlikely because of significant insurance related costs, the development of recreational aviation activity needs to be explored as there is continuing constriction in the number of airfields in the Greater Sydney area with the capability of allowing recreational aviation activity.

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[50] Australian Companion Animal Council Inc. - http://www.acac.org.au/

[51] Boomers, pet owners called future of tourism - http://www.postandcourier.com/news/2011/mar/07/state-reportboomers-pet-owners-called-future-of/

[52] Pet tourism – it's where you fetch the dog's slippers - http://rac.com.au/About-Us/RAC-eNews/August-2011/Pet-tourism.aspx

There has been a reduction in airfields around greater Sydney for training/recreational purposes which could provide greater opportunity for the Hawkesbury. Anecdotal feedback indicates that Bankstown airport, for example, needs to increase the number of people involved in support services (engine maintenance work etc.) and if they cannot find space at Bankstown, there will be a need to expand aviation activity to alternative locations. This may be precluded however because the facility in the Hawkesbury is a RAAF base.

9.5.10. National Orienteering Course

In partnership with the National Parks and Wildlife Service, investigations should be undertaken to develop a national orienteering centre with various orienteering courses able to be created within the national parks in the Hawkesbury.

Whilst a number of locations are available throughout NSW and nationally for orienteering competitions, potential may exist for developing a national centre which focuses on different levels of courses particularly in the national parks in the Hawkesbury, as well as a training facility.

FIGURE 19: ORIENTEERING

10. ACTION PLAN

10.1. PRIORITY TASKS

The following 6 priority tasks reflect the key initiatives to grow tourism within the Hawkesbury LGA over the next 12 months.

10.1.1. Establishment of the Tourism Working Group (TWG) as "leadership" for the industry

The creation of a Tourism Working Group (TWG), involving a partnership between Council and the tourism industry, will help drive and implement a number of initiatives to grow tourism in a more coordinated fashion. The TWG should be comprised of strategically minded representatives from the Hawkesbury tourism industry.

10.1.2. Digital promotional platform to market the LGA as a tourism destination

Development of a digital platform for the Hawkesbury LGA which may comprise a highly dynamic website which includes separate sub-portals for each of the Hawkesbury's main towns and booking/packaging capabilities, social media integration, a mobile app for the LGA with self-guided tours and the rollout of moveable 24/7 touch screens in key tourism hotspots. There is a growing expectation from visitor markets (including from younger experiential visitor markets through to grey nomads) that online options[53] for obtaining information about a destination as well as booking accommodation, attractions, events, packages etc. are made available.

10.1.3. TWG and Council to determine the Vision and Mission to guide tourism in the Hawkesbury LGA

The TWG and Council to discuss and agree regarding a suitable vision and mission statement for tourism to support the development of tourism on a sustainable basis. A draft vision, mission and set of objectives has been provided within this Tourism Strategy as a guide only.

[53] Via computers and mobile accessible websites/apps

10.1.4. Review of visitor services

Visitor services funded by Council need to be continually strengthened through a stronger digital base to reflect the market preference for online information sharing and access as well as booking facilities rather than traditional bricks and mortar information centres. Potential also exists to investigate expanding the Visitor Information Centre's (VIC) role to offer a range of Council services (such as paying registration fees, rate payments, general enquiries, potential for a small meeting room for community groups etc.).

10.1.5. Development of a tourism brand (which can have application for Brand Hawkesbury as a generic brand for investment etc).

The name "Hawkesbury" alone is inadequate as it often is associated with the Hawkesbury River which some perceive as a gateway to the Central Coast. A branding exercise is a further step which Council should consider in order to create "Hawkesbury Experiences" and which can build on the arts and heritage themes, equine experiences, outdoor recreational experiences particularly within the national parks and lastly, the attractiveness of some of the small towns within the LGA which provide character and can link to boutique events and festivals.

The brand developed should also have application across other industry sectors for the promotion of the Hawkesbury LGA as a place to "live, work, invest and play".

10.2. ACTION PLAN

In addition to the above priority tasks identified to be completed over the next 10 month period, the following action plan outlines the key result areas to be focused on to help facilitate the successful implementation of this Tourism Strategy over a short, medium and longer term. Please note that this action plan contains steps required to realise future opportunities and achieve the recommendations included in this Strategy, as well as supplementary actions that can be undertaken to further the success of this Strategy.

Short term strategies are those to be implemented within a 2 year time frame (2015 - 2017), medium term are those within a 3 – 5 year time frame (2018 - 2021) and long term includes those to be undertaken after five or more years (2022 onwards).

All timeline estimates are purely indicative and subject to confirmation by Council and feasibility assessments.

TABLE 6: KEY RESULT AREA 1

HAWKESBURY TOURISM WORKING GROUP				
STRATEGIES	**TASKS**	**RESPONSIBILITY**	**TIMING**	**KPIS**
EOI and selection of the Tourism Working Group (TWG)	▪ Develop Expression of Interest seeking strategically-minded local community members (and possibly members outside the LGA who have a keen interest) to join the TWG. ▪ The selection panel for the EOI should consist of internal Council personnel and an external stakeholder ▪ Skill base required includes: digital/technology skills, innovation/forward thinking skills and finance skills	Council	Short term	▪ Develop EOI and provide to the market ▪ TWG to be selected
Terms of Reference for the TWG	▪ Develop the Terms of Reference for the TWG	Council	Short term	▪ Terms of Reference to be developed
TWG meetings	▪ TWG to meet on a quarterly basis to discuss initiatives and project progress. These meetings will be held at Council.	TWG	Ongoing	▪ First TWG meeting to be held in 2015 and on a quarterly basis thereafter
TWG Workshops	▪ TWG to run one workshop every 3 months in a different town in the LGA ▪ Workshops can be used to educate the community on progress, Council initiatives, education on technology initiatives etc.	TWG	Ongoing	▪ First workshop to be held in 2015 and on a quarterly basis thereafter
Determine area to focus on	▪ First project for the TWG is to determine, through consultation and research, which town in the LGA should be the area of focus	TWG	Short term	▪ Project discussed in first TWG meeting and at the first TWG workshop ▪ Area of focus to be determined in 2015
Review composition of the TWG	▪ The TWG will be a term commitment determined by Council including a timeframe for reviewing its composition.		Ongoing	▪ Review composition by TWG, ▪ Resubmit EOI if the composition of the TWG needs to be changed

TABLE 7: KEY RESULT AREA 2

DEVELOPMENT OF A NEW BRAND FOR THE LGA				
STRATEGIES	**TASKS**	**RESPONSIBILITY**	**TIMING**	**KPIS**
Engagement of brand designer	▪ Create EOI for the development of branding for the Hawkesbury LGA. This branding may require sub-brands for the individual towns in the LGA. ▪ The LGA's tourism message needs to be reflected in its branding	Council and TWG	Short term	▪ Develop EOI and submit to the market ▪ Choose Brand Designer
Workshops to brainstorm brand concept	▪ Council and the TWG should undertake workshops in each of the LGA towns to brainstorm branding concept	Council, TWG and Brand Designer	Short term	▪ First workshop to be coordinated and undertaken ▪ All workshops to be completed
Draft branding created and tested	▪ Based on feedback from the workshops, the draft branding for the LGA is created by the Brand Designer ▪ Draft branding is tested with the community via workshops	-	Short term	▪ Draft branding submitted to Council and the TWG Workshops to test draft brand completed
Branding for the LGA is finalised	▪ Feedback from workshops is incorporated into the branding and finalised	Brand Designer	Short term	▪ Final branding completed

TABLE 8: KEY RESULT AREA 3

DEVELOPMENT OF COMMUNICATION / DIGITAL PLATFORM				
STRATEGIES	**TASKS**	**RESPONSIBILITY**	**TIMING**	**KPIS**
Development of destination website for the Hawkesbury	▪ Once branding for the LGA and individual villages/towns is completed, Council and TWG to engage web design firm to develop an online presence for the LGA, with sub-portals for the individual villages/towns	Council and TWG	Short term	▪ Web designer to be engaged ▪ While website is being drafted, Council, TWG and industry to create website content ▪ Draft website to be developed and tested with the community ▪ Website to go live
Update and management of website	▪ Any changes industry wish to make to their website need to be approved by Council ▪ Council to ensure website is updated on a regular basis, including approval of industry changes to individual pages	Council	Ongoing	▪ Website is updated on a weekly basis
Training for digital platform	▪ Library and cultural centre staff to be trained in how to use the digital platform so that they can run workshops and provide advice for Hawkesbury tourism operators	Council	Ongoing	▪ Training to be undertaken prior to website live date ▪ Workshops to be run on a quarterly basis
Hawkesbury media library	▪ Development of online media library with high quality images of the LGA. Images could be sourced through a bi-annual photography competition.	Council	Ongoing	▪ Online media library developed ▪ Photography competition to commence
Development of Communications Strategy	▪ Council to develop a communications strategy which is focused on communication needs for tourism, including websites, brochures, workshops, print-based media etc.	Council	Short term	▪ Communication Strategy to be developed
Industry newsletters	▪ Council to develop monthly online newsletters which can be emailed to the tourism industry outlining current projects, developments, statistics etc.	Council	Short term	▪ Monthly newsletters to commence
Market development	▪ Set up regular meetings to discuss industry/market development separately with NPWS, TAFE, UWS and possibly the Chambers of Commerce in the LGA	TWG and Council	Short-Medium term	▪ Meetings to commence

DEVELOPMENT OF COMMUNICATION / DIGITAL PLATFORM				
STRATEGIES	**TASKS**	**RESPONSIBILITY**	**TIMING**	**KPIS**
Free WiFi in town centres and the VIC	▪ Council to investigate the provision of free WiFi in the town centres and the VIC as a method of encouraging vibrancy and use of the town centres and VIC	Council	Medium term	▪ Investigation to take place ▪ If favourable result, WiFi to be implemented
Social media strategy	▪ Development of a social media strategy for the LGA which includes communication requirements for tourism via social media tools	Council	Short term	▪ Strategy developed

TABLE 9: KEY RESULT AREA 4

PRODUCT DEVELOPMENT				
STRATEGIES	**TASKS**	**RESPONSIBILITY**	**TIMING**	**KPIS**
Proposed event success criterion	▪ TWG and Council to develop a criterion to assess proposed events and their likely benefit. ▪ Criteria could include likely cost of event, level of industry and community support, ability to leverage off funding sources to support the event, timing of the event and visitor markets the event is likely to attract	Council and TWG	Ongoing	▪ Event success criterion to be developed ▪ Criterion to be applied to all new events
Consolidation of events list	▪ Apply event success criterion to existing council-run and supported events to ensure events list includes on those with the greatest economic and social benefit	Council and TWG	Short term	▪ Events success criterion applied to current events
Determination of lead event for the LGA	▪ Utilising the event success criteria, as well as community consultation, market segmentation data for the LGA etc, TWG to determine a lead event which should be pushed for the LGA ▪ The event needs to have a sound business model developed, including future funding arrangements ▪ The event developed needs to have resonance with the local community	TWG and Council	Medium term	▪ Lead event to be determined
Town/precinct development	▪ Develop signage strategy which includes: a focus on entry points into the LGA and creates a sense of arrival and a review of State signage. The strategy should investigate digital platforms for signage (both interpretive and directional). ▪ Undertake a review of public amenity within key LGA towns (such as public toilets etc.)	Council	Medium term	▪ Develop signage strategy ▪ Key actions from signage strategy begin to be actioned from strategy release date ▪ Review of public amenity to be undertaken ▪ Key actions from public amenity review begin to be actioned from strategy release date
Packaging of product	▪ TWG to investigate, in liaison with industry, packageable products/accommodation/ transport/dining options etc. which could form packages to suit identified target markets	TWG and industry	Ongoing	▪ First 3 packages to be developed

PRODUCT DEVELOPMENT				
STRATEGIES	**TASKS**	**RESPONSIBILITY**	**TIMING**	**KPIS**
Cooking schools	▪ Encourage the development of cooking schools which can cater for both adults and children. This will involve looking at possible demand, the most optimal location(s), grants which could be applied for as well as possible operators for the schools.	TWG & Council	Medium term	▪ Assessment to be undertaken ▪ If positive outcome, then solicit operator interest ▪ Introduce
Food Trail Cruise	▪ Undertake feasibility looking at the introduction of a food trail cruise on the Hawkesbury River. This will involve looking at possible demand, grants which could be applied for as well as possible operators for the cruise trail.	TWG & Council	Medium term	▪ Feasibility to be undertaken ▪ If positive outcome, then solicit operator interest
Heritage stories	▪ Investigate the development of a sound and light show to showcase heritage stories either in one specific area or throughout the LGA	TWG and Council	Medium term	▪ Undertake assessment
National Orienteering Course	▪ Assess feasibility of developing a national orienteering course in the LGA	TWG, and NPWS	Medium term	▪ Undertake feasibility study
Pet friendly Hawkesbury	▪ Development of clever marketing campaign to promote the Hawkesbury as pet-friendly ▪ Consider running famil trips with tourism magazines/websites/blogs to promote pet-friendly Hawkesbury	TWG & Council	Medium term	▪ Develop marketing campaign Run 2 -3 famil trips per year with tourism magazines/websites/blogs
Unlocking Hawkesbury's aviation history	▪ Identify strategies for unlocking and bringing alive Hawkesbury's aviation history	TWG	Medium term	▪ Undertake discussions with RAAF ▪ 5 strategies to be developed and workshopped with Council and the LGA's tourism industry
Completion of foreshore walk at Rickabys Creek	▪ Completion of foreshore walk over Rickabys Creek to extend the Great River Walk in Penrith.	Council	Medium term	▪ Foreshore walk extension to be completed
Review of planning instruments	▪ Undertake a review of planning instruments in the LGA ▪ Undertake applied planning exercise which demonstrates what development can take place in the LGA and where this can be located	Council	Medium term	▪ Review of planning instruments ▪ Applied planning exercise to be developed

PRODUCT DEVELOPMENT				
STRATEGIES	**TASKS**	**RESPONSIBILITY**	**TIMING**	**KPIS**
Equine Hub	▪ Council and industry to partner to leverage opportunities from existing equine events to encourage greater profile and to grow length of visitor stay	TWG, Council and equine industry	Medium term	▪ Assessment of current equine events ▪ Identification of enhancements ▪ Create Equine industry event strategy

TABLE 10: KEY RESULT AREA 5

VISITOR INFORMATION CENTRE				
STRATEGIES	**TASKS**	**RESPONSIBILITY**	**TIMING**	**KPIS**
Review of Visitor Services	▪ Undertake a full review of visitor services with a focus on the VIC and its operational costs and future market needs ▪ Investigate offering a wider range of Council support services such as the ability to pay rates, register dogs, general Council enquiries and potentially, offer a space for community meetings. ▪ Assess whether there is a better location for the VIC (e.g. as part of the library and gallery in Windsor as Windsor is noted as the major gateway into the LGA) ▪ If current site is identified as the most optimal site, undertake review of maintenance/upgrades which need to be completed to improve the VIC (painting, shelving and technology upgrades etc.)	Council	Short Term	▪ Review to be undertaken
Technology for visitor information services	▪ Investigate technology solutions which could provide visitor information 24/7. This could include visitor information touch screens/touch tables, mobile app, integration into the new website for the LGA etc.	Council and TWG	Short term	▪ Technology solutions to be investigated and implemented (where applicable)
VIC café	▪ If the VIC stays at its current location, Council to proactively advocate that the café is of a higher standard	Council	Ongoing	▪ To occur if VIC remains at existing site
Review VIC marketing budget	▪ Undertake a review of the VIC's marketing budget as currently the VIC only has a very small advertising budget	Council	Short term	▪ Undertake review of the VIC's marketing budget
VIC coordinator role	▪ Reallocation of VIC coordinator role from part-time to full-time, allowing for 2 offsite days visiting industry per week ▪ Consider introduction of a part time VIC junior-coordinator role to cover for those days when the VIC coordinator is offsite	Council	Short term	▪ Reallocation of VIC coordinator

11. APPENDICES

11.1. APPENDIX 1 - RESEARCH ON THE FUTURE OF VISITOR INFORMATION SERVICES

The following section contains secondary consumer research which was conducted for the Sunshine Coast Regional Council in 2010 as part of their Visitor Information Centres Review. As no similar consumer research in the Hawkesbury was found regarding visitor services, this research should be considered relevant and useful to the Hawkesbury regarding visitor information services.

This research has been utilised where appropriate as it contains findings which highlight the future use by consumers of VICs in addition to providing details on the impact of technology and the potential role it will play in providing visitor information services for the future. It is based on an online survey of 500 respondents nationwide, with an additional 60 based in New Zealand.

The key findings from the survey which highlight future trends for visitor information services include:

- The top three types of information sought prior to visiting a destination (gathered from websites or phone calls) include (in order of popularity): accommodation information, attraction information and information on “things to do” (indoor or outdoor experiences);
- Regarding sources which were accessed to gain this information, the top three sources included (in order of popularity): general websites, destination specific websites and government tourism websites. Other information sources included word of mouth recommendations, brochures and phone calls made directly to VICs. The popularity of websites for data gathering indicates the importance of having a strong, relevant and updated tourist information website;
- The top five forms of information gathered either over the phone or via the web from a VIC prior to visiting included (in order of popularity): maps, directions, brochure information, general advice and event and festival information;
- Regarding the most useful sources of tourist information, websites, brochures, guidebooks and word of mouth were indicated;

- The primary three types of information individuals gathered from a VIC during their visit included (in order of popularity): visitor attraction information, "things to do" information and information regarding accommodation options. Visitors appear to be utilising VICs to gather directional information as well as information regarding current attractions;
- During visitors' stay in a region, the top three sources of information utilised include (in order of popularity): brochures, word of mouth and VIC websites. The fact that visitors choose to visit VIC websites during their visit indicates the important and need to maintain an updated online presence. With the growing popularity of the internet, this trend is expected to continue;
- In relation to whether visitors are likely to utilise VICs in the future to obtain information, just over 25% indicated that they would definitely utilise them. The Group considers that growth in online bookings, services and advertising has had a significant impact on a visitor's likelihood of visitation to a VIC. Additionally, this is supported by the fact that over 20% indicated that they would not visit a VIC in the future because they could find all the information required over the internet. This once again highlights the importance for the region to establish an updated and reliable online presence for visitor information;
- Respondents indicated that the top two reasons as to why they would consider visiting a VIC included to gather information on local events and activities and to obtain local knowledge. The ability to obtain a locals perspective is a unique feature that VICs are able to offer which the internet often lacks; and
- In order to encourage visitation to VICs in the future, it was found that visitors want to be able to obtain discounts and promotions, be able to access internet facilities and be provided with restaurant guides.

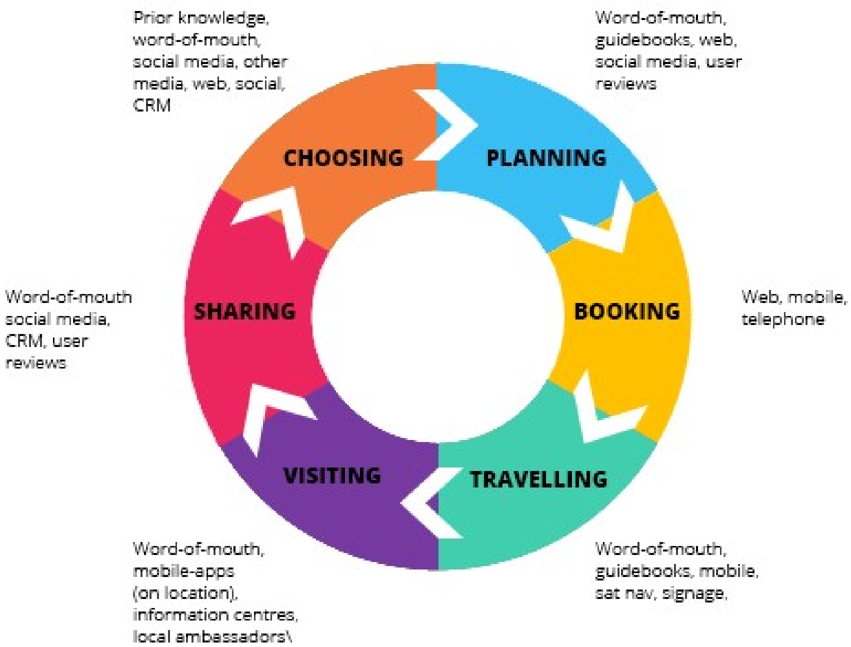
11.2. APPENDIX 2 - THE VISITOR INFORMATION JOURNEY

By creating a positive image of a destination, providing a hospitable and friendly welcome and creating a genuine sense of space, the provision of visitor information can play a key role in enhancing the overall experience for a visitor. The provision of a wide variety of visitor information which reaches a number of target markets provides the opportunity to inspire visitors to explore a region's tourism experiences and product.

The format and process with which visitors gather information is rapidly changing, with the more traditional forms (hard copy brochures, visitor/tourist information centres) being increasingly replaced by mobile and online technology.

The following figure presents an overview of the visitor information journey, outlining the various stages of the journey and the information and information sources which are often referenced by the visitor through each individual phase.

FIGURE 20: THE VISITOR INFORMATION JOURNEY



11.3. APPENDIX 3 - CURRENT AND FUTURE TRENDS FOR VISITOR INFORMATION SERVICING

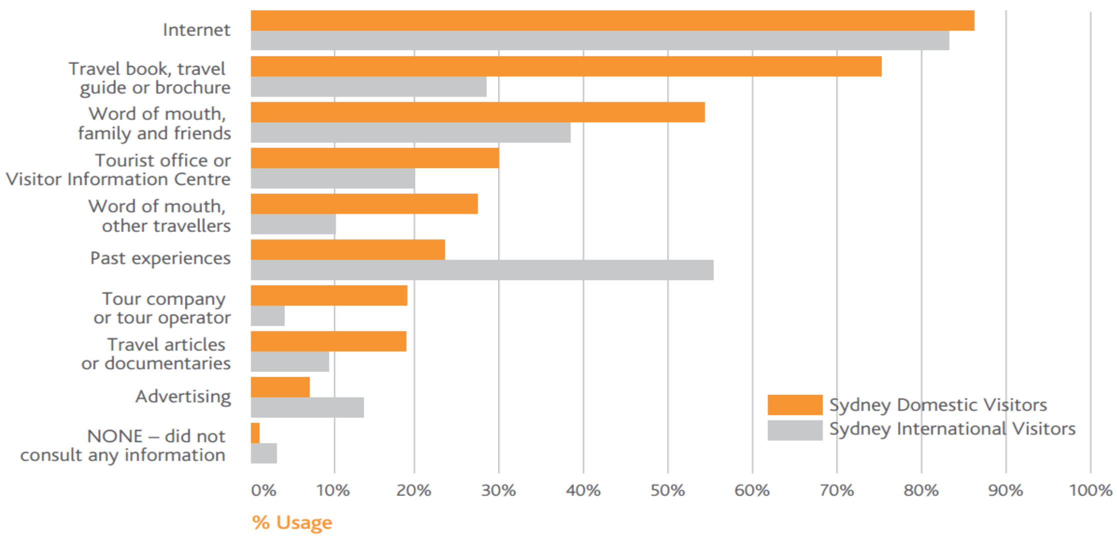
The following provides a synthesis of findings collected from national and international sources and consequently, help determine global trends for visitor information servicing:

- Many VICs nationally are supported by local councils. In smaller regions, the VIC is often the primary tourism investment undertaken by Council. However, Councils and industry have not assessed (or have thought to assess) whether the VIC services are still the optimum mechanism for Council investment. This comment relates not only to smaller regional areas but also larger regions and/or regions where tourism is a more significant component of the regional economy;
- In a review which was undertaken on Visitor Information Servicing in Sydney54, the following trends were noted:
  - The top information sources which are utilised by backpackers before departing on a trip included: friends/family members (70%), travel guide books such as Lonely Planet (59%) and search engines (58%). During their trip they most commonly sourced information from other travellers (68%), tour brochures (51%) and search engines (48%);
  - Facebook (64%) was by far the most popular social networking website used by backpackers, for staying in touch with home, joining and contributing to backpacker travel groups and for uploading photos;
  - Almost all respondents (88%) researched online prior to their visit;
  - Visitors were most interested in finding out information on the top "10 things to see and do" as well as "hidden secrets";
  - The internet is the most important source of information for both domestic and international visitors alike;
  - People who use the internet to make travel plans, reservations and payments show a high inclination to adapt to and use new technology. As the internet becomes more aligned to other technologies such as mobile phones and navigation systems, tourism providers need to grasp the opportunities which will arise and be aware of the threats of being an 'online laggard'[55];

[54] Visitor Information Servicing in Sydney, Tourism New South Wales, December 2010
[55] Visitor Information Servicing in Sydney, Tourism New South Wales, December 2010, page 7.

- Of the information services Australian's use on their mobile phones, 35% of people used maps, location and traffic information and 24% used restaurant or café information;
- Up to 80% of all travellers now pack their mobile/smart phone to take travelling; and
- The figure below illustrates the top sources of information which are utilised by domestic and international visitors. Although this is applied to a Sydney context, this helps indicate trends in visitor information servicing.

FIGURE 21: COMPARISON OF SOURCES OF INFORMATION FOR INTERNATIONAL AND DOMESTIC TOURISTS[56]



- Increasingly, with changes in consumer preference and desires, best practice visitor services involve the effective utilisation of a range of technologies to provide information to visitors on demand. This is definitely not suggesting that there is a one size fits all model for effective VIC operation but rather, VIC services need to be tailored to the needs of the retailers and the local tourism industry and the demands of consumers;
- The vexed question which visitor information providers need to consider is whether it is still cost effective to continue to invest to the same level in VICs and/or whether a different mix of visitor services is now something to be considered to better meet consumer and industry needs;
- There are a variety of structures operating, with differing staffing, volunteer structures, financial and other elements but not one uniform approach;
- There is little evidence to suggest that any visitor information centres actually provide a profitable operation or even achieve a true break even position (except Blue Mountains VIC near Sydney);

[56] Visitor Information Servicing in Sydney, Tourism New South Wales, December 2010, page 6.

- The most commercially focused VICs seem to clearly separate the volunteer and staff functions, and roles and in some cases, location of where they operate from;
- The Viennese United Nations Visitors' Centre, while not only a visitor information centre provides an interesting example of the use of other commercial revenue streams supporting the centre, operating a florist, hairdresser and café. While there might be some controversy with this option, the Group merely provides it as an example of a multipurpose centre which operates close to breakeven but in direct competition with commercial businesses offering similar or the same services;
- There are numerous examples of VICs which operate with "satellite" centres around central VICs. These satellite centres are in the form of small kiosks, or roaming "ambassadors" which are often volunteers as in London; and
- A number of centres offer multi-lingual support services as well as tours.

11.4. GLOBAL BEST PRACTICE ELEMENTS

The following indicates what a successful or global best practice visitor information model might look like:

- A high profile location to capture consumer and visitor interest;
- Multipurpose centres where the visitor information centres comprises but one function of the overall facility;
- A highly dynamic website which is attractive and functional, including booking abilities, packages which visitors can purchase, current and up to date events/what's on calendar, website accessible and optimised for smart phones and easily accessible contact information;
- Possibly a mobile application for the region57 which includes walking/cycling audio/video tours of a region, a booking functionality, list of top things to do within the region and a clean and attractive interface which is easy to navigate;
- State of the art technology screens, touch surfaces etc. to replace traditional brochure racks and print material;
- Highly trained roving ambassadors, usually volunteers who are allocated areas to patrol and assist visitors and also who offer tours;
- Highly trained staff with little expectation of cost recovery from visitor information services;

[57] Note many regions choose to simply make their website mobile accessible rather than designing a standalone mobile application. A standalone smart phone app can be beneficial because it will is far more scalable (in terms of functionality) and can, once downloaded, often be accessed whilst users do not have internet access.

- A variety of income streams but tending to include internet cafes or general food and beverage facilities as mechanisms for trying to offset overhead costs, particularly staffing costs;
- A robust merchandising strategy which focuses on good quality retail stock and the needs and expectations of the visitor centre's target markets; and
- Continuing expansion of web based services especially for bookings and general information.

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