



HAWKESBURY DESTINATION MANAGEMENT PLAN & ACTION PLAN 2017-2021



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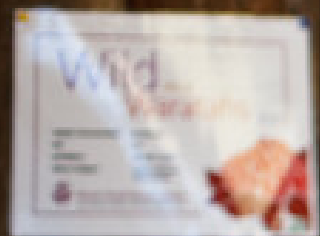
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1. Executive summary

1.1. Overview

The Stafford Group (The Group) was commissioned by Destination NSW to develop a Destination Management Plan (DMP) and Action Plan for the Hawkesbury State Electoral District (SED). For the purpose of this DMP and Action Plan, the Hawkesbury State Electoral District will be referred to as the Hawkesbury region.

The DMP and Action Plan has been developed in close consultation with the Hawkesbury Visitor Economy Advisory Committee (the Committee)¹ which was established by the local member, the Hon. Dominic Perrottet, to help guide the DMP and Action Plan's direction and determine how funds should be applied.

The Hon. Dominic Perrottet has secured \$3m in funding to develop a Tourism Strategy for the Hawkesbury region, implemented by a DMP and Action Plan. The funds are to be spread across various projects and years to generate incremental growth to the visitor economy in the Hawkesbury Region.

1.2. Why a DMP

The DMP and Action Plan is provided to assist the Hawkesbury region to develop a stronger, more sustainable visitor economy and to support the continued growth of visitor activity as well as recognising the needs of the local community going forward.

The primary objectives of the DMP and Action Plan include:

- growing the Hawkesbury region's share of greater Sydney's overnight visitation and expenditure;
- helping NSW achieve its tourism goal of doubling overnight visitor expenditure by 2020²; and
- focusing on tourism product which generates a solid commercial return to grow the sustainability of the region's visitor economy, leading to stronger local employment, development and investment.



¹ A list of Committee members has been included in Section 1 of the Supporting Documentation.

² Final Report of the Visitor Economy Taskforce, A Plan to Double Overnight Visitor Expenditure to NSW by 2020, NSW Trade and Investment, June 2012.

1.3. Situation Analysis

The following points help provide context for this DMP and Action Plan.

- The Hawkesbury River is a major asset for the region but is not yet able to be leveraged off effectively for tourism purposes.
- There is market confusion regarding who “owns” the Hawkesbury River as a destination brand³.
- The proximity of the region to Sydney is a double-edged sword; while it is easily accessible, it has struggled to position itself as an overnight destination in its own right.
- The region is recognised as a food bowl, offering quality food experiences such as produce markets and fruit picking. Potential exists to build the region as a “foodie” destination.
- The region is also important from a historic perspective, with Windsor being one of the oldest places of British settlement on the Australian continent. There is also Indigenous product associated with the broader region. Industry is keen to raise the awareness of the area’s history and

heritage values and to find ways of promoting these.

- In 2016, total visitation to the region was estimated at 1.1m, with the majority of visitors being domestic day trippers (75%), followed by domestic overnight visitors (22%) with the remainder (just under 3%) being international visitors.
- Based on a series of low, medium and high visitor forecasts, it is estimated that visitation to the region could increase to 1.3m visitors (low scenario), 1.4m visitors (medium) or 1.8m visitors (high) by 2027.
- There is a desire by industry and Hawkesbury City Council to spread the economic benefits of the visitor economy more widely throughout the region whilst recognising the need to provide more effective links between areas.
- There is a preference for growing visitor yield through encouraging more overnight visitation and longer length of stay, rather than merely encouraging a greater number of visitors.
- Hawkesbury City Council has also formed a Tourism Advisory Committee which has identified many of the same challenges and opportunities that this DMP and Action

Plan has found. There are logical synergies to be built on between the two committees (The Minister’s Visitor Economy Advisory Committee for this DMP and Action Plan and the Council’s Tourism Advisory Committee).

- A Regional Strategic Alliance has also recently been established by Hawkesbury, Blue Mountains and Penrith City councils. There are many opportunities, particularly from a marketing and product packaging perspective which can be linked together, such as food trails etc.
- The recent Draft West District Plan created by the Greater Sydney Commission which sets out long-term economic priorities for Western Sydney, notes that tourism and the visitor economy needs to be a major part of future economic growth for the region, including the provider for more local employment and new investment opportunities.
- A Western Sydney Visitor Economy Strategy and Action Plan is also being developed by Destination NSW to assess priorities for visitor economic development in Western Sydney, which will be informed by the district planning work being

undertaken by the Greater Sydney Commission. The Western Sydney Visitor Economy Strategy and Action Plan will also consider the Western Sydney City Deal which is being implemented by the Commonwealth and NSW Governments as a further economic initiative to help address regional unemployment and to stimulate regional development and investment.



³ Name association often puts the Hawkesbury River aligned to Brooklyn and the Central Coast rather than Windsor within the Hawkesbury LGA.

1.4. Challenges

A number of challenges have been identified which need to be adequately addressed to create a robust visitor economy and to pick up on the need to generate higher yielding visitor markets. These are included in Table 1.





Table 1: The challenges

Infrastructure Development & Planning	Marketing	Product Development	Other Challenges
<ul style="list-style-type: none"> Balancing demand for urban development with tourism needs Challenges in activating tourism in national parks, reserve lands and open space areas generally Council planning instruments and support for tourism Heritage site development constraints Lack of adequate signage and way finding River access constraints and usage State Government and Local Government planning instruments which restrict tourism development Upgrading tourism related infrastructure such as event facilities, parking, lighting, gateway signage and wayfinding Waterways maintenance/upgrade costs Urban planning quality in Windsor and other towns and villages 	<ul style="list-style-type: none"> Brand confusion of the Hawkesbury Limited understanding of the importance and value of tourism Lack of unified events calendar and lack of link to Visit Sydney regional calendar Lack of digital and media assets Limited digital presence Limited major events Limited travel trade packaged product Proximity to Sydney which encourages day trippers rather than overnight stays Limited market research to verify the level of market demand 	<ul style="list-style-type: none"> Few larger and medium sized tourism operators Limited branded products Lack of evening activities Lack of experiences for the under 10s market Lack of regular market days & produce markets Lack of travel trade product packaging Lack of room capacity for corporate functions and business events Lack of current tour operator interest Lack of tourism activity allowable at the Richmond RAAF base Limited new investment Lack of a signature visitor experience to leverage off Lower accommodation occupancy levels Not perceived as "open for business" (restricted shop trading hours) Lack of sufficient town and village differentiation Variable accommodation quality 	<ul style="list-style-type: none"> Ageing population Many lifestyle operators (i.e. those not operating a full-time tourism business) Growing competition from Penrith and Blue Mountains operators

1.5. Target Markets for the Hawkesbury region




Destination NSW has identified 18 visitor market segments for NSW, based on area of interest, demographics and purpose of trip. Based on discussions with industry, Destination NSW and Council, as well as the 2016 Hawkesbury Tourism Stakeholder Survey commissioned by Destination NSW, the following seven visitor market segments are considered to reflect the markets already being captured by the Hawkesbury region as well as those which present opportunities for the region to focus on. These are defined as the Hawkesbury region's target markets.

Table 2: Target markets for the Hawkesbury region

Market	Domestic Visitors	International Visitors	Why target?
Visiting friends & relatives 	✓	✗	<ul style="list-style-type: none"> Strong market for Sydney, NSW and the strongest purpose of visit for the Hawkesbury region Already a key driver of visitation to the region Potential to target both visitors and their hosts (friends or relatives) For the Hawkesbury region, the domestic VFR market is thought to be far larger than the international VFR market (though potential exists to target the international market once the destination is further developed and additional product added)
Caravan & camping 	✓	✗	<ul style="list-style-type: none"> Market has achieved significant growth nationwide Industry operators are looking for quality destination park sites within close proximity to Sydney CBD as there is currently a gap Higher trip spend than average domestic overnight visitor to NSW (\$745 per trip compared with \$578)
Food tourism 	✓	✓	<ul style="list-style-type: none"> Strong affiliation with history of the region as one of the nation's first food bowls and the focus many industry operators see the region as currently having⁴ Strong growth globally Visitors are able to experience rural/farm life within close proximity to Sydney CBD, including fruit picking. Potential to tie in with the Blue Mountains and Penrith (via the Regional Strategic Alliance) who both are looking to increase the prominence of food experiences
Cultural & heritage tourism 	✓	✗	<ul style="list-style-type: none"> History of the Hawkesbury region (Macquarie towns) and some of the oldest towns in Australia, along with Indigenous heritage is a natural fit with cultural and heritage tourism providing that product can be "brought to life". Considered by industry as being the top unique aspect of the region⁵ and the 2nd highest ranked reason the Hawkesbury is famous for (after the River). Typically, it is a higher spending market (particularly the domestic overnight market which spent \$330 more p/trip than the average domestic overnight visitor to NSW) A growing market - 29% growth in cultural and heritage visitation to NSW over the last 5 years. For the Hawkesbury region, there was 110% in this segment in the international market over the same period. The initial focus should probably be on the domestic cultural and heritage tourism market, and niche segments such as school groups, university groups and special interest groups.

⁴ Based on the 2016 Hawkesbury Stakeholder Research commissioned by Destination NSW as well as feedback from industry operators during the DMP process.

⁵ Based on the 2016 Hawkesbury Stakeholder Research commissioned by Destination NSW as well as feedback from industry operators during the DMP process.

Market	Domestic Visitors	International Visitors	Why target?
Nature-based tourism 	✓	✓	<ul style="list-style-type: none"> A natural fit with the Hawkesbury region, the River and surrounding areas which the Hawkesbury are looking to work with/leverage off such as the Blue Mountains. 66% of the Hawkesbury LGA is parkland, reserves or open space. Primary visitor market segment for the Hawkesbury region (for domestic overnight and international visitors) A growing market for NSW (41% growth over the last 5 years) and the Hawkesbury region (77% growth in the international market and 29% growth in the domestic market over the same period) Typically, it is a higher spending market (particularly the domestic overnight market which spent \$170 more p/trip than the average domestic overnight visitor to NSW) Focus on the domestic market but also consider international and potentially leverage off the large number of international day trippers who travel to the Blue Mountains on excursions. Coach operators are looking for new experiences to include in their itineraries.
Overnight short break market 	✓	X	<ul style="list-style-type: none"> The proximity of the region to Sydney and the rural vibe of the Hawkesbury region appeals to this market. The market segment represents almost 20% of domestic overnight visitors to the Hawkesbury region and grew by 33% from 2012-2016. In 2016, it surpassed nature-based visitation to the Hawkesbury region for the domestic overnight segment. A larger share of short break visitors stay in some form of commercial accommodation (in contrast to the average domestic NSW visitor market) This market likes to dine out as well as go sightseeing etc.
Cruise ship market 	✓	✓	<ul style="list-style-type: none"> Significant growth in the cruise industry globally Huge increase in the number of cruise ships docking in Sydney Cruise operators are looking for new product to add to their land-based tour offering International passengers are more likely to participate in organised tours, with the Blue Mountains being the most popular non-Sydney CBD destination. The potential exists to leverage off this. Opportunity to potentially offer day tour circuit from Sydney to Echo Point, Leura and back down via Bells Line of Road to Windsor and Sydney.

1.6. Product pillars for the Hawkesbury region

Figure 1 provides the product pillars for the Hawkesbury region which have been identified because they offer the strongest link to the target markets identified and which leverage off the raw assets which the Hawkesbury region has. Under each pillar is a variety of related product which could be further investigated as part of the DMP and Action Plan's implementation.

Figure 1: Product pillars and associated product for the Hawkesbury region



Food-based Product

- Fruit picking
- Cooking schools
- Farm-gate trails (self-guided & on tour)
- Culinary master classes by leading chefs
- Food festivals and events
- Food trail cruises
- Slow food dining experiences
- Farm stays
- Long table lunch events



Heritage & Cultural Product

- Heritage trails (self-guided and on tour)
- Heritage site activation through light shows, story boards and online information
- Indigenous community-led tours to sites of significance
- Heritage themed haunted attraction and associated event
- Equine events/festivals linking to one of Australia's oldest racing club (Hawkesbury Race Club)
- Recreation aviation activity events linked to Richmond RAAF base as one of Australia's oldest and largest air force bases



Nature-based Product

- Activating national and state parks to commercial tourism ventures for guided activities and recreation
- Adventure product such as zip lines, canopy walkways etc.
- Water-based tours such as river kayaking
- Expansion of water-based events and activities
- National orienteering course
- Seeing local flora and fauna and immersive wildlife experiences
- Overnight guided trekking experiences
- Glamping










Supporting Facilities








- Branded destination holiday park(s) close to Windsor or Richmond
- Branded 4-5 star hotel or resort
- Conference facility for 400+
- Outdoor amphitheatre for events/shows
- Gateway signage for the region and each village
- Improved wayfinding (online and at sites)

1.7. Product opportunities linked to Hawkesbury's target markets

Table 3 provides a link between the potential product opportunities identified and the key target markets for the Hawkesbury region. Marketing activity, such as website development etc., are not included in this table as it has not been directly correlated to an increase in visitor growth. They are, however, required to support the visitor experience and help facilitate growth.

Table 3: Product opportunities linked to target markets

							
Food-based tourism product							
1. Cooking schools	✓		✓			✓	✓
2. Food experience packaging via the regional strategic alliance	✓	✓	✓			✓	
3. Food trail cruise	✓	✓	✓	✓	✓	✓	✓
4. Seasonal food-based events	✓	✓	✓			✓	
Heritage and cultural product							
5. Activating cultural and heritage towns	✓			✓	✓		✓
6. Expansion of recreational aviation activity	✓	✓		✓			
7. Possible historic Hawkesbury light show development	✓	✓		✓	✓	✓	
8. Possible haunted historic Hawkesbury attraction/event development	✓	✓		✓	✓	✓	✓
Nature-based product							
9. Activating nature-based tourism product	✓	✓			✓	✓	
10. Eco and Indigenous tours	✓	✓		✓	✓	✓	✓
11. Glamping			✓	✓	✓	✓	
12. National orienteering course	✓				✓		
13. Major nature-based recreation attraction	✓	✓		✓	✓	✓	✓

							
Supporting facilities							
14. Destination holiday park	✓	✓			✓		
15. Equine tourism	✓	✓		✓		✓	
16. Mid-larger scale branded hotel/resort with conference venue				✓	✓	✓	
17. Outdoor Amphitheatre	✓			✓		✓	

1.8. Activating the DMP/next steps

A number of opportunities are identified within the DMP and Action Plan. These have a strong connection to the products desired by the various target market segments identified for the region. To ensure that this DMP and Action Plan is activated on a timely basis and that the requisite research and analysis is completed to investigate and verify the viability of a number of product development opportunities, the following steps are recommended.

- A DMP Project Manager be appointed to guide and coordinate the various initiatives identified, including working with Destination NSW, Council and others to ensure outcomes are achieved on a timely basis.
- Reviewing the online extensive product audit undertaken as part of this DMP by adding on the ground analysis by the DMP Project Manager, including assisting operators to include their product on the Australian Tourism Data Warehouse (ATDW) – Get Connected.
- Undertaking a content and media asset audit leading to the development of content to showcase the region to appeal to specific target markets.

- Complete a comprehensive audit of events and ensuring all are displayed on the Sydney.com events calendar.
- In partnership with Destination NSW, to develop a brand for the Hawkesbury region which applies the Greater Sydney Destination Brand Guidelines.
- To develop a PR plan to help grow awareness of the Hawkesbury region.
- For the DMP Project Manager to work closely with Council to develop a stakeholder engagement and communications plan to raise community and wider awareness of the DMP and Action Plan.
- To identify product gaps through the product and experience audit and to develop a tourism investment prospectus to encourage new investment into areas which will fill the product gaps.
- Develop a product and experience action plan which may also include industry training opportunities and to identify potential trail, tour and packaging opportunities.
- To develop a destination marketing campaign which will leverage cooperative partnerships and which will build gradually and sustainably as the brand becomes more highly profiled.



2. Introduction

2.1. Overview

The Stafford Group (The Group) was commissioned by Destination NSW to develop a Destination Management Plan (DMP) and Action Plan for the Hawkesbury State Electoral District. For the purpose of this DMP and Action Plan, the Hawkesbury State Electoral District will be referred to as the Hawkesbury region.

The primary objective of this project is to develop a robust DMP and Action Plan to assist the Hawkesbury region in growing tourism and managing the development of its visitor economy.

The DMP differs from a traditional DMP for two reasons:

- Boundaries: the boundaries being based on NSW state electoral boundaries rather than a local government area or regional tourism boundaries; and
- Funding: the NSW State Government has committed \$3m for the implementation of this DMP and Action Plan.

2.2. Methodology

The methodology adopted for this DMP and Action Plan has included the following.

- Liaison with Destination NSW, the Hawkesbury Visitor Economy Advisory Committee (the Committee) which was established by the Hon. Dominic Perrottet as well as a variety of tourism operators based in the region.
- Liaison with Hawkesbury City Council and their Tourism Committee as it was identified that there are many synergies between the Committee's and the Council Tourism Committee desires.
- A product audit of accommodation, attractions and events in the Hawkesbury region.

- A comprehensive review of existing strategies, plans and documentation from a variety of sources. A full list of those documents reviewed is contained in Section 1 of the Supporting Documentation.
- Face to face meetings, phone interviews with a variety of stakeholders including industry operators, investors and developers and senior representatives of the tourism sector.
- A review of visitor data based on a special data request to Destination NSW.
- Multiple workshops with the Committee to identify challenges as well as opportunities. This included refining opportunities in the action plan that builds upon each year.
- Development of a draft DMP and Action Plan and ongoing discussions with the Destination NSW and the Committee.
- After further review and feedback, completion and finalisation of the DMP and Action Plan.





3. Situation analysis

3.1. About the Hawkesbury region

The Hawkesbury region is a large semi-rural area on the north-west fringe of Sydney. It covers 3,171 km² and comprises the entirety of Hawkesbury LGA (88% of the region) as well as parts of the Hills Shire (approximately 257 km² of the Shire's total area and comprising 8% of the region⁶) and Hornsby Shire (approximately 138 km² of the Shire's total area and comprising 4% of the region⁷). It includes the historic towns of Windsor and Richmond and includes extensive national park and reserve lands (66% of the total region).

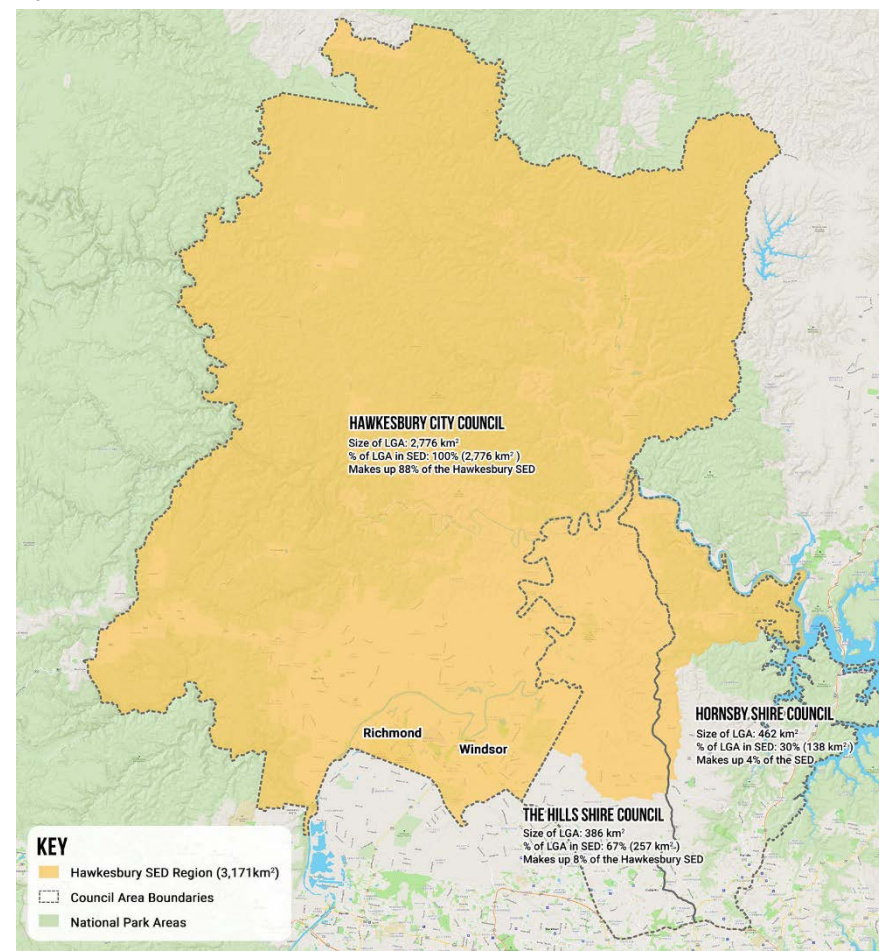
The NSW State Electoral Districts were revised in 2015⁸ as part of the 2013 Redistribution of state electoral boundaries⁹. Figure 2 illustrates the updated electoral boundary for the seat of Hawkesbury which forms the boundary for this DMP and Action Plan.

The region is situated approximately 1 hour's drive from Sydney CBD or just under 1.5 hours via public transport¹⁰.

3.2. Population

With the readjustment of the electoral boundaries in 2015, there is not an updated electoral boundary dataset available for the population of the Hawkesbury region.¹¹ Table 4, therefore, provides an estimate of the region's population based on a number of assumptions. In 2015, the region's population was approximately 75,130 residents, and, of these, roughly 88% resided in the Hawkesbury LGA.

Figure 2: Boundaries for this DMP and Action Plan



⁶ Estimates based on manual boundary size calculations through QGIS.

⁷ Estimates based on manual boundary size calculations through QGIS.

⁸ http://www.elections.nsw.gov.au/about_elections/electoral_boundaries/2013_redistribution_process

⁹ Prior to the redistribution, the seat of Hawkesbury did not cover Richmond or Windsor, and the seat's population was centred on the Hills shire. Hawkesbury lost most of its population in the Hills to Castle Hill, gaining Kurrajong and Richmond from Londonderry and Windsor from Riverstone (<https://www.tallyroom.com.au/archive/nsw2015/hawkesbury2015>)

¹⁰ Drive: From Sydney CBD – Windsor and public transport: From Town Hall – Windsor Station (based on Google Maps).

¹¹ Data which is currently available via the ABS (through Census Quick Stats) is based on the old electoral boundaries

Table 4: Estimated Resident Population

	Total LGA Population	Population within Hawkesbury Region ¹²	% of Hawkesbury Region Population
Hawkesbury LGA	66,134	66,134 ¹³	88%
The Hills Shire	160,584	8,357 ¹⁴	11%
Hornsby Shire	148,816	639 ¹⁵	0.9%
Total	375,534	75,130	100%

3.3. The value of tourism

Tourism in the Hawkesbury region is valued at \$245m¹⁶ (in terms of output) and accounts for 3% of total output. While it is not a primary sector for the region (manufacturing is by far the strongest sector), there is a strong potential for growing this sector.

The sector also provides 5%¹⁷ of jobs in the region (just under 1.3k positions).¹⁸ Currently, approximately 64% of the working population travels outside the region for employment.¹⁹ Growing tourism in a sustainable manner will support the creation of additional jobs in the region which will assist a percentage of these residents to reduce their journey to work time.

3.4. Relevant strategies

3.4.1. Greater Sydney Commission planning

The Greater Sydney Commission (GSC) recently released its draft West District Plan (WDP)²⁰, one of six District Plans developed by the GSC. The WDP covers the LGAs of Hawkesbury, Penrith and the Blue Mountains. It maps the GSC's 20-year vision for the West District and is one of six draft District Plans developed by the GSC.

The WDP recognises the strength of the Hawkesbury's rural and agricultural landscapes, its historic towns as well as the iconic Hawkesbury River. Windsor and Richmond are noted in the WDP as "District Centres" that provide access to a range of goods, services and jobs.

One of the WDP's central focuses is on leveraging investment in the proposed Western Sydney Airport which will connect the District to the rest of the world.

3.4.2. Western Sydney Visitor Economy Strategy and Action Plan

The NSW Government is also currently completing a Western Sydney Visitor Economy Strategy and Action Plan to assess economic development priorities for Western Sydney. The Strategy and Action Plan will be informed by the work being completed by the GSC and will also consider the Western Sydney City Deal which is being implemented by the Commonwealth and NSW Governments.

¹² 2015 estimate

¹³ The entirety of the Hawkesbury LGA has been included as the whole LGA falls within the Hawkesbury region.

¹⁴ Includes a proportion of the small areas of Rural North (100% of the residential population), Kenthurst (50%), Annangrove-Nelson-Maraylya (40%) and Dural-Middle Dural (20%). These percentages are based on the estimated area of that small area which falls within the Hawkesbury region.

¹⁵ Includes a proportion of the Arcadia-North Western Rural small area (15%). This percentage is based on the estimated resident populations of Canoelands and Berowra Creek.

¹⁶ This includes: tourism output for the whole of Hawkesbury LGA (as the entire LGA is in the Hawkesbury regional boundary) and 5% of the Hills Shire's tourism output (ratio determined in section 4.1 of this DMP and Action Plan). Tourism output data was not available for Hornsby Shire so it has been excluded from the assessment.

¹⁷ This includes: tourism employment for the whole of Hawkesbury LGA (as the entire LGA is in the Hawkesbury regional boundary) and 5% of the Hills Shire's tourism employment (ratio determined in section 4.1 of this DMP and Action Plan). Tourism employment data was not available for Hornsby Shire so it has been excluded from the assessment.

¹⁸ <http://www.economicprofile.com.au/hawkesbury/tourism>; and <http://www.economicprofile.com.au/thehills/tourism>

¹⁹ <http://www.economicprofile.com.au/hawkesbury/workers/live-in/place>; and <http://www.economicprofile.com.au/thehills/workers/live-in/place>

²⁰ The WDP is covered as it includes the whole of Hawkesbury LGA. The majority of the Hawkesbury region (88%) is the Hawkesbury LGA.

3.4.3. Hawkesbury City Council Tourism Strategy

Hawkesbury City Council developed its Tourism Strategy for the LGA in 2015, with a focus on the future directions and trends for the visitor economy. The Tourism Strategy developed a management framework to guide Council's activities in its tourism program over the short, medium and longer term. Out of the Tourism Strategy, a Tourism Committee was formed which involves a partnership between Council and industry, with a purpose of driving the outcomes of the Tourism Strategy.

3.4.4. Hills, Hawkesbury and Riverlands DMP

The Hills, Hawkesbury and Riverlands DMP was developed in 2013 by Hills, Hawkesbury & Riverlands Tourism, with support from The Hills Shire Council, Hawkesbury City Council and Richmond Club. The DMP's primary aim was to identify strategies to address the decline in overnight visitation, change perceptions that it is not merely a day trip destination and to encouraging a short-break market. The five strategic priorities noted in the DMP include:

- Embrace the Visitor Economy
- Greater Sydney Partnership
- Build the Experiences
- Get People Talking
- Make Trip Planning Easier



4. Visitor trends & markets

4.1. Methodology

It is important to note that Destination NSW and Tourism Research Australia (TRA) do not provide data based on electoral boundaries but rather focus on tourism regions and LGAs. Determining exact visitation to the Hawkesbury region is, therefore, challenging because it cuts across three LGAs, one in whole, and two in part. To provide an estimate of visitation for the Hawkesbury region, the following assumptions and data sets have been applied.

- Destination NSW has provided visitation data to the combined Hawkesbury, Hills and Hornsby LGAs for 2012-2016. In total, there were an estimated 2.85m visitors to the three combined LGAs in 2016. It is not possible, based on the NVS and IVS, to break this down further to determine visitation to the Hawkesbury region.
- Visitation to Hawkesbury LGA and The Hills Shire was also provided as part of separate data requests. Based on this data, there were an estimated 998k visitors to Hawkesbury LGA and 1m visitors to The Hills Shire. By deduction²¹, Hornsby Shire, therefore, received an estimated 855k visitors. However, this data represents visitation to the respective LGAs in their entirety. As only a portion of The Hills Shire and Hornsby Shire fall within the Hawkesbury region, there is a need to break this down further to provide an estimate of visitation to the Hawkesbury region.
 - The entire Hawkesbury LGA is included in the Hawkesbury region and it makes up 88% of the entire SED. It has, therefore, been assumed that total visitation data for the Hawkesbury LGA applies to the Hawkesbury region (that is, all visitors who visit the Hawkesbury LGA are considered visitors to the Hawkesbury region).

- Only a small proportion of the Hawkesbury region (8%) is part of The Hills Shire. As the majority of The Hills Shire's larger-scale tourism product falls outside the area of the Hawkesbury region²², it has been assumed that approximately 5%²³ of total visitation to The Hills Shire is to the area of the LGA which falls within the Hawkesbury region.
- An even smaller proportion (4%) of the Hawkesbury region is part of Hornsby Shire. As with The Hills Shire, the majority of Hornsby Shire's tourism product would appear to fall outside the Hawkesbury region²⁴. It has been assumed, therefore, that approximately 2%²⁵ of total visitation to Hornsby Shire is to the area of the LGA which falls within the Hawkesbury region.
- Visitation to the Hawkesbury region is, therefore, calculated as an amalgamation of total visitation to the Hawkesbury LGA and a smaller share of visitation to The Hills Shire (5%) and Hornsby Shire (2%).

4.2. Total visitation

Figure 3 provides a summary of visitation to the Hawkesbury region. In 2016, total visitation was estimated at 1.1m, with the majority of visitors being domestic day trippers (75%), followed by domestic overnight visitors (22%) with the remainder (3%) being international visitors. Hawkesbury region visitation represents approximately 37%²⁶ of total visitation to the three LGAs combined.

There is a desire by industry to leverage off the proximity of the Hawkesbury region to Sydney CBD, to grow the share of overnight visitation to the region especially, as overnight visitors contribute

²¹ 2.85m visitors (to the Hawkesbury region), less Hawkesbury LGA visitation (998k) and The Hills Shire visitation (1m).

²² Examples of the larger scale product that falls within The Hills Shire includes: Grand Mercure The Hills Lodge Hotel and Spa (97 rooms), Novotel Sydney Norwest (132 rooms), Quest Bella Vista (147 rooms), Adina Apartment Hotel Norwest (106 rooms), Quest Castle Hill (82 rooms) and Norwest Business Park (which would generate a business market which would be significant for overall visitation to the LGA).

²³ In the absence of visitor data for the Hawkesbury SED, a nominal proportion of visitation has been applied for The Hills Shire.

²⁴ Examples of the larger scale product that falls within Hornsby Shire includes: ibis Sydney Thornleigh (105 rooms), Waldorf Pennant Hills Apartment Hotel (30 rooms) and Waldorf Waitara Residential Apartments (18 rooms).

²⁵ In the absence of visitor data for the Hawkesbury SED, a nominal proportion of visitation has been applied for Hornsby Shire.

²⁶ There were an estimated total of 2.85m visitors to the three LGAs of Hawkesbury, Hills Shire and Hornsby Shire. Hawkesbury region visitation (estimated at 1.1m visitors), therefore, represents 37% of total visitation to these three LGAs.

far more through overnight spend on accommodation, food and beverage and transport etc. This also aligns with the NSW State's goal of doubling overnight visitor expenditure by 2020.

Figure 3: Visitation (2012 – 2016)²⁷

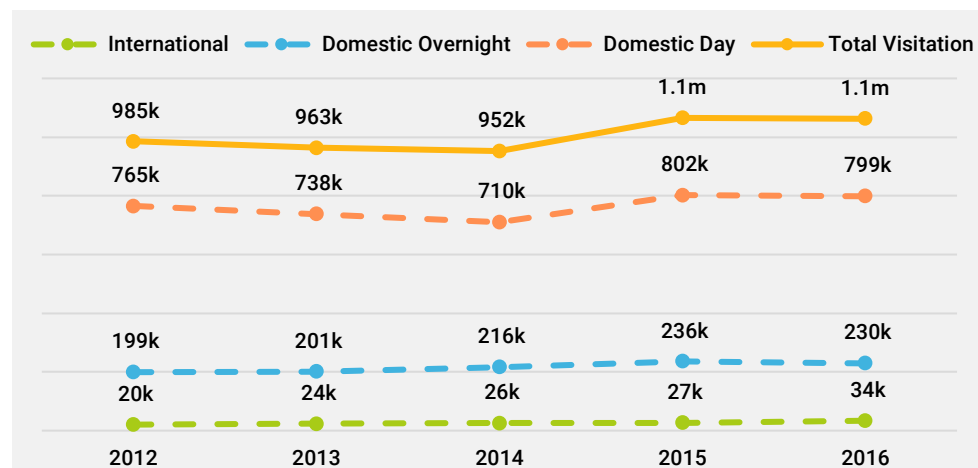
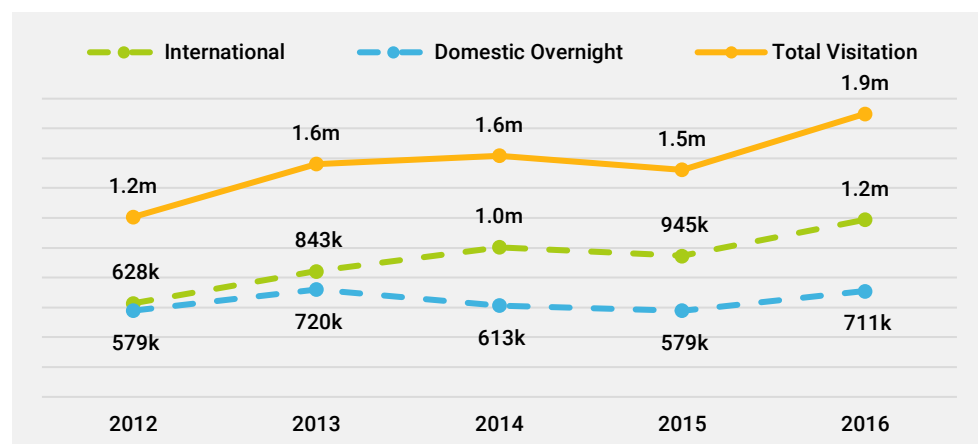


Figure 4: Visitor nights (2012 – 2016)²⁸



²⁷ Special data request to Destination NSW, based on IVS and NVS. Note: data is not collected for international day visitation.

4.3. Visitor nights

Figure 4 illustrates visitor nights spent in the Hawkesbury region from 2012–2016. The majority of visitor nights are undertaken by international visitors (63% of visitor nights in 2016) which is a result of a longer average length of stay (ALOS) of international visitors (35 nights compared to 3.1 nights for domestic visitors in 2016). The international visitor ALOS is often skewed by those travelling for education and business purposes so we consider this is unlikely to be reflective of the international ALOS for leisure-based visitors to the area which is more likely to be in line with the domestic ALOS of 3.1 nights.

Additionally, the visitor night data does not demonstrate a breakdown between those staying in commercial accommodation as opposed to those staying in private accommodation (this data is not available for the region). While commercial visitor nights are spent in hotels, motels and resorts etc., private visitor nights are generally spent with friends and relatives and generally have a lower spend pattern and as a result, a lower economic benefit to the region.

Data provided by Destination NSW on the number of nights spent by top accommodation uses demonstrates, that, on average, over the period 2012-2016:

- 60% of international guest nights were spent at a “friend’s or relative’s property” with the remainder either in a “rented house/apartment/flat or unit” (24%), or were unable to be determined (16%); and
- 68% of domestic guest nights were spent at a “friend’s or relative’s property”, with the remainder unable to be determined (32%).

This is supported by anecdotal feedback which indicates that the Hawkesbury region has a larger share of private overnight visitors, rather than commercial accommodation stayers, though there is a strong desire to grow the commercial overnight market.

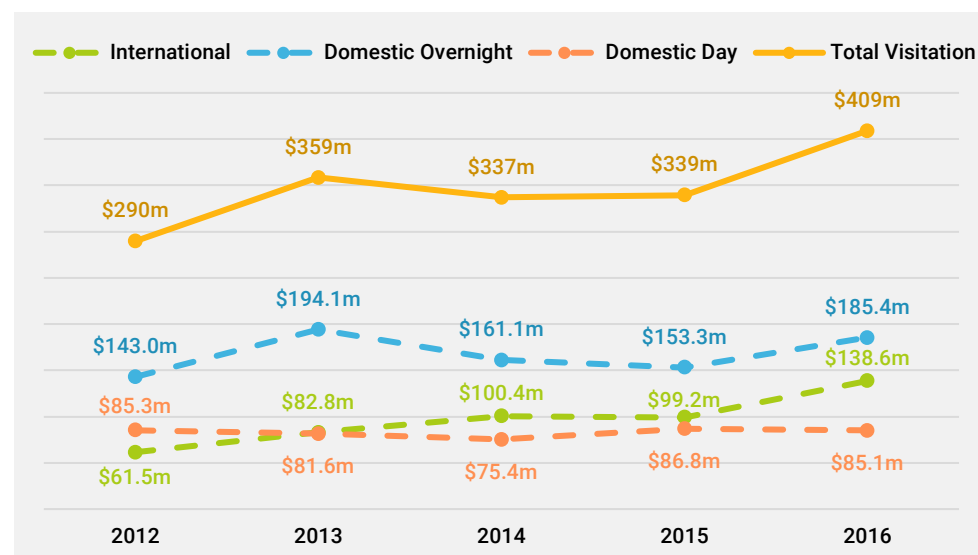
²⁸ Special data request to Destination NSW, based on IVS and NVS.

There is industry recognition that to do this will require introducing additional higher quality accommodation stock into the market, upgrading existing stock where possible and introducing new experiences, including family-friendly evening activities.

4.4. Visitor spend

Figure 5 illustrates visitor spend from 2012 – 2016 for the Hawkesbury region. In 2016, visitor spend totalled just over \$409m. The figure also demonstrates the higher yielding nature of the overnight market – while domestic overnight visitors only represented 22% of total visitation to the Hawkesbury region in 2016, they represented 45% of total spend. This supports industry's desire to grow the overnight visitor market to the region.

Figure 5: Total visitor spend (2012 – 2016)²⁹



²⁹ Special data request to Destination NSW, based on IVS and NVS.

Table 5 further illustrates the importance of the overnight market to the region:

- a domestic overnight visitor's spend per trip is more than seven times the level of spend of a domestic day visitor (based on a five-year average); and
- an international overnight visitor's spend per trip being more than 30 times the level of spend of a domestic day visitor (based on a five-year average).

Table 5: Spend per visitor per trip (2012 – 2016)³⁰

	2012	2013	2014	2015	2016	5 Year Average
Domestic Day	\$111	\$111	\$106	\$108	\$107	\$109
Domestic Overnight	\$718	\$964	\$744	\$650	\$806	\$776
International Overnight	\$3.0k	\$3.5k	\$3.9k	\$3.6k	\$4.1k	\$3,619

4.5. Average length of stay

Figure 6 provides a snapshot of the estimated average length of stay (ALOS) of visitors to the Hawkesbury. While the international overnight ALOS is significantly higher than domestic overnight visitors, this tends to be skewed by international workers and students who are in the region for extended periods of time.

We consider the domestic overnight ALOS would more likely be representative for both the domestic and international holiday/leisure markets to the Hawkesbury.

The domestic overnight ALOS demonstrates that overnight visitation to the Hawkesbury region on average comprises 2 nights - indicating a weekend, short break market.

³⁰ Special data request to Destination NSW, based on IVS and NVS.

Figure 6: Average length of stay (2012–2016)³¹

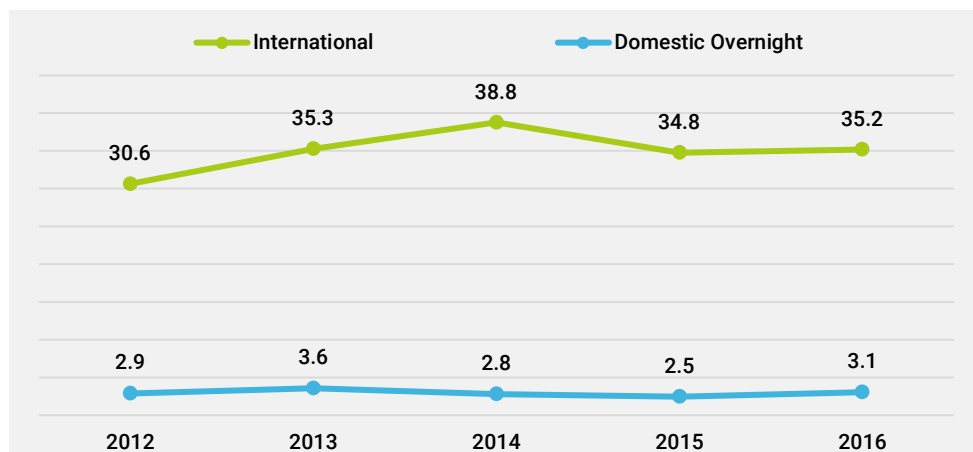
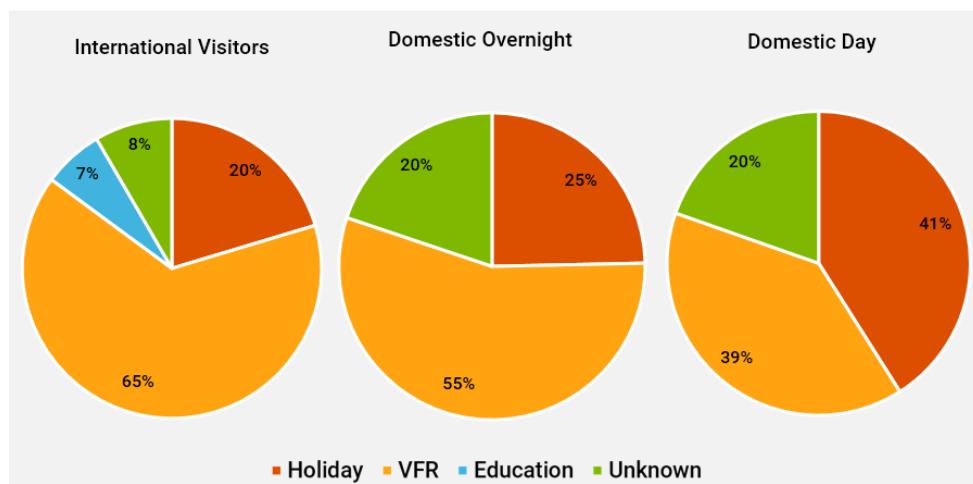


Figure 7: Purpose of visit (5-year average, 2012-2016)³²



³¹ Special data request to Destination NSW, based on IVS and NVS.

4.6. Purpose of visit

Figure 7 provides a summary of purpose of visit by international, domestic overnight and domestic day visitors to the Hawkesbury region. It demonstrates that across the Hawkesbury region, leisure-based travel is the primary purpose of visit with VFR and holiday being the primary purpose of visit across all visitor types.

Business travel was unable to be determined because of sample size issues.

4.7. Visitor Segments

Figure 8 on the following page provides a summary of visitation to the Hawkesbury region by visitor market segment based on visitor type. It is important to note the following.

- Data by visitor market segment at an LGA and SED level is difficult to ascertain as there are sample size errors and, as such, data for each segment type was unable to be provided. For example, data was able to be provided for six segments for the international visitor market but only two segments for the domestic overnight market and no segment data was able to be provided for the domestic day market for the Hawkesbury region.
- One visitor can be classified as being in one or more visitor market segments – for example, one international visitor could potentially be a food and wine visitor as well as a nature visitor. Market segment data does not, therefore, represent unique visitation.

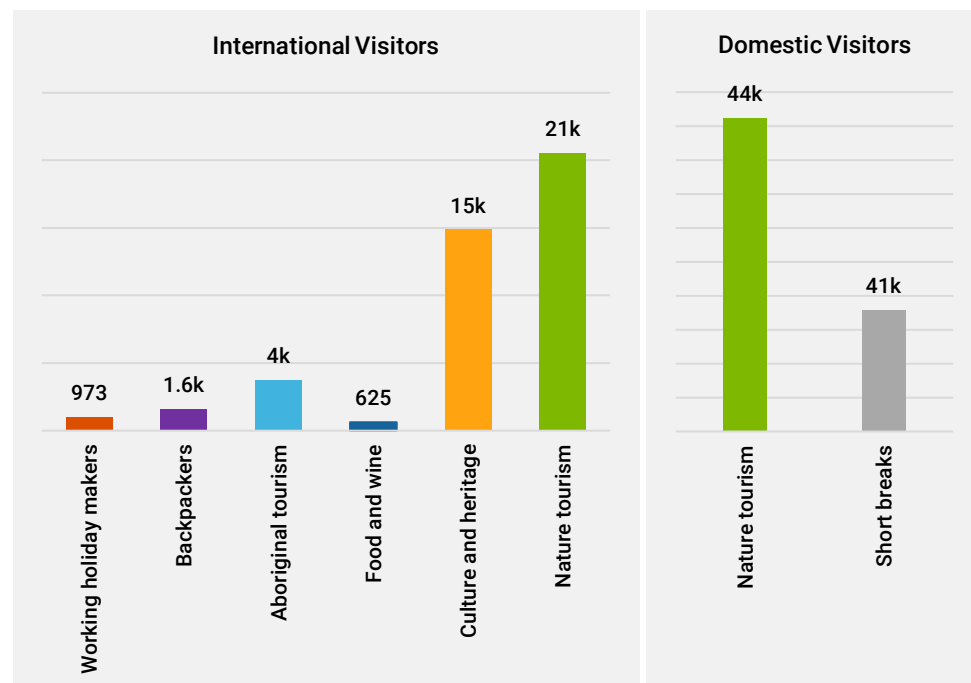
The data demonstrates the following.

- A major international visitor segment for the Hawkesbury region is nature-based tourism, attracting 21k visitors (based on a 5-year average), which represents approximately 78% of all international visitors to the region. This is followed by cultural and heritage tourism which represents 57% of visitors to the region.

³² Special data request to Destination NSW, based on IVS and NVS.

- Nature-based tourism is also a major segment of the domestic overnight market, attracting 44k visitors which represents 20% of all domestic overnight visitors, followed by the short break market (41k visitors) which represents 19% of visitors to the region.

Figure 8: Visitation by segment (5-year average, 2012-2016)³³



4.8. Hawkesbury stakeholder research

In September 2016, Destination NSW facilitated a consultation program with tourism stakeholders from the Hawkesbury Region.

The following reflects the key findings from that research.

- Heritage/history, the River and the proximity to Sydney city were identified as the “unique” attributes of the Hawkesbury region.
- The River and its heritage/history were noted as being what the region is famous for.
- It was noted that the region does not have enough accommodation options, festivals and events to attract overnight visitors, appropriate signage and appropriate transport options for visitors.
- Approximately half of the respondents rated autumn, summer and spring as peak seasons.
- With respect to the season best suited for tourism, spring was ranked highest, followed by autumn and winter.
- Primary visitor markets to the region were noted as Sydneysiders on day trips and overnight trips.
- The overnight Sydneysider market was listed as the top priority visitor market going forward, followed by overnight visitors from Regional NSW.
- Top activities which currently attract visitors were noted as: water-based activities (water skiing and boating); tours including sightseeing and agriculture etc.; visiting friends and relatives; food and drink experiences; and museums and heritage.
- With respect to marketing the region for tourism, food and drink and the parks, reserves and landscapes were the highest ranked.
- To attract more visitors to the region, it was noted there is a need to develop more products/experiences and to promote the region via marketing campaigns.

³³ Special data request to Destination NSW, based on IVS and NVS.



5. Destination benchmarking

A competitive destination benchmarking assessment was completed with competitor destinations including: Penrith the Blue Mountains, Camden, Campbelltown and Liverpool.

These destinations have been selected because they fall into one or more of the following categories:

- they are located on the fringe of Greater Sydney;
- they have major state or national park lands or significant open space areas within their boundaries;
- they have similar niche product such as equestrian and food; and/or
- they have major rivers and are seeking to activate and leverage off this.

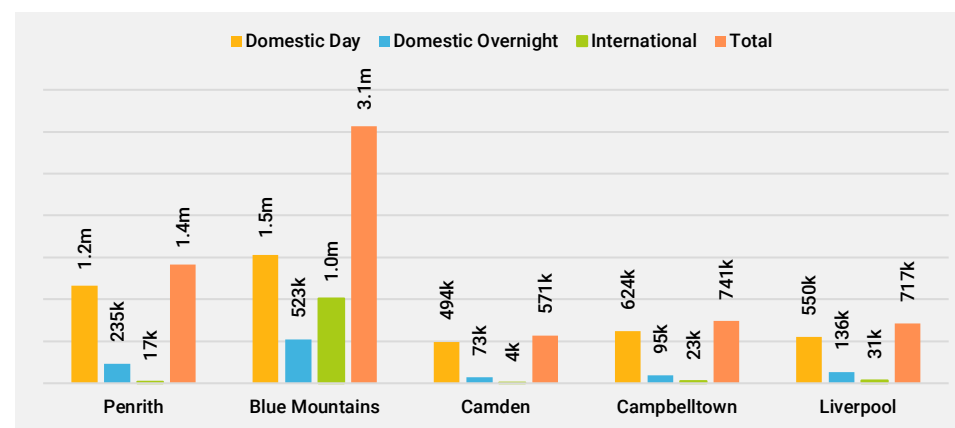
The Hawkesbury region has not been included as a comparative measure because it is a State Electoral District rather than an LGA. As noted earlier, visitor data is not provided by Destination NSW and TRA for SED's but rather is provided on tourism regions or LGAs. As the Hawkesbury region is an amalgam of the entire Hawkesbury LGA and parts of The Hills Shire and Hornsby Shire, comparing it with individual LGAs would not result in an accurate and worthwhile comparison. What this destination benchmarking does aim to show, however, is the strength of destinations surrounding the Hawkesbury region (such as the Blue Mountains) and the potential to leverage off this market.

The recently formed Regional Strategic Alliance between the Hawkesbury, Penrith and Blue Mountain City Councils, is a reflection of the value in finding workable partnerships to grow market demand to a combined region, where areas can leverage off one another.

5.1. Visitation

Out of the five areas assessed (Figure 13), the Blue Mountains received the most visitors (3.1m visitors), followed by Penrith (1.4m visitors) LGAs. Being in close proximity to both of these LGAs (and being part of the RSA) provides the potential for the Hawkesbury region to leverage off these stronger visitor markets.

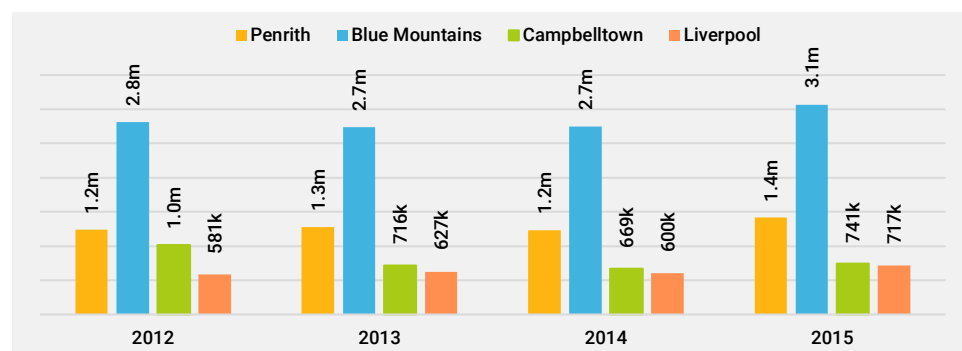
Figure 9: Visitation to competitor destinations (2015)³⁴



From 2012-2015, out of the four areas assessed (Camden was excluded as only a four-year average was provided so year on year growth was unable to be ascertained), the Blue Mountains achieved the largest growth in visitation (an additional 254k visitors), followed by Penrith (growing by 174k visitors) and Liverpool (growing by 136k visitors). Campbelltown was the only area assessed which experienced a decline in visitation, falling by 274k visitors.

³⁴ Data based on a special data request to Destination NSW. Note Camden data is based on a four-year average to YE Sept 2014 due to small sample sizes for each year. Visitation to the Blue Mountains also includes 960k international day visitors due to the large day trip market. For all other LGAs, the international day visitor market is small and data is not provided.

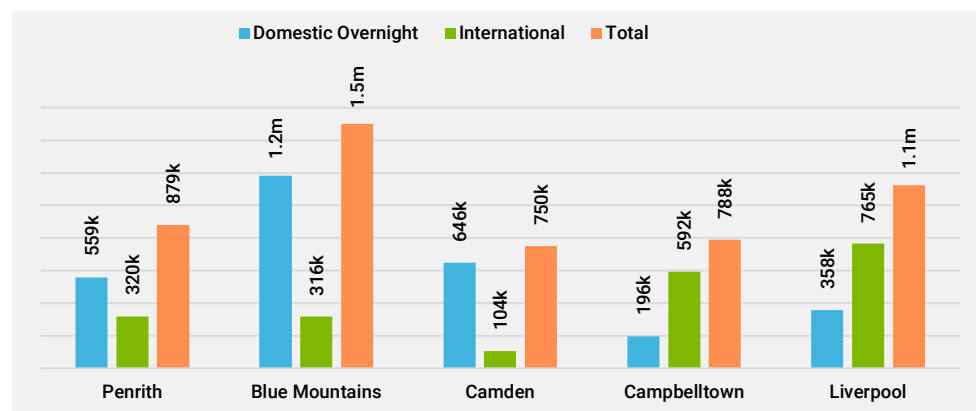
Figure 10: Visitation trends to competitor destinations (2012-2015)³⁵



5.2. Visitor Nights

The Blue Mountains ranked the highest in terms of visitor nights (1.5m nights), followed by and Liverpool (1.1m nights). Interestingly, however, while the Blue Mountains does achieve the highest number of domestic visitor nights, its number of international visitor nights (316k nights) is behind Liverpool (765k nights), Campbelltown (592k nights) and Penrith (320k nights).

Figure 11: Visitor nights to competitor destinations (2015)³⁶



³⁵ Data based on a special data request to Destination NSW. Trend data for Camden is not available due to small sample sizes.

³⁶ Data based on a special data request to Destination NSW. Note Camden data is based on a four-year average to YE September 2014 due to small sample sizes for each year.

What this data does not demonstrate is the proportion of visitor nights which are spent in commercial accommodation versus private accommodation (staying with friends and relatives). From work during 2015-2017 in Penrith, the Blue Mountains and Campbelltown, we note that:

- 72% of domestic overnight visitors and 88% of international overnight visitors to Penrith stay in private accommodation (generally with friends and relatives), rather than commercial accommodation;
- 68% of all overnight visitors to the Blue Mountains stay in private rather than commercial accommodation; and
- 60% of domestic overnight visitors and 66% of international overnight visitors to Campbelltown stay in private rather than commercial accommodation.

We note similar trends exist for other areas in greater Sydney such as Camden and Liverpool.

This demonstrates the challenge which these areas have in being so close to the Sydney CBD; while they are easily accessible, encouraging visitors to stay overnight in region, rather than using the Sydney CBD as their base and undertaking day trips from there can be challenging.

The Hawkesbury region and these other areas in greater Sydney need to consider the following (based on a clear evidence base through research and feasibility analysis) to grow their share of overnight visitors and help contribute to the NSW State goal of doubling overnight visitor expenditure by 2020:

- introduce new quality³⁷ branded accommodation stock to help meet and grow visitor demand;
- actively encourage the refurbishment and upgrade of existing properties where required;
- introduce new visitor attractions/experiences and events, particularly those which can be undertaken during the evening; and
- develop a range of packages which can be booked online which include accommodation, experience/attractions, event tickets, food and beverage and transport etc.

³⁷ In many cases this is thought to reflect a need for 3-4 star quality fully serviced hotels and serviced apartments






6. Target markets

6.1. Overview

Destination NSW has identified 18 visitor market segments for NSW, based on area of interest, demographics and purpose of trip. Based on discussions with industry, Destination NSW and Council, as well as the 2016 Hawkesbury Tourism Stakeholder Survey commissioned by Destination NSW, the following seven visitor market segments are considered to reflect the markets already being captured by the Hawkesbury region as well as those which present opportunities for the region to focus on. These are defined as the Hawkesbury region's target markets.





Where visitor segment data was available at a Hawkesbury region level, this has been provided. For those segments or visitor markets where data was not able to be provided, "Sydney and Surrounds" (which the Hawkesbury region falls into) has been applied, and where this was not available, NSW state-wide data has been utilised to illustrate trends.

Table 6: Target markets to focus on³⁸

Market	Domestic Visitors	International Visitors	Why target?
Visiting friends & relatives 	✓	✗	<ul style="list-style-type: none"> Strong market for Sydney, NSW and the strongest purpose of visit for the Hawkesbury region Already a key driver of visitation to the region Potential to target both visitors and their hosts (friends or relatives) For the Hawkesbury region, the domestic VFR market is thought to be far larger than the international VFR market (though potential exists to target the international market once the destination is further developed and additional product added)
Caravan & camping 	✓	✗	<ul style="list-style-type: none"> Market has achieved significant growth nationwide Industry operators are looking for quality destination park sites within close proximity to Sydney CBD as there is currently a gap Higher trip spend than average domestic overnight visitor to NSW (\$745 per trip compared with \$578)
Food tourism 	✓	✓	<ul style="list-style-type: none"> Strong affiliation with history of the region as one of the nation's first food bowls and the focus many industry operators see the region as currently having³⁹ Strong growth globally Visitors are able to experience rural/farm life within close proximity to Sydney CBD, including fruit picking. Potential to tie in with the Blue Mountains and Penrith (via the Regional Strategic Alliance) who both are looking to increase the prominence of food experiences

³⁸ See Section 6.2 for more detailed tables and data sources.

³⁹ Based on the 2016 Hawkesbury Stakeholder Research commissioned by Destination NSW as well as feedback from industry operators during the DMP process.

Market	Domestic Visitors	International Visitors	Why target?
Cultural & heritage tourism 	✓	✓	<ul style="list-style-type: none"> History of the Hawkesbury region (Macquarie towns) and some of the oldest towns in Australia, along with Indigenous heritage is a natural fit with cultural and heritage tourism providing that product can be “brought to life”. Considered by industry as being the top unique aspect of the region⁴⁰ and the 2nd highest ranked reason the Hawkesbury is famous for (after the River). Typically, it is a higher spending market (particularly the domestic overnight market which spent \$330 more p/trip than the average domestic overnight visitor to NSW) A growing market - 29% growth in cultural and heritage visitation to NSW over the last 5 years. For the Hawkesbury region, there was 110% in this segment in the international market over the same period. The initial focus should probably be on the domestic cultural and heritage tourism market, and niche segments such as school groups, university groups and special interest groups.
Nature-based tourism 	✓	✓	<ul style="list-style-type: none"> A natural fit with the Hawkesbury region, the River and surrounding areas which the Hawkesbury are looking to work with/leverage off such as the Blue Mountains. 66% of the Hawkesbury LGA is parkland, reserves or open space. Primary visitor market segment for the Hawkesbury region (for domestic overnight and international visitors) A growing market for NSW (41% growth over the last 5 years) and the Hawkesbury region (77% growth in the international market and 29% growth in the domestic market over the same period) Typically, it is a higher spending market (particularly the domestic overnight market which spent \$170 more p/trip than the average domestic overnight visitor to NSW) Focus on the domestic market but also consider international and potentially leverage off the large number of international day trippers who travel to the Blue Mountains on excursions. Coach operators are looking for new experiences to include in their itineraries.
Overnight short break market 	✓	✗	<ul style="list-style-type: none"> The proximity of the region to Sydney and the rural vibe of the Hawkesbury region appeals to this market. The market segment represents almost 20% of domestic overnight visitors to the Hawkesbury region and grew by 33% from 2012-2016. In 2016, it surpassed nature-based visitation to the Hawkesbury region for the domestic overnight segment. A larger share of short break visitors stay in some form of commercial accommodation (in contrast to the average domestic NSW visitor market) This market likes to dine out as well as go sightseeing etc.
Cruise ship market 	✓	✓	<ul style="list-style-type: none"> Significant growth in the cruise industry globally Huge increase in the number of cruise ships docking in Sydney Cruise operators are looking for new product to add to their land-based tour offering International passengers are more likely to participate in organised tours, with the Blue Mountains being the most popular non-Sydney CBD destination. The potential exists to leverage off this. Opportunity to potentially offer day tour circuit from Sydney to Echo Point, Leura and back down via Bells Line of Road to Windsor and Sydney.

⁴⁰ Based on the 2016 Hawkesbury Stakeholder Research commissioned by Destination NSW as well as feedback from industry operators during the DMP process.

6.2. Visiting friends and relatives

6.2.1. Overview










The domestic VFR market is important for NSW; after the Holiday market, it is the second largest purpose of visit segment and one which has demonstrated considerable growth over the last few years⁴¹.

Domestic 2016, an annual survey by TNS into the Australian travel market, notes that visiting friends and relatives remains a key driver of domestic travel and presents an opportunity for industry to leverage off as both visitors and hosts can be targeted.⁴²

6.2.2. Market Snapshot⁴³

Market size 	<ul style="list-style-type: none"> Sydney and surrounds received 3.5m domestic overnight VFR visitors and 6.2m domestic day VFR visitors in 2016. VFR is the strongest purpose of visit for the Hawkesbury region, representing 67% of international visitors to the region, 54% of domestic overnight visitors and 41% of domestic visitors. In terms of size, the domestic day VFR market and the domestic overnight VFR market for the Hawkesbury region are the largest, comprising 328k and 121k visitors respectively in 2016. Comparatively, the international VFR market comprised 23k visitors.
Market growth 	<ul style="list-style-type: none"> Over the last 10 years, domestic overnight VFR visitation to Sydney and Surrounds has increased by 22% (up 622k visitors) as has domestic day VFR visitation by 14% (up 785k visitors). VFR visitation for the Hawkesbury region has also grown, up 6% (22k visitors) from 2012-2016.
Expenditure 	<ul style="list-style-type: none"> Domestic overnight VFR visitors spent over \$1.2b in Sydney and Surrounds in 2016, while domestic day VFR visitors spent \$407m, demonstrating the higher yield generated by overnight visitors when compared to day visitors. Per visitor per trip, domestic overnight VFR visitors to Sydney and Surrounds spent \$345, in comparison to domestic day trippers at \$65.

	<ul style="list-style-type: none"> Major expenditure items for domestic overnight VFR visitors to NSW include: food, drink and accommodation (51% of total expenditure) followed by transportation (19%), airfares (13%) and shopping (12%).
Origin 	<ul style="list-style-type: none"> Regional NSW was the largest source of domestic overnight VFR visitors to Sydney and Surrounds, accounting for 50% of domestic VFR visitors, followed by Queensland (14%) and Victoria (12%).
Transport 	<ul style="list-style-type: none"> The majority of the domestic VFR market to Sydney and Surrounds travel via private vehicle or company car (61%).
Travel party 	<ul style="list-style-type: none"> In comparison to the non-VFR domestic overnight market to Sydney and Surrounds, the VFR market involves a higher proportion of those travelling as an adult couple (28% compared to 20%) or family group (16% compared to 12%).
Activities 	<ul style="list-style-type: none"> After visiting friends and relatives, the most popular activity for domestic overnight VFR visitors to Sydney and Surrounds was to "eat out, dine at a restaurant or café" (62%), followed by "go shopping for pleasure" (24%).
Age 	<ul style="list-style-type: none"> Typically, the majority of domestic overnight VFR visitors to Sydney and Surrounds are aged from 15 to 29 (25%) and 60 to 69 years (18%).
Visiting friends 	<ul style="list-style-type: none"> Tend to be younger than those visiting relatives Tend to travel alone or in groups without children Tend to spend more on food and drinks and pubs and nightclubs.
Visiting relatives 	<ul style="list-style-type: none"> Tend to be older people Tend to be friends and family groups travelling with children Are more likely to go shopping Are more likely to spend money on transport, souvenirs, gifts and other shopping.

⁴¹ Domestic VFR travel to NSW, Year ended December 2015, Destination NSW

⁴² Domestic 2016, page 2, TNS

⁴³ Unless otherwise specified, data in this table is sourced from the following: Special data request to Destination NSW; Travel to Sydney Tourism Region, Year ended December 2016, Destination NSW; Travel to Sydney to Visit Friends and Relatives, Year

ended December 2016, Destination NSW; Domestic VFR travel to NSW, Year ended December 2015, Destination NSW; Engaging with the domestic VFR market, September 2010, Destination NSW

6.2.3. What the market is looking for

The VFR market is looking for a mix of experiences and events which also enables them to catch up with friends and relatives. These visitors are often keen to pursue heritage, nature and food and beverage experiences. Areas such as the Hawkesbury, which can offer a range of farm gate experiences including seasonal fruit picking, are often very appealing.

The potential for dining out is important, recognising that locals/hosts want to share exciting dining options with visiting friends and relatives.

Locals/hosts are looking for experiences to take their visiting friends/relatives to which: showcase the uniqueness of the region; are an experience you can only do within that particular region; and/or which are a higher quality experience than what is offered elsewhere.

The VFR market is a valuable catalyst in encouraging locals to get out and try product and experiences in their own area which they may otherwise forget to do.







6.3. Caravan and camping



6.3.1. Overview

The Australian caravan and camping industry is forecast to grow, with a number of trends supporting this such as the number of campervan/motorhome registrations and a substantial increase in the number of motorhomes manufactured.⁴⁴

6.3.2. Market Snapshot⁴⁵

Market size 	<ul style="list-style-type: none"> The domestic caravan and camping market reflects constant growth. In 2016, NSW received 4m domestic caravan and camping visitors (60% of whom stayed in commercial caravan and camping sites) and who stayed 17m nights.
Market growth 	<ul style="list-style-type: none"> Over the last 5 years, the number of domestic caravan and camping visitors to NSW has grown by 29% or 900k visitors. The number of nights spent has also grown, increasing by 21% (an additional 3m nights). TRA data for 2016 shows that the market has achieved the highest recorded annual growth in overnight trips and visitor nights since data was first recorded in 1998. This unprecedented growth saw Australians take a total of 11.7m caravan and camping overnight trips (a 9% increase on 2015).⁴⁶ The length of time spent caravanning and camping has also grown, with 51.6m domestic visitor nights recorded (up 16% on 2015) in Australia⁴⁷ Over the past two years in NSW, the number of recreational vehicles and caravans registered have grown significantly, increasing by 21% and 13% respectively. NSW experienced the largest growth in registrations out of all states and territories in Australia.⁴⁸
Expenditure 	<ul style="list-style-type: none"> On average, caravan and camping visitors to NSW spent \$800 per trip and \$179 per night (average for all domestic overnight visitor spend is \$175 per night or \$578 per trip). Expenditure has grown from \$2.1b in 2012 to \$3b in 2016.
Origin 	<ul style="list-style-type: none"> Regional NSW was the largest source of domestic caravan and camping visitors to NSW (40%), followed by Sydney (25%) and Queensland (17%).
ALOS 	<ul style="list-style-type: none"> Domestic caravan and camping visitors stayed, on average, 4 nights in NSW. This was 25% longer than the average for all visitors to NSW (3.2 nights).
Travel party 	<ul style="list-style-type: none"> In 2016, 'adult couple' (35%) was the most common travel party of commercial domestic caravan and camping visitors to NSW, followed by 'friends and relatives' (28%) and 'family group' (28%). For non-commercial domestic caravan and camping visitors to NSW, the biggest travel party is 'friends and relatives' (37%), followed by 'alone' (23%) and 'adult couple' (22%).



⁴⁴ Postcode data report, Caravan Industry of Australia

⁴⁵ Unless otherwise specified, data in this table is sourced from the following: Special data request to Destination NSW; Domestic caravan and camping travel to NSW, Year ended December 2016, Destination NSW; and Domestic caravan and camping travel to NSW, Year ended December 2016, Destination NSW

⁴⁶ <http://www.caravanindustry.com.au/unprecedented-growth-in-aussie-caravan-and-camping-holidays>

⁴⁷ Ibid

⁴⁸ Postcode data report, Caravan Industry of Australia

Destination 	<ul style="list-style-type: none"> In 2016, “North Coast region” (28%) was the most popular destination in NSW for domestic caravan and camping visitors. “South Coast region” (21%) was the second most popular, followed by “The Hunter” (12%). Sydney and surrounds received 7.5% of caravan and camping visitors, up from 4% in 2015. The lack of sufficient destination holiday and caravan parks in and around Sydney is likely to be a contributing factor for this smaller market share.
Age 	<ul style="list-style-type: none"> In 2016, the youth market (15-29 years) was the largest age group of non-commercial caravan and camping visitors (29%) to NSW. ‘30 to 39 years’ (19%) and the ‘40 to 49 years’ (18%) were the next biggest age groups. For commercial domestic caravan and camping, the largest age group was ‘40-49 years’ (22%), followed by ‘15-29 years’ (19%) and ‘60-69 years’ (18%). The evidence suggests that caravan and campers are not dominated by the older grey nomads, but rather, reflect a far wider age demographic.

6.3.3. What the market is looking for⁴⁹

The Caravan and Camping Industry Association of NSW defines two primary generational trends and opportunity market segments for the coming decade. The segments are considered large and growing, which have a “natural affiliation with camping and caravanning experiences”⁵⁰. The segments are defined as the following.

6.3.3.1. Post-War Baby Boomers

The post-war “baby boomer” babies are now aged 52 to 67 years old - and starting to retire. The camping and caravan industry has always had a strong foot-hold in the retiree market, but will need to adapt to the special needs and preferences of this generation who are wealthier, better educated, more active and have higher demands in terms of quality service at a good price.

More recently, the baby-boomers have been part of the move towards taking short breaks and cheap airfare trips to both domestic and international destinations, including indulgent experiences, day spas and retreats.

⁴⁹ Trends affecting our industry over the next decade and beyond, Caravan and Camping Industry Association NSW and Manufactured Housing Industry Association NSW.

⁵⁰ Trends affecting our industry over the next decade and beyond, Caravan and Camping Industry Association NSW and Manufactured Housing Industry Association NSW, page 1.

New “glamping” style products will appeal to some of the baby-boomers, who hold a disproportionately high share of the country’s wealth. The baby-boomers are concerned about succession planning, superannuation, investments and the welfare of their Generation Y children, who are now aged 22 to 37 years old.

6.3.3.2. Generation Y

Generation Y (born 1976-1991) are at, or entering, the young family-life stage. This group have grown up in smaller families, have enjoyed prosperous times and well-off parents.

As a generation, they have embraced the holiday concepts of Schoolies and Gap years and they have big expectations of holidays. However, they are often financially stretched due to the high costs of housing and lifestyles and are looking for affordable family holiday options.

6.4. Food Tourism⁵¹

6.4.1. Overview



Food tourism has been the major sectoral focus of the World Tourism Organisations for the last 15 years, recognising that it has become “one of the most dynamic and creative segments of tourism ...[with] more and more tourists ... looking for concrete learning experiences, and in this endeavour, the gastronomic experience, in highly diverse ways, is playing an increasingly prominent part”⁵².







Food tourism is often defined as including: visitors to primary and secondary producers of food, gastronomic festivals, food fairs, events, farmers’ markets, cooking shows and demonstrations, tastings of quality food products or any food-related tourism activity.

⁵¹ Note: Destination NSW’s market segmentation includes Food and Wine Tourism. As the Hawkesbury region is not a wine making region, we have excluded this sub-segment from the analysis.





⁵² Global Report on Food Tourism, UN World Tourism Organisation, pages 5-6.

Areas such as the Hawkesbury region offer the potential to cultivate a “slow food” theme with farm gate experiences, fruit and vegetable picking, fresh produce purchasing and consuming, cooking schools and gastronomy events.

6.4.2. Market Snapshot⁵³

 Market size	<ul style="list-style-type: none"> While there is no specific data available on food tourism (statistics produced tend to focus on wine tourism⁵⁴), Sydney and Surrounds visitation data demonstrates that the most popular activity for all visitors was to “eat out/dine at a restaurant and/or café”. As the oldest food producing area in NSW and one of the oldest in the country, the opportunity to leverage off food especially exists.
 Market growth	<ul style="list-style-type: none"> Over the past 10 years, the number of visitors to Sydney and surrounds who stated that they ate out or dined at a restaurant and/or café has Grown by 44% (6.1m people). Additionally, the proportion of people participating in this activity has also grown, increasing from 50% to 59% of all visitors.
 Expenditure	<ul style="list-style-type: none"> In NSW, \$572 p/person p/trip was spent on food and wine travel.
 Research	<ul style="list-style-type: none"> The main sources of information prior to taking the trip were: Internet sites (82%), Word of mouth (78%), Previous experience (76%) and TV and newspaper ads (64%). The significance of online promotion of food experiences within the Hawkesbury is an important marketing mechanism to develop.
 ALOS	<ul style="list-style-type: none"> 32% two night trip 21% one night trip 14% day trips 38% went for longer trips (3+ nights)
 Distance travelled	<ul style="list-style-type: none"> Most travelled less than 299 km (70%) and 3.5 hours for a day trip (one way). 200–299 km was as far as most people (36%) would travel for a weekend trip. For a week-long trip, people were willing to travel further - 40% would travel further than 400 km.

⁵³ Unless otherwise specified, data in this table is sourced from the following: Special data request to Destination NSW; and Food and Wine Tourism in NSW, January 2015, Tourism Research Australia.

	<ul style="list-style-type: none"> The strategic location of the Hawkesbury region being 1-1.5 hours from most parts of Greater Sydney fits comfortably into the travel times seen as acceptable.
 Travel party	<ul style="list-style-type: none"> 45% travelled as a couple, 23% as a family and 23% with friends/ colleagues. Families were fairly evenly split between young families where most of the children are under 16 years and older families where most of the children are over 16 years.
 Seasonality	<ul style="list-style-type: none"> More than one-quarter had no preference. Spring and autumn had the highest appeal (21% and 19% respectively). Summer and winter had the lowest appeal (9% and 7% respectively). The ability of the Hawkesbury to offer distinctly different seasonal food experiences should be an advantage in encouraging different “foodies” and niche markets.
 Triggers	<ul style="list-style-type: none"> The top three triggers for food and wine experiences were: need for a short break, special occasions as a couple and wanted a luxury pampered weekend. The Hawkesbury’s strategic proximity to Greater Sydney fits well within the short break trigger, the current mix of accommodation options offers locations for special occasions and potential exists to introduce more product to deliver luxury pampered weekends.
 Destination	<ul style="list-style-type: none"> In 2012–2014, food and wine enthusiasts from Sydney, Canberra, Brisbane and Melbourne respondents visited Hunter Valley (39%), Blue Mountains (20%), Mudgee (13%), Southern Highlands (13%) and Canberra District (12%). Food and wine visitors mostly travelled to the destinations adjacent to their home ... [with] Sydney residents most often travelling to Hunter Valley (58%), Blue Mountains (28%) and Southern Highlands (23%). Despite the further distance from Sydney, Mudgee (22%) was a popular destination for Sydney residents. Distance from home was considered the most important attribute for food and wine visitors when choosing a destination. The Hawkesbury’s proximity to Sydney and seasonal variances in produce is a major attribute for encouraging more food visitors.

⁵⁴ For example, the report “Food and Wine Tourism in NSW” by Tourism Research Australia provides a summary of total domestic overnight visitors to wineries in NSW but does not cover all aspects of food tourism.

6.4.3. Types of Food Visitors⁵⁵

- Dedicated — One in six (16%) described themselves as being passionate when it came to food and wine. Typical characteristics of these visitors included:
 - aged between 25–44 years
 - travelling as a couple or with a small group of friends
 - more interested in attending a special event, wine lectures, information sessions, participating in master classes and wine club dinners
 - liked to eat at wineries, to have conversations with winemakers, chefs, local food growers, and be able to eat fresh, organic food.
- Interested— Accounted for the majority of food and wine visitors (60%). Typical characteristics of these visitors included:
 - aged between 18–24 years
 - liked to have conversations with winemakers, meet local food growers, and learn something new
 - having a luxury/pampered break, or experiencing a food and wine festival likely triggered food and wine holiday or break.
- Accidental - The remaining 24% were occasionally motivated to experience food and wine. Typical characteristics of these visitors included:
 - aged 65 years or more and travelled as a couple
 - had no preference on which season to travel
 - more likely to have not taken a holiday for a food and wine experience in NSW in the last two years
 - wanted food and wine experiences in nearby regional destinations

6.4.4. What the market is looking for

The food market is looking to:

- eat fresh, locally grown food for breakfast, lunch and dinner;
- buy local produce in its various forms;
- take short drives to places of interest near the main destination;
- make the journey part of the break with 'interest' stops on the way there and back home;
- multiple attractions that can provide 1-2 days of activities; and
- websites that allow them to plan their trip and stops along the way.

The Hawkesbury region has the potential to become a far more significant food destination with an ability to actively encourage a wide range of food visitors once product enhancements are introduced.

6.5. Cultural and Heritage Tourism



6.5.1. Overview

Cultural and heritage tourism is a niche segment with a focus on heritage and the arts⁵⁶. It includes activities such as going to the theatre, attending concerts, visiting an art show and watching an Aboriginal performance.⁵⁷

This segment analysis primarily focuses on the domestic cultural and heritage market, as this is what appears to present the largest opportunity for the Hawkesbury region.







⁵⁵ Based on Food and Wine Tourism in NSW, January 2015, Tourism Research Australia

⁵⁶ Cultural and Heritage Tourism to NSW, Year ended December 2016, Destination NSW



⁵⁷ It includes those who travel and attend the theatre; concerts or other performing arts; visit museum or art galleries; visit art, craft workshops or studios; attend festivals, fairs, or cultural events; experience Aboriginal art, craft and cultural display; visit an

Aboriginal site or community; visit historical heritage buildings, sites or monuments; and attend Aboriginal performance (international visitors only).

6.5.2. Market Snapshot⁵⁸

Market size 	<ul style="list-style-type: none"> In 2016, there were 12.3m international and domestic cultural visitors to NSW; the majority were domestic day trippers (42%), domestic overnight visitors (37%) and international visitors (21%). For international visitation to the Hawkesbury region, the culture and heritage segment was the second largest segment after nature-based tourism. Based on a five-year average, culture and heritage tourism to the region represented 57% of international visitors.⁵⁹
Market growth 	<ul style="list-style-type: none"> From 2012 to 2016, there was a 29% increase (2.8m) in cultural and heritage tourism to NSW. Spend by cultural and heritage visitors also grew, increasing by 52% or \$4.1b. From 2012 to 2016, international culture and heritage visitors to the Hawkesbury region grew by 110%, increasing from 11k visitors to 27k visitors.
Expenditure 	<ul style="list-style-type: none"> NSW cultural and heritage visitors spent a combined total of \$12b in 2016. Domestic overnight cultural and heritage visitors to NSW spent \$907 p/trip - \$330 more p/trip than the average domestic overnight visitor to NSW. Domestic day cultural and heritage visitors to NSW spent \$119 p/trip - \$15 more p/trip than the average domestic day tripper to NSW
Origin 	<ul style="list-style-type: none"> Intrastate visitors (overnight and day trip) were the largest source of cultural and heritage visitors to NSW, with Sydney residents accounting for the largest share. The national significance of the Hawkesbury region's Macquarie Towns offers a rich selection of sites and stories to build cultural product around, including Indigenous product.
Seasonality 	<ul style="list-style-type: none"> School holiday periods appear to be the most common time for domestic cultural and heritage visitors to travel including January, April, June, October and December.
Travel party 	<ul style="list-style-type: none"> A third (33%) of domestic overnight cultural and heritage visitors came to NSW as an 'adult couple' while almost equal proportions travelled as 'families with children' and 'group of friends or relatives without children' (22% each).

⁵⁸ Unless otherwise specified, data in this table is sourced from the following: Special data request to Destination NSW; and Cultural and Heritage Tourism to NSW, Year ended December 2016, Destination NSW

Activities 	<ul style="list-style-type: none"> For domestic overnight and day cultural and heritage visitors, the most popular activities undertaken included: visit history/heritage buildings, sites or monuments; visit museums or art galleries; attend festivals/fairs or cultural events; and attend theatre, concerts or other performing arts.
Age 	<ul style="list-style-type: none"> For domestic overnight and day trip cultural and heritage visitors to the NSW, the seniors (60 years plus) accounted for the largest proportions (29% and 33%, respectively).
Destination 	<ul style="list-style-type: none"> 'Sydney' was the most visited region in NSW by domestic overnight cultural and heritage visitors (37%), domestic day trip cultural and heritage visitors (47%) and international cultural and heritage visitors (96%).

6.5.3. Types of cultural and heritage visitors⁶⁰

- The purposeful cultural visitor or "culture vulture" - cultural and heritage experiences is the primary motive for visiting a destination and the tourist has a deep cultural experience.
- The sightseeing cultural visitor - cultural and heritage experiences are a primary reason for experiencing a destination, but the experience is less deep.
- The serendipitous cultural visitor - A visitor, who does not travel for cultural/heritage reasons but who, after participating, ends up having a deep cultural experience.
- The casual cultural visitor - cultural and heritage experiences are a weak motive for travel and the resulting experience is light.
- The incidental cultural visitor - the visitor does not travel for cultural reasons, but nonetheless participates in some activities and has light experiences/exposure.

⁵⁹ Domestic culture and heritage segment data was not able to be provided because of sample size issues.

⁶⁰ Based on profiling completing by Visit Britain (Culture and Heritage Topic Profile), February 2010, Visit Britain

6.5.4. What the market is looking for

- Authenticity and uniqueness - This can be a product, a service or an experience, as well as looking for a sense of it within themselves. This has always been something the older generations and the more upmarket younger consumers have had a particular interest in, but it is now applying to a cross section of society and is likely to increase among the population of developed markets as accessibility to knowledge and information continues.
- Cultural immersion - well-travelled visitors appear to take a genuine interest in local culture and want to meet the people. Not only are visitors keen to explore the history, heritage and culture of the country but want to go beneath the surface and experience the local people and traditions.
- Experiential holidays - In the future, people will have more and more diverse interests, and travel will develop to be more about the experience and participation. It will be the immersion and passion that counts above the destination itself.
- Collecting experiences - As consumers have less time, they are demanding more from their leisure activities and there are an ever-increasing number of savvy travellers who want to collect 'experiences', not just tick a destination off the list.
- Special Interest Travel and Self Improvement - Evidence is building for the existence of multiple markets for special interest/niche travel e.g. lifestyle holidays.

Within time, the Hawkesbury region should be able to offer authentic and unique heritage product with wider appeal to both domestic and international "culture vultures". This will require "bringing alive" the history of the Macquarie Towns and their colourful past.

⁶¹ <http://www.tourism.australia.com/nature-based-tourism.aspx>

⁶² A nature-based visitor participates in at least one of the following activities: bushwalking or rainforest walks; visit national parks or State parks; whale or dolphin watching; visit botanical or other public gardens; visit farms; go to the beach; visit wildlife parks, zoos or aquariums; and visit the outback (international visitors only)

6.6. Nature tourism



6.6.1. Overview

Nature-based tourism forms a significant component of Australia's visitor economy; our biggest strength is our world-class nature.⁶¹ Nature-based tourism is leisure travel undertaken largely or solely for the purpose of enjoying natural attractions and engaging in a variety of nature-based activities – from scuba diving and bushwalking to going to the beach.⁶²

While nature-based tourism is not a term that is commonly used by visitors (as it is not seen to be a type of holiday in its own right), it is a term of value to industry in the context of describing visitor desires, experiences and activities.

Nature-based experiences are intimately linked to all other aspects of the visitor's total experience of a destination, such as food, culture, relaxation, health, escape, family needs, accommodation, transport, etc. All serve to complement each other and together form the basis of a visitor's overall satisfaction with their holiday.

This segment analysis primarily focuses on the domestic cultural and nature-based market as this is what appears to present the largest opportunity for the Hawkesbury region.









6.6.2. Market Snapshot⁶³



Market size



- In 2016, there were 26.9m nature-based visitors to NSW.
- The majority of these were domestic day trippers (47%), domestic overnight visitors (42%) and international visitors (12%).
- Nature tourism is the primary market segment for domestic overnight and international visitors to the Hawkesbury region. Based on a five-year average from 2012-2016, there were 44k nature-based domestic overnight visitors to the Hawkesbury (representing 20% of domestic overnight visitation) and 21k international nature-based visitors (representing 78% of international visitation).

⁶³ Unless otherwise specified, data in this table is sourced from the following: Special data request to Destination NSW; Nature-based tourism in Australia, Year Ending December 2014, Tourism Research Australia; and Nature-based Tourism to NSW, Year Ended September 2016, Destination NSW.

Market growth 	<ul style="list-style-type: none"> From 2012 to 2016, there was 41% growth (7.8m) in nature-based visitation to NSW. Spend by nature-based visitors also grew, increasing by 43% or \$5.5b. From 2012-2016, nature-based tourism to the Hawkesbury region also experienced growth, increasing by 77% (12k visitors) in the international visitor market and by 29% (9k visitors) in the domestic overnight market.
Expenditure 	<ul style="list-style-type: none"> Nature-based visitors to NSW spent \$18.3b. Domestic overnight nature-based visitors to NSW spent \$747 p/trip - \$170 more p/trip than the average domestic overnight visitor to NSW. Domestic day nature-based visitors to NSW spent \$90 p/trip - \$15 less p/trip than the average domestic day tripper to NSW
Origin 	<ul style="list-style-type: none"> Sydney was the largest source of domestic overnight nature-based visitors (35%) and domestic day trip nature-based visitors (55%) to NSW. The proximity of the Hawkesbury region to Sydney is a major strength to be leveraged off.
Seasonality 	<ul style="list-style-type: none"> In the last 5 years, January has been the most popular month among Domestic overnight nature-based visitors to NSW for returning to their trip. Months with the lowest percentage of those returned from their trip varied among May, June and August.
Accommodation 	<ul style="list-style-type: none"> 'Friends or relatives property' (31%) was the most popular accommodation type used by domestic overnight nature-based visitors in NSW. 'Hotel/resort/motel or motor Inn' (19%) was the 2nd most popular, followed by 'caravan park or commercial camping ground' (18%).
Travel party 	<ul style="list-style-type: none"> For domestic overnight nature-based visitors, 'Adult Couple' was the most common travel party (28.3%), closely followed by travelling with 'Friends or relatives' (27.3%).
Activities 	<ul style="list-style-type: none"> Go to the beach' was the most popular activity undertaken by domestic overnight nature-based visitors (65%) and domestic day trip nature-based visitors (54%) to NSW. This was followed by bushwalking/rainforest walks and visiting national/state parks. With over 66% of the Hawkesbury being state/national parks or reserve land, and with major riverways to use, the Hawkesbury region has the natural assets to leverage off.
Age 	<ul style="list-style-type: none"> The youth market (15-29 years) was the largest age group among domestic overnight nature-based visitors (25%) and domestic day trip nature-based visitors (30%) to NSW. This was followed by the 60+ market for domestic overnight nature-based visitors and the 30-39 and the 40-49 market for domestic day nature-based visitors.

Destination 	<ul style="list-style-type: none"> 'Sydney' was the most visited region in NSW by domestic day trip nature-based visitors (29%), while 'North Coast' was the most visited region in NSW (26%) by domestic overnight nature-based visitors.
Research 	<ul style="list-style-type: none"> Domestic overnight nature-based visitors to Australia primarily used the internet as their main source of information about their trip (47%) and this information source was at a higher rate than that of other visitors (34%).

6.6.3. What the market is looking for

The research shows that visitors don't want the same nature-based holiday wherever they go. They want to experience something different, something out of the ordinary, and something which prompts an emotional reaction. They want to experience something special which will turn their short-break away into a lifelong memory. These experiences include the following.

- Standout walking journeys across the landscape – and short walks to build tourism experiences on foot.
- Native wildlife experiences – bush close to the city, interactive tree-top animal viewing experiences.
- Marine wildlife experiences.
- Cutting edge sensory experiences that leave a lasting impression – immersing visitors in nature with "outside the box" experiences.
- Connecting food, wine and nature by developing exclusive opportunities to utilise spectacular natural settings for innovative accommodation, dining or events.
- Creating infrastructure such as zip lines or cable cars, which enable visitors to experience nature from the treetops, mountaintops, underground or underwater.
- Investing in emerging niche markets, including geo-tourism, bird watching, mountain biking and heritage tourism.

The Hawkesbury region has the potential to offer wide appeal to the nature-based tourism market. To bring areas to market and encourage cutting edge sensory experiences will, however, necessitate introducing environmentally sensitive and nature-based tourism product into national parks and

reserve lands such as overnight walking experiences, canopy walkways and zip lines and determining the potential for bird watching and other unique niche products.

6.7. Overnight short breaks⁶⁴





6.7.1. Overview








Short breaks are an important part of NSW's visitor economy. Domestic 2016 outlined that "short breaks have become the new norm as Australian's look to break free for the frenetic pace of everyday life and find space to be themselves away from the pressures of home – domestic holidays can offer a safety net to Australians with easy and affordable trips at home"⁶⁵. Domestic short breaks are often a mix of planned and spontaneous trips, spread across the year to provide milestones to look forward to.

Fundamentally, the short break market is characterised by "weekend getaways" or "midweek breaks" and tends to comprise 1-3 night getaways.

This segment analysis primarily focuses on the domestic short break market as this appears to present the largest opportunity for the Hawkesbury region.

6.7.2. Market snapshot⁶⁶



Market size 	<ul style="list-style-type: none"> In 2015, there were 7.4m domestic short break trips to NSW, who stayed 13.7m nights. NSW leads other Australian states and territories in domestic short break visitors. The Hawkesbury region's domestic short break market is estimated at 44k visitors in 2016, representing almost 20% of all domestic overnight visitors in 2016. In 2016, it surpassed nature-based visitation to the Hawkesbury region for the domestic overnight segment.
Market growth 	<ul style="list-style-type: none"> From 2006-2015, the short breaks market in NSW grew by 14% (900k trips), in line with growth that occurred in the Australian short break market (also 14%). The domestic short break market for the Hawkesbury region also grew, increasing by 11k visitors (or 33%) from 2012-2016.

Origin 	<ul style="list-style-type: none"> The majority (74%) of domestic short break visitors to NSW came from within NSW, almost evenly divided between Sydney residents (38%) and Regional NSW residents (36%). Interstate short break visitors mostly came from Queensland (10%), Victoria (7%) and ACT (7%).
Destination 	<ul style="list-style-type: none"> Sydney received 24% of domestic short break visitors while Regional NSW (which includes places such as the Blue Mountains) received three-quarters (76%). The most popular regional destinations were coastal areas, i.e. South Coast and North Coast (16% each), followed by The Hunter (12%).
Seasonality 	<ul style="list-style-type: none"> The March quarter is the most popular time of year for domestic short break travels to NSW.
Accommodation 	<ul style="list-style-type: none"> The preferred accommodation choices amongst domestic short break visitors to NSW included staying in a standard hotel, motel or resort (22%), staying with friends or relatives (17%), luxury hotel/resort (14%), caravan park or commercial camping ground (14%) or a rented house/apartment (11%). The domestic short break market, therefore, has a much higher tendency to stay in commercial accommodation when compared with the domestic NSW visitor market overall (where, for the same period, 41% of visitors stayed with friends/relatives and only 14.7% stayed in a standard hotel, motel or resort).
Travel party 	<ul style="list-style-type: none"> Adult couples were the most common travel party amongst domestic short break visitors to NSW (32%), followed by friends and/or relatives (28%) and friends and/or relatives travelling with children (27%).
Activities 	<ul style="list-style-type: none"> The top activities for domestic short break visitors to NSW were social activities such as: eating or dining out, sightseeing, going to the beach and/ or doing shopping.
Transport 	<ul style="list-style-type: none"> In 2015, car travel was the main form of transport for domestic short break visitors to NSW, comprising 84% of all visitors.

⁶⁴ Short Breaks to NSW, March 2016, Destination NSW

⁶⁵ Domestic 2016, page 1, TNS

⁶⁶ Unless otherwise specified, data in this table is sourced from the following: Special data request to Destination NSW; and Travel to NSW, Year ended September 2015, Destination NSW

Age 	<ul style="list-style-type: none"> In 2015, 27% of short breaks in NSW were undertaken by those aged 15-29, followed by 40-49 (20%)
Triggers 	<ul style="list-style-type: none"> Proximity (travel time to/from home) and ease of travel. The more popular short-break destinations tend to be no more than 1-2 hours away from home.

6.7.3. What the market is looking for

The overnight short break market is looking for easily accessible destinations (1-2 hours ex Sydney) which can offer:

- relaxation and replenishment;
- quality and indulgence;
- pampering and well-being;
- quality food and dining related experiences; and
- stylish accommodation, whether it be up-market or more niche focused.

The Hawkesbury region's location, its topography, climatic variations and quality natural features and landscape provide the core elements to expand the product base to attract this market.

6.8. Cruise ships







6.8.1. Overview

Sydney is Australia's premier cruise port and it continues to grow as a major international cruise destination.

Sydney is Australia's only port with two world-class contemporary cruise facilities (the Overseas Passenger Terminal at Circular Quay and White Bay Cruise Terminal near Rozelle and Balmain) and our ports can now accommodate cruise ships carrying up to 5,000 passengers.⁶⁷







6.8.2. Market snapshot⁶⁸

Market size 	<ul style="list-style-type: none"> In 2016, Sydney received 317 cruise ship visits, the majority of which were to the Sydney Overseas Passenger Terminal (182) and to Sydney White Bay (115). This brought approximately half a million passengers to Sydney.
Market growth 	<ul style="list-style-type: none"> The number of cruise ships arriving into Sydney has experienced strong growth, increasing by 166% from 2010 (119 arrivals) to 2016 (317 arrivals).
Expenditure 	<ul style="list-style-type: none"> In 2016, Sydney received \$1b in direct cruise ship expenditure - \$574m of this originating from passengers.⁶⁹ The cruise market is continually looking for new day tour excursions for which the Hawkesbury has potential to develop product for.
Origin 	<ul style="list-style-type: none"> Almost sixty per cent of domestic passengers who boarded cruise ships in Sydney were NSW residents (57%) with more than a quarter residing in Sydney (26%). More than a third of international cruise passengers who visited Sydney were from the USA (35%), followed by the United Kingdom (22%) and other Europe (15%).

⁶⁷ 2015-16 Annual Report, Port Authority of NSW

⁶⁸ Unless otherwise specified, data in this table is sourced from the following: 2012/13 Annual Report, Sydney Ports Corporation; and 2015-16 Annual Report, Port Authority of NSW and

⁶⁹ Economic Impact Assessment of the Cruise Industry in Australia, 2015-16

Excursions 	<ul style="list-style-type: none"> International passengers were more likely than domestic passengers to have participated in organised tours during their time in Sydney (25% vs. 6%). The Blue Mountains was the most popular destination and was visited by 14% of international passengers and 10% of domestic passengers. The other top destinations for international passengers were the Central Coast (2%) and Hunter Valley (2%). Domestic passengers also visited the Central Coast (9%), the South Coast (9%) and Hunter Valley (6%).
Seasonality 	<ul style="list-style-type: none"> Primary cruise ship season aligns with Australian summer: primarily late September through to March.
Travel party 	<ul style="list-style-type: none"> Travel as an adult couple (69% international vs. 41% domestic), transiting in Sydney (47% international vs. 3% domestic passengers) Domestic passengers tend to travel with more people (average of 4.9 people for domestic vs. 3.6 people for international), fully independent travellers (94% domestic vs. 75% international non-organised tour passengers), non-luxury passengers (81% domestic vs. 59% international).
Research 	<ul style="list-style-type: none"> The internet/travel websites were the main source of information about Sydney for both passengers (37%) and crew (38%).
Activities 	<ul style="list-style-type: none"> The most popular activities undertaken by cruise passengers in Sydney were visiting attractions (81%), followed by shopping (46%) and dining (35%).
Age 	<ul style="list-style-type: none"> International passengers tend to be older (74% international vs. 39% domestic aged 60 years or older), retired from work (69% international vs. 32% domestic). Domestic passengers were more likely to be female (62% domestic vs. 54% international)

6.8.3. What the market is looking for

The cruise industry and the day tour operators who support the industry are keen for new products. Existing product such as excursions to the Blue Mountains to visit Echo point, Scenic World and sometimes Leura, have been heavily marketed and toured for some time.

The cruise market is looking for new experiences which:

- can be undertaken in 30–60-minute segments;
- are on drive circuits which link to existing circuits and/or main roads, so they are easily accessible;
- may link to farm gate experiences to sample fresh produce;
- may offer unique interactive heritage experiences;
- offer the opportunity to shop and purchase local product which is well-packaged; and
- provides access to unique flora and fauna ideally in a natural setting.

The Hawkesbury region has the potential to deliver to this important market segment, but market research and more comprehensive analysis is required to verify the ability to introduce the products cost effectively, which this market segment are looking for.

Additionally, the potential exists to look to work with existing industry operators in the Blue Mountains to identify potential ways to leverage off the 960k international day visitors, including significant cruise visitors, to the Blue Mountains. It is estimated that close to 600k⁷⁰ of these international day trippers are on structured coach tours.

⁷⁰ Based on research completed for the Blue Mountains DMP, including tour operator feedback.



7. Product audit

A product audit has been completed covering accommodation, tourism attractions/experiences, events and food and beverage. The full findings of the product audit assessment are contained in Section 4 of the Supporting Documentation at the rear of this DMP and Action Plan.

7.1. Accommodation

Table 7 provides a summary of commercial accommodation and Council/National Park campgrounds for the Hawkesbury region. It indicates the following.

- As of April 2017, the region has 113 commercial accommodation establishments and Council/National Park campgrounds and 889 rooms available of various quality standards.
- Resorts account for the largest room stock with 229 rooms throughout the region (26% of total room stock). This is followed by motels which account for 185 rooms (21%).

It is important to note that a quality assessment on these properties has not been undertaken. This is important to note as a stocktake of available accommodation rooms in all forms of commercial accommodation does not reflect their marketability. In many instances, the ability to grow, for example, higher yielding visitor markets, is constrained by the lack of suitable quality accommodation facilities to match market needs. This DMP and Action Plan, therefore, advocates for new commercial accommodation to better meet market needs and to deliver to a higher yielding visitor market which is currently under-represented.

Importantly, the ATDW database only covers 46 accommodation properties, which represents 41% of total properties and reflects that many properties have yet to put their properties on the ATDW.

Table 7: Accommodation audit for the Hawkesbury region⁷¹

Type	# of Properties	% of Properties	# of Rooms	% of Rooms
Resorts	5	4%	229	26%
Motels	9	8%	185	21%
Caravan, Camping and Holiday Parks	20	18%	127	14%
Retreat and Lodges	16	14%	119	13%
Bed and Breakfast	25	22%	86	10%
Apartments	4	4%	79	9%
Cottages	23	20%	26	3%
Farmstays	6	5%	22	2%
Hotels	1	1%	11	1%
Holiday Houses	4	4%	5	1%
Total	113	100%	889	100%

Figure 12 on page 42 provides a spatial overview of accommodation in the region. It reflects the following.

- Commercial accommodation tends to be clustered around the four main towns of Windsor, Richmond, Kurrajong and Wisemans Ferry or along the Hawkesbury River.
- The Sebel Hawkesbury Resort & Spa is the only branded property in the region. It is also the largest property, supplying 105 rooms.
- There is no commercial accommodation situated within national park areas, apart from NPWS campgrounds, though there are a number of smaller properties situated on the fringes of national park areas.

⁷¹ This included data from the following websites: hotels.com, bookings.com, Expedia, TripAdvisor, Hawkesbury Tourism, Hawkesbury VIC, Discover Hornsby, Hornsby Shire Visitor Guide, The Hills Tourism and Events in the Sydney Hills, About-Australia, Tourism Australia and Hawkesbury Escapes. Data from the Australian Tourism Data Warehouse (ATDW) was also

provided by Destination NSW. If accommodation is not listed on these websites or the ATDW data, they may not be included in this audit. Data was based on postcodes and then mapped according to location. Product which was permanently closed or fell outside of the Hawkesbury region was removed from the audit.

- The majority of properties (95 properties, 84% of property stock) are located in the Hawkesbury LGA. This is followed by The Hills (13 properties, 12% of property stock) and Hornsby (5 properties, 4% of property stock).
- The Hills and Hornsby LGAs have more accommodation facilities in other parts of their respective LGAs but those noted are only those which fall in the Hawkesbury region (electoral) boundary.

7.2. Experiences and attractions

Table 8 provides an audit of experiences and attractions throughout the Hawkesbury region. This product audit captures those operators who are listed on ATDW, Sydney.com, Hawkesbury Tourism, Harvest Trails and Markets, Expedia and TripAdvisor websites and rank highly in Google searches. There may be some operators which do not have a web presence and are, therefore, not captured in this product audit, though this is highly unlikely. The ATDW covers 42 experiences and attractions, which represents 36% of total experiences and attractions, again reflecting the lack of product provided to the ATDW from the region.

Based on this product audit, a total of 117 tourism-related experiences or attractions were identified. Across the region, this product is primarily distributed amongst:

- sports and recreation facilities which comprise 31% of all product;
- produce (such as orchards and food trails) which comprises 17% of all product; and
- natural attractions (such as national parks and walking trails) which comprise 11% of all product.

Figure 13 on page 43 provides a spatial overview of experiences and attractions in the region. It reflects the following.

- Much of the region's tourism product is clustered around Windsor and Richmond and aside from walking trails and picnic tables etc., there is no commissionable tourism product within

the national park areas. There is an opportunity to encourage potential in-park product as NPWS are keen to explore commercial partnerships for in-park experiences.

- The vast majority of product (76%) is situated in the Hawkesbury LGA, followed by the Hills (16%) and Hornsby (8%).
- The Hills and Hornsby LGAs have more attractions/experiences in other parts of their respective LGAs but those noted in this audit are those which fall in the Hawkesbury region (electoral) boundary.

Table 8: Summary of experiences and attractions audit for the Hawkesbury region⁷²

Type	# of Experiences and Attractions	% Split
Sports and Recreation Facilities	36	31%
Produce	20	17%
Natural Attractions ⁷³	13	11%
Galleries, Museums and Collections	8	7%
Tour	8	7%
Historical Sites and Heritage Locations	7	6%
Parks and Gardens	4	3%
Breweries	3	3%
Wineries	3	3%
Agri, Mining and Industry	3	3%
Hire Services	3	3%
Visitor Information Centre	2	2%
Transport Services	2	2%
Spas and Retreats	2	2%
Observatories and Planetariums	1	1%
Shopping and Markets	1	1%
Entertainment Venues	1	1%
Total	117	100%

⁷² Based on data from the 2015 Hawkesbury City Council Tourism Strategy, TripAdvisor, Hawkesbury Tourism website and ATDW data provided by Destination NSW. If an attraction is not listed in these sources then it may not appear in this audit. Attractions that appear to fall outside of the Hawkesbury region (based on postcodes and latitude/longitude points) have been excluded. Attractions that appear to be permanently closed have been excluded. Although RSLs have been listed as

Restaurants and Cafés in the ATDW list, these have been excluded from the experiences and attractions audit as they have been included in the food and beverage audit (see section 6.3).

⁷³ Note: the ATDW lists contained 3 records for the Old Great North Road, including "The Great North Road", "Old Great North Road - World Heritage Walk" and "Old Great North Road Bike Ride". This audit has only included "Old Great North Road - World Heritage Walk" as the others were considered to be duplicate entries.

7.3. Food and beverage

As per data provided by Destination NSW (via the ATDW and the Best Restaurants Feed), there are 20 food and beverage (F&B) operators listed for the Hawkesbury region. Based on discussions with Destination NSW, we understand there is a significant challenge (Australia-wide) in encouraging F&B providers to self-list on the ATDW, so there is expected to be far more F&B product in the region than what is displayed in Table 9.

For those F&B providers listed, however, the majority are restaurants/bars, which comprise 90% of listed F&B product.

The DMP Project Manager will need to work with industry to complete a more comprehensive audit of F&B to identify those F&B operators who should be encouraged to be listed.

Table 9: Summary of food and beverage audit for the Hawkesbury region⁷⁴

Type	# of F&B	% Split
Restaurant/Bar	18	90%
Café	2	10%
Total	20	100%

Figure 14 on page 44 provides a spatial overview of food and beverage in the region. It reflects the following.

- F&B tends to be clustered around Windsor, Richmond, Kurrajong, Wisemans Ferry and along Bells Line of Road.
- 75% of product is located in the Hawkesbury LGA (15 restaurants/bars and cafés), followed by 20% in The Hills LGA (4 restaurants/bars), and 5% in Hornsby LGA (1 café).
- The Hills and Hornsby LGAs have more F&B product in other parts of their respective LGAs but those identified for this audit only include those which fall in the Hawkesbury region (electoral) boundary.

⁷⁴ Based on data from the Best Restaurants feed and ATDW as provided by Destination NSW. This may, therefore, not cover F&B operators who have not listed themselves with these databases.

7.4. Events

Table 10 provides a summary of events held in the Hawkesbury region over the past 1 – 2 years (as well as future events noted such as the World Polo Championship). In total, there are 31 events in the region, 84% of which (26 events in total) are hosted in the Hawkesbury LGA. The remaining 5 events are hosted in The Hills Shire. The ATDW covers 18 events, which represents 58% of total events.

Markets make up the largest event category (35% of all events) but these comprise mainly smaller-scale local markets which tend not to be visitor/destination-based events.

Table 10: Summary of events audit for the Hawkesbury region⁷⁵

Type	# of events	% Split
Markets	11	35%
Sporting Events	7	23%
Exhibition and Shows	5	16%
Festivals and Celebrations	3	10%
Classes, Lessons, Workshops and Talks	2	6%
Community Event	1	3%
Food and Wine	1	3%
Concert or Performance	1	3%
Total	31	100%

Figure 15 on page 45 provides a spatial overview of events in the region. It reflects the following.

- Events tend to be clustered around the main towns of Windsor and Richmond, as well as Kurrajong and East Kurrajong.
- The Hills and Hornsby LGAs have more events in other parts of their respective LGAs but those noted here only cover those which fall in the Hawkesbury region (electoral) boundary.

⁷⁵ Based on data from the 2015 Hawkesbury City Council Tourism Strategy, Sydney.com and ATDW data provided by Destination NSW. If an event was not listed in these sources, then it may not appear in this audit. Only larger annual/ongoing events were included, with events such as workshops etc. excluded.

Figure 12: Accommodation audit mapped by accommodation type

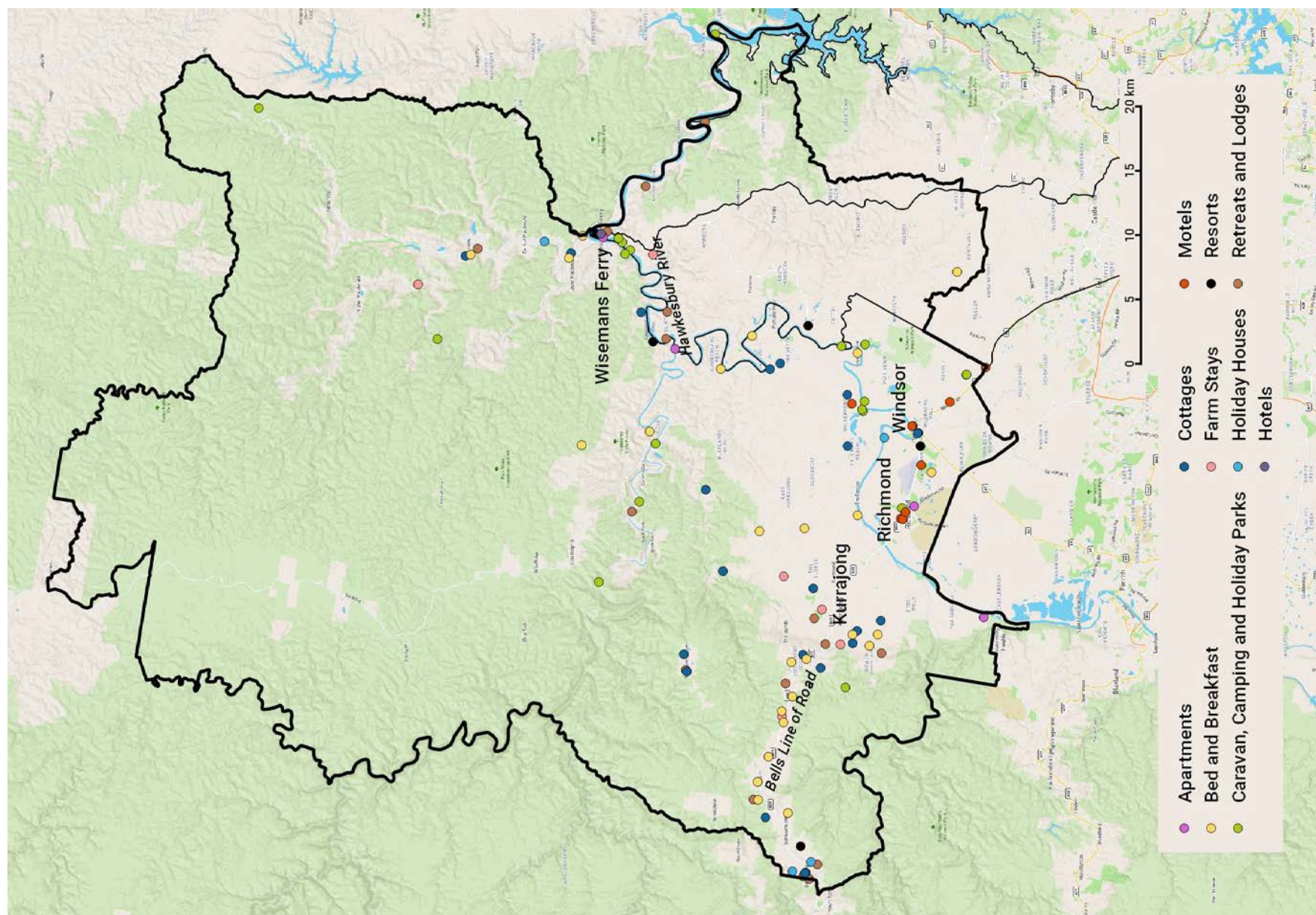


Figure 13: Experiences and attractions audit map by type

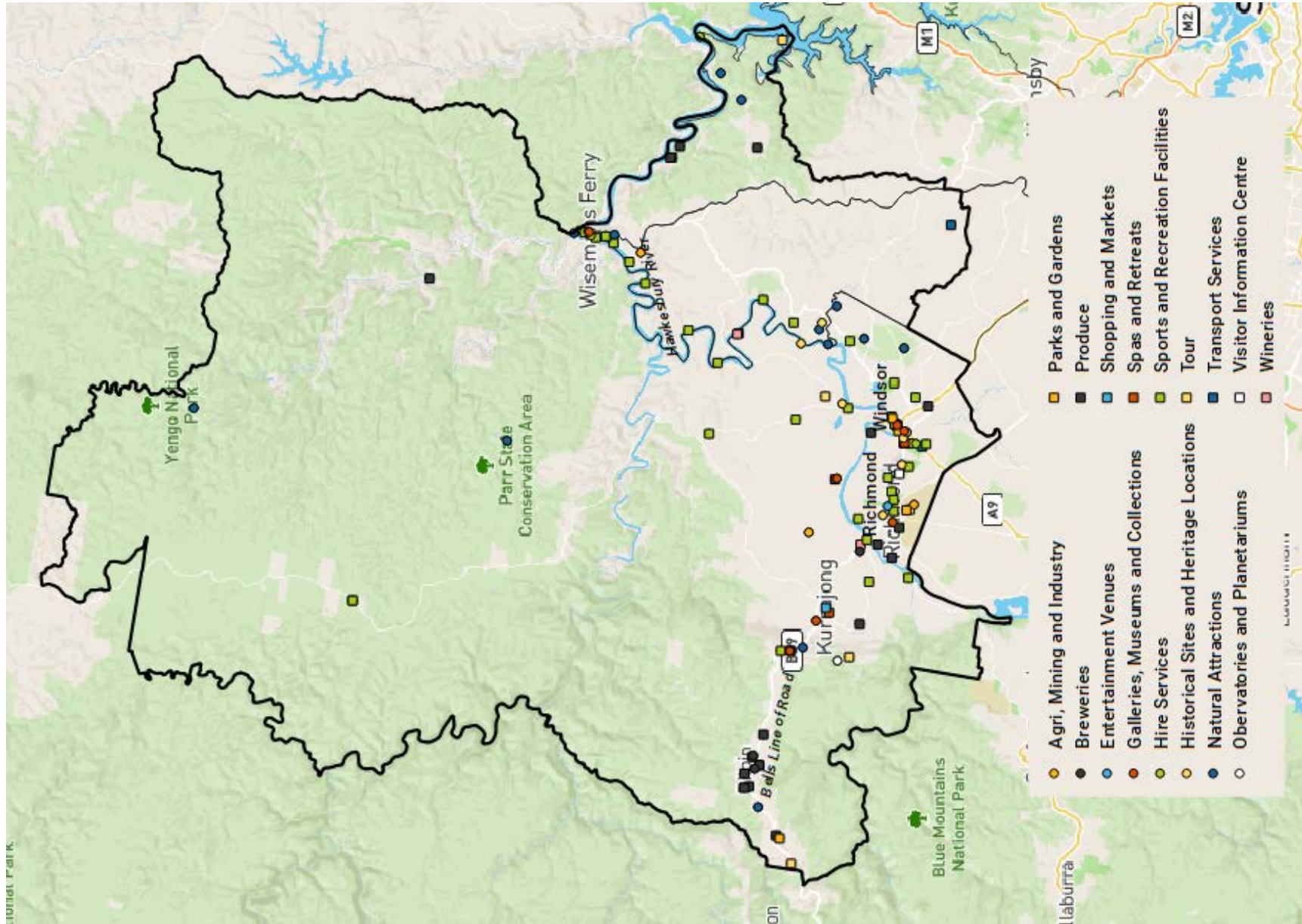


Figure 14: Food and beverage audit map by type

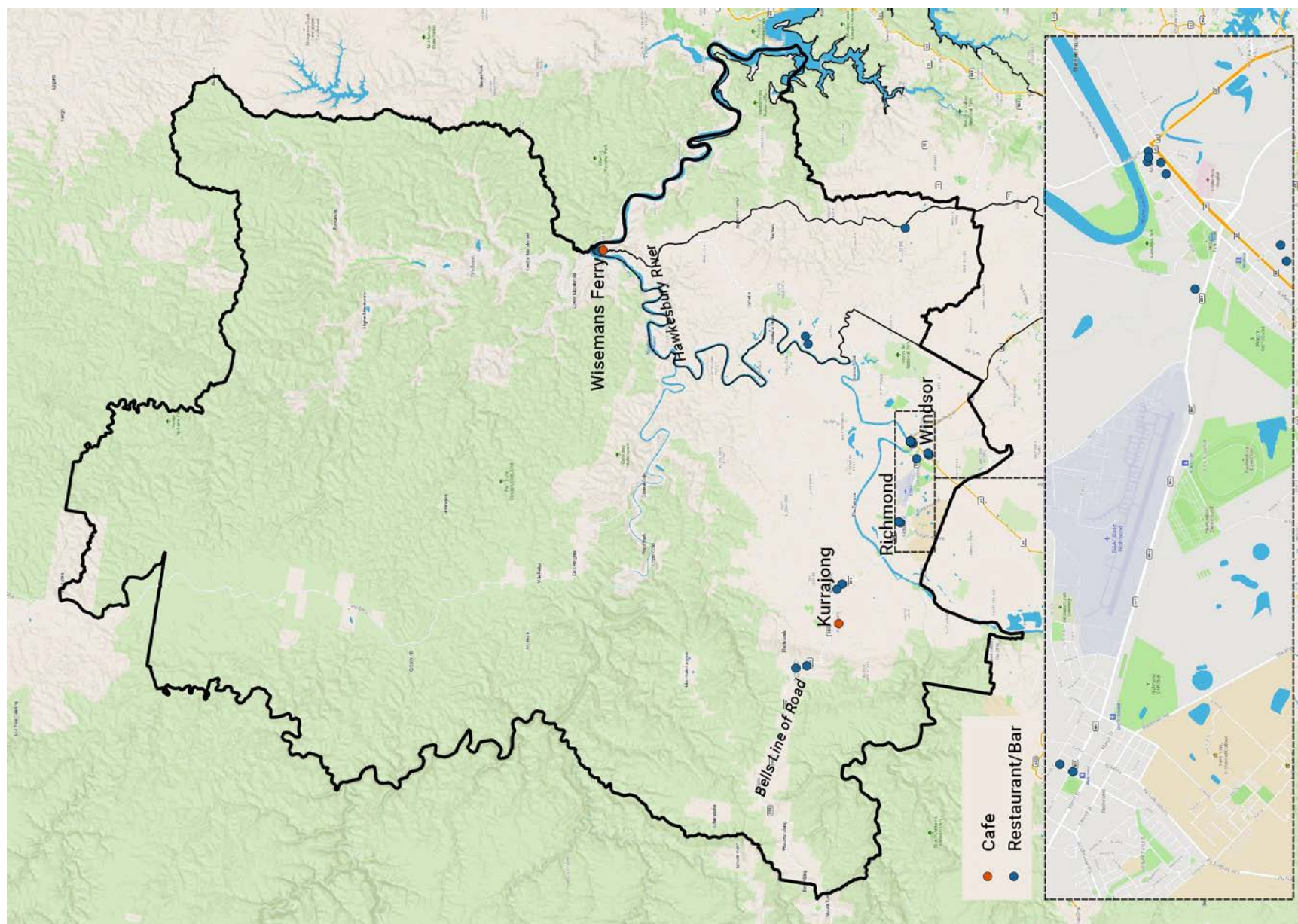
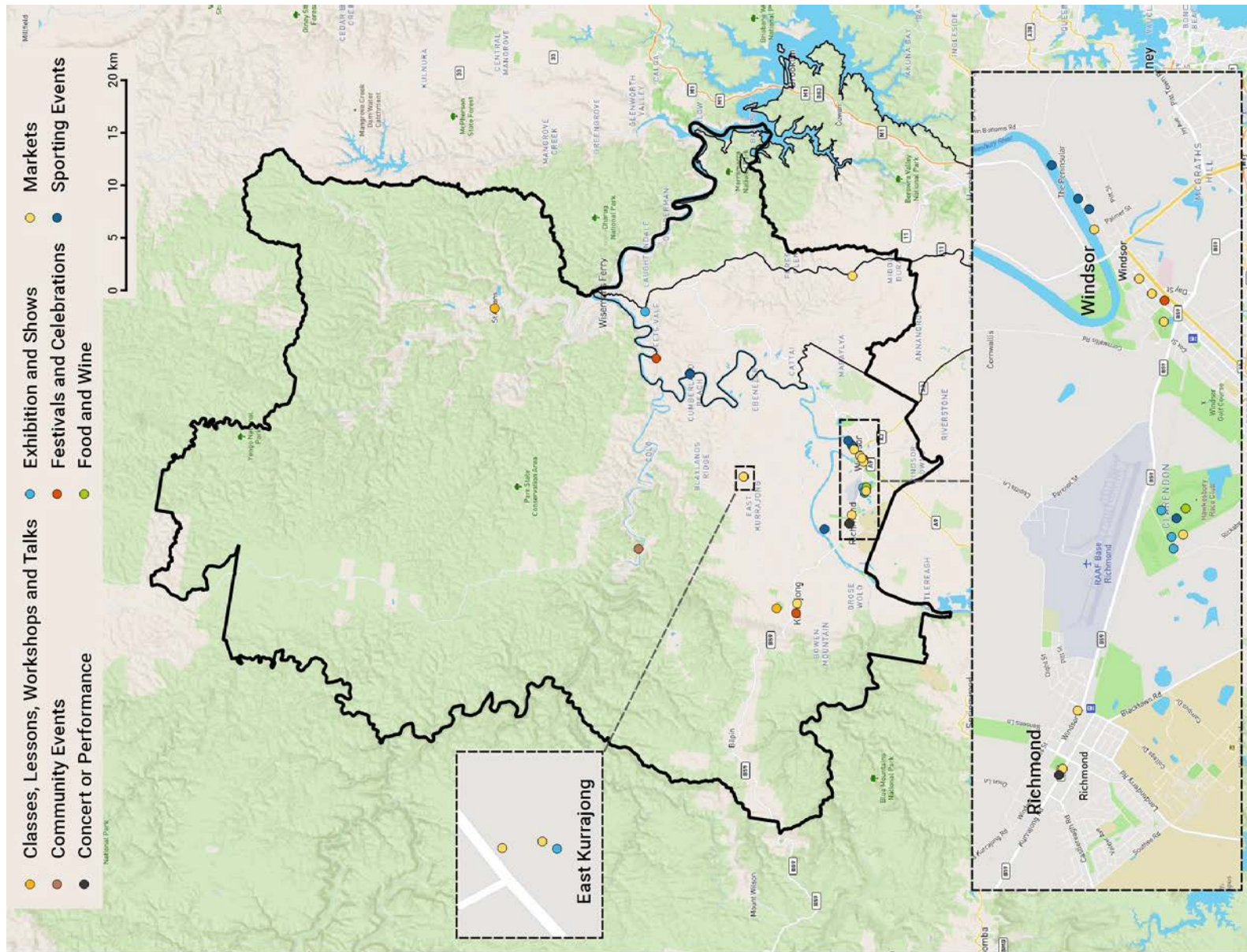






Figure 15: Event audit mapped by event type






7.5. Hawkesbury's product strengths, weaknesses & product gaps

Table 11 provides a summary of the Hawkesbury region's strengths, weaknesses and product gaps (based on the product audit completed), aligned with the target markets identified.

Table 11: Hawkesbury's product strengths, weaknesses & product gaps

Target Market	Strengths	Weaknesses + Gaps
Visiting friends & relatives 	<ul style="list-style-type: none"> There are a variety of food-related experiences such as fruit picking and food trails (such as Hawkesbury Harvest) which appeal to this market The range of produce grown in the region potentially offers year-round food-based experiences 	<ul style="list-style-type: none"> There is a lack of drawcard experiences available to appeal to this market and offer "brag" value for hosts to show their guests Farm gate experiences are not always offered year-round and lack of year-round farmers markets linked to seasonal products grown is seen as a weakness. There is limited nature-based or heritage product yet to offer additional experiences for this market.
Caravan & camping 	<ul style="list-style-type: none"> The region already has a number of caravan, camping and holiday park properties (18% of accommodation properties) which could appeal to this market. There is a cluster of holiday parks near Wisemans Ferry (including Del Rio Riverside Resort). 	<ul style="list-style-type: none"> There is a lack of glamping experiences which the Caravan and Camping Association notes the Baby Boomer market is looking for⁷⁶. There is a need for more destination holiday parks closer to Richmond and Windsor. There are no branded destination holiday parks in the region
Food tourism 	<ul style="list-style-type: none"> Produce is the 2nd largest experiences and attractions category, with 20 experiences and attractions (17% of total experiences and attractions product). There are also wineries and breweries which account for a further 3% of experiences and attractions product each. The Hawkesbury Harvest Farm Gate Trail features a cluster of product along Bells Line of Road in particular. 	<ul style="list-style-type: none"> There is a lack of cooking classes and celebrity chef experiences to provide value adds. Lack of awareness of farm gate trails such as Hawkesbury Harvest but potential to operate this as a commissionable tour product rather than a self-guided only product. Although produce is available year-round in the Hawkesbury region, this is not necessarily available to visitors year-round. Lack of wine product limits market demand. Lack of product coordination for marketing and packaging by operators/growers
Cultural & heritage tourism 	<ul style="list-style-type: none"> Hawkesbury Regional Gallery and Hawkesbury Regional Museum showcase collections with a regional significance but focus more so on the local market. There are a number of heritage/historical trails such as The Great North Road, Windsor Heritage Walk, and Macquarie Trail. The region has a rich cultural history linking back to early settlement with Windsor being one of the oldest towns in Australia 	<ul style="list-style-type: none"> Apart from Hawkesbury Regional Gallery and Hawkesbury Regional Museum, galleries and museums tend to be small-scale with only local significance. There is no arts trail or cluster of art studios etc. which is lacking. Lack of heritage product marketing and lack of tour product. Heritage buildings lack wayfinding, interpretation and information generally. Cultural and heritage assets are very passive but could be brought to life

⁷⁶ Trends affecting our industry over the next decade and beyond, Caravan and Camping Industry Association NSW and Manufactured Housing Industry Association NSW.

Target Market	Strengths	Weaknesses + Gaps
Nature-based tourism 	<ul style="list-style-type: none"> 66% of the region is national park or reserve land offering a range of self-guided walking, cycling and guiding tours. There are examples of a high-quality soft-adventure product such as The Trees Adventure Grose River Park. There are clusters of water-based activity product such as ski parks etc. around Wisemans Ferry and along the Hawkesbury River. 	<ul style="list-style-type: none"> There is a lack of commissionable tourism product within the national park areas. There is a lack of native wildlife experiences. There is a lack of environmentally friendly quality accommodation options within or near national park/reserve land areas such as glamping. There are restrictions on accessing parts of the Hawkesbury River.
Overnight short break market 	<ul style="list-style-type: none"> Sebel's award-winning Villa Thalgo Spa has luxury packages and higher quality accommodation to appeal to this market. Various smaller B&B properties offer quality accommodation and meals – the potential exists to profile and package these. Farm gate and fruit picking experiences 	<ul style="list-style-type: none"> There is a lack of wineries in the region. A cluster of high-quality day spas is lacking. Aside from the Sebel, a few B&B's, there is a lack of higher quality accommodation options for this market. A lack of product packaging for this market (could be because of a lack of export-ready product and/or a lack of operators with sufficient expertise to work collectively on this).
Cruise ship market 	<ul style="list-style-type: none"> 1-1.5 hour drive from Sydney makes the Hawkesbury region easily accessible. Potential to possibly link to the Blue Mountains' existing product as part of a circuit tour via Bells Line of Road. Farm gate/fresh produce and fruit picking at Bilpin and environs. 	<ul style="list-style-type: none"> There is currently no export-ready product available within the region to encourage cruise tour operators to include the Hawkesbury region on their itineraries There is a need to develop a signature experience. There is a need to package up product which will appeal to the cruise market



8. SWOT Analysis

Table 12 sets out a SWOT analysis of the visitor economy in the Hawkesbury region.

Table 12: SWOT Analysis

Strengths	Weaknesses	Opportunities	Threats
<ul style="list-style-type: none"> Proximity to Sydney (both a strength and a weakness) Ability to leverage off the strength of the Blue Mountains brand and its international recognition A gateway to the Blue Mountains (also a weakness, at times) The region is a noted agricultural hub The heritage-built environment The history associated with the region and particularly towns such as Windsor, Richmond and Pitt Town etc. Region is accessible by road, bus and rail Recognised as an equine hub with a very diverse equine industry Cultural heritage assets such as art galleries Demonstrated desire to strengthen the visitor economy by both industry and Council The passion and commitment of local tourism businesses 	<ul style="list-style-type: none"> Balancing housing and tourism needs Challenges in activating national parks Cost of upgrading tourism related infrastructure Council Planning instruments and support for tourism Heritage development constraints Lack of adequate signage and wayfinding River access constraints Challenges with State and Local Government planning instruments Waterways maintenance/upgrade costs Brand confusion Lack digital and media assets Lack of understanding of the importance of tourism Lack of unified events calendar Limited digital presence Limited major destination-style events Limited travel trade packaged product Proximity to Sydney (both a strength and a weakness) Few larger and medium-sized tourism operators Lack of evening activities Lack of experiences for the under 10s market Lack of market days & produce markets Lack of room capacity for functions and events Lack of tour operator interest Lack of tourism activity allowable at the Richmond RAAF base Limited new investment Lack of a larger visitor experience to leverage off Lower accommodation occupancy levels Not perceived as "open for business" Lack of town and village differentiation Variable accommodation quality Ageing population Larger proportion of lifestyle operators 	<ul style="list-style-type: none"> Cooking schools Food experience packaging via the regional strategic alliance Food trail cruise Seasonal food-based events Heritage and cultural product Activating cultural and heritage towns Expansion of recreational aviation activity Possible historic Hawkesbury light show Possible haunted historic Hawkesbury attraction/event Activating nature-based tourism product Eco and Indigenous tours National orienteering course Major Nature-based recreation attraction Destination holiday park Equine tourism Mid-larger scale branded hotel/resort with conference venue Outdoor amphitheatre Tourism cluster of larger-scale product Destination website Digital and media assets Assess name association of the "Hawkesbury" Packaging of product Promoting the value of the visitor economy 	<ul style="list-style-type: none"> Megatrends supporting growth in outbound leisure travel and wanting new destinations Community resistance to new tourism product and enhancements Bushfire risks in parts of the region limiting development potential Major flood prone areas limiting development sites Growing competition from Penrith and Blue Mountains operators



Image credit: James Horan, Destination NSW

9. Challenges

9.1. Overview

The following section outlines a range of challenges which have been identified through the consultation and analysis undertaken for this DMP and Action Plan. Additionally, some challenges which were identified in the Hawkesbury Tourism Strategy⁷⁷ have been included as they are considered relevant.

In discussing these challenges, Committee members noted that while there are simple solutions for addressing some of the marketing and related challenges, there is significant red tape which is limiting the ability to activate tourism development and investment overall.

Responsibility for this was seen to lie with Council as well as State Government, particularly when it comes to allowing activities in national parks and on the Hawkesbury River which are significant areas that dominate the landscape.

The challenges have been listed (in alphabetical order) according to the following categories:

- Infrastructure Development and Planning Challenges
- Marketing Challenges
- Product Development Challenges
- Other Challenges

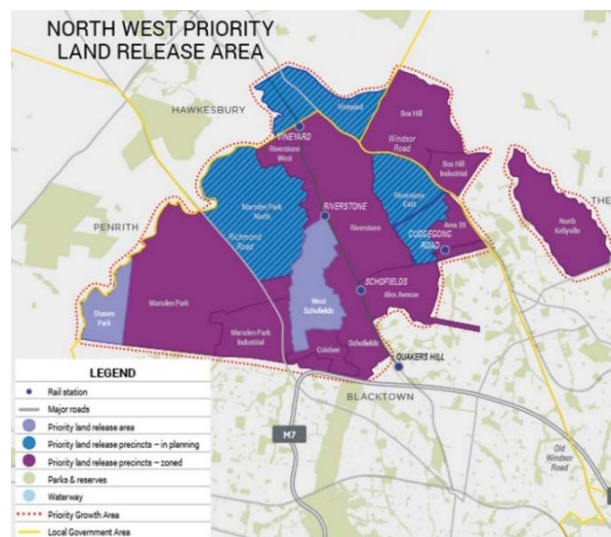
⁷⁷ Hawkesbury Tourism Strategy, July 2015, Hawkesbury City Council

9.2. Infrastructure Development and Planning Challenges

9.2.1. Balancing housing and tourism needs

Tourism growth in the Hawkesbury region is challenged by trying to achieve a balance with State Government targets for new housing lands especially in the North West Growth Centre (Figure 16) where the Hawkesbury and Hills Shire are important LGAs.

Figure 16: North West Growth Centre⁷⁸



⁷⁸ Department of Planning & Environment, NSW Government

State Government targets on employment growth are also having an impact. While they are not contrary to the needs of the tourism sector, other industry sectors, where the employment ratios are thought to be higher, are being actively encouraged.

The introduction of more housing estates and the lack of sufficient open space areas and buffer zones is likely to limit tourism potential in a variety of locations within or near urban centres in particular.

9.2.2. Challenges in activating national parks

Approximately 66% of the Hawkesbury region is national park/state conservation area. The product audit completed indicated that the majority of tourism product in the Hawkesbury region is situated near major town centres or outside of national park areas.

The inability to activate commercial opportunities in these areas is noted as a significant challenge not only the Hawkesbury region but other major tourism destinations in NSW such as the Blue Mountains. With NPWS keen to explore revenue generating opportunities and commercial partnerships, the potential exists to introduce appropriate in-park experiences.

9.2.3. Cost of upgrading tourism related infrastructure

A major challenge going forward are 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 region.

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.

9.2.4. Council Planning instruments and support for tourism

Hawkesbury City Council's planning instruments and the interpretation of these are considered by some stakeholders as being restrictive and inflexible.

Feedback from Council indicates that various State Government policies limit the ability of Council, at times, to offer greater flexibility for development approvals because of standard planning instruments and the tight interpretation required of these.

It may be necessary for Council and industry to lobby State Government to allow for greater flexibility of state planning instruments. Industry, Government and Council need to

determine solutions for relaxing certain planning constraints where strategic and timely outcomes are being unduly constrained.

9.2.5. Heritage development constraints

The region's many heritage sites should be a drawcard for visitors. Historic town centres, streetscapes and dwellings provide an important sense of place. Authentic heritage sites can add an inestimable value to a visitor experience. The development and maintenance of heritage sites can, however, involve considerable expense.

Without interactive experiences and value adds, static heritage sites are often challenging to draw visitors to.

9.2.6. Lack of adequate signage and wayfinding

Feedback indicates that there is a lack of both directional signage (wayfinding) and interpretive signage throughout the region. Signage plays an important role in dispersing visitors throughout an area and highlighting important information about points of interest.

We understand there are also challenges, from an operator perspective, with getting approval to place signage to attractions, experiences and accommodation facilities. This is not a challenge unique to the Hawkesbury region as many operators in most other areas comment on the same issue.

There is a need for the Tourist Attraction Signposting Assessment Committee guidelines (via the Tourist Signposting

Manual⁷⁹) to be clearly promoted to industry to understand the eligibility requirements they need to satisfy in order to introduce signage.

9.2.7. River access constraints

One of the key selling features identified for the Hawkesbury region is the Hawkesbury River. However, access to the River is very restrictive and these are limited opportunities to:

- consider development along the River's banks; and
- encourage greater use of the river for recreational and leisure activities.

Lack of access to 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.

9.2.8. Challenges with State Government planning instruments

It is noted that various State Government policies limit the ability of councils, at times, to offer greater flexibility for tourism development approvals because of standard planning instruments and the often tight interpretation of these. It may be necessary for Hawkesbury City Council (as the main LGA in the region) to lobby State Government to allow for greater flexibility of state planning instruments. Industry, Government and Council need to determine solutions for relaxing certain planning constraints where these are unduly constraining

⁷⁹ Tourist Signposting, 2012, Destination NSW and Roads and Maritime Services.

appropriate development opportunities to activate the visitor economy.

9.2.9. Waterways maintenance/upgrade costs

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.

9.3. Marketing Challenges

9.3.1. Brand confusion

While the Hawkesbury River is a well-recognised asset, there is confusion in the market of who actually “owns” the Hawkesbury River brand. The River, 120km from the north of Penrith to its mouth at Broken Bay, travels through Hawkesbury LGA as well as bordering The Hills Shire, Hornsby Council, the Northern Beaches Council and Central Coast Council.

9.3.2. Lack digital and media assets

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 region. This will allow businesses within the region to utilise these images for marketing and promotion, providing a high-quality interpretation of the destination.

9.3.3. Lack of understanding of the importance of tourism

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

- how the tourism dollar disperses through the regional 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/ratepayer funding is required to maximise the total returns to the Hawkesbury region as demonstrated via economic benefits, social and infrastructure improvements and higher quality environmental outcomes.

9.3.4. Lack of unified events calendar

The lack of a robust and collated events calendar is a challenge for introducing new events and avoiding event clashes. There is a need to develop an events calendar which is current and adopted by the region as the main calendar for all events.

The scope of the events calendar will need to be investigated as it could potentially be done as:

- a Hawkesbury LGA only calendar as a joint project by Council and their Tourism Committee;
- a regional initiative with the Regional Strategic Alliance (RSA) formed between Hawkesbury, Penrith and Blue Mountains LGAs;
- an initiative with Hawkesbury, The Hills Shire and Hornsby Shire LGAs.

9.3.5. Limited digital presence

Currently, the only destination website focused specifically on the Hawkesbury region is the website administered by Hawkesbury City Council⁸⁰. The website is dated and the user interface does not match the aesthetics of the Hawkesbury region.

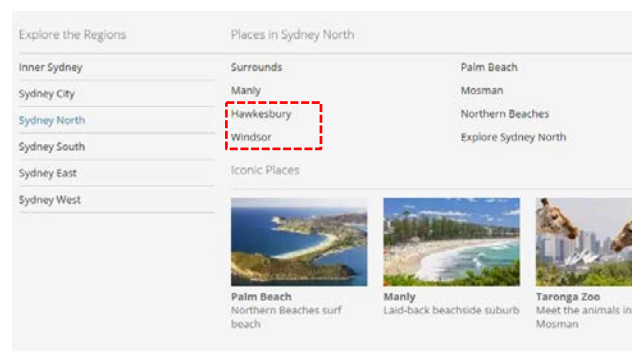
Some parts of the Hawkesbury region are, however, included on Sydney.com which is the regional website for Sydney and Surrounds and are listed under the Sydney North Region (see Figure 17). We would consider that Windsor does not have a natural affinity with the other places included in the Sydney

⁸⁰ www.hawkesburytourism.com.au

North Region such as Manly, Palm Beach and Mosman, which all fall within or near the Northern Beaches area of Sydney.

Furthermore, the “Hawkesbury” region (Figure 17) listed under the Sydney North category is primarily focused on the Brooklyn-end of the Hawkesbury River as this is where the majority of tourism-based product is situated. This does, however, add to branding confusion for the visitor.

Figure 17: Sydney.com Regions



9.3.6. Limited major destination-style events

While the region has a number of smaller-scale local and community-based events, it does not have many destination events which draw in a broader visitor market.

We note the region is hosting the Eleventh FIP World Polo Championship in 2017, which is an eight-day festival and polo tournament. However, we understand this is a one-off event.

There is a need to consider introducing a major event which can run on a regular or semi-regular basis. This could potentially be centred on food and the produce which is grown in the region.

9.3.7. Limited travel trade packaged product

There is limited product packaging available on destination-based websites and existing operators comment that finding suitable product to package is challenging.

There is a need to develop packages which could include accommodation, transport, guided walks/cycling, food and beverage and spa treatments etc.

There is also a need for industry training and up-skilling to identify opportunities for packaging product of a similar quality. The DMP Project Manager will need to work alongside industry to activate this.

9.3.8. Proximity to Sydney

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

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

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

9.4. Product Development Challenges

9.4.1. Few larger and medium-sized tourism operators

The Hawkesbury has very few large-scale commercial operators (accommodation and tourism attractions/ experiences). While the boutique nature of many operators in the region may offer a more personalised experience for some visitors, there is a balance required as larger-scale operators tend to bring with them larger marketing budgets which not only markets their product but also the region.

9.4.2. Lack of evening activities

The Hawkesbury region, and Sydney generally, has a lack of evening activities for visitors and particularly the family market. This makes it challenging to convince the day tripper market to convert their trip into an overnight stay.

The development of evening activities in the region is often challenging due to local community concerns regarding perceived noise levels, etc. However, there may be seasonal evening experiences which, if implemented carefully, could provide an experience which visitors and locals can enjoy. The location for night-time activities should be within the primary tourism nodes with the ability to leverage off existing infrastructure.

9.4.3. Lack of experiences for the under 10s market

While the region has a passive recreational product, these are not always suitable for the family market with children under 10 years of age. There is a need to investigate the introduction of

experiences for younger children, such as high ropes and aerial courses, outdoor mazes and indoor fun parks etc. Indoor family product would also be of benefit to local families.

9.4.4. Lack of market days & produce markets

Feedback from a number of stakeholders indicates the challenge which the Hawkesbury region 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. This would appear to be due changes in market sentiment, lack of sufficient financial returns to produce providers, limited marketing budgets and lack of ability to maintain the critical mass of stall providers.

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

Based on discussions with Destination NSW and research from the United Nations World Tourism Organisation (UNWTO), food tourism is a rapidly emerging sector. Additionally, there is 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 considered a highly effective mechanism for encouraging greater visitation potentially.

9.4.5. Lack of room capacity for functions and events

There is a lack of larger accommodation properties in the Hawkesbury region that can meet demand, particularly during peak visitor periods. This impacts on the ability to convert day trippers to overnight visitors, to encourage a longer length of stay and to support conferences and events especially.

9.4.6. Lack of tour operator interest

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

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

The greatest impediment to encouraging and motivating inbound tour operators and wholesalers to recognise the value and importance of the Hawkesbury region as a visitor destination is the lack of a major all-weather reasonably sized

visitor attraction or experience. Stakeholder feedback indicated 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.

9.4.7. Lack of tourism activity allowable at the Richmond RAAF base

The Richmond RAAF Base is noted as one of Australia's oldest and largest air force bases.⁸¹

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, security risks and the cost of meeting this have made it prohibitively expensive to continue to operate open days. This is in spite of what is perceived to be strong interest from a number of visitor markets to attend air show/open days.

There is a need to reassess the potential for:

- expanding light aircraft training opportunities;
- expanding the opportunity for gliding, parachuting etc.;
- 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; and
- for different types of air shows.

⁸¹ <http://www.airforce-technology.com/projects/raafbaserichmond/>

9.4.8. Limited new investment

There has been limited, new, privately funded tourism investment in the region. Lack of investment and reinvestment exists not only in tourism but across other commercial sectors, as evidenced in some of the retail and food and beverage offerings in villages in the region. The primary anecdotal reasons provided is: the level of project risk; lack of sufficient support from all levels of government; and insufficient product to leverage off.

9.4.9. Lack of a larger visitor experience to leverage off

One of the major challenges for the Hawkesbury is identifying new product which can act as a major drawcard for the region and a catalyst for growth. While smaller product development opportunities are often easier to create because of the lower capital cost and can 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 experience.

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.

9.4.10. Lower 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 achieved room rate. Based on discussions with accommodation operators and data from Destination NSW, accommodation occupancy rates in the Hawkesbury region average between 50-65% with visitor stays of up to 2-3 days.⁸²

While these occupancy rates are noted as reasonable for some, it needs to be seen within the context that there are many smaller operators who 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 keen to actively encourage stronger occupancy rates through the growth of tourism product/experiences in the area and reduce their reliance on conferences and events.

9.4.11. Not perceived as “open for business”

There is a perception that the Hawkesbury region is not yet sufficiently “open for business”. There is a need for government to actively promote that the region is supportive of the right forms of tourism development and to proactively pursue these opportunities. Tourism investment needs to be actively encouraged.

9.4.12. Lack of town and village differentiation

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

It is also 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 partly offers and which the markets are looking for (B&Bs, guesthouses, eco-retreats and quality glamping experiences).

⁸² Based on discussions with operators as well as the Hawkesbury LGA Tourism Accommodation Profile - <http://www.destinationnsw.com.au/wp-content/uploads/2013/10/Hawkesbury-LGA-accommodation-profile.pdf>

9.4.13. Variable accommodation quality

As noted in Section 7.1, out of the 113 properties which the region has, it only has one branded property being The Sebel Hawkesbury Resort & Spa Hotel (which is an Accor property).

While the accommodation audit did not assess the quality/rating of properties, feedback indicates that, at times, the quality marketed by some properties does not always meet visitors' expectations.

The introduction of additional higher quality and branded properties will assist in encouraging operators to raise their standards to better match consumer expectation.

9.5. Other Challenges

9.5.1. Ageing population

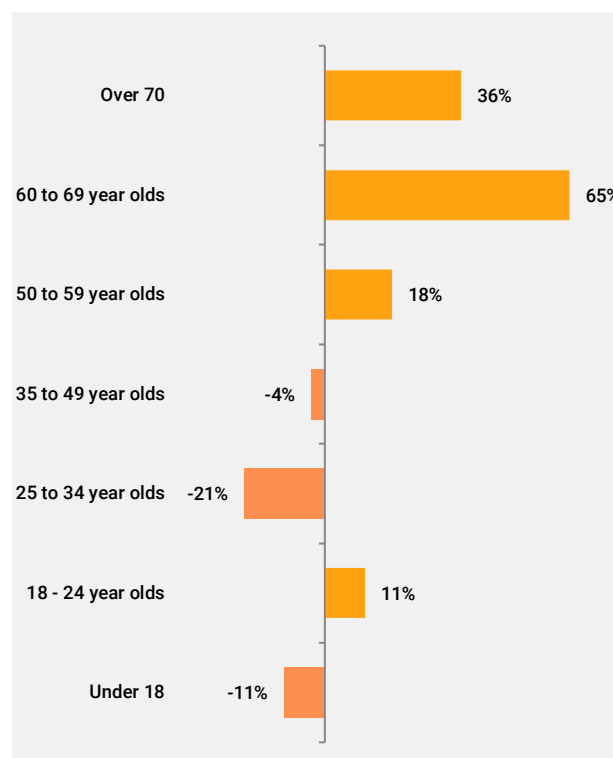
Figure 18 illustrates the change in age groups in the Hawkesbury LGA⁸³ over the period 2001 – 2011 and demonstrates the growing ageing population.

An ageing population is challenging as the elderly generally rely more heavily on support facilities and resources and may be less enthusiastic about new or expanded tourism development due to perceived impacts on lifestyles.

The disproportionately larger older aged resident demographic in the Hawkesbury LGA is likely to continue to put pressure on

the need for more health and social services to support their needs. While this age group may not be interested in encouraging greater tourism development within the LGA, without new development and new jobs for locals, the ability to attract younger people to consider the LGA for work and relocation is likely to be constrained.

Figure 18: Population Age Group Change (2001 – 2011)⁸⁴



Hawkesbury region primarily comprises the Hawkesbury LGA (88% of the total region), the population age data for the LGA is considered relevant for the Hawkesbury region.

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).

For example, while 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 and hospitality sector will also be a major consideration. 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.

⁸³ Note, data has been provided for the Hawkesbury LGA only as population data based on the updated 2015 state electoral boundaries has not yet been released. The data provided by the ABS for the Hawkesbury SED in 2011, therefore, represents the old electoral boundaries and, therefore, is not relevant. As the

⁸⁴ Based on Census of Population and Housing - <http://profile.id.com.au/hawkesbury>

9.5.2. Lifestyle operators

A high proportion of industry operators within the Hawkesbury are noted as lifestyle rather than full commercial operators, including accommodation providers, food and beverage operators and general retailers. Several operators 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 sectors 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 region is closed 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 weekends, it is important that they (and the general community) are provided with insight of the economic benefits of doing so, as well as information on the importance of the tourism industry for the Hawkesbury region.





Image credit: Paul Blackmore, Destination NSW

10. Activating the DMP



There are a variety of research and related requirements before it is possible to identify the viability of various product opportunities for the Hawkesbury region. These steps are outlined in the following subsections.

10.1. DMP Project Manager

This DMP has identified a number of challenges, actions and potential opportunities for the Hawkesbury region. To ensure that these challenges are appropriately addressed, actions implemented and opportunities investigated, there is a need to engage a DMP Project Manager.

The primary responsibility of the Project Manager will be to oversee the implementation of the DMP over a three-year period to ensure the action plan proposed is achieved.

10.2. Product and experience audit and development

This DMP has completed a comprehensive online product audit of all product which is noted as being situated within the Hawkesbury region⁸⁵. This included listings from:

- the Australian Tourism Data Warehouse (ATDW), Destination NSW's Get Connected program that links operators, products and services to consumers (as provided by Destination NSW);
- local tourism organisation and council websites;
- hotel and attraction booking sites including: hotels.com, bookings.com, expedia.com and tripadvisor.com; and
- feedback from industry operators.

As the audit was primarily conducted online, there may be product which is not listed on any of the above sources and, therefore, would not have been captured as part of the audit. There is a need for the DMP Project Manager to undertake "on the ground" analysis to fill any gaps.

The DMP Project Manager will also need to assist operators in including their product in the ATDW as the audit found that 56% of all tourism-based product for the Hawkesbury region was currently not listed in the ATDW.

By completing a comprehensive product audit, the product gaps identified (which align with the region's target markets) will be able to be further refined and short and long-term product development opportunities will be able to be more tightly defined.

10.3. Content and media asset audit and development

Much of the digital and media content for the Hawkesbury region is focused on the Hawkesbury River. There is a need to engage a skilled digital and media producer to develop content which fully showcases what the region has to offer. Importantly, this should be:

- focused on product which will have appeal to the region's primary target markets (identified in Section 5 of this DMP) but which may be further refined by the DMP Project Manager as further research and audits are undertaken; and
- aligned to the product audit which the DMP has completed at a top line level, but which the Project Manager will need to

⁸⁵ Only product which falls in the suburbs that are listed in the Hawkesbury region has been included in the audit.

update through “on the ground” investigation with industry operators.

10.4. Event calendar audit and development

In total, there were 30 events identified for the Hawkesbury region. Of these:

- just over half (58% or 18 events) appear on the ATDW list which feeds into VisitNSW.com and Sydney.com; and
- 35% (or 11 of the 31 events) were markets (including farm produce, bric-a-brac etc.), primarily being focused on a local, rather than visitor market.

There is a need to complete a comprehensive audit of events held in the region and ensure all are displayed on the Sydney.com events calendar. The audit will also assist in clarifying specifically the local and visitor markets which each event currently attracts. This will provide a clearer understanding of those which potentially could feature as destination events (over time) or those which are likely to remain local community events.

The audit would need to identify if the region has a gap in the type of events offered, particularly when aligned with the target markets identified.

10.5. Hawkesbury destination brand development

One of the key challenges associated with the name association of the Hawkesbury region is who actually “owns” the Hawkesbury River brand; while those in towns such as Windsor and Richmond may claim ownership, those in Berowra and Brooklyn (by way of example) also associate themselves with the Hawkesbury River brand (there is also much online collateral which is centred on the Brooklyn “end” of the Hawkesbury River).

There is a need, therefore, for the DMP Project Manager to work closely with Destination NSW, to engage professional marketing services to develop a brand for the Hawkesbury region. The branding developed would need to:

- integrate with the Greater Sydney Destination Brand Guidelines;
- take into account the audits completed for product, media and events;
- be focused on the target markets identified for the region and how these markets would be enticed to consider visiting the region; and
- should include broad stakeholder consultation and communication to ensure industry/community ownership.

10.6. Public relations plan development

There is a need to develop a PR plan with a variety of strategies to encourage a mix of wholesalers, inbound tour operators, event planners, cruise ship product organisers and special interest group promoters to help grow awareness of the region as a visitor destination.

10.7. Stakeholder engagement & communication

To ensure all appropriate stakeholders are aware of the DMP and have input into delivering the DMP, there is a need for the DMP Project Manager to develop a stakeholder engagement and communications plan. This will ensure that industry and the community have buy-in to work together to implement the DMP.

The communications plan should also demonstrate the value of the visitor economy and how delivering on the actions in the DMP can assist in growing the region’s visitor economy.

As Hawkesbury City Council are keen to grow the visitor economy and help implement the DMP, the DMP Project Manager will need to work with Council to ensure all community communication aligns with the DMP outcomes.

10.8. Tourism investment prospectus

Once the product and event audit is completed (although noting that this is likely to be an ongoing process as new product comes online or goes offline) and product gaps are identified, there is a need to engage services to identify potential product development opportunities which could fill these product gaps and appeal to the target markets identified. While the DMP has identified a variety of potential opportunities which could fill these gaps, these are preliminary opportunities only which require further investigation once the product audit is refined.

The tourism investment prospectus should be targeted at industry and investors/developers and should include top line feasibility and market demand assessments on each of the associated opportunities being profiled.

10.9. Product and experience development

Based on the product audit and gap analysis to be completed, as well as the tourism investment prospectus opportunities, there is a need to develop a product and experience action plan which: identifies new product which could be developed to cater to the region's target markets; provides industry training opportunities to upskill operators (for example, in assisting them to make their product "export ready" or to display their product in the ATDW); and identifies potential trail, tour and/or packaging opportunities.

10.10. Destination marketing campaign

There is a need to develop a destination marketing campaign which is: strongly aligned with the destination brand developed; Always-On; and which builds awareness of the Hawkesbury region and aims to drive greater overnight visitation. This increase in visitation is not likely to occur immediately, but rather, will be a gradual growth resulting from the implementation of the various actions and opportunities identified in this DMP.

The destination marketing strategy should also seek to leverage cooperative partnerships with industry within the Hawkesbury region and the level of partnerships should grow as the brand becomes more highly profiled.



Image credit: Royal Australian Air Force

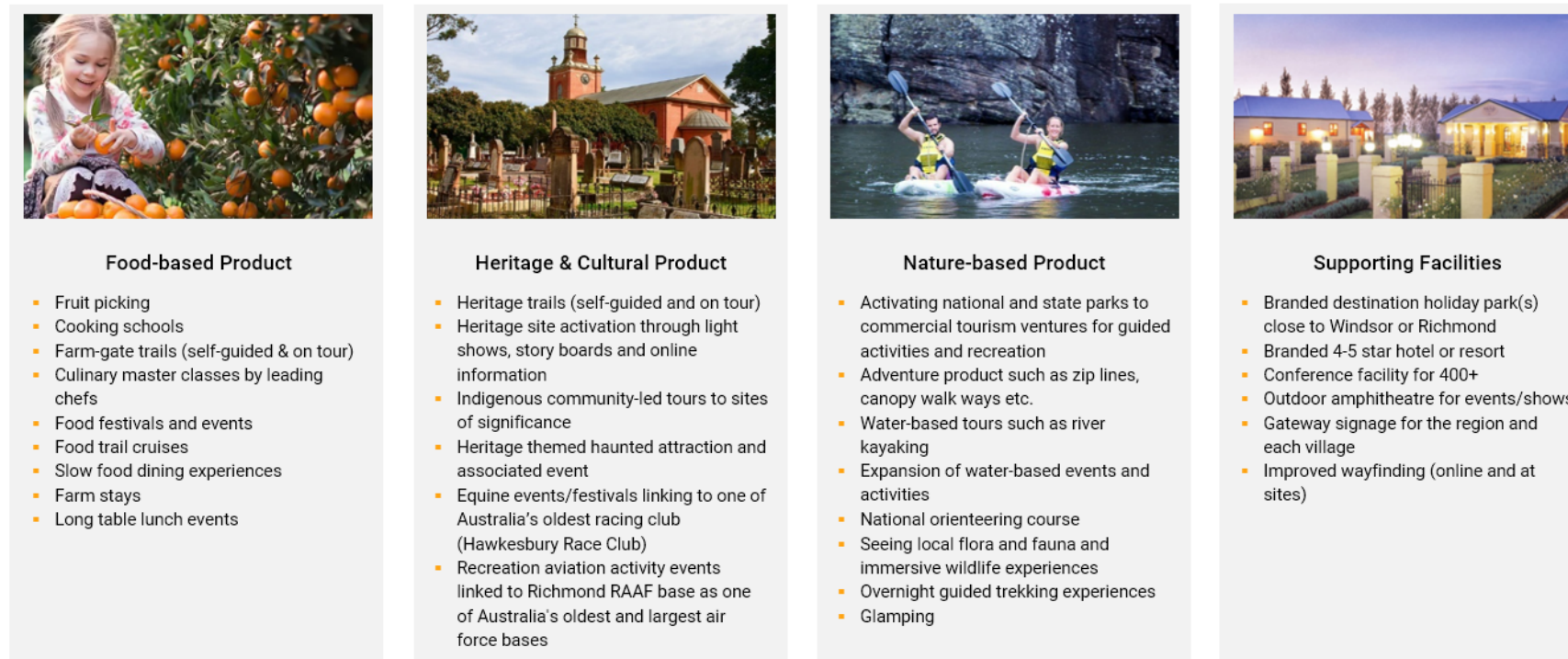
11. Potential opportunities

11.1. Overview

The following section provides a summary of the opportunities identified through the DMP process. The opportunities (which have been listed alphabetically) have been segmented into the Hawkesbury region's product pillars of: food-based tourism product; heritage and cultural product; nature-based product; and supporting facilities. An additional category for marketing activity has also been covered in this section (though this is not classified specifically as a product pillar for the Hawkesbury).

For many of these opportunities, there is a need for more detailed research and analysis which will need to be undertaken by the DMP Project Manager.

Figure 19: Product pillars and associated product for the Hawkesbury region



11.2. Food-based tourism product

11.2.1. Cooking schools

The potential may exist to leverage off the slow food movement, which aims to strengthen ties between the grower and consumer and celebrate local food traditions. This is seen to include the introduction of an integrated gourmet cooking school program throughout the region, helping to strengthen the notion that the Hawkesbury was Australia's first food bowl.

Based on supporting research and analysis to test the project viability, the cooking schools could also act as a showcase for the fresh 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 may also be an 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 fruit 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.

11.2.2. Food experience packaging via the regional strategic alliance

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 region is considered one of Australia's first food bowls. While the growth of the agricultural sector in the region has plateaued, it is still considered an important agricultural region in NSW, contributing to roughly 6% (\$261m) of total agricultural, forestry and fishing exports from NSW (\$4.4b).⁸⁶

Importantly 'Great food, wine, and local cuisine' ranks as the third most important factor for influencing a decision on a holiday destination across Australia's key tourism markets⁸⁷.

The potential exists to strengthen the Hawkesbury's positioning as a "foodie" destination, which ties strongly to the demands and needs of the key target markets identified for the Hawkesbury including VFR, food tourism, overnight short breaks, cultural and heritage and nature-based tourism. All of these market segments are looking for unique, authentic and genuine experiences; for which the fresh slow food component, is seen as an integral component to package and promote.

The Blue Mountains and Penrith LGAs are keen to investigate packaging food experiences through the RSA which could leverage off the individual food and beverage-related strengths of each LGA⁸⁸. Authentic food experiences throughout the RSA region such as cooking schools, farm gate sales, farm and winery tours, boutique cafés and restaurants with a focus on local produce could be evaluated for product packaging.

11.2.3. Food trail cruise

With the Hawkesbury also being noted as a food production hub, the potential may exist to create a food trail cruise. The cruise could possibly use the River for accessing sites and potentially offer an onboard dining experience.

Pennicott Wilderness Journeys' Seafood Seduction (Figure 20) is an award-winning product⁸⁹ located in Tasmania. It has developed to a stage where it is attracting significant numbers of international visitors (and particularly the China market). The tour operates on the Derwent River down through to Bruny Island and runs for approximately 7.5 hours. As part of the tour, participants are provided with a 2.5-hour progressive lunch, including a variety of freshly caught seafood such as abalone, rock lobster and oysters, a visit to the Tassal Salmon Farm as well as gourmet local produce and Tasmanian wines, boutique beers, ciders and juices.

This example is highlighted here as a best practice model for food tours and demonstrates the importance of providing a highly authentic food experience. As the consumer's interest in

⁸⁶ <http://www.economicprofile.com.au/hawkesbury/economy/regional-exports#table>

⁸⁷ Food and Wine Experiences, 2016, Tourism Australia

⁸⁸ For example, Hawkesbury has a number of agricultural producers, farmers' markets as well as fruit picking and Penrith has a sake factory.

⁸⁹ Awarded by Tourism Australia as Australia's "Best New Tourism Development"

food has grown, more destinations have indicated a desire to focus on food tourism. If the Hawkesbury region wishes to focus on this niche sector, there is a need to ensure operators are providing an authentic and high-quality product which showcases the unique product etc. of the region.

Figure 20: Seafood Seduction Tour, Tasmania



11.2.4. Seasonal food-based events

The potential could exist for introducing a series of events which leverage off the different produce which is able to be sourced from the Hawkesbury region over the different seasons. This could feature, by way of example, a stone fruit-focused festival for summer, apples for autumn, citrus during the winter months and other fruit during spring.

The festival series could also incorporate music and other elements such as celebrity cooking demonstrations and a long table lunch etc. All of these options would potentially tie back well to the key target market segments of VFR, food tourism markets, overnight short break market, and many of those coming for nature-based experiences and culture and heritage.

Orange, for example, has been particularly successful at marketing itself as a “foodie” destination. The success of events such as F.O.O.D week (Australia’s longest running regional food festival⁹⁰ - see Figure 21) and Orange Wine Festival are testaments to this. Brand Orange (a destination and event marketing agency) are charged with facilitating and promoting these events. A key prong of their promotional strategy for positioning Orange as a foodie destination and growing awareness of these events is their annual “Taste Orange” showcase in Martin Place, Sydney. This provides Sydneysiders and visitors with the opportunity to speak directly with food producers, wine makers and accommodation providers.

Figure 21: Orange F.O.O.D Week



⁹⁰ <http://orangefoodweek.com.au/>

What needs to be recognised is that events are not a panacea; they are but one element of a destination's product mix. Additionally, major events require significant investment and manpower to move them from being a local event to being a destination-based event.

If the Hawkesbury region is keen to establish a series of "hallmark" food-based events, engaging a professional destination marketing and event management firm would be prudent.

11.3. Heritage and cultural product

11.3.1. Activating cultural and heritage towns

Both Richmond and Windsor are historic Macquarie Towns, with an important history dating back to Australia's first settlement. There is minimal evidence of this historic value currently, but potential may exist to introduce product and related infrastructure to make these towns appealing to the target market interested in culture and heritage tourism. These towns could become heritage attractions over time.

While Windsor is noted as having significant heritage importance, further research and analysis is required to support the value in offering:

- Heritage focused wayfinding to support self-guided heritage trails and linking to online cultural websites etc;
- The potential for storyboards and interpretation of sites of historic significance;
- Linking back to the historic fact that this area was one of the first areas of commercial market gardens in Australia,

with the possibility of recreating examples of this and the produce which they specialised in;

- Working with Council to enhance the town centre of Windsor as the historic heart of the Hawkesbury region and a potential staging post for cultural tours out to other locations; and
- Working with Council to improve the ambience of the town centre with heritage and cultural styles of lighting, painting, planting and general streetscaping to strengthen the heritage values and cultural tourism appeal.

The suggestion is to focus on Windsor first, as the primary gateway town into the region, and eventually, assess the potential to develop Richmond (along with other smaller towns and villages) for their cultural heritage appeal.

11.3.2. Expansion of recreational aviation activity

Subject to further research and analysis, the potential may exist to explore opportunities for possible recreational aviation activity (gliding, small aircraft training, microlights etc.) which could be potentially be linked to the RAAF base at Richmond. While the ability to hold air shows/events is challenging because of significant insurance related costs and related higher security concerns, 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.

In the past, Council has advised that there have been major air shows held at the Richmond RAAF Base, which have attracted thousands of visitors. It is understood that the Department of Defence regularly assesses a variety of air-force base sites for potential shows, but Richmond is not currently on a list of sites.

This opportunity would need to be further explored by the DMP Project Manager.

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.

11.3.3. Possible historic Hawkesbury light show development

Heritage tourism is thought to be a major potential pillar of the Hawkesbury region, strengthened by the selection of historic buildings and the nationally important stories associated with the area in Australia's history.

Windsor and Richmond, in particular, are significant from a heritage and cultural perspective. Important historical attributes include (but are not limited to) the following.

- Windsor is the third-oldest place of British settlement on the Australian continent.
- Windsor, Richmond, Wilberforce and Pitt Town are four of the five Macquarie towns established by Governor Lachlan Macquarie in 1811.

- The region has many buildings which are registered with the Register of the National Estate (21 in Windsor alone).⁹¹
- Richmond is home to the RAAF Base Richmond which was established in 1923. The air base is currently the home to the RAAF's transport squadrons. During the Vietnam War, logistic support and medical evacuations were supplied by the C-130 Hercules aircraft from RAAF Richmond.
- The Battle of Richmond Hill took place in May and June 1795 between the Darug people and the European settlers.

The opportunity may exist to focus on the positioning of the Hawkesbury region as greater Sydney's most historically rich area. To do this, however, entails bringing history "alive" to appeal to a broader range of visitor markets.

This could entail developing a seasonal light show that capitalises on the historic architecture and stories that the Hawkesbury region has to offer.

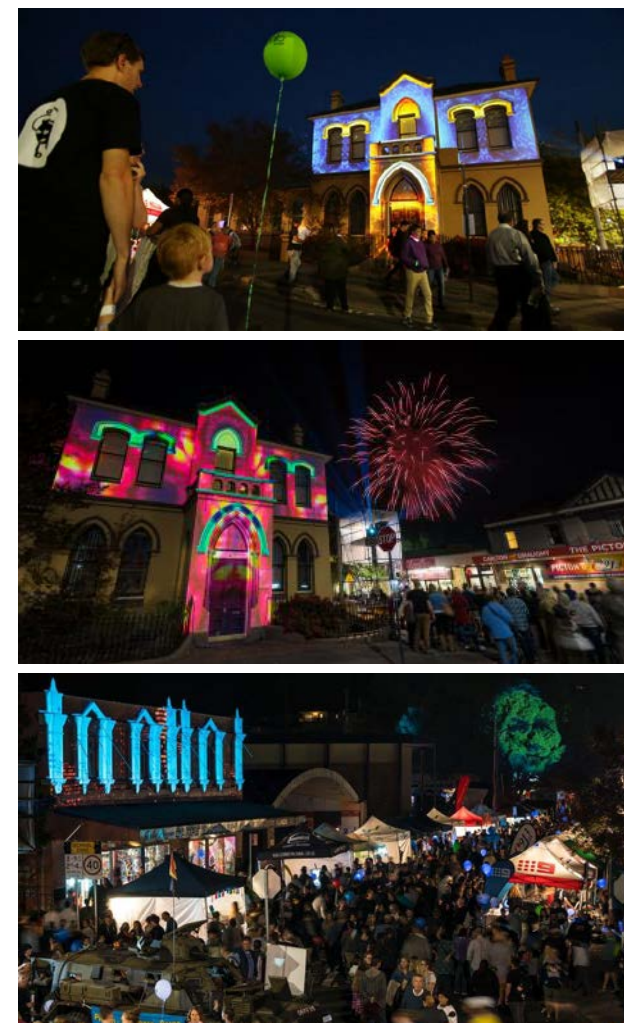
The success of major light shows such as Vivid Sydney and the popularity of sound and light shows such as the Tower of David (Jerusalem, Israel) and the Blood on the Southern Cross (Ballarat) illustrates that, with the right product and technology mix, heritage stories can be brought alive and made far more interesting. These are, however, extensive, high-tech experiences which are expensive to create and implement.

A lower cost and more contained option could possibly be a similar style experience as developed in Picton, NSW (located in Wollondilly Shire). Council has, for the past two years, hosted an IlluminARTE light festival (Figure 22) in their main street which profiles local artists as well as offering performances, food stalls and markets.

In 2015, the festival attracted over 15k locals and visitors⁹², far more than originally estimated (5k had been forecasted), and by 2016, estimated attendance grew to 25k.⁹³ The festival has been featured in the Sydney Morning Herald, the Daily Telegraph and by Destination NSW. The festival has a wide range of sponsors, including Channel 9. The ongoing success of illuminARTE demonstrates the pent-up demand evident in the greater Sydney region for family-friendly evening experiences.

A similar style of light show in the Hawkesbury, but focused on the history and heritage of the region, may assist in promoting the key heritage towns of Windsor and Richmond especially, as well as attracting a number of targeted market segments including: the VFR market; caravan and camping; culture and heritage; the overnight short break market; as well as those from the food and nature-based market segments who would also likely be keen to experience a night-time experience focused on heritage and culture.

Figure 22: IlluminARTE



⁹¹ The Heritage of Australia, Macmillan Group, 1981, pp.2/124-129

⁹² <http://www.macarthuradvertiser.com.au/story/3007608/festival-shines-bright-light-on-picton/>

⁹³ <http://www.wollondilly.nsw.gov.au/assets/attachments/MINUTES-Economic-Development-Advisory-Group-Meeting-25-May-2016.pdf>

Figure 23: Spookers Haunted House, New Zealand



11.3.4. Possible haunted historic Hawkesbury attraction/event development

In addition to a possible light show, the potential may exist to investigate bringing alive the heritage/cultural stories of the region through an attraction and/or via an events/festival program which could be centred on the concept of “Haunted Hawkesbury” or “Hawkesbury Horrors”. The following could be investigated as a concept.

- A 2-3 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 a similar fashion to Spookers Haunted House in New Zealand and possibly using redundant facilities within the region (such as the old hospital site if available).
- The creation of a dedicated horror film festival utilising the classic Richmond Cinema and through social media, encouraging people to nominate the best horror movies so interested parties can help select the program and become actively involved.

Spookers (Figure 23) is but one example of a successful haunted attraction which provides a valuable model to investigate. The attraction is situated approximately 45 minutes from Auckland CBD in an abandoned psychiatric hospital (Kingseat Psychiatric Hospital).

Since opening in 2005, visitation to the attraction has averaged approximately 60k visitors per annum and it employs over 130 people (a mixture of full-time and casual). More than 10% of these visitors are from Australia and in total, 24% of visitors are from overseas. The attraction operates two nights per week as well as during the Halloween season.

Spookers has diversified by adding several different products to the mix including medical moulage work with the NZ Defence Force, and Business Studies programs for years 12 and 13 which complies with the NZ secondary school curriculum.

Spookers has been actively looking to set up a similar attraction in Australia and has noted the potential to open in several cities with populations much larger than Auckland. Discussions with Spookers indicated they are looking for the following, all of which the Hawkesbury potentially fulfils.

- proximity to a major CBD (within 1-1.5 hour drive);
- ability to lease or purchase an older-style/themed building; and
- interesting site or regional history to leverage off.

11.4. Nature-based product

11.4.1. Activating nature-based tourism product

One of the major target markets identified for the Hawkesbury is nature-based tourism. With nearly 66% of the area designated as national or state parks along with reserve lands, the potential exists to find ways to activate some of these locations for a range of commercial tourism activity. Currently, most of these areas are only available for public (rather than commercial) use,

and the land managers (NPWS and Crown Lands) have been reluctant to consider commercial tourism options.

The Hawkesbury also has various waterways, including the Hawkesbury River. Further research and analysis is required to determine if a number of water based commercial tourism opportunities could be developed using the river in particular for a variety of tours and potentially for water based events.

The key target markets (VFR, caravan and camping, nature-based and overnight short breaks) are often keen to find product offering a mixture of passive and active recreational (land and/or water based) pursuits they can undertake as part of their visit to the region.

Potential may, therefore, exist to investigate the following.

- River canoeing and kayaking tours along parts of the Hawkesbury River.
- A mix of guided walks and kayaking packages to offer visits to unique fauna and flora and/or significant cultural sites.
- Seasonal 1 hour boat tours, also with the possibility of linking into the cruise ship market who are after new experiences and accessible from Sydney.
- Events, competitions and festivals with options for river kayaking, water skiing, jet skis etc.
- Developing Richmond or Windsor as the possible staging posts for these river based activities once further research and analysis is completed to prove the viability.

All of these product opportunities, however, would need to be subject to further market research and analysis, which the DMP Project Manager would need to facilitate.

11.4.2. Eco and Indigenous tours

Areas throughout the Hawkesbury region are noted as having a strong Indigenous history though more detailed research and analysis is required to provide a full product audit of this. Based on further market research and analysis, the potential may exist to introduce a variety of passive and more active eco-experience tours and overlay these with a variety of stories relating to Indigenous as well as European history.

It is important that any Indigenous tours created are developed by local Indigenous community representatives with the support of Council, Destination NSW and local tourism groups. The DMP Project Manager would need to liaise with local Indigenous community representatives (including possible Land Council members, Elders etc.) to verify Indigenous community interest and to assess the marketability of product options.

11.4.3. Glamping

The Hawkesbury region's topography and extensive national and reserve parklands provide an opportunity for discrete and quality glamping experiences to appeal to a nature-based and short break visitor market in particular.

This product tends to be high yielding and is boutique in nature.

Figure 24 provides pictures of some best practice examples of eco-friendly chalets and glamping tents built to complement their natural surroundings.

Figure 24: Best practice glamping⁹⁴



⁹⁴ O'Reillys Mountain Villas, Lamington National Park, Brisbane; Natural Retreats, UK; Nightfall Camp, Lamington National Park, Brisbane; and Herbal Glamping Resort, Slovenia

11.4.4. Major Nature-based recreation attraction

There is a need to further investigate the opportunity to introduce a major new nature-based recreational attraction in the region, which might include a mix of indoor and outdoor elements such as a canopy walkway, zip-lines, a luge, etc. to offer a signature attraction (something which is missing in the region). This could potentially appeal to a mix of day and overnight market segments including the VFR, caravan and camping market segments amongst others who are known to have the disposable income to spend if there were more charge for experiences available in the region.

11.4.5. National orienteering course

In partnership with the NPWS, an investigation could be undertaken to develop a national orienteering centre with various orienteering courses able to be created within the national parks in the Hawkesbury. If NPWS support is not forthcoming, potential may exist on other reserve lands etc.

While a number of locations are available throughout NSW and nationally for orienteering competitions, the 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.

11.5. Supporting facilities

11.5.1. Destination holiday park

The Hawkesbury region mostly offers more traditional caravan park accommodation with no nationally branded destination holiday parks (which have greater appeal to a wider range of markets who are attracted by their brand).

A key target market identified for the Hawkesbury region is the caravan and camping segment. This market segment has struggled to find sites within greater Sydney to meet the strong market demand which has been a constant trend for some time. The potential exists to introduce branded destination holiday parks into the region's accommodation mix.

Over the past 15 years, the domestic caravan, motorhome and camping industry has been fast growing. Caravan and RV registrations have increased by more than 250%⁹⁵. The industry is worth \$19 billion nationally and generates 11m overnight trips.⁹⁶ Savvy operators are responding to consumer demand for better standards and facilities by transforming traditional transit parks into holiday/destination parks.

A destination holiday park (e.g. Discovery Parks/BIG4) is a product currently missing in the region's accommodation mix, along with many destinations in Greater Sydney.

Destination holiday parks offer a mix of facilities to guests such as: swimming pools, aquatic parks, kids clubs, camp kitchens, mini-golf, group entertainment and shops etc. These parks are

attracting family market visitors who use the parks as a base for day excursions to surrounding regions. Importantly, these destination holiday park guests undertake many visitor experiences which a region might offer including food, nature and heritage based experiences. They are, therefore, considered a good potential fit for the Hawkesbury region.

Typically, a destination holiday park will require:

- land area of 8-10 ha or greater;
- capacity for 80 - 120 powered sites and 60 - 100 non-powered sites and up to 25 - 30 cabins/chalets;
- a focus on visitors rather than permanent residents;
- a family friendly focus to attract the family market and to convert day trips into overnight stays;
- amenities such as a heated pool, spa, BBQ facilities, camp kitchen, tennis court, bike hire/loan, kids' playground, daily children's activities, a café and a convenience store; and
- easy access to major roads and highways.

Figure 25 shows pictures of three more traditional caravan parks. Often these parks have more basic facilities and are used as transit parks (i.e. overnight accommodation when travelling between two destinations, rather than as a destination in their own right).

Figure 26 shows images of destination holiday parks. These parks usually feature a combination of RV/caravan/camping sites as well as chalets, waterparks, pools and water slides, kids' playgrounds, game rooms, biking trails, cafés and shops.

⁹⁵ <http://www.caravanningnews.com/penrth.htm>

⁹⁶ <http://www.smh.com.au/small-business/growing/australias-caravan-industry-worth-19-billion-and-growing-20160722-gqbgp5.html>

The market need would still have to be supported by a feasibility and site assessment exercise to determine the most appropriate sites for one or more destination holiday parks and to assess levels of investment interest. Hawkesbury City Council has advised that Macquarie Park could provide a potential site for development, subject to full site assessment. The Hawkesbury region's close proximity to Sydney, the Central Coast and the Blue Mountains means it could potentially become a hub for caravaners/RVs for Greater Sydney.

Figure 25: Traditional caravan parks

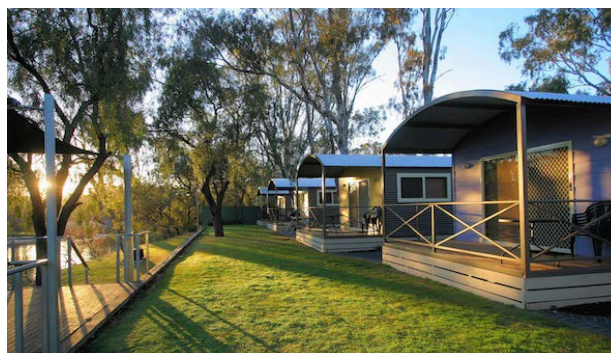


Canobolas Caravan Park, NSW



Burrum Heads Beachfront Tourist Park, QLD

Figure 26: Destination holiday parks



Deniliquin Holiday Park, NSW



Pambula Beach Discovery Holiday Park, NSW



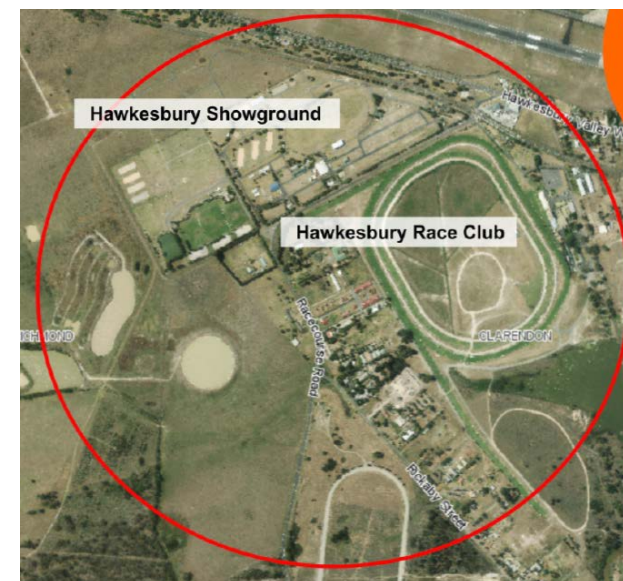
Merimbula Beach Holiday Park, NSW

11.5.2. Equine tourism and events

The Hawkesbury region is recognised as a major equine hub not only within NSW but nationally, with a number of domestic and international stud owners. The industry in the region is diverse with activities ranging from pony clubs, horse racing, show jumping, breeding, polo, endurance, learning equestrian and education. The numbers of horses in the area is estimated to be approximately 10,000 with 1,600 horse properties. The Hawkesbury has one of the oldest race clubs in Australia, with the premier provincial showground located at Clarendon.

The Hawkesbury Horizon project in 2016 (driven by Council) identified the strength of equine-related product in the region and proposed an equine precinct concept (Figure 27).

Figure 27: Hawkesbury Horizon - Equine Precinct Concept



The concept involved: upgrading and expanding the existing equine facilities in the region; and building on the equine hub which includes the Hawkesbury Showground, Hawkesbury Race Club, WSU, TAFE and a range of private equine activities.

Potential may exist to leverage of this strength and 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.

There are also a variety of equine related events such as EquiFest and Dressage NSW's Clarendon Winter Festival. Industry and Council need to partner to leverage opportunities from existing equine events to encourage greater profile and to grow the length of visitor stay.

The equine sector events are likely to be of interest to a variety of the identified Hawkesbury target markets including VFR, overnight short break market and caravan and camping. In addition, there may be elements of the cultural and heritage tourism market segment who may be attracted if there is a link back to the historic significance of horse racing, show jumping and other events in the region.

The DMP Project Manager will need to work closely with the Council driven Hawkesbury Horizon project team to make sure that any product being contemplated fits well with the needs of the various market segments identified.

11.5.3. Mid-larger scale branded hotel/resort with conference venue

The Hawkesbury region has many smaller-scale accommodation operators (87% have 25 rooms or less⁹⁷). There is a need for another larger scale and possibly internationally branded property. Operators see the need to change the perception that the Hawkesbury region is a day trip destination by encouraging branded operators to raise the profile, change perceptions and better meet market demand for overnight accommodation.

Accommodation operators in the region, for the most part, consider that introducing a larger, branded property will only "grow the tourism pie" rather than taking away market share. By way of example, the reopening of the Hydro Majestic in 2014 demonstrated the pent-up demand for new and unique accommodation in the Blue Mountains. Rather than taking market share away from existing properties, the size of the overnight market has grown due, in part, to the Hydro's reopening.

The accommodation could also include the following.

- A spa/wellness centre which is of regional significance and would appeal to a greater Sydney market. The positioning of this facility could be strengthened given the natural/rural ambience which is offered but which is easy to access from the Sydney CBD and greater Sydney generally.

- A larger scale resort could provide a much-needed conference facility to cater for 450+ patrons and events which currently cannot be attracted. Larger events, conventions and conferences are being turned away because of the lack of facilities. Any new larger conference facility should ideally be available for use by all operators within the region.

Anecdotal feedback from industry operators and other stakeholders indicates that the important short break target market is constrained by the lack of medium – larger scale branded hotel properties within the region. This is also impacting on the lack of ability of event attendees to stay overnight, with limited room capacity.

11.5.4. Outdoor Amphitheatre

The potential could exist to develop an outdoor styled natural amphitheatre which could support seasonal shows and events including bringing alive the rich culture and heritage of the Hawkesbury but in a more interactive way (this may obviate any need to invest more significantly in current heritage and historic sites through wayfinding, interpretation, displays and museum related experiences which all of them require).

⁹⁷ Note: this is based on the accommodation audit completed in section 7.1. Room numbers were not able to be determined for all properties. This figure is, therefore, based on only those properties for which room numbers were identified.

11.6. Marketing Projects

11.6.1. Destination website

The Hawkesbury region is not yet represented in Sydney.com, though Windsor (as the primary gateway) is covered. Further work is required to position the Hawkesbury region within Sydney.com and to actively encourage existing and future tourism operators within the region to upload their details into the ATDW.

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, important that the Hawkesbury region develops a new consumer friendly website which showcases the region 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 region which follows the overarching Hawkesbury branding but which showcase each of the towns' separate unique features⁹⁸;

⁹⁸ 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.

- 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 product packages which can be custom developed by consumers online to include accommodation, events, food and beverage and attractions etc.;
- 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 region;
- 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 smartphones.⁹⁹
- A mobile application or mobile accessible website for the region which includes walking/cycling audio/augmented

⁹⁹ Note having a website which is accessible and optimised for smartphones is different from having a mobile app. Having a smart phone accessible website

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 region 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-guided walking 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

means all website features display on smartphones and are optimised for the smartphone's smaller screen.

- 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.

11.6.2. Digital and media assets

To initiate the development of a media database, consideration should be given to working closely with Destination NSW to develop a suite similar to their online image library.¹⁰⁰

To fill the media database with high-quality images, the opportunity exists to hold an annual regional photography competition, with possible 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.

This initiative should be coordinated by the proposed DMP Project Manager.

11.6.3. Name association of the “Hawkesbury”

There is confusion regarding who “owns” the Hawkesbury destination brand and whether this refers to the Brooklyn/Central Coast (lower part of the Hawkesbury River) or that part of the River that fall within the Hawkesbury region (upper part of the Hawkesbury River).

There is a need to distinguish the Brooklyn end of the River to the Windsor/Richmond part of the River. This could potentially

include branding the Hawkesbury (under the Greater Sydney Destination Brand Guidelines) region’s part of the River as “Upper Hawkesbury River” and the Brooklyn/Central Coast end being “Lower Hawkesbury River”.

The destination brand (under the Greater Sydney Destination Brand Guidelines) should also convey the unique selling proposition of the Hawkesbury region which could incorporate, by way of example:

- Hawkesbury as a food bowl with its various farm gate and fruit picking;
- Historic Hawkesbury with its historic link to the nation’s first market gardens and its Macquarie towns;
- Hawkesbury as a potential health and wellness-focused destination with links to land and river-based recreational activities; and/or
- Hawkesbury as an equine hub, recognising the significance of the area for stabling, training, breeding, and eventing such as polo etc.

The destination brand and related collateral to be created will need to be developed by a destination brand specialist, who is able to incorporate the needs of the local community as well as those of broader visitor markets.

Whatever brand is established, there is a need to ensure there is a regional adoption of the brand and its related collateral which is well supported by industry.

The new Regional Strategic Alliance (RSA) would appear to be one of the first sub-regional tourism collaborations under the Destination Network umbrella. The RSA provides the opportunity for the Hawkesbury region to more strongly and collectively market with both Blue Mountains and Penrith LGAs, particularly as each of the LGAs have product which complement, rather than compete, with each other. The potential to leverage off the strong international brand cachet which the Blue Mountains has (particularly as the Hawkesbury region is a gateway to the Blue Mountains), via the RSA, already exists.

11.6.4. Packaging of product

Whilst there already are a range of visitor attractions and experiences throughout the Hawkesbury region, there is generally limited synergy between these attractions, experiences, accommodation, food and beverage and transport options. This is attributed to the limited range of product available in some areas, the lack of product packaging experience of some operators, and the seasonal nature of product availability at times.

To grow Hawkesbury’s visitor economy, effective connections between these elements need to be developed and ideally 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 region and higher visitor spend. Industry support is needed to upskill and encourage operators to package their product with others,

¹⁰⁰ We note currently, there are very few images of the Hawkesbury LGA included in this media database - <http://images.destinationnsw.com.au>

whether there are logical synergies and similarities in the quality of product and services on offer.

This also needs to be tied carefully back to the various niche market segments which have been identified and targeted for the region. The DMP Project Manager will need to work closely with industry operators to ensure the correct types of product are packaged in an appealing way, to the select target markets. Where required, this may also need to include complementary product which is available in the surrounding areas which comprise the RSA partners.

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

While 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 on fishing, rafting, trekking, art trails, cooking schools etc. having these connected to appealing accommodation offers along with food and beverage experiences, will strengthen the product offering for the region and boost its marketability as a visitor destination.

The Hawkesbury region needs to note it is often too hard to find good food and beverage offerings in the region, particularly

during evening periods, so packaging which can include some if not all evening dining experiences will help to offer far greater certainty and help lead to more overnight stays.

11.6.5. Promoting the value of the visitor economy

There is insufficient understanding about the important role tourism plays in the Hawkesbury region's economy and why it needs stronger support from Council and government generally. This is also important to raise community and government awareness of the potential niche target markets for the region, and the importance of developing tourism product and services to better meet the needs of the market.

Because of the strength in raw assets which the Hawkesbury could focus on, to grow the food tourism market segment and the nature tourism market segments especially, there is a need to better integrate agriculture and tourism so the sectoral stakeholders understand the needs of each. Similarly, the potential for developing land and river-based nature tourism product, requires far greater awareness and understanding by key stakeholder groups including the community at large, major government landholders (Crown lands, NPWS etc.) and various interest groups focused on environmental protection etc.

There is also a lack of awareness of how the tourism dollar spreads throughout the economy (Figure 28).

The Hawkesbury region's visitor economy¹⁰¹:

- is valued at \$245m¹⁰² and accounts for almost 3% of total output (in line with the NSW state average of 3.2%);
- accounts for just under 1.3k jobs, comprising 5% of all employment in the region¹⁰³ (in line with the NSW state average of 5.4%).

Hawkesbury City Council should be encouraged to develop and implement a tourism awareness campaign to show:

- how the tourism dollar disperses through the local economy (the direct and indirect impact of visitor spend);
- what businesses benefit from tourism including cafés, retailers, service stations, bars and transport providers etc.;
- how extended trading hours (even seasonally) can benefit the community and local employment;
- what the estimated value of tourism is via direct, indirect and induced spending impacts (this could be demonstrated in terms such as how many loaves of bread, cups of coffee and litres of fuel etc. are purchased by tourists on any given day: a large figure such as \$245m does not provide the information needed to illustrate its impact on local businesses and their suppliers); and
- why Council/ratepayer funding is required to maximise returns to the region's community via economic, social and infrastructure benefits and to attract new investment.

¹⁰¹ Note this incorporates both tourism and hospitality.

¹⁰² This includes: tourism output for the whole of Hawkesbury LGA (as the entire LGA is in the Hawkesbury regional boundary) and 5% of the Hills Shire's tourism output (ratio determined in section 4.1 of this DMP and Action Plan). Tourism

output data was not available for Hornsby Shire so it has been excluded from the assessment.

¹⁰³ This includes: tourism employment for the whole of Hawkesbury LGA (as the entire LGA is in the Hawkesbury regional boundary) and 5% of the Hills Shire's

tourism employment (ratio determined in section 4.1 of this DMP and Action Plan). Tourism employment data was not available for Hornsby Shire so it has been excluded from the assessment.








Figure 28: The importance of tourism



11.7. Product opportunities linked to target markets

Table 13 provides a link between the potential product opportunities identified and the key target markets for the Hawkesbury region. Marketing activity, such as website development etc., are not included in this table as it has not been directly correlated to an increase in visitor growth. They are, however, required to support the visitor experience and help facilitate growth.

Table 13: Product opportunities linked to target markets

							
Food-based tourism product							
1. Cooking schools	✓		✓			✓	✓
2. Food experience packaging via the regional strategic alliance	✓	✓	✓			✓	
3. Food trail cruise	✓	✓	✓	✓	✓	✓	✓
4. Seasonal food-based events	✓	✓	✓			✓	
Heritage and cultural product							
5. Activating cultural and heritage towns	✓			✓	✓		✓
6. Expansion of recreational aviation activity	✓	✓		✓			
7. Historic Hawkesbury light show	✓	✓		✓	✓	✓	
8. Haunted Historic Hawkesbury Attraction/Event	✓	✓		✓	✓	✓	✓
Nature-based product							
9. Activating nature-based tourism product	✓	✓			✓	✓	
10. Eco and Indigenous tours	✓	✓		✓	✓	✓	✓
11. Glamping			✓	✓	✓	✓	
12. National orienteering course	✓				✓		
13. Major Nature-based recreation attraction	✓	✓		✓	✓	✓	✓








							
Supporting facilities							
14. Destination holiday park	✓	✓			✓		
15. Equine tourism	✓	✓		✓		✓	
16. Mid-larger scale branded hotel/resort with conference venue				✓	✓	✓	
17. Outdoor Amphitheatre	✓			✓		✓	



Image credit: NSW National Parks

12. Visitor forecasts

12.1. Forecasts by market segments

12.1.1. Estimated visitation

The following section provides estimates of potential visitor growth applied to each of the various target market segments for the Hawkesbury region. The estimates are based on anecdotal industry and other stakeholder feedback, along with a determination of potential product opportunities which align with current product in the region, and which match the market segmentation needs identified.

Marketing activity, such as website development etc., are not included in this table as it has not been directly correlated to an increase in visitor growth. They are, however, required to support the visitor experience and help facilitate growth.

These forecasts should be considered as indicative only, as there is very limited existing market segmentation visitor data across each of the three LGAs covered for the Hawkesbury region. They are provided here to reflect the opportunity, and to offer quantification of this over a 10-year period.

It is important to note that this table does not reflect unique visitation as one visitor can undertake more than one experience. Other assumptions which support the data are provided in section 12.1.2.

Table 14: Forecasts by market segments (2018-2027)

	Target market segments likely to appeal to ¹⁰⁴	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
Food-based tourism product											
1. Cooking schools	VFR, Food & Wine, Short Break, Cruise										
International						100	104	108	112	117	122
Domestic Overnight		400	440	484	532	554	576	599	623	648	674
Domestic Day		200	220	242	266	277	288	299	311	324	337
2. Food experience packaging via the RSA	VFR, Caravan & Camping, Food, Short Break										
International		700	1,000	1,100	1,210	1,258	1,309	1,361	1,416	1,472	1,531
Domestic Overnight		850	1,500	1,800	2,160	2,592	3,110	3,732	4,479	4,658	4,844
Domestic Day		2,500	3,125	3,750	4,500	5,400	6,480	7,776	9,331	9,704	10,093
3. Food trail cruise	All Segments										
International		1,200	1,500	1,800	2,160	2,592	3,110	3,732	4,479	4,658	4,844

¹⁰⁴ Based on Table 13 on page 78 of this DMP and Action Plan.

	Target market segments likely to appeal to ¹⁰⁴	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
Domestic Overnight		1,800	2,304	2,949	3,775	4,832	6,185	7,422	8,906	9,262	9,633
Domestic Day		3,400	4,250	5,100	6,120	7,344	8,813	10,575	12,690	13,198	13,726
4. Seasonal food-based events	VFR, Caravan & Camping, Food, Short Break										
International			3,500	4,200	5,040	6,048	7,258	8,709	10,451	10,869	11,304
Domestic Overnight				5,000	6,000	7,200	8,640	10,368	12,442	12,939	13,457
Domestic Day		5,500	12,000	14,400	17,280	20,736	24,883	29,860	35,832	37,265	38,756
Heritage and cultural product											
5. Activating cultural and heritage towns	VFR, Culture & Heritage, Nature-Based, Cruise										
International			1,200	1,320	1,452	1,510	1,570	1,633	1,699	1,767	1,837
Domestic Overnight			2,500	2,750	3,025	3,146	3,272	3,403	3,539	3,680	3,828
Domestic Day			5,500	6,600	7,920	9,504	11,405	13,686	16,423	17,080	17,763
6. Expansion of recreational aviation activity	VFR, Caravan & Camping, Culture & Heritage										
International			-	-	-	1,500	1,800	2,160	2,592	3,110	3,732
Domestic Overnight			-	-	-	2,500	3,000	3,600	4,320	5,184	6,221
Domestic Day			-	-	-	22,500	27,000	32,400	38,880	40,435	42,053
7. Historic Hawkesbury light show	VFR, Caravan & Camping, Culture & Heritage, Nature-Based, Short Break										
International			-	1,500	1,800	2,160	2,592	3,110	3,732	4,479	4,658
Domestic Overnight			-	3,000	3,600	4,320	5,184	6,221	7,465	7,764	8,074
Domestic Day			-	15,000	19,500	25,350	29,153	30,610	30,916	30,298	29,995
8. Haunted Historic Hawkesbury Attraction/Event	VFR, Caravan & Camping, Culture & Heritage, Nature-Based, Short Break, Cruise										
International			-	1,200	1,440	1,728	2,074	2,488	2,986	3,583	3,727
Domestic Overnight			-	3,600	4,320	5,184	6,221	7,465	8,958	9,316	9,689
Domestic Day			-	12,500	16,875	21,938	25,228	26,490	27,814	29,205	30,665
Nature-based product											
9. Activating nature-based tourism product	VFR, Caravan & Camping, Nature-Based, Short Break										
International			-	1,200	1,320	1,373	1,428	1,485	1,544	1,606	1,670
Domestic Overnight			-	3,000	3,600	4,320	5,184	6,221	7,465	7,764	8,074
Domestic Day			-	6,000	7,800	10,140	11,661	12,244	12,856	13,499	14,174
10. Eco and Indigenous tours	VFR, Caravan & Camping, Culture & Heritage, Nature-Based, Short Break, Cruise										
International			-	1,200	1,320	1,373	1,428	1,485	1,544	1,606	1,670
Domestic Overnight			-	1,500	1,800	2,160	2,592	3,110	3,732	3,882	4,037
Domestic Day			-	2,500	3,250	4,225	4,859	5,102	5,357	5,625	5,906

	Target market segments likely to appeal to ¹⁰⁴	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
11. Glamping	Food, Culture & Heritage, Nature-Based, Short Break										
International			-	800	880	915	952	990	1,029	1,071	1,113
Domestic Overnight			-	2,500	3,000	3,600	4,320	5,184	6,221	6,470	6,728
Domestic Day			-	-	-	-	-	-	-	-	-
12. National orienteering course	VFR, Nature-Based										
International			-	-	200	240	288	346	415	498	518
Domestic Overnight			-	-	1,800	2,160	2,592	3,110	3,732	3,882	4,037
Domestic Day			-	-	2,500	3,250	3,738	3,924	4,121	4,327	4,543
13. Major Nature-based recreation attraction	VFR, Caravan & Camping, Culture & Heritage, Nature-Based, Short Break, Cruise										
International			-	-	-	1,200	1,440	1,728	2,074	2,488	2,588
Domestic Overnight			-	-	-	3,300	3,960	4,752	5,702	5,930	6,168
Domestic Day			-	-	-	22,000	25,300	26,565	27,893	29,288	30,752
Supporting facilities											
14. Destination holiday park	VFR, Caravan & Camping, Nature-Based										
International			-	1,752	1,927	2,120	2,332	2,565	2,693	2,963	3,259
Domestic Overnight			-	41,172	45,289	47,554	48,980	50,450	51,963	50,924	49,905
Domestic Day			-	876	964	1,012	1,042	1,073	1,106	1,083	1,062
15. Equine tourism	VFR, Caravan & Camping, Culture & Heritage, Short Break										
International			2,400	2,640	2,904	3,194	3,322	3,455	3,490	3,525	3,560
Domestic Overnight			4,800	5,280	5,808	6,389	6,644	6,910	6,979	7,049	7,120
Domestic Day			5,500	6,050	6,655	7,321	7,613	7,918	7,997	8,077	8,158
16. Mid-larger scale branded hotel/resort with conference venue	Culture & Heritage, Nature-Based, Short Break										
International			-	-	2,248	2,473	2,721	2,993	3,142	3,456	3,802
Domestic Overnight			-	-	51,151	53,709	55,320	56,980	58,689	57,515	56,365
Domestic Day			-	-	2,811	2,951	3,040	3,131	3,225	3,160	3,097
17. Outdoor Amphitheatre	VFR, Culture & Heritage, Short Break										
International			-	-	1,200	1,320	1,452	1,597	1,677	1,845	2,029
Domestic Overnight			-	-	5,600	6,160	6,776	7,454	7,826	8,609	9,470
Domestic Day			-	-	2,800	3,080	3,388	3,727	3,913	4,304	4,735

12.1.2. Assumptions for market segment forecasts

The following assumptions apply to each of the target market potential product options identified.

12.1.2.1. Food-based tourism product

- Whilst there is a small cohort of cooking school facilities already operating in the region, anecdotal feedback indicates the desire of some existing operators to expand, along with new entrants who often appear to have existing food or produce (farms, food processing and farm stays) operations to leverage off. Overall growth in numbers attending new facilities is expected to be modest.
- The regional strategic alliance councils (Hawkesbury, Penrith and Blue Mountains) already have a variety of food based experiences on offer, and with a collective desire to encourage the growth of this market segment. The Hawkesbury region is already well known for fresh produce (Bilpin apples etc.). potential may exist to package up food based experiences such as fresh fruit picking in the Hawkesbury, with visitation to food and beverage processing facilities such as the Sake brewery in Penrith, and Megalong Valley wineries and farm gate experiences in the Blue Mountains, along with restaurant outlets across all three LGAs.
- The value of the Hawkesbury River as a nature based and activity based product is well recognized in various research. Potential may exist for food based cruises (a slow food experience on the river) to appeal to all target market segments of the region. Depending on timing, cost and packaging, this may have potential to grow into shorter product options to appeal to a mix of international and domestic visitors.
- The Hawkesbury LGA especially, has fresh produce and farmers markets. Potential is seen to take these fresh food market experiences to another level as part of a possible seasonal food based event, which can focus in on the unique seasonal produce grown. Once the concept is fully developed, and well marketed to the various target market segments identified, it could potentially grow into a signature event for the region, and the estimated visitation post the first few years reflects this possibility.

12.1.2.2. Heritage and cultural product

- Prior market research by Destination NSW highlighted that local stakeholders felt the heritage and cultural product (Indigenous and early settler) of the region and key historic towns such as Windsor and Richmond etc. offered potential for guided and self-guided tours along with possible cultural events.
- The RAAF Richmond Airforce Base used to hold major air shows/events which apparently drew significant numbers of visitors. Potential may exist to reinstate similar types of events assuming the Department of Defence is agreeable to reinstating these. As other air-force bases around Australia currently hold air shows, this would require the Richmond Airforce Base being reinstated as a venue. The potential may also exist to extend the use of part of the Base only for a variety of recreational aviation activity, noting the anticipated closure of Camden Airport, the capacity constraints at Bankstown Airport, and the potential closure of others around greater Sydney. The visitation projections are however, solely linked to the introduction of major air shows and associated events.
- In similar fashion illuminARTE (the light show in Picton), potential may exist to also include a similar type of light show which might be able to be themed around the historic towns of the Hawkesbury region. The visitation estimates forecast are based on similar achieved numbers visiting Picton, in Wollondilly Shire, in 2016 for illuminARTE.
- Potential may exist for a themed haunted festival or a dedicated haunted attraction, building on the heritage and historic themes within the region and especially associated with some of the more colourful convict era history and tales associated with a number of towns and historic sites. If the potential existed to possibly link this to Halloween with a number of inter linked events over 2-3 weeks, the estimated visitor numbers reflect this.

12.1.2.3. Nature-based product

- With over 65% of the Hawkesbury LGA alone managed as national parks, Crown reserve lands or open space areas, the region has a vast nature based area to visit. Visitation estimates are based on encouraging more visitors to venture into the region for passive recreation activities, including river based kayaking and boating along with day and overnight trekking.

- Potential is seen to offer a variety of eco and Indigenous tours with visits to sites of significance covering Aboriginal history, areas of unique flora and fauna and with the eventual possibility of overnight in park guided walks with Indigenous tour guides.
- The potential may exist for introducing discreet and higher quality glamping style tent camps on the periphery of national park boundaries and within crown reserve land areas. The quality of the natural environment along with the close proximity to Sydney, would appear to lend itself to glamping style accommodation options.
- Over time, potential may exist to encourage the establishment of a national or state level orienteering course within the region, noting the extensive park and reserve lands which exist. Visitation estimates reflect the gradual potential development and growth of this, subject to further research and analysis.
- The number of possible sites for a larger scale nature based recreation attraction are thought to be extensive within the region. The potential may exist to create a facility which offers a mix of canopy walkways, zip lines, confidence rope courses etc. for a mix of FIT and structured groups which fit within the target markets identified. Visitation estimates and forecasts reflect the growth potential of the nature tour market segment.

12.1.2.4. *Supporting facilities*

- While the region already has a variety of caravan parks and a few destination holiday parks, it is lacking branded product. With significant visitor growth in the caravan and camping target market segment nationally and state wide, potential may exist to encourage one or more branded operators to establish within the region, and potentially help position the Hawkesbury region as a dedicated hub for this high growth and good yielding market segment. The estimated visitation reflects potential growth from one larger scale branded higher quality destination holiday park. Ideally this and others, are also able to be located within close proximity of major towns to leverage off their existing food and beverage amenities and retail facilities.

- The scale of the equine sector within the region and the potential to grow this through a variety of events and shows is well recognized by local industry in the region. Visitation forecasts reflect the potential to extend current events and through careful marketing and packaging of product, to actively encourage a stronger overnight visitor short break market especially.
- The need for large scale and higher quality branded accommodation was identified in previous Destination NSW market research, along with anecdotal feedback from industry within the region. The visitor forecasts provided reflect demand estimated for a potential resort property which also is able to offer an appropriately scaled conference venue attached to it. This type of product is seen as a key element of supporting infrastructure to ensure the overnight visitor market can be grown for a number of target segments.
- An outdoor amphitheatre is a possible facility to support a variety of community and commercial tourism events and shows. It could be an important venue to support seasonal shows to reflect the history and heritage of the region, offering a variety of interactive ways to bring culture alive through performing arts etc. The visitor forecasts reflect the potential seasonal usage of such a facility.

12.2. Total visitation forecasts

Table 15 offers three growth scenarios, for visitation over the next 10-year period to the region. the low growth scenario assumes fairly minimal new events or products would be developed and implemented so marketing activity would likely be constrained by the lack of product options.

The medium growth scenario, assumes that stronger growth may occur with a mixture of clever marketing programs and promotions, development of events especially around food tourism, nature and culture, and some new supporting infrastructure.

The high growth scenario, assumes that each of the suggest potential products gets developed, with most opening post 2022 to allow adequate time for planning and feasibilities, development approvals and construction time frames. Though domestic overnight and international visitation is forecast to grow strongly, the share size of the domestic day market along with constant growth, collectively generates a further 512k visitors by year 10 (2027) compared to the low growth scenario and a further 386k more visitors by year 10 compared to the medium growth scenario.

The potential to achieve these higher levels of overnight visitation especially, are dependent on a number of new promotional initiatives, coupled with new and well-focused events and appropriate supporting facilities. All of these are reliant on an evidence based approach, gathered from additional research and analysis required, as outlined in this DMP and Action Plan.

The visitor estimates for each of the potential target market products, provide an important base to help guide the overall estimated visitor forecasts to the region. As many visitors will come to do a number of activities and because of potential cross over in target market segmentation (i.e. a short break visitor may also come to experience food tourism, culture and heritage, and nature), care is needed to avoid double counting.

Table 15: Total visitation forecasts for the Hawkesbury region (2017-2027)

Forecast Scenario	2016 Market Size	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
Low												
International	34k	34k	35k	35k	36k	37k	37k	38k	39k	40k	40k	41k
Domestic Overnight	230k	232k	235k	239k	244k	249k	254k	260k	268k	278k	283k	289k
Domestic Day	799k	807k	815k	831k	848k	873k	899k	926k	945k	954k	964k	973k
Total	1.06m	1.07m	1.08m	1.11m	1.13m	1.16m	1.19m	1.22m	1.25m	1.27m	1.29m	1.30m
Medium												
International	34k	34k	35k	35k	37k	38k	39k	40k	41k	42k	43k	44k
Domestic Overnight	230k	232k	237k	242k	249k	256k	267k	277k	289k	297k	306k	312k
Domestic Day	799k	807k	823k	847k	873k	908k	944k	982k	1.01m	1.03m	1.05m	1.07m
Total	1.06m	1.07m	1.09m	1.12m	1.16m	1.20m	1.25m	1.30m	1.34m	1.37m	1.40m	1.43m
High												
International	34k	34k	35k	35k	37k	38k	40k	42k	45k	48k	49k	51k
Domestic Overnight	230k	232k	237k	244k	254k	269k	291k	314k	333k	349k	363k	374k
Domestic Day	799k	807k	847k	881k	934k	1.01m	1.08m	1.15m	1.22m	1.30m	1.35m	1.39m
Total	1.06m	1.07m	1.12m	1.16m	1.22m	1.32m	1.41m	1.51m	1.60m	1.69m	1.76m	1.81m

12.3. Visitor spend forecasts

Table 16 illustrates potential visitor spend under the three different visitor growth scenarios offered. The level of daily spend has been adjusted for domestic and international overnight visitors from 2022, to reflect the anticipated higher spend associated with the introduction of possible new visitor attractions and supporting facilities such as new commercial accommodation. This, however, only affects the medium and the high growth scenarios. In addition, a most adjustment (reflecting CPI movement estimates) has been applied to domestic day visitor market spend across all three growth scenarios.

The ability to offer greater levels of commissionable product (tours, transfers, attractions and commercial accommodation) are important for not only growing visitor spend levels, but also to actively encourage more active involvement by wholesalers, tour operators and other intermediaries who play an important role in growing various structured tour markets to the region and helping to promote the region as well.

Table 16: Visitor spend forecasts (2017-2027)

Forecast Scenario	2016 Spend ¹⁰⁵	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
Low												
International	\$4.1k p/trip	\$140.0m	\$142.1m	\$144.2m	\$147.1m	\$150.0m	\$153.0m	\$156.8m	\$160.8m	\$164.0m	\$165.6m	\$167.3m
Domestic Overnight	\$806 p/trip	\$187.3m	\$189.2m	\$192.9m	\$196.8m	\$200.7m	\$204.7m	\$209.9m	\$216.2m	\$223.7m	\$228.2m	\$232.8m
Domestic Day	\$107 p/trip	\$86.0m	\$89.0m	\$90.8m	\$92.6m	\$95.4m	\$98.2m	\$101.2m	\$103.2m	\$104.2m	\$105.3m	\$106.3m
Total	\$409m total spend	\$413.2m	\$420.2m	\$427.9m	\$436.4m	\$446.1m	\$456.0m	\$467.9m	\$480.1m	\$491.9m	\$499.1m	\$506.3m
Medium												
International	\$4.1k p/trip	\$140.0m	\$142.8m	\$145.6m	\$150.0m	\$154.5m	\$166.8m	\$171.8m	\$176.9m	\$180.5m	\$184.1m	\$187.8m
Domestic Overnight	\$806 p/trip	\$187.3m	\$191.0m	\$194.8m	\$200.7m	\$206.7m	\$253.4m	\$263.5m	\$274.1m	\$282.3m	\$290.8m	\$296.6m
Domestic Day	\$107 p/trip	\$86.0m	\$89.9m	\$92.6m	\$95.3m	\$99.2m	\$103.1m	\$107.2m	\$110.5m	\$112.7m	\$114.9m	\$117.2m
Total	\$409m total spend	\$413.2m	\$423.6m	\$433.0m	\$446.0m	\$460.3m	\$523.3m	\$542.6m	\$561.5m	\$575.4m	\$589.8m	\$601.6m
High												
International	\$4.1k p/trip	\$140.0m	\$142.8m	\$145.6m	\$151.4m	\$157.5m	\$173.3m	\$182.0m	\$192.9m	\$204.5m	\$212.7m	\$219.1m
Domestic Overnight	\$806 p/trip	\$187.3m	\$191.0m	\$196.8m	\$204.6m	\$216.9m	\$319.7m	\$345.3m	\$366.0m	\$384.3m	\$399.7m	\$411.7m
Domestic Day	\$107 p/trip	\$86.0m	\$92.5m	\$96.2m	\$102.0m	\$110.1m	\$117.8m	\$126.1m	\$133.7m	\$141.7m	\$147.4m	\$151.8m
Total	\$409m total spend	\$413.2m	\$426.3m	\$438.6m	\$458.0m	\$484.5m	\$610.9m	\$653.4m	\$692.6m	\$730.5m	\$759.7m	\$782.5m

¹⁰⁵ Based on spend data provided by Destination NSW (see section 4.4).



13. Action Plan

The following Action Plan is provided to guide the implementation of this DMP from project scoping (2016/17) through to building advocacy and visitor experiences (2019/20). The Action Plan and Budget prepared by Destination NSW is indicative only. However, it is based on the 3-year funding allocation secured by the Hon. Dominic Perrottet.

Table 17: Action Plan (2016/17 – 2019/20)

Action	Tasks	Responsibility	Status	Budget (estimate)	KPI	MO Announceable
2016-2017 Project scoping key deliverables						
Identification of opportunities to grow the visitor economy and maximise major events in the Hawkesbury electorate.	<ul style="list-style-type: none">Analysis and presentation of stakeholder survey results, facilitation of stakeholder workshop and preparation of finalisation report and recommendations.	Lead: Destination NSW Support/Input: HVEAC	Completed - November 2016	\$7,298	<ul style="list-style-type: none">Destination NSW to facilitate presentation and discussion with HVEACIdentification of strategic priorities for utilising the NSW Government investment and maximise the outcomes to be achieved for the areas.	X
Facilitation of a Hawkesbury Destination Management Plan (DMP)	<ul style="list-style-type: none">Co-ordination of Request for Quotation (RFQ) processEvaluation panel to assess RFQ submissionsContracting of successful contractorCo-ordination of inception meeting, stakeholder consultation and project milestones	Lead: Destination NSW Support/Input: HVEAC	In progress	\$58,410	<ul style="list-style-type: none">A Hawkesbury DMP that provides the key strategies and direction for the development and marketing of tourism and events.	✓
Project scoping total				\$65,708		
2017-2018 Year 1 key deliverables: action plan development and engagement of services						
DMP Project Manager	<ul style="list-style-type: none">Development of a Request For Tender (RFT) for a DMP Project Manager for 3 years to implement the DMPRFT goes to marketProgress contracting of applicant and determine roles and responsibilities	Lead: Destination NSW Support/Input: HVEAC	July 2017 - June 2018	\$150,000	<ul style="list-style-type: none">Base salary \$130k and allowance up to \$20k for administration expenses (office, car etc)Delivery and monitoring of DMP action itemsQuarterly update reports on key deliverables and KPIs	✓

Action	Tasks	Responsibility	Status	Budget (estimate)	KPI	MO Announceable
Content and media asset audit and development	<ul style="list-style-type: none"> Engagement of services to undertake analysis of content and media assets across all stakeholders against DMP Product Audit 	Lead: DMP Project Manager Support/Input: HVEAC, Destination NSW, LGAs	Plan development: July 2017 - September 2017 Delivery: October 2017 - June 2018	\$120,000	<ul style="list-style-type: none"> Audit of existing content and media assets across all stakeholders Development of content and media asset creation plan and priorities that focuses resources on the product and experiences that showcase the Hawkesbury region, aligned to core target markets 	✓
Event calendar audit and development	<ul style="list-style-type: none"> DMP Project Manager to conduct analysis of DMP Events Audit to identify ATDW listing targets, timeframes and process/communications for future events Analysis of DMP Map of events spread across the region, pillars and target markets to identify short and long-term opportunities to leverage and fill strategic gaps 	Lead: DMP Project Manager Support/Input: HVEAC, Destination NSW, LGAs	Plan development: July 2017 - September 2017 Delivery: October 2017 - June 2018	\$30,000	<ul style="list-style-type: none"> Audit of existing events calendar Development of events action plan that improves the Hawkesbury Region events offering by leveraging existing opportunities and identifying strategic gaps (includes event development/training opportunities, cluster opportunities to leverage Destination NSW It's On! marketing events program and develops a business case to develop new events that fill a strategic gap with a focus on sustainability) Event gap analysis to focus on pillars of water-based (canoe/kayak on River) and food (Hawkesbury Harvest, cooking schools, Masterchef, Kylie Kwong) 	✓
Product and Experience audit and development	<ul style="list-style-type: none"> DMP Project Manager to undertake analysis of DMP Product Audit to identify ATDW listing targets, timeframes and process/communications for refresh/future product Analysis of DMP Map of product spread across the region, pillars and target markets to identify short and long-term opportunities to refresh and develop new product and experiences 	Lead: DMP Project Manager Support/Input: HVEAC, Destination NSW, LGAs	Plan development: July 2017 - September 2017 Delivery: October 2017 - June 2018	\$30,000	<ul style="list-style-type: none"> Audit of existing product and experiences of the Hawkesbury Region Development of a product and experience action plan improves the Hawkesbury Region tourism offering by leveraging existing opportunities and identifying strategic gaps (includes industry development/training opportunities, tour/trail/itinerary development) 	✓
Hawkesbury Destination - region brand/identity development	<ul style="list-style-type: none"> Engagement of services to conduct through analysis of the product/experience, content/media asset and event calendar assessments, develop an RFQ for the contracting of marketing services to develop a brand for the Hawkesbury region, including broad stakeholder consultation and communication 	Lead: Destination NSW Support: DMP Project Manager, HVEAC, Destination NSW, LGAs	October 2017 - March 2018	\$80,000	<ul style="list-style-type: none"> A Hawkesbury Destination region/brand identity, as part of the Greater Sydney destination brand guidelines, including production of a toolkit and relevant messaging 	✓

Action	Tasks	Responsibility	Status	Budget (estimate)	KPI	MO Announceable
Public Relations plan development	<ul style="list-style-type: none"> PR agency to deliver PR plan to align with content and campaign development 	Lead: DMP Project Manager Support/Input: HVEAC, Destination NSW, LGAs	Plan development: July 2017 - September 2017 Delivery: October 2017 - June 2018	\$70,000	<ul style="list-style-type: none"> Engage agency for PR activity plan and delivery to generate awareness and understanding of the Hawkesbury region with core markets 	✓
Stakeholder engagement and communications	<ul style="list-style-type: none"> DMP Project Manager to identify and develop a stakeholder database and communications calendar 	Lead: DMP Project Manager Support/Input: HVEAC, Destination NSW, LGAs	Plan development: July 2017 - September 2017 Delivery: October 2017 - June 2018	\$15,000	<ul style="list-style-type: none"> Stakeholder database established and maintained Communications calendar developed and implemented Development and delivery of a stakeholder engagement and communications plan to gain buy-in and commitment from stakeholders to work together to implement the DMP and grow the Hawkesbury Region visitor economy. 	✓
Tourism Investment Prospectus/attraction	<ul style="list-style-type: none"> Engagement of services to conduct through analysis of the product/experience and event calendar assessments, develop an RFQ for the contracting of services to develop a Tourism Investment Prospectus to attract investment for key projects identified for the region 	Lead: DMP Project Manager Support/Input: HVEAC, Destination NSW, LGAs	October 2017 - March 2018	\$50,000	<ul style="list-style-type: none"> A Hawkesbury Region Investment Prospectus (printed and online versions) that showcases the tourism investment opportunities aimed at building the visitor economy. 	✓
Year 1 total				\$545,000		

2018-2019 Year 2 key deliverables: regional branding & content campaign in market

DMP Project Manager	<ul style="list-style-type: none"> Continuation of contract services of a DMP Project Manager to deliver on DMP action plan 	Lead: Destination NSW Support/Input: HVEAC	July 2018 - June 2019	\$150,000	<ul style="list-style-type: none"> Base salary \$130k and allowance up to \$20k for administration expenses (office, car etc) Delivery and monitoring of DMP action items Quarterly update reports on key deliverables and KPIs 	X
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Action	Tasks	Responsibility	Status	Budget (estimate)	KPI	MO Announceable
Content for marketing and Media Asset development	<ul style="list-style-type: none"> Contracted services to create new content for marketing and media assets aligned to the regions key pillars and core target markets 	Lead: DMP Project Manager/Contracted services Support/Input: HVEAC, Destination NSW, LGAs	July 2018 - June 2019	\$225,000	<ul style="list-style-type: none"> Delivery of Phase 1: Content plan and implementation for video, drone, photos and other related assets focusing on the product and experiences that showcase the Hawkesbury region, aligned to core target markets 	✓
Events calendar support and development	<ul style="list-style-type: none"> Improve the appeal of the events calendar aligned to the regions key pillars and core target markets 	Lead: DMP Project Manager Support/Input: HVEAC, Destination NSW, LGAs	July 2018 - June 2019	\$100,000	<ul style="list-style-type: none"> Delivery of events action plan that improves the Hawkesbury Region events offering by leveraging existing opportunities and identifying strategic gaps (includes event development/training opportunities, cluster opportunities to leverage Destination NSW It's On! marketing events program and develops a business case to develop 2 new iconic events that fill a strategic gap (food and water-based) with a focus on sustainability) 	✓
Product and Experience development	<ul style="list-style-type: none"> Improve tourism offering aligned to the regions key pillars and core target markets 	Lead: DMP Project Manager Support/Input: HVEAC, Destination NSW, LGAs	July 2018 - June 2019	\$100,000	<ul style="list-style-type: none"> Delivery of product and experience action plan that may include industry development/ training opportunities, tour/trail/itinerary development 	✓
Destination marketing campaign	<ul style="list-style-type: none"> Build awareness and increase overnight visitation to the Hawkesbury region 	Lead: Destination NSW/media agency Support/Input: DMP Project Manager, HVEAC, Destination NSW, LGAs	July 2018 - June 2019	\$250,000	<ul style="list-style-type: none"> Targeted (Always-On and co-operative partnership) campaign to drive incremental increase in overnight visitation as aligned to the Hawkesbury Region destination brand 	✓

Action	Tasks	Responsibility	Status	Budget (estimate)	KPI	MO Announceable
Public Relations plan development	<ul style="list-style-type: none"> Contracted services to deliver PR plan to align with content and campaign development 	Lead: DMP Project Manager/Contracted services Support/Input: HVEAC, Destination NSW, LGAs	Plan development: July 2017 - September 2017 Delivery: October 2017 - June 2018	\$100,000	<ul style="list-style-type: none"> PR agency to generate awareness of the region's key pillars 	✓
Building tourism operator and key stakeholder advocacy to drive the visitor economy	<ul style="list-style-type: none"> Building on the stakeholder engagement and communications plan, regional brand and tourism investment prospectus, generate local awareness, understanding and appreciation of the value of the visitor economy to the Hawkesbury Region 	Lead: DMP Project Manager Support/Input: HVEAC, Destination NSW, LGAs	July 2018 - June 2019	\$ 25,000	<ul style="list-style-type: none"> Promotion of the value of the Visitor Economy across the Hawkesbury Region to ensure it is ready for innovation and investment 	✓
Year 2 total				\$950,000		

2019-2020 Year 3: building advocacy and visitor experience

DMP Project Manager	<ul style="list-style-type: none"> Continuation of contract services of a DMP Project Manager to deliver on DMP action plan 	Lead: Destination NSW Support/Input: HVEAC	July 2019 - June 2020	\$150,000	<ul style="list-style-type: none"> Base salary \$130k and allowance up to \$20k for administration expenses (office, car etc) Delivery and monitoring of DMP action items Quarterly update reports on key deliverables and KPIs 	X
Content and media asset development	<ul style="list-style-type: none"> Improve the content and media assets aligned to the regions key pillars and core target markets 	Lead: DMP Project Manager/Contracted services Support/Input: HVEAC, Destination NSW, LGAs	July 2019 - June 2020	\$150,000	<ul style="list-style-type: none"> Delivery of Phase 2: Content and media asset creation plan that builds on phase 2 to showcase influencers, opinion leaders, testimonials and content of target markets enjoying the new products and experiences of the region. 	✓

Action	Tasks	Responsibility	Status	Budget (estimate)	KPI	MO Announceable
Events calendar support and development	<ul style="list-style-type: none"> Improve the appeal of the events calendar aligned to the regions key pillars and core target markets 	Lead: DMP Project Manager Support/Input: HVEAC, Destination NSW, LGAs	July 2019 - June 2020	\$100,000	<ul style="list-style-type: none"> Delivery of events action plan that improves the Hawkesbury Region events offering by leveraging existing opportunities and identifying strategic gaps (includes event development/training opportunities, cluster opportunities to leverage Destination NSW It's On! marketing events program and delivers 2 new iconic events that focuses on food and water-based activities) 	✓
Product and Experience development	<ul style="list-style-type: none"> Improve tourism offering aligned to the regions key pillars and core target markets 	Lead: DMP Project Manager Support/Input: HVEAC, Destination NSW, LGAs	July 2019 - June 2020	\$100,000	<ul style="list-style-type: none"> Delivery of product and experience action plan that improves the Hawkesbury Region tourism offering by leveraging existing opportunities and identifying strategic gaps (includes industry development/training opportunities, tour/trail/itinerary development), consult ITOs 	✓
Dedicated Destination Marketing campaign	<ul style="list-style-type: none"> Build awareness and increase overnight visitation to the Hawkesbury region 	Lead: Destination NSW/Media agency Support/Input: DMP Project Manager, HVEAC, Destination NSW, LGAs	July 2019 - June 2020	\$350,000	<ul style="list-style-type: none"> Implement the following campaign activities: <ul style="list-style-type: none"> 1) Highly targeted 'Always-On' digital and social media campaign (\$100k) 2) Dedicated campaign x2 per year that leverages co-operative partnerships Campaign activity aimed at driving incremental increase in overnight visitation as aligned to the Hawkesbury Region destination brand 	✓
Public Relations plan development	<ul style="list-style-type: none"> Contracted services to deliver PR plan to align with content and campaign development 	Lead: DMP Project Manager/Contracted services Support/Input: HVEAC, Destination NSW, LGAs	Plan development: July 2017 - September 2017 Delivery: October 2017 - June 2018	\$150,000	<ul style="list-style-type: none"> PR agency to generate awareness of the region's key pillars 	✓

Action	Tasks	Responsibility	Status	Budget (estimate)	KPI	MO Announceable
Building tourism operator and key stakeholder advocacy to drive the visitor economy	<ul style="list-style-type: none">Building on the stakeholder engagement and communications plan, regional brand and tourism investment prospectus development, generate local awareness, understanding and appreciation of the value of the visitor economy to the Hawkesbury region	Lead: DMP Project Manager Support/Input: HVEAC, Destination NSW, LGAs	July 2019 - June 2020	\$25,000	<ul style="list-style-type: none">Promotion of the value of the Visitor Economy across the Hawkesbury Region to ensure it is ready for innovation and investment	✓
Year 3 total				\$1,025,000		
Infrastructure ¹⁰⁶ & Contingency						
Support of key infrastructure development		Lead: DMP Project Manager Support/Input: HVEAC, Destination NSW, LGAs	Ongoing	\$214,292	<ul style="list-style-type: none">Activities, reports, consultants, workshops and other actions that support the development of key infrastructure identified for the Hawkesbury Region, as it pertains to the visitor economy (including focus groups, visitor impact studies and related reports)	X
Infrastructure total				\$214,292		
Contingency funds	<ul style="list-style-type: none">Upon agreement of the HVEAC, contingency funds to be allocated to projects aligned to delivery of the DMP			\$200,000		X
Contingency total				\$200,000		
Overall total				\$3,000,000		

¹⁰⁶ *Infrastructure has been identified as a key component of the Hawkesbury DMP, however action items and timelines are dependent on other factors beyond the control of the HVEAC. This includes the completion of the Hawkesbury River Precinct Business case being prepared by the Hawkesbury Council, Windsor town centre revitalisation and the attraction of grant and private investment funds.



Locally Grown
Cherry Tomatoes
\$1

Locally Grown
Lettuce
\$2

Locally Grown
Carrots
\$2

Locally Grown
Cherry Tomatoes
\$1

14. Supporting documentation

14.1. Supporting documentation 1 – literature review list

- Australian Tourism Data Warehouse (output provided by Destination NSW)
- Unprecedented Growth in Aussie Caravan and Camping holidays, 30 March 2017, Caravan Industry Association of Australia
- Domesticate 2016, TNS Australia
- Draft Blue Mountains Destination Management Plan, 2017, Blue Mountains City Council
- Draft Hawkesbury Community Strategic Plan 2017-2036, Hawkesbury City Council
- Draft North District Plan, 2016, Greater Sydney Commission
- Draft West Central District Plan, 2016, Greater Sydney Commission
- Draft West District Plan, 2016, Greater Sydney Commission
- Economic Impact Assessment of the Cruise Industry in Australia, 2015-16, Australian Cruise Association
- Final Report of the Visitor Economy Taskforce, 2012, Visitor Economy Taskforce
- Global Report on Food Tourism, UN World Tourism Organisation
- Hawkesbury City Community Profile - <http://profile.id.com.au/hawkesbury>
- Hawkesbury City Council Tourism Strategy, 2015, Hawkesbury City Council
- Hawkesbury Economic Profile - <http://www.economyprofile.com.au/hawkesbury/>
- Hawkesbury Horizon Handouts, Hawkesbury City Council
- Hawkesbury Stakeholder Research – Survey Summary, 2016, Destination NSW
- Hills, Hawkesbury and Riverlands DMP, Hills Hawkesbury and Riverlands Tourism, 2013
- Hornsby Shire Community Profile - <http://profile.id.com.au/hornsby>
- Hornsby Shire Economic Profile - <http://economy.id.com.au/hornsby>
- Local Government Area Profiles for Hawkesbury, The Hills and Hornsby, 2014 – 2016, Destination NSW
- Market Segment Profiles, 2015-2015, Destination NSW
- Nature-based tourism, Tourism Australia - <http://www.tourism.australia.com/nature-based-tourism.aspx>
- NSW State Tourism Statistics, 2016, Destination NSW
- Postcode data report, Caravan Industry of Australia
- Sydney Tourism Statistics, 2016, Destination NSW
- The Hills Future Community Strategic Plan 2015-2016, The Hills Shire Council
- The Hills Shire Community Profile - <http://profile.id.com.au/the-hills>
- The Hills Shire Economic Profile - <http://www.economyprofile.com.au/thehills>
- Trends affecting our industry over the next decade and beyond, Caravan and Camping Industry Association NSW and Manufactured Housing Industry Association NSW
- Western Sydney City Deal Fact Sheet, Australian Government – <https://cities.dpmc.gov.au/22446/documents/44846>
- Your Community Plan 2013-2023, Hornsby Shire Council
- 2015-16 Annual Report, Port Authority of NSW

14.2. Supporting documentation 2 - Committee members

Table 18: Committee Members

Representative			Position	Organisation
Mr	Anthony	Miller		Rotary Club of Windsor Inc.
Mr	David	O'Neil	CEO	Castle Hill RSL Group
Mr	Paul	Maher	Manager	Loxley on Bellbird Hill
Mrs	Kimberley	Talbot	CEO	Richmond Club
Mr	Tony	Jeffcott	General Manager	Windsor RSL Club
Ms	Carol	Giuseppi	CEO	Tourism Accommodation Australia
Mr	David	Ross	General Manager	The Sebel Resort and Spa Hawkesbury
Mr	Ian	Knowd	Treasurer	Hawkesbury Harvest
Mr	Michael	Sperling		Bilpin Springs Lodge
Mr	Bill	McNamara	Manager	Del Rio Riverside Resort
Mr	Rod	Cowdroy	Managing Director	Tobruk Sheep Station
Mr	Peter	Higgins	President / CEO	Sydney Polo Club Pty Ltd
Mr	Martin	Boetz		Food Producer /Restaurateur (influencer in Food & Wine space)
Mr	Greg	Rudolph	CEO	Hawkesbury Race Club Limited
Ms	Sue	Guymer		Colo Resident
Cr	Sarah	Richards		Hawkesbury City Council
The Hon.	Dominic	Perrottet MP	NSW State Treasurer	Member for Hawkesbury

14.3. Supporting documentation 3 – DMP and Action Plan consultation list

Table 19: DMP and Action Plan Consultation List

Names	Category	Position	Organisation
Councillor Emma-Jane Garrow	Councillor	Councillor (Chair of the Council Tourism Committee)	Hawkesbury City Council
Councillor Paul Rasmussen	Councillor	Councillor (member of the Council Tourism Committee)	Hawkesbury City Council
Councillor Sarah Richards	Councillor	Councillor (Deputy Chair of the Council Tourism Committee and on the Ministers Advisory Committee)	Hawkesbury City Council
Fiona Mann	Council Personnel	Strategic Planner and Coordinator of the Council Tourism Committee	Hawkesbury City Council
Kerry	Council Personnel	Manager of the Art Gallery and Cultural Facilities	Hawkesbury City Council
Suzanne Stuart	Council Personnel	Strategic Planner, Environment	Hawkesbury City Council
Peter Conroy	Council Personnel	Incoming General Manager	Hawkesbury City Council
Belinda Mitrovich	Council Personnel	Ex but still involved in the region	Hawkesbury VIC
Shari Hussein	Council Personnel	Manager, Development Planning	Hawkesbury City Council
Christopher Snelling	Industry operator	-	Powerhouse Museum / Cultural events
Megan Wood	Industry operator	-	Richmond Mainstreet Inc
Gina Porteous	Industry operator	-	Bilpin House B&B
Mike Sperling	Industry operator	-	Bilpin Springs Lodge
Angelo and Alannah	Industry operator	-	Cornwallis House
Anthony Miller	Industry operator	Director	Rotary Club of Windsor Inc.
David O'Neil	Industry operator	CEO	Castle Hill RSL Group

Names	Category	Position	Organisation
Paul Maher	Industry operator	Manager	Loxley on Bellbird Hill
Kimberley Talbot	Industry operator	CEO	Richmond Club
Tony Jeffcott	Industry operator	General Manager	Windsor RSL Club
Carol Giuseppi	Industry operator	CEO	Tourism Accommodation Australia
David Ross	Industry operator	General Manager	The Sebel Resort and Spa Hawkesbury
Ian Knowd	Industry operator	Treasurer	Hawkesbury Harvest
Bill McNamara and Sharon	Industry operator	Owner and Manager	Del Rio Riverside Resort
Rod Cowdroy	Industry operator	Managing Director	Tobruk Sheep Station
Peter Higgins	Industry operator	President / CEO	Sydney Polo Club Pty Ltd
Greg Rudolph	Industry operator	CEO	Hawkesbury Race Club Limited
Sue Guymer	Industry operator	Richmond Airforce Base	Colo Resident
Simon McGrath	Industry operator	COO Asia Pacific	Accor
Matt	Industry operator	Ex Big 4 Caravan Parks Director	Destination Holiday Park consultant
Venecia Wilson	Industry operator	Heritage consultant – Council Tourism Committee	Hawkesbury resident
Vanessa Hanna	Industry operator	Council Tourism Committee	Richmond Markets
Sophie Devine	Industry operator	Council Tourism Committee	Retailer
Declan Blue	Industry operator	Council Tourism Committee	Resident
Sarah Rieger	Industry operator	Council Tourism Committee	Retailer

14.4. Supporting documentation 4 – full product audit

Table 20: Full accommodation audit

Name	Type	ATDW List	Total Rooms	Total Powered	Total Unpowered
Able Hawkesbury River Houseboats - Kayaks and Dayboats	Apartments	Yes	9		
Bandusia Country Retreat	Farmstays	Yes	9		
Blueberry Hills On Comleroy	Farmstays	Yes	2		
Carinya Ski Ranch	Caravan, Camping and Holiday Parks	Yes	3	-	-
Coach House Hill Cottage	Bed and Breakfast	Yes			
Cornwallis House	Holiday Houses	Yes	4		
Del Rio Riverside Resort	Caravan, Camping and Holiday Parks	Yes	54	20	106
Happy Buddha Retreats	Retreat and Lodges	Yes			
Hawkesbury Race Club Motel	Motels	Yes	30		
Hawkesbury Riverside Tourist Park	Caravan, Camping and Holiday Parks	Yes	-	-	-
Hermitage Cottage	Cottages	Yes	2		
Highfields Country Cottages	Cottages	Yes	-		
Juniors on Hawkesbury	Resorts	Yes	29		
Koorawal	Bed and Breakfast	Yes	-		
Kurrajong Trails and Cottages	Cottages	Yes	4		
Loxley on Bellbird Hill	Retreat and Lodges	Yes	39		
Lutanda Yarramundi	Apartments	Yes	38	-	-
Madisons Mountain Retreat	Farmstays	Yes	8		
Ossian Hall Valley Retreat	Bed and Breakfast	Yes	3		
Plynlimmon: The Cottage at Kurrajong	Cottages	Yes	-	-	-
Price Morris Cottage	Cottages	Yes	1		
Riverside Oaks Golf Resort	Resorts	Yes	36		
Riverview Nature Retreat	Cottages	Yes	-		
Rustic Spirit	Bed and Breakfast	Yes	6		
Sefton Cottage	Cottages	Yes			
Singletons Retreat	Retreat and Lodges	Yes	3		

Name	Type	ATDW List	Total Rooms	Total Powered	Total Unpowered
Spicers Sangoma Retreat	Retreat and Lodges	Yes	-		
Sydney Getaway Holiday Park	Caravan, Camping and Holiday Parks	Yes	-	-	-
Tabaraga Ridge Eco House	Cottages	Yes	-		
The Maples	Cottages	Yes	4		
The Retreat at Wisemans	Resorts	Yes	54		
The Sebel Resort And Spa Hawkesbury Valley	Resorts	Yes	105		
Tizzana Winery Bed And Breakfast	Bed and Breakfast	Yes	2		
Tobruk Sydney Farm Stay	Farmstays	Yes			
Trafalgar Bed and Breakfast	Bed and Breakfast	Yes	-		
Trellises Guest House	Bed and Breakfast	Yes	15		
Views at Kenthurst	Bed and breakfast	Yes	-	-	-
Western Sydney University Village Hawkesbury	Apartments	Yes	30		
Wheelbarrow Lodge Bed and Breakfast	Bed and Breakfast	Yes	4		
Wisemans Inn Hotel	Hotels	Yes	11		
Wollemi Cabins	Holiday Houses	Yes	-		
Forgotten Valley Country Retreat	Retreat and Lodges	No	3		
Ferndale Country Retreat	Retreat and Lodges	No	20		
Koveda Holiday Park	Caravan, Camping and Holiday Parks	No	-		
NSW Water Ski Gardens	Caravan, Camping and Holiday Parks	No	-	-	-
Paradise Afloat Houseboats	Apartments	No	2		
Percy's Place	Caravan, Camping and Holiday Parks	No	-	-	-
A Spot on the River	Bed and Breakfast	No	1		
Alexander the Great Motel	Motels	No	25		
Ararat Lodge	Retreat and Lodges	No	6		

Name	Type	ATDW List	Total Rooms	Total Powered	Total Unpowered
A-Vina Van Village	Caravan, Camping and Holiday Parks	No	70	45	-
Banjara Retreat	Retreat and Lodges	No	1		
Bellbirds B&B	Bed and Breakfast	No	28		
Best Western Colonial Motel	Motels	No	39		
Bielany	Caravan, Camping and Holiday Parks	No	-	-	-
Bilpin Resort	Resorts	No	5		
Bilpin Springs Lodge	Retreat and Lodges	No	5		
Blue Mountain Cabins	Retreat and Lodges	No	5		
Bowens Creek Cottage	Cottages	No	1		
Butterfly Farm	Caravan, Camping and Holiday Parks	No	-	-	-
Cedar Rose Cottage incl. Tomah and The Main House	Cottages	No	-		
Chapel Hill Retreat	Retreat and Lodges	No	7		
Chapel, The (James Rose)	Cottages	No	-		
Cooks Co-Op Cottage	Cottages	No	1		
Court House, The	Bed and Breakfast	No	4		
Cliftonville Lodge Resort	Retreat and Lodges	No	20		
Cupitt's Cottage (James Rose)	Cottages	No	1		
DC Hawkesbury Get-A-Way	Bed and Breakfast	No	-		
Ding Dang Doo Ranch	Bed and Breakfast	No	-		
Dreamwood Estate	Bed and Breakfast	No	2		
Farm Panaroma	Bed and Breakfast	No	3		
Gateway Motel, The	Motels	No	44		
Ghost Hill Rd Retreat	Retreat and Lodges	No	2		
Glenhuntly Retreat	Retreat and Lodges	No	2		
Heritage Hotel/Motel	Motels	No	-		
Hidden Valley Retreat Cottages	Cottages	No	4		
Highview Cottage	Cottages	No	-		

Name	Type	ATDW List	Total Rooms	Total Powered	Total Unpowered
Jerimuda B&B	Bed and Breakfast	No	3		
King Cottage Wilberforce	Cottages	No	1		
Kurrajong Farmhouse Homestay	Farmstays	No	-		
Maples Cottage, The	Cottages	No	2		
Merroo Christian Centre	Retreat and Lodges	No	-		
Mill Paddock Cottage	Cottages	No	-		
Mirradong Cottage	Cottages	No	-		
Mountain Devil	Bed and Breakfast	No	1		
Nana & Pa's Retreat	Bed and Breakfast	Yes	3		
New Inn, The	Motels	No	-		
Racing Stables, The	Bed and Breakfast	No	-		
Remony Farm	Farmstays	No	3		
Richmond Inn	Motels	No	-		
Riverside Ski Park	Caravan, Camping and Holiday Parks	No	0	10	10
Rivervalley Lodge	Bed and Breakfast	No	4		
Rosehaven at Bilpin	Bed and Breakfast	No	4		
St Joseph's Guesthouse	Holiday Houses	No	-		
Sunset Cottages	Cottages	No	2		
Suz River Views	Bed and Breakfast	No	1		
Wanderest Travellers Park	Caravan, Camping and Holiday Parks	No	0	10	12
Willows at Kurrajong, The	Bed and Breakfast	No	-		
Windsong Cottage	Bed and Breakfast	No	2		
Windsor Cottage (James Rose)	Cottages	No	1		
Windsor Motel	Motels	No	23		
Windsor Riverside Van Park	Caravan, Camping and Holiday Parks	No	-	-	-
Windsor Terrace Motel	Motels	No	24		
Wisemans Ferry Cottage	Cottages	No	2		
Woodmere	Holiday Houses	No	1		
Yanada Retreat	Retreat and Lodges	No	6		
Cattai Campground	Caravan, Camping and Holiday Parks	Yes			

Name	Type	ATDW List	Total Rooms	Total Powered	Total Unpowered
Upper Colo Reserve	Caravan, Camping and Holiday Parks	No			
Colo Meroo Campground	Caravan, Camping and Holiday Parks	No			
Gentlemans Halt Campground	Caravan, Camping and Holiday Parks	No			

Name	Type	ATDW List	Total Rooms	Total Powered	Total Unpowered
Heartbreak Hill Campground	Caravan, Camping and Holiday Parks	No			
Mogo Campground	Caravan, Camping and Holiday Parks	No			
Burralow Creek Campground	Caravan, Camping and Holiday Parks	No			

Table 21: Full experiences and attractions audit

Name	Type	ATDW Listing
Canoelands Orchard	Produce	Yes
Ebenezer Church	Historical Sites and Heritage Locations	Yes
Enniskillen Orchard	Produce	Yes
Ferry Artists Gallery	Galleries, Museums and Collections	Yes
Good Az Gold Tours and Transfers Coach Hire	Hire Services	Yes
Governor Phillip Park	Parks and Gardens	Yes
Hawkesbury Harvest Farm Gate Trail	Produce	Yes
Hawkesbury Kayaks at Wisemans Ferry	Hire Services	Yes
Hawkesbury Paddlewheeler	Tour	Yes
Hawkesbury Race Club	Sports and Recreation Facilities	Yes
Hawkesbury Regional Gallery	Galleries, Museums and Collections	Yes
Hawkesbury Regional Museum	Galleries, Museums and Collections	Yes
Hawkesbury Regional Museum Visitor Centre	Visitor Information Centre	Yes
Hawkesbury Sightseeing Tours	Tour	Yes
Hawkesbury Valley Heritage Tours	Tour	Yes
Hawkesbury Visitor Information Centre	Visitor Information Centre	Yes
Howe Park	Parks and Gardens	Yes
Humming in a Hummer	Transport Services	Yes
Kurrajong Radio Museum	Galleries, Museums and Collections	Yes
Kurrajong Village	Shopping and Markets	Yes
Lynwood Country Club	Sports and Recreation Facilities	Yes

Name	Type	ATDW Listing
Macquarie Princess Cruises	Tour	Yes
Purple Noon Gallery	Galleries, Museums and Collections	Yes
Rallyschool Western Sydney	Sports and Recreation Facilities	Yes
Riverside Oaks Golf Course	Sports and Recreation Facilities	Yes
St Matthews Anglican Church	Historical Sites and Heritage Locations	Yes
Sundari	Spas and Retreats	Yes
Sydney Trail Riding Centre	Sports and Recreation Facilities	Yes
The Australian Pioneer Village	Historical Sites and Heritage Locations	Yes
Tizzana Winery	Wineries	Yes
Tobruk Sydney	Agri, Mining and Industry	Yes
Trees Adventure Grose River Park	Sports and Recreation Facilities	Yes
Villa Thalgo	Spas and Retreats	Yes
Windsor Heritage Walk	Historical Sites and Heritage Locations	Yes
Bellbird Hill Lookout	Natural Attractions	No
Bellsridge Cottage	Galleries, Museums and Collections	No
Bilpin Cider	Breweries	No
Black Diamond Wakeboarding	Sports and Recreation Facilities	No
Blue Mountains Glow Worm Tours	Tour	No
Bowman Cottage	Historical Sites and Heritage Locations	No
Butterfly Farm / Indy 800 Kart Track	Sports and Recreation Facilities	No
Caradon Leisure Park	Sports and Recreation Facilities	No
Cattai National Park	Natural Attractions	No

Name	Type	ATDW Listing
Cloud 9 Balloon Flights	Sports and Recreation Facilities	No
Cobham Hall Museum	Galleries, Museums and Collections	No
Crago Observatory	Observatories and Planetariums	No
Dargle Water Ski Resort	Sports and Recreation Facilities	No
Denmar Coaches	Transport Services	No
Ford's Farm	Produce	No
Hawkesbury BMX Club	Sports and Recreation Facilities	No
Hawkesbury Powered Parachute Centre	Sports and Recreation Facilities	No
Hawkesbury River Charter	Hire Services	No
Hawkesbury Vegetable Farm	Produce	No
Hawkins Lookout	Natural Attractions	No
Heliblow Pty Ltd	Sports and Recreation Facilities	No
Hellarewe Adventures - 4WD Tours and Bushwalks	Tour	No
Hillbilly Cider	Breweries	No
Ironbark Distillery	Breweries	No
Jubilee Vineyard Estate	Wineries	No
Kasarina Vineyard	Wineries	No
Kurrajong Heights Grass Karts	Sports and Recreation Facilities	No
Macquarie Trail	Historical Sites and Heritage Locations	No
Marramarra National Park	Natural Attractions	No
North Richmond Skate Park	Sports and Recreation Facilities	No
NSW Water Ski Gardens	Sports and Recreation Facilities	No
Off Road Rush	Sports and Recreation Facilities	No
Pacific Park Waterski and Motocross	Sports and Recreation Facilities	No
Pine Crest Orchard	Produce	No
Planet X Indoor Trampoline Park	Sports and Recreation Facilities	No
Richmond Golf Club	Sports and Recreation Facilities	No
Richmond Pool	Sports and Recreation Facilities	No
Richmond Regent Twin Cinema	Entertainment Venues	No
Riverside Ski Park	Sports and Recreation Facilities	No
Rum Corps Barracks Golf Course	Sports and Recreation Facilities	No
Scheyville National Park	Natural Attractions	No
Secret Garden & Nursery	Parks and Gardens	No

Name	Type	ATDW Listing
Sydney Ski School	Sports and Recreation Facilities	No
Sydney Waterski and Wakeboard	Sports and Recreation Facilities	No
Tanglin Lodge Alpacas	Agri, Mining and Industry	No
Tic Toc Equestrian	Sports and Recreation Facilities	No
Torrens Water Ski Gardens	Sports and Recreation Facilities	No
Ultimate Paintball	Sports and Recreation Facilities	No
Upper Hawkesbury PowerBoat Club	Sports and Recreation Facilities	No
Valley View Park	Sports and Recreation Facilities	No
Watkins Orchard	Produce	No
Wildwood Garden	Parks and Gardens	No
Windsor Canoe Club	Sports and Recreation Facilities	No
Windsor Country Club	Sports and Recreation Facilities	No
Windsor Ghost Tours	Tour	No
Windsor Tenpin Bowl	Sports and Recreation Facilities	No
Wisemans Ferry Golf Course	Sports and Recreation Facilities	No
Wisemans Ferry Water Sports	Sports and Recreation Facilities	No
Yengo National Park	Natural Attractions	No
Yvonne West Fine Art Studio	Galleries, Museums and Collections	No
Town and Country Gardens	Produce	No
Bilpin Springs Orchard	Produce	No
Helleborus Down Under	Produce	No
Saliba Fruits	Produce	No
TNT Produce	Produce	No
Shields Orchard	Produce	No
Bilpin Fruit Bowl	Produce	No
Riverview Produce	Produce	No
Schofields Orchard	Produce	No
Historic Hawkesbury Agricultural College: Walking Tour	Tour	No
Hawkesbury EarthCare Centre	Agri, Mining and Industry	No
M&R Fresh Vegies	Produce	No
Kurrajong Australian Native Foods	Produce	No
T&T Fresh Farm	Produce	No
St Albans Nut Company	Produce	No
Parr State Conservation Area	Natural Attractions	Yes

Name	Type	ATDW Listing
Cattai Homestead and Historic Farm Buildings	Historical Sites and Heritage Locations	Yes
Cattai Farm picnic area	Natural Attractions	Yes
Mitchell Park picnic area	Natural Attractions	Yes

Name	Type	ATDW Listing
Greater Blue Mountains Drive - The Mounts	Natural Attractions	Yes
Longneck Lagoon Walking Track	Natural Attractions	Yes
Canoelands Ridge Walking Track	Natural Attractions	Yes
Old Great North Road - World Heritage Walk	Natural Attractions	Yes

Table 22: Full events audit

Name	Type	ATDW Listing
Art In Action	Classes, Lessons, Workshops and Talks	Yes
Australian Stock Horse Society County of Cumberland ASH Branch Annual Show	Sporting Events	Yes
Bridge To Bridge Water Ski Classic	Sporting Events	Yes
Collectors Plant Fair	Exhibition and Shows	Yes
Hobby Show and Show N Shine	Exhibition and Shows	Yes
JAM Festival	Festivals and Celebrations	Yes
Orchids Out West	Exhibition and Shows	Yes
St Albans Writers Festival	Classes, Lessons, Workshops and Talks	Yes
Stamp, Coin and Collectables Fair	Markets	Yes
Sydney Blues and Roots Festival	Festivals and Celebrations	Yes
The Song Company presents Accidental Plans: Richmond	Concert or Performance	Yes
Trash and Treasure at East Kurrajong School of Arts	Markets	Yes
True Grit - Australian 24 Hour Enduro	Sporting Events	Yes
True Grit Military Inspired Obstacle Challenge	Sporting Events	Yes
Twilight Markets at East Kurrajong School of Arts	Markets	Yes
Australian Rotary Health Wine, Food and Music Race Day	Food and Wine	No
Australia Day Celebrations	Festivals and Celebrations	No
Hawkesbury Double Dash	Sporting Events	No
Hawkesbury Canoe Classic	Sporting Events	No
Hawkesbury Show	Exhibition and Shows	No
Kurrajong Village Markets	Markets	No
Lions Club Richmond Markets	Markets	No
Richmond Good Food Market	Markets	No
Rotary Market	Markets	No
Tobruk Mobile Shows	Exhibition and Shows	No
Windsor Mall Craft Markets	Markets	No
Windsor Riverside Markets	Markets	No
World Polo Championship	Sporting Events	No
A VIP Camping Experience Designed for First Time Campers	Community Event	Yes
Windsor Riverside Christmas Market	Markets	Yes
Glenorie Growers Market	Markets	Yes

Table 23: Full food and beverage audit

Name	Type	ATDW Listing
Glenorie RSL Club	Restaurant/Bar	Yes
Windsor RSL	Restaurant/Bar	Yes
Lochiel House	Restaurant/Bar	Yes
The Riverbend Restaurant @ Australis Retreat Wisemans Ferry	Restaurant/Bar	Yes
Archibald Hotel	Restaurant/Bar	Yes
Barrel 58	Restaurant/Bar	Yes
Bungool	Restaurant/Bar	Yes
Busby's Cafe Restaurant	Café	Yes
Kravings	Restaurant/Bar	Yes
Riverside Oaks	Restaurant/Bar	Yes

Name	Type	ATDW Listing
Sassafras Creek Cafe	Café	Yes
Tandoori Village	Restaurant/Bar	Yes
Marquise Bar	Restaurant/Bar	Yes
The Church Bar	Restaurant/Bar	Yes
The Grill on George	Restaurant/Bar	Yes
Biviano's	Restaurant/Bar	Yes
Easy Lane	Restaurant/Bar	Yes
Sebel Resort & Spa Hawkesbury Valley Harvest Restaurant	Restaurant/Bar	Yes
Illusions Lounge	Restaurant/Bar	Yes
Richmond Club	Restaurant/Bar	No



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