

PENRITH DESTINATION MANAGEMENT PLAN

Prepared for Penrith City Council, April 2015



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1. Executive Summary

1. Executive Summary

The Stafford Group (The Group) was commissioned by Penrith City Council (Council) to develop a Destination Management Plan (DMP) for Penrith. The DMP is being developed to consolidate and build the visitor economy, with the anticipated outcome of enabling all stakeholders, at all levels of government and private investors, to have a clear view of the tourism investment opportunities and requirements in the Penrith Local Government Area (LGA).

1.1. A SNAPSHOT OF PENRITH LGA AND ITS TOURISM SECTOR

Penrith LGA, situated in Western Sydney, has a population of just over 190k. The LGA is one of the main service centres of greater Western Sydney, providing a range of amenities, jobs, services and infrastructure to a catchment of over 500k residents within Penrith and in surrounding LGAs. Penrith LGA is well recognised as one of the major growth centres in Western Sydney.

Over the past 10 years, Penrith's population has continued to grow and this trend is expected to continue into the foreseeable future.

Penrith LGA receives approximately 1.3m visitors per annum.¹ The majority (78%) of visitors are day trippers, visiting the LGA for leisure (including visiting family and friends), events and business etc. Domestic overnight visitors account for just over 20% of visitors. International visitation is small (1%), with visitations primarily coming from NZ (27%) and the UK (21%). The vast majority of Penrith's existing visitor base is made up of those from the greater Sydney region.

Penrith's tourism industry is primarily associated with visiting friends and relatives and events and festivals, particularly those associated with sports and recreation. In addition, natural assets such as the Nepean River and the Penrith Lakes Scheme are located in the Penrith LGA and have potential to be major drivers of increased visitation.

¹ Special data request to Destination NSW.

1.2. ISSUES AND GAPS

A number of issues and gaps in the LGA's tourism sector have been identified. The figure on the following page provides a succinct summary of these issues and gaps.

Importantly, the responsibility for resolving these broad ranging issues does not fall squarely on Council's shoulders but rather, requires the active participation of both Council and the tourism industry within the Penrith LGA.

FIGURE 1: ISSUES AND GAPS

Product and supporting infrastructure issues	Marketing issues	Other issues
Lack of Accommodation	Lack of Dynamic Tourism/Destination Website	Lack of synergy between the CBD and River
Lack of Signage – Interpretive and Directional	Lack of a Media Database	Limited Retail Trading Hours
Lack of Sufficient Hallmark Events and Festivals	Market Perception of Penrith as being the gateway to the Blue Mountains	Lack of Planning Zones Designated for Tourism
Public Transport Services to Key Tourism Attractions within the LGA & Coordination Between Different Forms of Public Transport	Lack of Linkage with the Blue Mountains and Other Surrounding LGAs	Link to Education Sector
	Lack of local awareness of the Importance of the Tourism Industry to the Local Economy	Lack of Linkage between Tourism & the Arts/Culture Sector
	Inclusion within the "Greater Sydney Region" (along with many others)	Need for Penrith CBD Revitalisation
		Dominance of Penrith Panthers
		Lack of Activation of Natural Assets

1.3. THE OPPORTUNITIES

Opportunities have been categorised according to:

- Tourism investment and development;
- Marketing and promotion; and
- Supporting infrastructure and coordination.

The realisation of these opportunities will help stimulate stronger visitor growth, increased length of stay, visitor spend and better focussed profiling for the Penrith LGA.

It is also important to note that several of the opportunities identified are currently midway through being implemented by Council. They have been noted here to reiterate the need for these initiatives (such as the website, information touch screen kiosks, media database etc).

TOURISM INVESTMENT OPPORTUNITIES

- **Additional Hotel Accommodation** – Assess demand for a second major hotel to offer more quality room stock and extend the length of visitor stay in the LGA (to allow for packaging of adventure and other tourism product);
- **Expanded Activity at Penrith Lakes** – more soft and active adventure activities (climbing walls etc), high ropes course, a ski jump for professional snow ski jump practice, paddle steamer (lunch time cruises etc.);
- **Creating The Experience Hub** – centralised experience hub with ticketing facility and information sharing outlet (similar to a smaller version of The Station at Queenstown, NZ);
- **Destination Caravan Park** – development of a quality destination-style caravan park with possibly 80-120 caravan/camping sites and 30 cabins; and
- **Major Caravan/Campervan Service Centre** – creation of a major service centre for caravans, campervans, trailers and camping equipment to support a major destination holiday park (helping to position Penrith as the caravan/campervan hub for Greater Sydney).

MARKETING OPPORTUNITIES

- **Development of a Tourism and Cultural Precinct** – develop a marketing cluster of activity operators as well as arts and cultural facilities to collectively market these attractors;
- **Semi and Active Activity Product for Cruise Industry** – packaging in with cruise ship day trip experiences (they already drive past en route to the Blue Mountains);
- **Selling Penrith Campaign** – rebrand and reposition Penrith as a destination in its own right (a tourism brand for the LGA, rather than the City brand which has already been undertaken). This is needed to move on from Penrith being perceived as the gateway to the Blue Mountains.
- **Website and Linked Mobile App (or Mobile Accessible Website)** – This is currently underway but needs to be well integrated, high quality and rolled out by December 2015;
- **Packaging of Product** – packaging of visitor experiences, attractions, transport options and accommodation throughout Penrith as well as cross-LGA packaging with the Blue Mountains and Hawkesbury in particular as these other LGA's offer complimentary product;
- **Events Calendar and Promotion** – in 2014, there were over 54 tourism based events/festivals etc. there is a need for a unified events calendar to help minimise events clashing and enable better planning and a focus on supporting and growing 6 – 8 hallmark events;
- **Tourism Awareness Campaign** – grow the community's awareness of the importance of the tourism industry to the local economy (direct and indirectly) and the vibrancy of the LGA; and
- **Coordinated cultural tourism support program** – to include cultural event development, banners and flags to profile cultural institutions and sites, cultural attraction map and to link this to food experiences such as cafes, restaurants and food markets.

SUPPORTING INFRASTRUCTURE AND COORDINATION OPPORTUNITIES.

- **Tourism Advisory Group** – Council to establish a Tourism Advisory Group, comprising tourism industry stakeholders and Council, to help drive selected recommendations from this DMP;
- **Signage Program** – Development of action plan for improving both directional (way finding) and interpretive signage throughout the LGA (M4 and The Northern Road);
- **Streetscaping Gateways into the LGA** - To create a stronger sense of arrival into the Penrith destination, commission a gateway landscaping strategy for streetscaping each of the primary arrival points into the LGA;
- **Customer Service Program** – Improve customer service standards. Council could potentially access training initiatives and funding via State Government or industry associations such as NSW TIC to help raise service standards generally, including retail;
- **Stimulate Investment into Penrith** – Develop an investment memorandum to outline the types of tourism development Council would like to see within the LGA and the areas throughout the LGA which are suitable for the development of tourism facilities and are more likely to get Council's support;
- **Roving Ambassador Program:** Creation of a volunteer roving ambassador program to be utilised during periods of peak visitation such as major events etc. They can provide directions, general information etc. to visitors to the LGA and may be situated at main tourism hotspots, town centres etc; and
- **Link to Badgerys Creek Airport:** Picking up on the number of international and domestic travellers who are likely to use Badgerys Creek Airport and who will look for day activities within easy access of the airport.

1.4. AN LTO FOR THE PENRITH LGA

One of the challenges which the tourism sector in Penrith faces is the ability to create a unified voice for lobbying Government at all levels for various forms of support.

Whilst Council have indicated they are keen to eventually see the establishment of an industry operated Local Tourism Organisation (LTO) to act as the LGA's peak tourism body, the current level of tourism sector evolution in Penrith makes this outcome slightly premature.

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

For the interim we would therefore recommend the establishment of a Tourism Advisory Group (TAG), comprising members representing various sub-sectors of the tourism sector and Council

personnel. Council will need to provide a facilitation and secretariat role to ensure the TAG remains focused and does not lose momentum.

As Council has agreed to play a more significant role as an enabler of tourism throughout the LGA, this offers an appropriate interim step until such time in the future that a strong and coordinated LTO is able to be established.

1.5. GOING FORWARD

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

The recommendations provided in this DMP focus on options that identify marketing, product development and tourism investment opportunities which can be stimulants to develop a more unified direction forward for Penrith and to encourage additional investment into and stronger marketing of the LGA.

Industry feedback gathered through the consultation for this DMP clearly indicated that focusing on marketing of existing product alone will not activate the opportunities identified and address the challenges; there is a recognised need for new product (particularly different forms of accommodation product) and greater industry cohesion to grow tourism for the LGA.

1.6. PENRITH'S POINT OF DIFFERENCE

Whilst Penrith is currently positioned as one of the three major growth centres in Western Sydney, from a tourism perspective, it needs to have its own unique point of difference.

The major natural features which can provide this unique point of difference are water based; via the future activation of Penrith Lakes and the Nepean River. No other LGA's in Greater Sydney (excluding those on the coast or harbour) can offer this major natural feature. Importantly however, Penrith Lakes and the Nepean River require activation for "tourism development" to change these water based assets from merely features to actual attractions. Tourism's needs are also totally in harmony with environmental and sustainability needs for these waterways.

These water based features, coupled with the growth in new visitor experiences, offers the base to support a number of new tourism investment opportunities and to provide further amenities to the local community.



2. Introduction

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2.1. PROJECT OVERVIEW

The Stafford Group (The Group) was commissioned by Penrith City Council (Council) to develop a Destination Management Plan (DMP) for Penrith. The DMP is being developed to consolidate and build the visitor economy, with the anticipated outcome of enabling all stakeholders, at all levels of government and private investors, to have a clear view of the tourism investment opportunities and requirements in the Penrith Local Government Area (LGA).

2.2. METHODOLOGY

The process adopted to complete this DMP has involved the following:

- Ongoing liaison with Council to gather additional information, to discuss the consultation program for the DMP and to share observations and analysis;
- An ongoing literature review to build a strong context for the DMP and to fully understand projects and strategies as well as relevant government policies affecting Penrith;
- Consultation with Council stakeholders as well as a selection of tourism industry stakeholders²;
- Desktop research, including a full audit of tourism product within the Penrith LGA.
- A number of dedicated visits to Penrith to review product, meet with operators and assess new opportunities and potential development sites;
- Liaison with industry operators (accommodation operators, food and beverage providers, farm operators, attraction operators etc.);
- Structured meetings with Council to discuss the vision for tourism, infrastructure, development and interrelationship with operators and discussion around related projects such as business parks, stadia, town centre revitalisation and education sector development;
- Compilation of the three progress report findings into a draft DMP to highlight issues and opportunities which need to be considered by Council in particular;
- Meetings with Council to discuss the draft DMP findings;
- Preparation of the draft DMP after feedback with Council and other stakeholders including key State Government agencies; and
- Finalisation of the DMP.

² For a list of stakeholders consulted with as part of this DMP, please see Supporting Documentation 1.



3. Situation Analysis

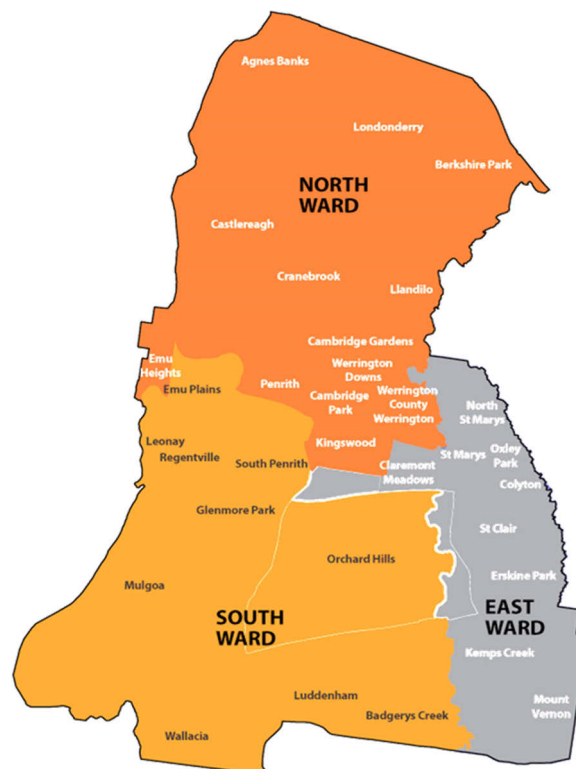
3. Situation Analysis

3.1. THE PENRITH TOURISM REGION

Penrith LGA is located roughly 50km from Sydney CBD and covers approximately 405km².

The LGA boundaries are Colyton and Oxley Park in the east, Emu Plains in the west, Wallacia, Luddenham and Kemps Creek in the South and Agnes Banks and Berkshire Park in the north. Neighbouring LGAs include: Blue Mountains City Council, Hawkesbury City Council, Blacktown City Council, Fairfield City Council, Liverpool City Council and Wollondilly Shire Council. From a tourism perspective, Penrith is recognised as the gateway to the Blue Mountains.

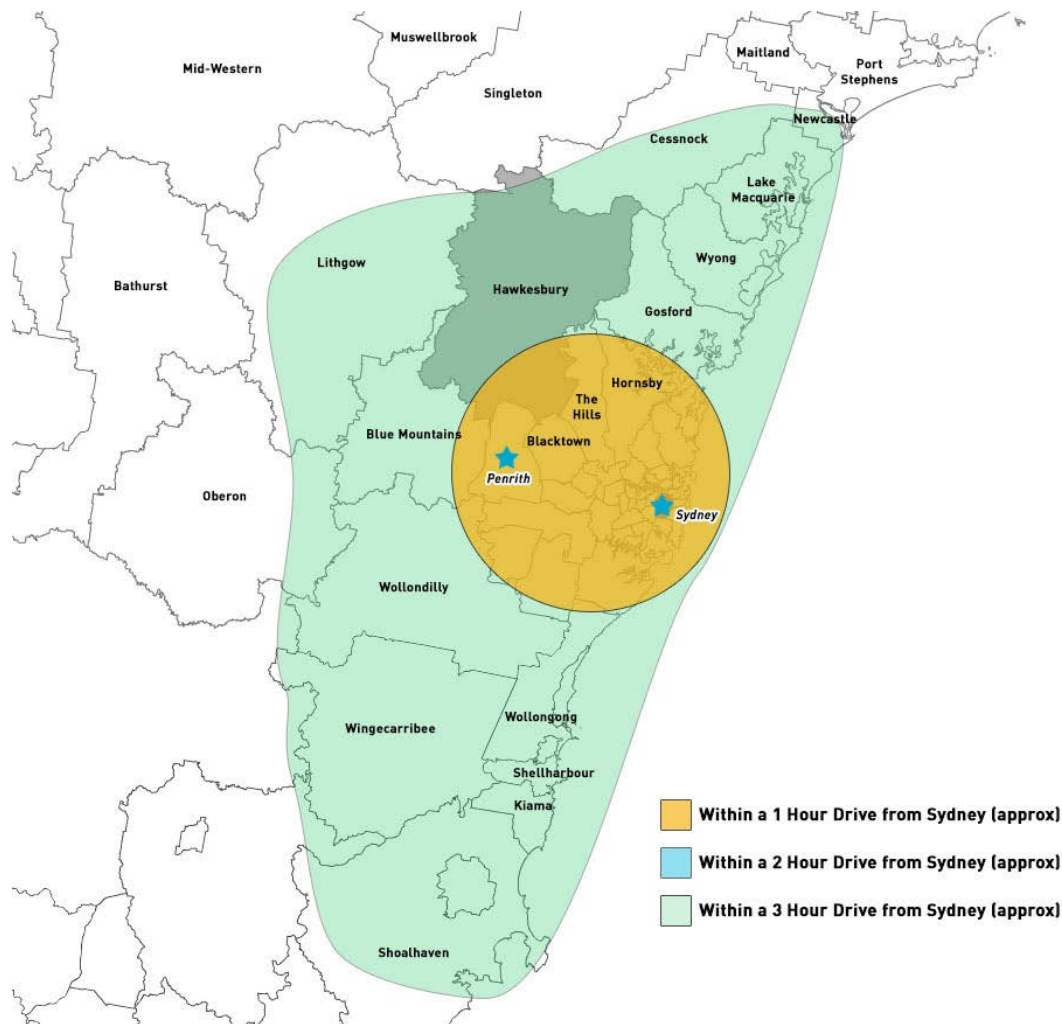
FIGURE 2: MAP OF THE PENRITH LGA



Penrith LGA offers 328 ha of parklands, 375 ha of sporting fields, 199 ha of community land and 153 ha of natural areas. It is a very large LGA compared to many others within the Greater Sydney region and it offers extensive waterways unlike any other LGA in Western Sydney. Though some are natural (Nepean River) and some are manmade (Penrith Lakes), they offer a unique feature which should be a major catalyst for tourism and recreational development and investment.

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

FIGURE 3: DISTANCE FROM SYDNEY CBD³



Furthermore, being surrounded by a number of popular destinations (such as the Blue Mountains) which Sydney short break visitors can choose from, makes it more challenging to position and sell the Penrith LGA as a short break destination. The figure below reflects the distance from the Sydney CBD to Penrith and other nearby tourism destinations on Sydney’s doorstep, including the Blue Mountains, and marginally further out to the Southern Highlands, the Central Coast and the South Coast.

³ Driving distances determined via Google Maps.

From a positive perspective, Penrith is already on the well-worn domestic and international visitor route to the Blue Mountains. Though it is currently perceived as a gateway to the Blue Mountains, potential exists to capture many of these travellers so they start to stop and stay for a while in Penrith. Within time, potential exists to develop Penrith as a visitor hub to service not only Penrith based tourism attractions and experiences, but to act as an overnight hub for those visiting to also explore the Blue Mountains and Hawkesbury as well.

Significant urban expansion out into parts of the Penrith LGA (and broader Western Sydney region) for residential development has also impacted on the way the LGA brand is perceived (possibly more as a major dormitory suburb for greater Sydney and less as a possible tourist destination in its own right).

Nevertheless, being very close to such a large urban catchment area (Sydney), makes the LGA highly accessible not only to the local domestic market but also the inbound international market which primarily flies into Sydney. A number of opportunities to capture these markets are included within this DMP. Importantly however, Penrith needs to actively encourage more local domestic visitors from Greater Sydney as the obvious and easier visitor market to access.

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

3.2. POPULATION

3.2.1. Historic Population

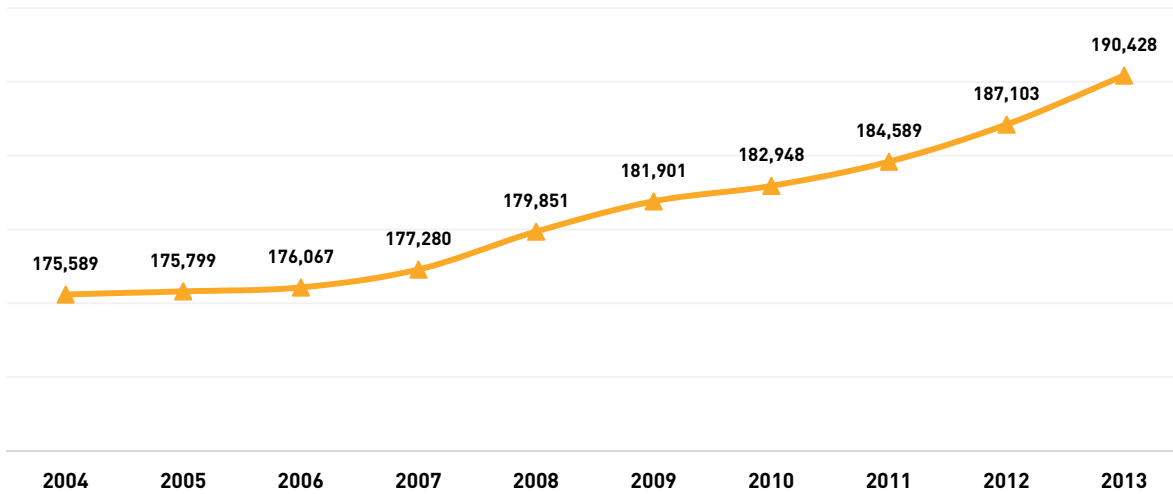
Penrith has an estimated resident population of just over 190k. Over the last 10 years, the Penrith population has experienced positive year on year growth averaging 1.6k residents per annum (almost 1% year on year growth). The resident population of Penrith is heavily concentrated within Glenmore Park, St Clair, Cranebrook and Penrith.

It is important to note however, that the Penrith LGA is considered to be one of the main service centres of greater Western Sydney, providing a range of amenities, jobs, services and infrastructure to a catchment of over 500k residents within Penrith and in surrounding LGAs.

This population growth necessitates the creation of more local jobs to encourage more young people in particular to stay in the LGA and for young families to relocate to Penrith.

This is an important factor as the need for more local jobs in the LGA is important to keep more young families living and working locally. Tourism related services can offer a wide range of skilled and semi-skilled employment opportunities to bolster the Penrith visitor economy.

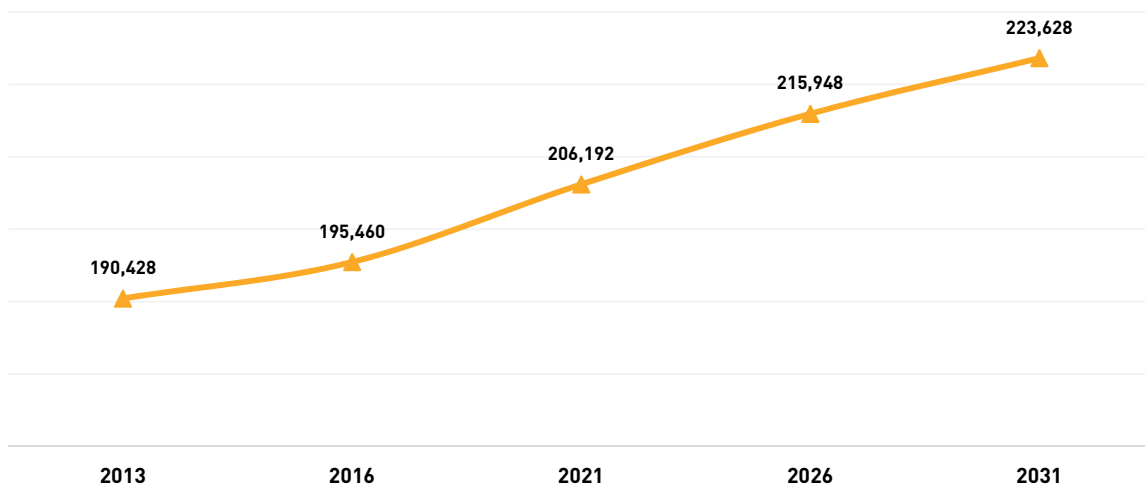
FIGURE 4: HISTORIC POPULATION GROWTH⁴



3.2.2. Forecasted Population

By 2031, the population of Penrith is anticipated to grow by 17% (33.2k residents), increasing from just over 190k residents to 224k residents. The majority of this growth is anticipated to be in Jordan Springs (an additional 9.5k residents), Penrith Lakes (8.8k residents) and Penrith (4.6k residents).

FIGURE 5: POPULATION PROJECTIONS⁵



⁴ Estimated Resident Population, Local Government Areas, New South Wales, ABS

⁵ <http://forecast.id.com.au/penrith/population-summary>

3.2.3. Age of the Resident Population

The following table provides a breakdown of the Penrith LGA's population based on service age groups. As demonstrated, over the period 2001 – 2011, the LGA has experienced a decline in its young population and a growth in its population aged 50 and over.

It is important to note however, this trend is not unique to Penrith, with both the Greater Sydney Region as well as NSW experiencing similar trends.⁶

TABLE 1: PENRITH POPULATION - SERVICE AGE GROUPS⁷

Penrith Population Service Age Groups				
Age Group	2001	2006	2011	Change 2001 - 2011
Babies and pre-schoolers (0 - 4)	8.06%	7.48%	7.60%	-0.46%
Primary schoolers (5 - 11)	11.64%	10.73%	9.81%	-1.83%
Secondary schoolers (12 - 17)	9.75%	9.49%	8.69%	-1.06%
Tertiary education & independence (18 - 24)	11.05%	10.90%	10.37%	-0.68%
Young workforce (25 - 34)	15.94%	14.97%	14.74%	-1.20%
Parents and homebuilders (35 - 49)	22.68%	21.80%	20.90%	-1.77%
Older workers and pre-retirees (50 - 59)	10.98%	12.65%	12.90%	1.92%
Empty nesters and retirees (60 - 69)	5.12%	6.42%	8.84%	3.72%
Seniors (70 - 84)	4.24%	4.73%	5.09%	0.85%
Elderly aged (85 and over)	0.55%	0.83%	1.05%	0.51%

The implication for tourism is the opportunity for encouraging those reaching retirement age to consider part time and potentially full time or casual work in areas of tourism and hospitality along with the chance of investing in tourism enterprises. Mature aged workers often find many employment options in the tourism sector.

To encourage younger people to remain in the LGA also is a key consideration for Council. With many currently travelling out of the LGA each day for work the opportunity exists to create tourism employment options within the LGA. Tourism, unlike many sectors of the economy, can offer unskilled, semi and fully skilled employment opportunities.

⁶ <http://profile.id.com.au/sydney/service-age-groups>

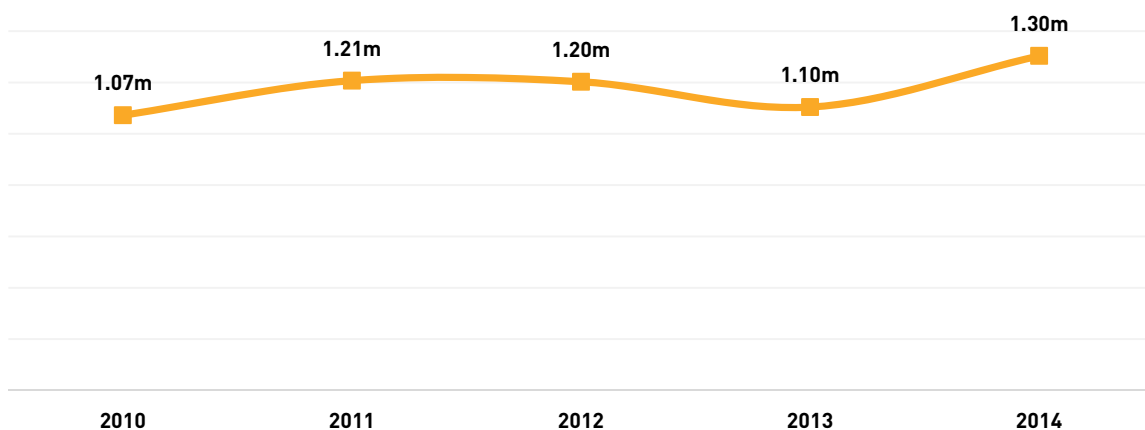
⁷ <http://profile.id.com.au/penrith/service-age-groups>

3.3. VISITATION TO THE PENRITH LGA

3.3.1. Total Visitation

Visitation to Penrith has increased over the past 5 years, growing from 1.07m visitors in 2010 (June YE) to just over 1.3m visitors in 2014. Over the 5 year period assessed, year on year growth equated to an average increase in visitors of 6% p/a or just under 58k visitors which is significant. Figure 5 below provides a summary of this growth.

FIGURE 6: VISITATION TO PENRITH LGA 2010 – 2014 FYS⁸



3.3.2. Visitor Type

Over the 5 year period assessed, the majority of visitation to Penrith was undertaken by domestic day trip visitors, comprising 78% of total visitation to the region in the 2014 FY. The following figure provides a breakdown of visitation, by visitor type, from 2010 – 2014.

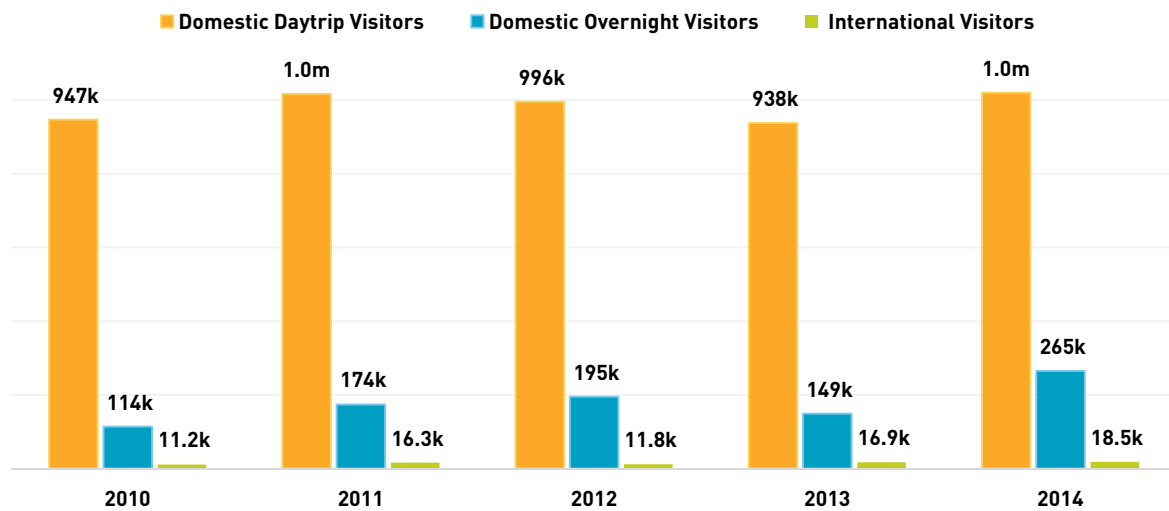
Points to note include:

- International visitation experienced year on year growth of 18% (1.8k visitors), but from a low base;
- Domestic day trip visitation, in line with national trends, increased from 947k to just over 1m visits, year on year annual growth of 2% (18.3k visitors); and
- Domestic overnight visitation experienced an average annual growth rate of 30% (38k visitors) over the 5 year period, growing from 114k in 2010 to 265k in 2014. This growth is important to recognise as many LGAs and tourism regions have experienced a decline in overnight visitation.⁹

⁸ Special data request to Destination NSW. Data reflects June YE periods.

⁹ Examples of regions which have experienced a decline in domestic overnight visitation over the period 2010 – 2014 include: New England North West, Outback NSW, Riverina, The Murray.

FIGURE 7: VISITOR TYPE TO PENRITH 2010 – 2014 FYS¹⁰

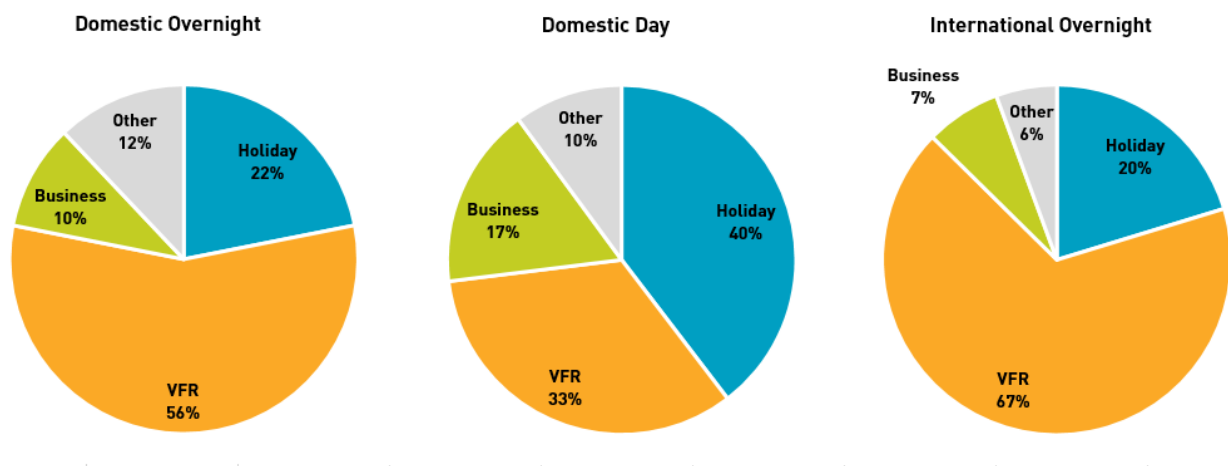


This outcome is particularly positive as many regions are seeing a decline in overnight domestic visitation over this period.

3.3.3. Purpose of Visitation

The following figure provides an overview of visitors' purpose of visitation to the Penrith LGA in 2014. This demonstrates the strong holiday and VFR (visiting friends and relatives) market across all visitor types. As more tourist product starts to become available, the percentage share for holiday visitors especially should start to noticeably grow.

FIGURE 8: PURPOSE OF VISITATION TO PENRITH 2014 FY¹¹



¹⁰ Special data request to Destination NSW. Data reflects June YE periods.

¹¹ National and International Visitor Surveys, YE June 2014, Tourism Research Australia

3.3.4. Top 5 Origin Markets

Table 2 below provides a breakdown of visitor origin for visitors to the Penrith LGA in the 2014 FY. For both domestic overnight and domestic day visitors, the most common visitor origin to the Penrith LGA was Sydney, comprising 19% and 60% respectively. New Zealand was the most common origin of international visitors to the LGA, comprising 27% of visitors, followed by the UK at 21%. This is likely to reflect the higher percentage of people living in Penrith from New Zealand and the UK, with visitation for VFR being the predominant reason for travel to Penrith.

TABLE 2: TOP 5 VISITOR ORIGIN MARKETS OF VISITORS TO PENRITH 2014 FY¹²

Top 5 Origin Markets					
Domestic Overnight		Domestic Day		International Overnight	
Sydney	19%	Sydney	60%	New Zealand	27%
Central NSW	11%	Blue Mountains	26%	United Kingdom	21%
North Coast NSW	9%	Central Coast	5%	USA (incl. Hawaii)	9%
Blue Mountains	9%	Canberra	3%	Indonesia	3%
Hunter	8%	South Coast	3%	France	2%

We note industry operator feedback which highlights the strength of visitor markets such as Bathurst, Orange, Mudgee and the Central Coast for specific attractions, though some of these generating markets have reduced in the last 3 – 5 years.

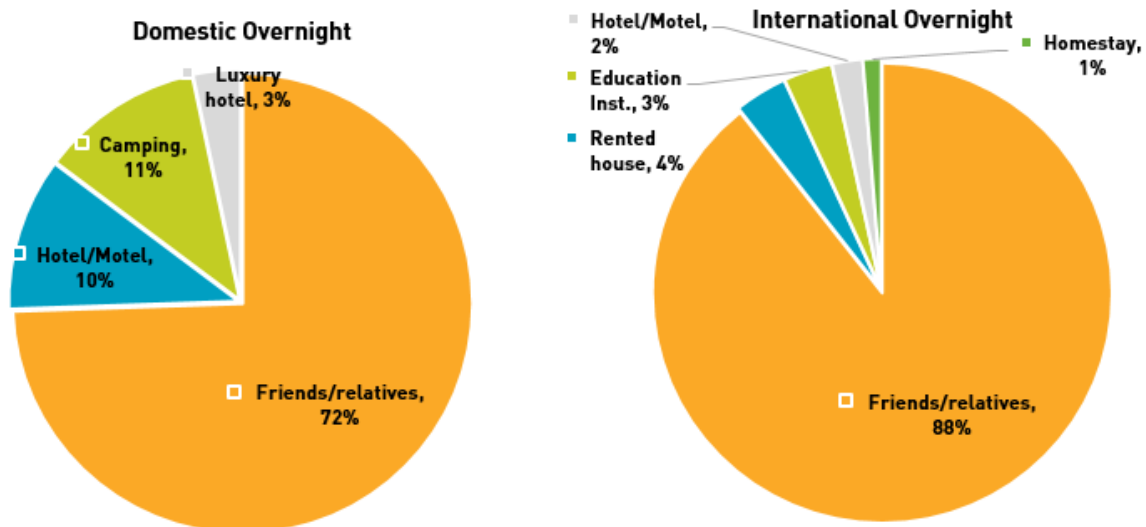
3.3.5. Top 5 Accommodation

The following figure demonstrates the dominance of visitors who stay with friends or relatives when visiting the Penrith LGA, as opposed to staying in commercial accommodation (motels, hotels, resorts, caravan parks etc.), with over 72% of domestic overnight visitors and 88% of international overnight visitors staying with friends or relatives.

FIGURE 9: TOP 5 ACCOMMODATION USED BY VISITORS TO PENRITH 2014 FY¹³

¹² National and International Visitor Surveys, YE June 2014, Tourism Research Australia

¹³ National and International Visitor Surveys, YE June 2014, Tourism Research Australia



Whilst the visitor statistics highlights demand for staying with friends and relatives, this may also be due to the lack of sufficient commercial accommodation (especially variety/types and possibly quality) available.

Industry operator feedback has highlighted the need for another 3 – 4 star quality major hotel to enable industry to package up experiences (with accommodation) and to offer additional venues for corporate and family (life event) functions.

Potential may also exist for a wider range of commercial accommodation, including glamping near Penrith Lakes and a major destination holiday park to support the caravan and camping sector.

Introducing new accommodation supply may therefore easily change the percentage balance of accommodation types used in the future.

3.4. REGIONAL, STATE AND NATIONAL TRENDS

The following table provides an overview of regional, state and national trends which may influence Penrith City's ability to successfully grow tourism. These trends are focused particularly on tourism, but also include economic development, environmental management, governance and social wellbeing.

TABLE 3: TRENDS AND THEIR IMPLICATIONS

Trend	Implication Of Trend For Penrith City
Tourism continues to grow internationally	<p>World Tourism Organisation figures highlight continued growth in travel globally, with constant growth in all sectors; leisure, business, conferencing, visiting friends and relatives, MICE, education trips, food tourism, cruise, special interest markets etc.</p> <p>Even with the recent global financial crisis, worldwide tourism figures overall have reflected growth. City-based market segments constantly look for new day trip and overnight destinations. The development of new visitor experiences and activities in Penrith can pick up on the major urban conurbation of Sydney's desire for new and easily accessible experiences (particularly because there has been a lack of new tourism product created in and around the Sydney region for some time).</p> <p>Whilst tourism is not recession proof, it is far more resilient than previously, as visitor markets often view tourism and travel as a necessity¹⁴ rather than a luxury. This equates to more day trippers coming to regions such as Penrith and its surrounding regions (Blue Mountains, Hawkesbury etc.) to escape city based areas.</p>
Developing countries are the standout for medium term growth	<p>The rapid growth of visitor generating markets, such as many of those in South Asia, are already well targeted by Destination NSW and Tourism Australia. These visitors, coming in increasingly larger numbers, are not just after the city based experience which Sydney CBD can offer. They visitors are also keen to visit coastal and mountainous areas and, where they can access suitable and appealing product, inland areas.</p> <p>Penrith, being close to the Blue Mountains and having a rural area, could start to develop packaged tours for these visitors. Even simple activities such as kayaking, fishing and fruit picking can have strong appeal to a number of these international visitor markets who may only visit as day visitors, preferring to stay in city based accommodation.</p>
Growth in those coming from Asia	<p>NSW is experiencing a significant increase in visitors coming from Asia (particularly China, India, Indonesia and Malaysia), but many regions are not yet ready with product or service standards to capitalise on the growth potential.</p> <p>Penrith has potential in developing inbound tours ex Sydney if it can link into local tour operators and market desire for day trips, adventure tourism, and passive tours to look at scenery etc. This could include leveraging on Penrith's relationships with surrounding LGAs such as the Blue Mountains and the Hawkesbury to develop packaged tours. The introduction of purpose built Asian style restaurants to offer appropriate food options and, possibly in a highly attractive water based setting, may help grow the day visitor market and also generate investor interest. Supply of appropriate product has to drive demand from these Asian markets.</p>

¹⁴ The need to visit new places (event for day trip experiences) to help with social wellbeing, to get out of the rat race, to visit places of natural beauty, to find locations to just sit, relax and contemplate, and to find new locations for passive and active recreational pursuits. Penrith has the potential to deliver on all of these physiological needs.

Trend	Implication Of Trend For Penrith City
A growing middle class	<p>Greater prosperity, not only within Australia, but internationally is rapidly growing the visitor markets with the disposable income required to go travelling.</p> <p>After visitor markets tick off the major local destinations of interest (Sydney, Brisbane and Melbourne), they tend to go looking for the next level of visitor experiences. As long as Penrith has the products to entice the domestic market who are looking for new passive and active experiences and new events (and that these are packaged), it can benefit from this growing cohort of mostly domestic visitors looking for new experiences within easy access of Sydney.</p> <p>Penrith needs to be mindful that competition is intense for capturing the domestic market in particular, especially those interstate visitors basing themselves in the Sydney and looking for surrounding regional day trips which offer unique experiences.</p> <p>The declining Australian dollar is also creating more opportunities for the domestic market to holiday at home if the right product exists.</p>
Changing cultural and entertainment tastes of Chinese tourists	<p>Initially, visitation ex China was via highly structured tours. As this market has matured, so has the need for new experiences which they can undertake in smaller groups (mini bus sized special interest tours) and as family groups (using rental cars to explore). The desire now exists to travel as free independent travellers and without venturing too far from major gateway cities such as Sydney.</p> <p>Sydney is geographically well located to pick up on this changing market need.</p>
New competition for NSW - developing countries are heavily investing in tourism	<p>The challenge for NSW (and Penrith specifically) is that the level of competition from developing countries to attract tourists is intense and the level of investment occurring is significant. Without new investment occurring into new tourism product within Penrith to attract local, intrastate, interstate and international visitors, visitor growth opportunities are likely to be slow to eventuate and potentially may not occur at all.</p> <p>From work undertaken in the surrounding regions, we note that most councils are actively looking to encourage investment and development into new and improved facilities in order to grow their share of visitor numbers and more importantly visitor yield. In addition, tourism facilities often correlate with new recreational facilities for locals.</p>
Rapid growth in youth travel	<p>The youth market (under 25's) is growing significantly fast, often buoyed by school based excursions, school exchanges and younger people travelling with more confidence as they leave school or during their university holidays or work breaks.</p> <p>Penrith can capitalise on this youth market providing it can supply the active pursuits this segment is looking for. For the short – medium term this may need to focus on packaging adventure experiences to encourage greater youth interest and awareness of the product Penrith has to offer. Currently, we consider that many domestic markets are unaware of what Penrith has to offer this niche market.</p>
The youth traveller – more mobile, more wealthy	<p>The youth market has often benefited from travel and holidays traditionally funded by parents. This has led to a generation (Gen Y and Gen Z) who do not wish to go without the experiences which their parents exposed them to. More disposal income is therefore applied by this sector of the market to travel. Penrith would need to create the product opportunities for this sector to produce sufficient brag value to attract it. In essence, the youth market has shown to be very resilient and higher spending than many older market segments.</p>
Nature as Australia's drawcard for tourists	<p>There is a need to position Penrith as offering unique experiences, particularly those which complement its highly attractive scenery. What Penrith has over other areas in Western Sydney especially are significant waterways. However, people need to be able to use these for a range of active and passive pursuits.</p>

Trend	Implication Of Trend For Penrith City
Increased urbanisation is likely to increase the desire for open space	The greater the urban density in the Sydney region, the greater the demand for day or short break excursions to Penrith and its surrounding regions with open space qualities to escape the city/urban landscape. As there is significant competition to capture these markets from neighbouring regions, Penrith has to look at a marketing campaign which both raises awareness of the product offering and experiences within the LGA.
An increasing desire for authentic experiences	The domestic and international market desire more genuine experiences that often may simply include good accommodation, kayaking and hiking, food experiences linked by effective transport services. For Penrith, this will equate to local food and beverage outlets (rather than major chain food outlets), unique events, community events and more unique product. Everyone has art trails, recreation product, food trails and various events so what are the unique elements which will make Penrith's experiences stand out?
Internet usage continues to grow	<p>The increasing use of the internet for researching and buying tourism products means that building an online presence - through social media channels and other online tools (particularly for bookings) - has become important for tourism businesses. Penrith operators need to update and maintain their websites on a regular basis.</p> <p>The product audit which was undertaken as desktop research as part of this DMP revealed the challenge associated with old websites which either have not been updated because the business is no longer operating (but based on their web presence, they appear to be operating) or the business owners are lacking the expertise required. As a result, visitors are given a false impression of what is and is not available within the Penrith LGA.</p> <p>A far stronger and consolidated web based presence is required to promote Penrith and to encourage more visitor enquiries for bookings.</p>
Increased internet usage on smartphones	<p>There is a growing expectation by visitors to be able access information, maps, brochures, booking facilities and self-guided tours via a smart phone app or smart phone accessible website.</p> <p>The potential exists to develop a mobile app or mobile accessible website for the Penrith LGA which also incorporates visitor interpretation material which helps provide visitors with an overview of the LGA and each of the suburbs/areas specifically.</p>
Information technology will continue to change how tourists access and use information	<p>Many regions throughout the country are now well advanced in offering visitor information through a digital platform (websites, mobile apps etc.). There is a steady move away from investment in traditional bricks and mortar style VICs centres as the cost to councils and industry operators to supply brochures and offer services 7 days a week are prohibitively expensive.</p> <p>Whilst Penrith has recently closed its VIC in recognition of the abovementioned points, there is a need for Penrith to implement its destination based website as quickly as possible to ensure visitors are being given accurate and relevant information on the LGA.</p>
More bookings are made online	<p>Increasingly, visitors expect to be able to book all or most of their travel (accommodation, activities, transport etc.) online, often prior to travelling.</p> <p>As a result, it is important that Penrith operators have an active and up-to-date website with booking capabilities (where required). Websites not well maintained will quickly turn off potential visitor interest.</p>
The changing role of the travel agent	The travel agent role is gradually being replaced by direct online bookings for hotels, rental cars, flights and events. Penrith needs to investigate technology solutions which will help raise its profile in a cost effective manner and encourage industry to become stronger web-based marketers.

Trend	Implication Of Trend For Penrith City
Greater information flows between travellers	<p>Smart phones, iPads etc. enable the sharing of information far more readily. Negative feedback on TripAdvisor, Yelp, Facebook and other travel-related websites can quickly impact on businesses and even destinations.</p> <p>Penrith needs to take advantage of increased and improved information flows to use visitors as a marketing tool to encourage others to visit by effective word of mouth advertising.</p> <p>This will also require ongoing improvements in service standards to better deliver to all visitor market segments.</p>
Cruise ships on the rise	<p>As Penrith is close to Sydney CBD, it has the potential to link into land based tours offered by cruise companies. Offering day tour companies a cluster of Penrith and surrounding LGAs experiences and packaging these up for promoting to these tour companies would be required. It is important to note however that there is intense competition for these cruise visitors as they are often very high spending.</p>
Overseas holidays are getting cheaper	<p>With low cost carrier flights ex Sydney, there is increasing competition from Asian and Pacific Island destinations to lure the domestic market offshore, even for short breaks (3-4 days). What many of these destinations are doing is offering holidays which are completely packaged (flights, accommodation, transfers, food and activities). This is seen as highly appealing for the short break visitor market which is often time poor.</p> <p>Penrith operators need to remain value driven and look for value added components to offer in order to be competitive. The potential exists to package and brand certain experiences as unique.</p>
Tourism companies face high (and increasing) costs	<p>Compliance costs, government imposts and approval delays are making it increasingly difficult for tourism companies to remain profitable. Council needs to assist local operators and incoming tourism companies to help them remain competitive. For example, concerns over delays in getting Council approvals need to be discussed and resolved. With more available land for development than many other LGAs in Greater Sydney, Penrith has the potential to grow and develop as a tourism investment hub, as long as it is seen to be investor friendly and open for business.</p>
Lack of investment in the domestic market holds back local potential	<p>Too often, destinations focus on marketing and promotion rather than the improvement of existing product and the development of new product when attempting to grow visitation and visitor yield to a region.</p> <p>Challenges in attracting new tourism attractions and facilities and the lack of capital often available to help drive this, need to be addressed. Council's leadership role in working with industry is vital in addressing these challenges. Whilst improving market awareness of Penrith is a highly important outcome, expanding the product mix and creating more development opportunities is equally as important.</p>
The increasing cost of visiting Australia	<p>The relative strength of the Australian dollar and the economic conditions in some source markets make it even more important for operators in Penrith to be as value driven as possible. Consumers will continue to look for value adders being offered to make packages more attractive.</p>
Staffing challenges	<p>Increasing challenges in attracting and keeping semi-skilled and skilled staff and the impact of penalty rates during weekends and in the evening on business viability are major challenges for hospitality sector operators especially. Penrith needs cafes and retailers open, especially during weekend periods when events are on and visitors are looking to spend. Working with TAFE and other education providers to help provide tourism and hospitality trainees and apprentices needs to be considered by industry.</p>

3.5. SWOT ANALYSIS

The following table provides a SWOT analysis for the Penrith LGA, focusing on tourism related strengths, weaknesses, opportunities and threats. It has been created after discussions with various industry and government stakeholders and from the review of research and associated analysis.

TABLE 4: SWOT ANALYSIS

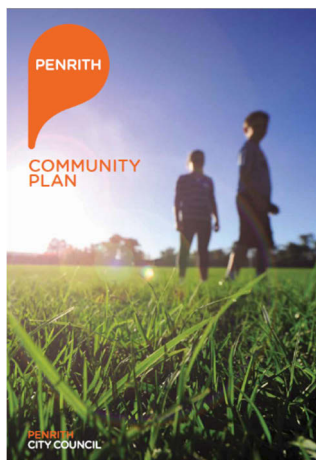
STRENGTHS	<ul style="list-style-type: none"> Strong growth in the value of the tourism sector and employment in the tourism sector Good public infrastructure access to the LGA (train, bus and road) Council is actively pro tourism The Nepean River and its associated recreational activities Proximity to one of Sydney's key visitor attractions, the Blue Mountains, and being the gateway to this area for development Availability of land There are a number of active tourism operators in the LGA Community is generally supportive of tourism and recognise Growing tourism product in the LGA such as Penrith Lakes, Penrith Whitewater Stadium, Penrith Panthers and iFLY Downunder by way of example Marketing partnership opportunities with the Blue Mountains and Hawkesbury Cultural assets such as Joan Sutherland Performing Arts Centre and the Penrith Regional Gallery and The Lewers Bequest 	WEAKNESSES	<ul style="list-style-type: none"> Perceived distance from Sydney CBD Penrith CBD needs revitalisation Lack of a coordinated tourism industry Lack of sufficient accommodation to cater for major events Limited high quality dining options (although we note this is growing) The destination out of Sydney is perceived to be the Blue Mountains Lack of destination website to promote the LGA and provide visitor information No real destination identity and seen as possibly just part of Greater Sydney Lack of market awareness No regional tourism entity to leverage off Lack of product packaging Consumer perception of Penrith as a major urban growth area (residential) Inability to activate areas such as the Nepean River and Penrith Lakes Penrith perceived as a gateway rather than a destination hub
OPPORTUNITIES	<ul style="list-style-type: none"> High quality digital marketing platform Capitalising on the fast growing family market in Western Sydney Packaging opportunities, particularly focused on active and passive tourism product Growing population-market in Sydney region Local market looking for new/closer experiences Partnering with neighbouring regions/LGAs and leveraging off associated strengths to develop packages for different visitor types Designating areas for tourism development and zoning accordingly Activating Penrith Lakes via tourism and events Development of a booking hub/visitor experience centre in prime location Advocating for a stadium that is capable of hosting national and international events (entertainment and sport) Development of a tourism precinct and rezoning to support it Developing new accommodation product (destination holiday park, glamping, new 3 – 4 star hotel and conference venue) Positioning Penrith as the area for new tourism investment due to land availability 	THREATS	<ul style="list-style-type: none"> Local residents' attitude goes negative toward tourism Growing competition (Blue Mountains changes its focus, Hawkesbury offering strong food trails, food markets and heritage events) Penrith Lakes activation does not occur Zoning for tourism does not occur and tourism stays amongst general urban renewal sites Nearby mature and rejuvenated destinations with greater marketing budgets over shadow Economic downturn Penrith Panthers working in isolation of industry and council



4. Penrith City Council Strategic Planning

4. Penrith City Council Strategic Planning

Penrith City Council has undertaken and/or commissioned a number of strategic plans which have findings, recommendations and actions that are of relevance to this DMP. Many of these plans were written with the intention of revitalising the CBD and the Nepean River, and have elements which support the findings and recommendations noted within this DMP.



**Penrith Community
Strategic Plan 2031, 2013**

The Community Strategic Plan (CSP) developed by Council in 2013 identifies the Penrith community's long term aspirations (20 years) for the City. Based on consultation and research undertaken for the CSP, the community's vision was identified, "one of a sustainable and prosperous Regional City with a harmony of urban and rural qualities."

Key priorities identified within this CSP include:

- More local jobs; and
- Making sure that Penrith has the services and infrastructure needed.

To achieve these goals, Council identified that over the next four years, the following is required:

- Focusing on investment and growth in the City's key centres, Penrith Health and Education Precinct and Western Sydney Employment Area
- Creating opportunities for activities on and around the Nepean River
- Advocating for a stadium that is capable of hosting national and international events (entertainment and sport)
- Working with government to secure the Penrith Lakes Parklands and participate in unlocking future development potential.

Outcomes identified in the CSP which have direct relevance to this DMP include:

- Outcome 3 "we can get around the city": improving roads, public transport, footpaths and cycleways;
 - Outcome 4 "we have safe, vibrant places": having safe, clean, welcoming and vibrant public places. This covers both the physical aspects of the public domain (lighting, paving, and seating) with social aspects (restaurants, activities, events and festivals). The three key major town centres are Penrith City Centre, St Marys Town Centre and Kingswood Specialised Centre.
 - Outcome 6 "we're healthy and share strong community spirit": the importance of encouraging health and wellbeing, as well as community pride and a sense of belonging. This includes the development and continued growth of the arts, libraries, playgrounds and sporting facilities.
-



Penrith City Strategy, 2013

The Penrith City Strategy (PCS) was developed to assist in building a sustainable future for the City and the community by identifying key issues facing the City over the next 10 – 20 years and developing strategies to respond to these issues.

Issues identified, with relevance to this DMP include:

- Jobs and economy – countering low employment levels and opportunities through the generation of additional job opportunities. Council has set a target of an additional 40,000 jobs in 2031;
- Transport and access – roads still support most of the region's journeys, primarily because the City is not served by an effective public transport network, with both bus and train services operating at inadequate frequencies. The potential development of Sydney's second airport needs to be considered, as well as a future high speed rail system within the Sydney network; and
- Community wellbeing – cultural development and creativity are critical to Penrith's potential as a Regional City by contributing to economic vitality, social equity and environmental sustainability.



The Delivery Program including the Operational Plan, 2013

The Delivery Program is Council's 4 year work program that assists in the implementation of the Community Plan.

The Delivery Program outlines a number of strategies to achieve the community outcomes, several of which are relevant to this DMP. These include:

- Outcome 1 - We can work close to home:
 - Strategy 1.1: Diversify the region's economy and attract investment, particularly targeting new and emerging employment sectors
 - Strategy 1.3: Support agriculture and local food production as a significant contributor to the region's economy
- Outcome 2 – We plan for our future growth
 - Strategy 2.2: Protect the City's natural areas, heritage and character
- Outcome 3 - We can get around the City:
 - Strategy 3.1: Secure an effective public transport network
 - Strategy 3.2: Provide a safe, efficient road network supported by parking
 - Strategy 3.3: Improve the City's footpaths and shared pathway network
 - Strategy 3.4: Improve critical cross regional transport connections
- Outcome 4 - We have safe, vibrant places:
 - Strategy 4.1: Improve public spaces and places
 - Strategy 4.2: Grow and revitalise our centres and neighbourhoods
- Outcome 6: We're healthy and share strong community spirit:
 - Strategy 6.1: Provide opportunities for our community to be healthy and active
 - Strategy 6.3: Support cultural development, activating places and creativity



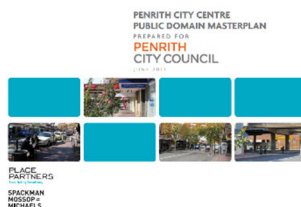
'Our River' Nepean River Masterplan, 2013

The Our River Masterplan (ORM) was developed in November 2013 with the purpose of reinforcing connections between the Nepean River and the community. The ORM is guided by a number of planning and design principles, including:

- Our Accessible River: Key to the wider awareness of the river and its recreational use and enjoyment is improved access to the parklands along its foreshores and the opportunity to get down to the water's edge and onto the water;
- Our Active River: Once the river is reached what is on offer to the visitor and resident? An active and vibrant river should provide a wide range of recreational opportunities both on and off the water;
- Our Cultural River: As a spectacular natural and cultural landscape setting, the river provides the opportunity for a series of memorable spaces and places each with their own focus and character, creating a place to celebrate the community's culture and diversity;
- Our Healthy River: The River's health is vital to the environmental health of its river landscape and the health and wellbeing of those who live beside it or visit it. Enhancing the health of the river vegetation and the quality of water is of key importance; and
- Our Managed River: Like all rivers systems, the river's catchment extends beyond local government boundaries and its management needs to be considered in this wider perspective. Managing and maintaining the river's natural values, cultural heritage and landscape.

The strategic intent identified in the ORM include:

- Refocus upon the Nepean River for destination development;
- Develop a series of hubs along the Nepean River;
- Improve visual and physical access to the water;
- Improve pedestrian connectivity and enhance riparian habitat; and
- Connect to Penrith City Centre to the Nepean River.

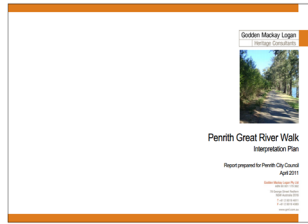


Penrith City Centre Domain Masterplan, 2013

The Penrith City Centre Domain Masterplan (PCCDM) was developed with significant public consultation and aims to pave the way for improvements to revitalise Penrith City Centre streets, including future 'on the ground' works. The project objectives included:

- Create a unique City Centre identity and sense of place that enhances the connection between people and place;
- Improve the quality of the urban environment to encourage economic growth and support new investment;
- Facilitate dining and a night time economy;
- Increase property values, economic activity & business opportunities;
- Enhance the visual and aesthetic qualities, liveability and attractiveness of the City Centre, and address the economic, intellectual, social, cultural and sensory aspects; and
- Effectively engage the community throughout the preparation of the Masterplan. Achieve broad community and stakeholder support for both the Masterplan and the subsequent projects that are to be implemented.

From the consultation and research, five conceptual approaches to achieve these objectives were developed, comprising maximising footpath space, creating a linked network of pocket places, public space 'book ends', Station St Boulevard and minimum intervention.



Great River Walk 2013 & Great River Walk Interpretation Plan, 2011

Upon completion, the Great River Walk will provide a walking track that follows the Hawkesbury Nepean River system from the south of Goulburn to its mouth at Broken Bay just north of Sydney, a total distance of 570 km.

Council has progressively funded and constructed sequential stages of the Great River Walk and the path loop on both sides of the river between Victoria Bridge and the M4 Bridge.

An interpretation plan has also been developed which identifies key themes, locations and recommended devices for interpretation along the Penrith section of the walk.

gen.a

Penrith Brand Strategy Project Report

April 2012

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Penrith Brand Strategy Project Report, April 2012

This Strategy was developed with the purpose of creating a new brand to represent the Penrith region, replacing the previous brand "Penrith Valley, River Mountains Lakes", which had been utilised since the Sydney Olympics.

The purpose of the rebrand was to leverage Penrith's economic and social development potential and take advantage of its Regional City status and growth potential in the Greater Sydney region. Council's aspiration for the brand was to show Penrith as a place that:

- Offers opportunities for youth, a place they want to stay;
- Has well-defined commercial opportunities and vision;
- Has a well-defined brand that is understood and owned by the community;
- Has a community that embraces their personality;
- Is an inspirational and free-thinking arts hub;
- Is part of Sydney... yet proudly independent; and
- Has a Council that shows a true leadership role in driving effective and positive change with and for the community.

From the online research commissioned for the rebrand, the top 6 attributes pertaining to Penrith include:

- Quality and access to food / basic necessities;
- Access to recreational facilities & activities;
- Cost of living, quality of national cultural attraction, tourism cultural attractions, accessibility of major attractions;
- Communication and Internet facilities;
- Lifestyle (entertainment / recreation / sport / shopping); and
- Quality of professional assistance.



Brand Style Guide, 2012

The Brand Style Guide (BSG) was developed as a design toolkit for the Penrith brand, outlining the principles and tools for the application and development of the brand.

The brand communicates that Penrith city aims to attract the right talent, investment and enrichment to stimulate a confident, productive, happy and well-connected community. To achieve this, we are always strongly connected to our surrounding communities while retaining an inherent link to Sydney.



5. Product and Infrastructure Audit

5. Product and Infrastructure Audit

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

5.1. ATTRACTION AUDIT

Based on desktop research and consultation, the following table provides a supply side audit of Penrith's tourism product.¹⁵ The audit identified 60 tourism attraction related experiences and ranging from cultural experiences to adventure experiences to hire companies and tour operators. The following table provides a breakdown of these experiences, based on their location.

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

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

- Arts, cultural and heritage experiences – the majority of which are free experiences;
- Active/adventure product - most of which are pay for experiences; and
- Recreation product and parks and reserves – most of which is free product.

TABLE 5: PENRITH TOURISM PRODUCT AUDIT SUMMARY¹⁶

Product Category	Product Count	% Breakdown
Active / Adventure	13	21%
Arts, Cultural, Heritage	13	21%
Brewery/Winery	1	2%
Food Experience	2	3%
Entertainment	5	8%
Recreation	14	22%
Parks & Reserves	12	19%
Tour Operator	3	5%
TOTAL	63	100%

¹⁵ While The Group has undertaken a detailed audit of all tourism product, including event spaces and transport operators (such as mini bus companies), the audit included here reflects only attraction-based product to narrow down the focus of the audit.

¹⁶ Note, the Food Experience category does not reflect all food and beverage operators, but rather, reflects food and beverage experiences which can be undertaken such as cooking schools etc.

Table 6 below summarises the tourism product/infrastructure based on where it is located in the Penrith LGA. This demonstrates that more than half of the tourism product/supporting infrastructure in the Penrith LGA is located within the Penrith sub area which broadly can be defined as an area bounded by Jamison Road, The Northern Road, the Nepean River, Andrews Road and old Castlereagh Road.¹⁷

TABLE 6: PENRITH TOURISM PRODUCT AUDIT SUMMARY BY AREA

	Active / Adventure	Arts, Cultural, Heritage	Brewery /Winery	Food Experience	Entertain- ment	Recreation	Parks & Reserves	Tour Operator	Total
Castlereagh	1	2	0	0	0	0	1	0	4
Colyton	0	0	0	0	0	0	0	0	0
Cranebrook	1	0	0	0	0	0	1	0	2
Emu Plains	0	2	0	0	0	1	2	0	5
Glenmore Park	0	0	0	0	0	1	0	0	1
Jamisontown	0	0	0	0	1	1	1	0	3
Kingswood	0	0	0	0	0	0	0	0	0
Leonay	0	0	0	0	0	1	0	0	1
Londonderry	0	0	0	0	0	0	0	0	0
Luddenham	0	1	0	1	0	1	0	0	3
Mulgoa	1	0	0	1	0	1	2	0	5
Penrith	9	6	1	0	4	7	1	3	31
St Marys	1	2	0	0	0	0	1	0	4
Wallacia	0	0	0	0	0	0	2	0	2
Werrington	0	0	0	0	0	1	1	0	2
Total	13	13	1	2	5	14	12	3	63

The following table provides the results of the full tourism product audit. This table has been regularly updated throughout the course of the DMP and should be treated as a work in progress as new product is introduced into the LGA and some existing product potentially closes.

TABLE 7: PENRITH TOURISM PRODUCT AUDIT

Name	Suburb	Type	Free or Pay for Experience
737Jet Flight Simulator Experience	Penrith	Active / Adventure	Pay for
Cables Wake Park	Penrith	Active / Adventure	Pay for
iFly Downunder	Penrith	Active / Adventure	Pay for
Penrith Whitewater Stadium	Penrith	Active / Adventure	Pay for
Tandem Jetpacks	Penrith	Active / Adventure	Pay for
Luddenham Raceway	Penrith	Active / Adventure	Pay for
Penrith Ice Palace	Penrith	Active / Adventure	Pay for
The Climbing Centre	Penrith	Active / Adventure	Pay for

¹⁷ <http://profile.id.com.au/penrith/about/?WebID=310>

Name	Suburb	Type	Free or Pay for Experience
Horizon Line	Penrith	Active / Adventure	Pay for
Fiona Hughes Equestrian Centre	Castlereagh	Active / Adventure	Pay for
Sydney International Regatta Centre	Cranebrook	Active / Adventure	Pay for
Mulgoa School of Equitation	Mulgoa	Active / Adventure	Pay for
Segway Dude	St Marys	Active / Adventure	Pay for
Castlereagh Historic Cemetery	Castlereagh	Arts, Cultural, Heritage	Free
Muru Mittigar Aboriginal Cultural & Education Centre	Castlereagh	Arts, Cultural, Heritage	n/a
Arms of Australia Inn Museum	Emu Plains	Arts, Cultural, Heritage	Pay for
Penrith Regional Gallery & The Lewers Bequest	Emu Plains	Arts, Cultural, Heritage	Free (but pay for some shows etc.)
Model Park (Sydney Society of Model Engineers Inc.)	Luddenham	Arts, Cultural, Heritage	Pay for
Crafty Monkeys (Pottery and Craft Workshop and Shop)	Penrith	Arts, Cultural, Heritage	Pay for
Joan Sutherland Performing Arts Centre	Penrith	Arts, Cultural, Heritage	Free (but pay for shows etc.)
Lorraine Quartermain's Art Gallery (Private Gallery)	Penrith	Arts, Cultural, Heritage	n/a
Museum of Fire	Penrith	Arts, Cultural, Heritage	Pay for
Penrith Museum of Printing	Penrith	Arts, Cultural, Heritage	Free (but pay for courses)
Historic Bennett Wagon in St Marys	St Marys	Arts, Cultural, Heritage	Free
Mamre Homestead	St Marys	Arts, Cultural, Heritage	Free (but request donations)
The Nepean Naval Museum	Penrith	Arts, Cultural, Heritage	Free (but request gold coin donation)
Sun Masamune Sake Brewery	Penrith	Brewery/Winery	Pay for
Penrith RSL	Penrith	Entertainment	Pay for
Penrith Slot Car & Hobby Centre	Jamisontown	Entertainment	Pay for
Hoyts Cinema	Penrith	Entertainment	Pay for
KAOS Family Amusement Centre	Penrith	Entertainment	Pay for
Panthers World of Entertainment	Penrith	Entertainment	Pay for
Blue Mountains Honey Company - The Honey Shed	Luddenham	Food Experience	Pay for
Mulgoa Valley High Tea	Mulgoa	Food Experience	Pay for
Castlereagh Nature Reserve	Castlereagh	Parks & Reserves	Free
Wianamatta Nature Reserve	Cranebrook	Parks & Reserves	Free
Lions Park	Emu Plains	Parks & Reserves	Free
Regatta Park	Emu Plains	Parks & Reserves	Free
Tench Reserve	Jamisontown	Parks & Reserves	Free
Mulgoa Nature Reserve	Mulgoa	Parks & Reserves	Free
The Rock Lookout	Mulgoa	Parks & Reserves	Free
Weir Reserve	Penrith	Parks & Reserves	Free
Victoria Park	St Marys	Parks & Reserves	Free
Bents Basin State Conservation Area	Wallacia	Parks & Reserves	Free

Name	Suburb	Type	Free or Pay for Experience
Blaxland Crossing Reserve	Wallacia	Parks & Reserves	Free
Werrington Lakes	Werrington	Parks & Reserves	Free
UWS Penrith Observatory	Werrington	Recreation	Pay for
AMF Bowling	Penrith	Recreation	Pay for
Glenmore Park Skatepark	Glenmore Park	Recreation	Free
Unreal Mini Golf	Jamisontown	Recreation	Pay for
Leonay Golf Club	Leonay	Recreation	Pay for
Twin Creeks Golf & Country Club	Luddenham	Recreation	Pay for
Aqua Golf	Penrith	Recreation	Pay for
Great River Walk	Penrith	Recreation	Free
Jamison Park Skatepark	Penrith	Recreation	Free
Nepean Belle Paddlewheeler	Penrith	Recreation	Pay for
Penrith Golf & Recreation Club	Penrith	Recreation	Pay for
Glenmore Heritage Valley Golf	Mulgoa	Recreation	Pay for
The Rowers Nepean Rowing Club	Penrith	Recreation	Pay for
Penrith Skatel	Emu Plains	Recreation	Pay for
A.A.C Tours	Penrith	Tour Operator	Pay for
Oz Trails Day Tours & Charters	Penrith	Tour Operator	Pay for
River Run Eco Tour/Fishing Tour	Penrith	Tour Operator	Pay for

5.2. ACCOMMODATION AUDIT

The following table provides a summary list of commercial accommodation available throughout the Penrith LGA. While Penrith has a variety of smaller scale accommodation comprising self-contained apartments and B&Bs etc, the summary demonstrates that there is a distinct lack of larger scale or branded accommodation properties.

TABLE 8: PENRITH ACCOMMODATION AUDIT SUMMARY

Accommodation Type	Count
B&B	5
Camping/Caravan Park (traditional transit / camping ground style)	3
Commercial Self Contained Apartments	7
Guesthouse	1
Hotel/Motel	10
Serviced Apartments	2
Villas/Resort	2
Holiday Homes/Self Contained Apartments	26
Total	56

TABLE 9: PENRITH ACCOMMODATION AUDIT

Name	Suburb	Type	Rate \$	Capacity	Rooms	Beds	Star Rating
Penrith Lakes Bed and Breakfast & Bunkhouse	Cranebrook	B&B	\$25-\$120	28	5	24	-
Kerr Cottage	Penrith	B&B	\$99-\$119	6	2	-	-
Home-Lea B&B	South Penrith	B&B	\$60-\$80	-	3	-	-
La Casa Cabrera	Werrington	B&B	\$85-\$95	-	2	-	-
La Grande Manor	Glenmore Park	B&B	\$125-\$155	-	4	4	-
Nepean River Holiday Park	Emu Plains	Camping/Caravan Park	\$25-\$175	-	72 Cabins 130 Powered Sites & Tent Sites	-	Self Rated 4
Bents Basin	Wallacia	Camping/Caravan Park	\$10-\$14	-	200	-	-
Wallacia Caravan Park	Wallacia	Camping/Caravan Park	\$16.50-\$22	-	6 Unpowered Sites	-	-
UWS Penrith Village	Kingswood	Commercial Self Contained Apartments	\$56-\$300	-	-	-	Self Rated 3
Penrith Serviced Accommodation	Leonay	Commercial Self Contained Apartments	Price on Application	14	5	10	-
Mulgoa Valley Receptions	Mulgoa	Guesthouse	\$180	8	4	-	-
Mercure Penrith	Penrith	Hotel/Motel	\$155-\$370	-	216	-	4 star
Quality Inn	Penrith	Hotel/Motel	\$145-\$220	-	55	-	Self Rated 4
St Marys Park View Motel	St Marys	Hotel/Motel	\$125-\$190	-	28	-	Self Rated 4
Wallacia Hotel	Wallacia	Hotel/Motel	\$100-\$220	-	30	-	Self Rated 4
Penrith Valley Inn	Penrith	Hotel/Motel	\$120-\$200	-	38	-	Self Rated 3
Blue Cattle Dog Hotel	St Clair	Hotel/Motel	\$95-\$240	-	18	-	-
Overlander Hotel Motel	Penrith	Hotel/Motel	\$66-\$99	-	21	-	-
Colyton Hotel	Colyton	Hotel/Motel	\$70-\$99	-	30	-	-

Name	Suburb	Type	Rate \$	Capacity	Rooms	Beds	Star Rating
Jamison Hotel	Penrith	Hotel/Motel	\$76	-	8	-	-
Penrith Hotel Motel	Penrith	Hotel/Motel	\$66-\$77	-	11	-	2 Star
Value Suites	Emu Plains	Commercial Self Contained Apartments	\$72-\$400	-	43	-	Self Rated 3
Penrith Furnished Accommodation	Orchard Hills	Commercial Self Contained Apartments	\$320-\$400 weekly	-	-	-	-
Penrith Central	Penrith	Commercial Self Contained Apartments	\$99	-	3	-	-
The Vines Holiday Cottages	Orchard Hills	Commercial Self Contained Apartments	Price on Application	55	3 Cottages	-	-
Waterview	Leonay	Commercial Self Contained Apartments	\$100	8	1	-	-
Astina Serviced Apartments - Central	Penrith	Serviced Apartments	\$199-\$480	-	16	-	Self Rated 4
Astina Serviced Apartments - Parkside	Jamisontown	Serviced Apartments	\$185-\$480	-	15	-	Self Rated 4
Nepean Shores Riverside Resort & Conference Centre	Penrith	Villas/Resort	\$125-\$180	-	65	-	Self Rated 3.5
Hopewood	Wallacia	Villas/Resort	Price on Application	-	-	103	-

5.3. PRODUCT GAP ANALYSIS

As has been identified in the opportunities section of this report, there are a number of new initiatives which could be considered to help bolster the tourism product mix within the Penrith LGA. In addition, a detailed assessment of the current product mix has identified a number of potential product gaps. These gaps are noted as follows (not in priority order):

- The limited number of 3-4 star branded hotel rooms available (noting that the Mercure is the only branded property currently in Penrith);
- The opportunity for developing a high quality holiday park to pick up on the strong growth in the campervan and caravan market and the lack of holiday park sites in and around Greater Sydney;
- The potential for high quality tent camps (termed glamping) within forest reserve and park areas;
- Over water bungalows and chalets as part of unique water based accommodation if permissible at Penrith Lakes;
- The lack of packaging of product (accommodation, visitor attractions, food and beverage options etc.);
- New product options to support the Penrith Whitewater Stadium and Regatta Centre at Penrith Lakes;
- Other forms of passive and active tourism product to help grow the tourism product base within the LGA overall;
- The need for additional cycleways and walkways particularly utilising the fringes of the Nepean River for both recreational and tourism purposes but also to offer short stay packages for visitors and for associated cycle hire opportunities;
- Potential for sound and light shows particularly in locations along the Nepean River, potentially at Penrith Lakes and other locations to offer an evening based visitor experience as there is limited evening product currently on offer;
- Refreshing and packaging heritage based experiences (local community museums, historic sites and sites of significance) as part of guided walking tours including ghost tours etc.;
- Development of a mobile app with augmented reality to tell the history of the unique parts of the LGA and their context within Greater Sydney;
- The creation of a major visitor hub to act as a booking centre, information centre and potentially interactive visitor attraction which is close to major public transport activity (the Railway Station for example);

- Looking beyond the LGAs boundaries to create synergy with tourism product in neighbouring areas such as the Hawkesbury's food trails and related experiences but using Penrith as the base to experience these from;
- Cementing Penrith as a dedicated gateway and accommodation hub for the Blue Mountains with new forms of accommodation to offer overnight stays (and overcoming the perception that Penrith is merely a gateway rather than a destination in its own right); and
- Developing a major visitor perception campaign to be promoted in Greater Sydney and focused on the wide product range available within Penrith, which is required to help change perceptions of what the LGA is.



6. Identified Issues

6. Identified Issues

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

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

The issues have been segmented into the following categories:

- Product and supporting infrastructure issues;
- Marketing issues; and
- Other issues.

It is important to note that the responsibility of resolving these issues does not fall only on Council's shoulders. Rather, many will require the active participation of Penrith tourism operators as well as other stakeholders.

Recommendations regarding how many of these issues can be resolved or converted into opportunities for Penrith are outlined in Section 7 of this DMP.

6.1. PRODUCT AND SUPPORTING INFRASTRUCTURE

6.1.1. Lack of Accommodation

One of the primary issues raised by stakeholders and Council is the lack of accommodation in the form of hotels, motels, caravan parks etc. in the Penrith LGA.

Visitor statistics from the National Visitor Survey indicate that the majority of overnight visitors to Penrith (72% of domestic overnight visitors and 88% of international overnight visitors) stay with a friend or relative. Only 13% of domestic overnight visitors and 2% of international overnight visitors stayed in a commercial hotel, motel or motor in.¹⁸

This has several implications for the LGA, including:

- Due to its lack of accommodation options, and its position close to regions and LGAs with larger accommodation options (such as the Blue Mountains, the Hawkesbury and Parramatta), Penrith is increasingly perceived as a drive through region, rather than a stop and stay destination in its own right;

¹⁸ National and International Visitor Surveys, YE June 2014, Tourism Research Australia

- The caravan parks in the LGA have a high ratio of permanents and may not be able to really cater for visiting travellers; and
- While the LGA has international quality sporting and large event facilities, it is difficult for the LGA to secure large-scale events with lack of commercial accommodation.

We also note the main provider of higher quality accommodation in Penrith (Mercure¹⁹ at Penrith Panthers which has 223 rooms) has recently changed management rights and owners.

Whilst the current supply of accommodation is suitable for some periods, supply is unable to cater for business and peak periods. If developer interest in creating additional accommodation is unable to be sourced, there may be a need to consider alternative strategies to ensure the LGA is able to secure large scale events and conferences, including developing partnerships with surrounding LGAs with a greater supply of accommodation. This could involve Council developing a promotional package which they present to event organisers which includes accommodation and transport (via shuttle) options which can be used to host event attendees. Some of this accommodation would be in the LGA, with the remainder (depending on event size/scale) being scattered throughout neighbouring LGAs.

This situation however, is not ideal due to the economic leakage from visitors staying outside of the Penrith LGA and spending on food and beverage, accommodation and entertainment.

6.1.2. Public Transport Services and Coordination²⁰

There is a lack of regular public transport services within the LGA to transport visitors to key tourism attractions, such as the Penrith Lakes Scheme and White-water Stadium (a 5min drive away from Penrith CBD). Several of Council's strategies, such as the Community Plan and the City Strategy, identify the need for improved public transport within the LGA.

Alternative options for improving transport to these tourism attractions (particularly during peak periods, such as for events) needs to be developed. This may include a greater promotion of existing services, such as the shuttle service which we understand runs between points in the CBD and Penrith Lakes Scheme during events.

¹⁹ We note the Chifley has recently been purchased by Accor and will be branded a Mercure property

²⁰ Public Transport Services to Key Tourism Attractions within the LGA & Coordination Between Different Forms of Public Transport

6.1.3. Lack of Signage – Interpretive and Directional

Within the Penrith CBD and broader LGA, there is a lack of directional signage. Directional signage, particularly within a CBD, is crucial to encourage visitation to places of interest, outline walks that can be completed through the CBD to attractions (such as heritage and cultural walks). It is important to consider that the better signposting of Penrith's natural attractions, particularly around the Nepean River, could also encourage visitors and the community to make better use of these facilities for walking, cycling and picnicking etc.

There is also a lack of interpretative signage within the CBD, when entering the region and at attractions. What should be introduced are large attractive gateway signs on all access roads into Penrith, highlighting the key experiences and branding of the LGA. These are needed to encourage visitors to visit and stay, rather than drive through.

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

We note Council is currently aware of this issue and is investigating strategies to improve signage, including the introduction of digital information kiosks at key visitor locations (such as the Penrith Lakes Scheme).

6.1.4. Lack of Sufficient Hallmark Events and Festivals

Though there are a number of existing events already in the LGA, these are perceived as mostly local/community based activities. There is limited evidence of how many non-locals attend events and festivals, other than those driven by Panthers such as the Gun Show, the Bridal Expo etc. Interestingly these are strongly branded as Panthers, rather than Penrith, based events.

Many LGAs tend to suffer from an overabundance of events and festivals. This tends to result in:

- Volunteers being spread too thinly over too many events;
- Insufficient paid for event coordination and management staff due to the small size of events and associated revenue able to be generated;
- Volunteer burnout which is often seen with the same volunteers and community groups trying to run too many events;
- Events often fall over after 3 – 5 years as interest wains and organisers lose enthusiasm; and
- The budget needs of events increases whilst the available Council related funding cannot keep up.

The need is seen to consolidate event funding and support fewer events which can be grown strongly over time. These “hallmark” events should be able to source funding and other support from a variety of sources over time and reduce the reliance on Council funding in particular.

6.2. MARKETING ISSUES

6.2.1. Lack of Dynamic Tourism/Destination Website

Currently, while there is a range of tourism websites for attractions and smaller product within the Penrith LGA, there is no unified website that is accepted by the Penrith tourism industry being the online ‘face’ of the LGA. We note there is an old website for the LGA, branded with the LGA’s old destination branding “Penrith Valley”.

With the recent closure of the VIC, there is a need to have a current website which promotes the Penrith region and its product offering, as well as providing a range of visitor information which visitors would traditionally have obtained via a VIC. It is important this website utilise new web technologies in order to meet visitors’ expectations and to compete with the multitude of other destination-based websites.

We note Council is currently in the process of getting a website up and running, with an expectation that this will be completed by June 2015.

6.2.2. Inclusion within the “Greater Sydney Region”²¹

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

Penrith is effectively “lost” as a destination if merely included as part of Greater Sydney.

6.2.3. Lack of a Media Database

Stakeholder feedback indicates a need for a media database to be developed which contains a range of high quality images and other material for Penrith. This will allow businesses within the region to utilise these images for marketing and promotion, providing better quality imagery and interpretation of Penrith.

Council is midway through completing this database, with a project completion date of after June 2015.

²¹ Inclusion within the “Greater Sydney Region” along with many other LGAs

To continue to refresh the database, consideration should be given to holding an annual photography competition (with prize money) for top images. All images entered into the competition should be able to be used by Council and local operators for marketing collateral, with photographer acknowledgement.

6.2.4. Lack of local awareness of the Importance of the Tourism Industry to the Local Economy

Whilst Penrith does have a number of very active tourism operators, there are also many who appear somewhat ambivalent or inactive. Furthermore, while the community is generally supportive of tourism, as is similar in many other LGAs, communities often fail to understand that councils are generally the largest financial contributors to tourism via visitor information services, tourism marketing and promotion, funding of local tourism organisations, maintenance of visitor infrastructure (such as signage, art galleries, museums etc.).

A strategy which promotes far more industry participation is required. This strategy should include a community awareness campaign which demonstrates the following:

- How the tourism dollar disperses through the Penrith economy (to show that many retailers and suppliers of goods and services are also beneficiaries);
- The wide range of businesses which benefit from tourism;
- How extended trading hours could provide benefits to a wide cross spectrum of the community;
- What the estimated value is of tourism via direct, indirect and induced spending impacts; and
- To help support why Council/rate payer funding is required to maximise the total returns to Penrith as demonstrated via economic benefits, social and infrastructure improvements and higher quality environmental outcomes.

6.2.5. Market Perception of Penrith as being the gateway to the Blue Mountains

With over 80% of visitors to the LGA being day trippers, there is a perception amongst tour operators, wholesalers and tourism intermediaries generally that Penrith is a day market only. That is, interstate and international visitors currently will stay in the Sydney CBD and travel out to Penrith for day visitor experiences rather than consider the possibility for overnight stays. This view is reinforced by local markets from the greater Sydney region who do not yet see the need for overnight stays, possibly based on the products currently on offer, the excellent accessibility to the LGA and the perception that the LGA is not yet a destination in its own right.

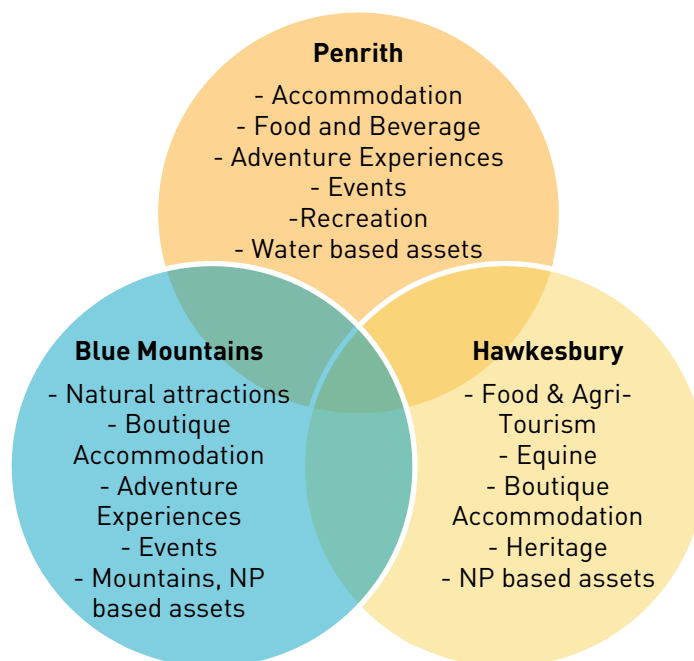
6.2.6. Lack of Linkage with the Blue Mountains and Other Surrounding LGAs

While it is normal for Penrith to view its surrounding regions and LGAs as its competitors, there is a need to recognise the benefits which could be yielded if Penrith was to work, particularly in a promotional and packaging sense more closely, with these areas.

The Blue Mountains and Hawkesbury regions provide good potential synergies for Penrith, with each area having unique products which, when packaged together, could present a number of enticing options for a range of visitor markets.

We note Council is currently holding discussions with both of these LGAs to discuss possible marketing partnerships which could be established.

FIGURE 10: POSSIBLE SYNERGIES BETWEEN PENRITH, BLUE MOUNTAINS AND HAWKESBURY



6.3. OTHER ISSUES

6.3.1. Lack of synergy between the CBD and River

Many of the strategies developed by Council have recognised the strength of the Nepean River as an important asset for the City, but the lack of linkage between the River and the Penrith CBD is often quoted.

Connectivity, via signage, pathways, public transport links etc. is important for encouraging use of both precincts and stimulating greater vibrancy.

6.3.2. Limited Retail Trading Hours

Limited shop trading hours, particularly over the weekend and in the evening, is a concern because it creates the perception that Penrith is not open at night.

To encourage retailers, and particularly restaurant and café operators, to extend their trading hours, it is important that they (as well as the general community) are provided with insight as to the economic benefits of doing so. A rotational system where different restaurants/cafes open late or on the weekends may be an option to consider.

It is important to recognise that greater community commitment to growing and promoting tourism will lead to greater word of mouth advertising for the region and stronger use of cafes, restaurants and attractions.

6.3.3. Lack of Planning Zones Designated for Tourism

Though the LGA is seen to have an abundance of available land for development, it is perceived that these areas are for primarily residential developments, education and health sector based specific precincts or business hubs. Tourism is yet to feature.

Investors and developers in tourism look for certainty via areas which offer tourism growth potential and which also offer buffers from other land uses which can be counterproductive for tourism such as industrial and residential areas.

With a lack of available land in most LGAs in Greater Sydney for tourism development, the ability to designate an area for tourism development in the Penrith LGA could be a major selling feature to encourage more tourism and related businesses to establish.

6.3.4. Link to Education Sector

Whilst there has been a strong focus on developing and expanding the tertiary education sector via University and TAFE expansion initiatives, as well as through the Penrith Business Alliance (PBA), who have been advocating for the investment into a major health and education precinct²², there is a need for greater linkage between the health, education and tourism sectors. This link could include the development of commercial accommodation options to support students, researchers, conference attendees, family members visiting and short term residential courses for Australians.

²² Penrith's Health and Education Precinct (PHEP), Key Advocacy Issue 2 – 5 Key Advocacy Issues, Penrith Business Alliance

6.3.5. Lack of Linkage between Tourism & the Arts/Culture Sector

With the Joan Sutherland Centre and the Penrith Regional Gallery & The Lewers Bequest, the LGA has strong regional arts based facilities. These are not being packaged yet (with accommodation, food and beverage options and other attractions) to encourage cultural visitation with exhibitions and shows.

Cultural tourism is an important sub-sector of the tourism industry but needs to be well integrated to improve visitation, visitor spend and wider economic benefits.

6.3.6. Need for Penrith CBD Revitalisation

The current look and feel of the Penrith CBD is challenging from a visitor growth perspective with limited product to appeal. The challenge is that future tourism precincts and areas of interest may need to be away from the CBD which will potentially drive visitor numbers and visitor spend to other parts of the LGA.

Potential for offering new amenities and services to support the visitor economy in the CBD may need to be considered or a decision made to effectively by-pass the CBD in favour of other locations within the LGA where tourism can grow.

We note that the Penrith Progression project is currently being undertaken, which is investigating new economic, social and environmental drivers that will underpin the urban renewal and revitalisation of the Penrith CBD. This project includes the development of an Economic Masterplan (EMP) and a Place-Shaping Framework (PSF) as well as the creation and implementation of an Activation Plan.

6.3.7. Dominance of Penrith Panthers

Having a major visitor attraction such as Panthers is a real strength especially with its strong focus on many major regional events and sporting activity. The success of major state based events such as the Bridal Expo and the gun show, just as examples, draws many visitors from throughout the state and further a-field. And having a major attraction undertaking constant upgrades such as the \$850m expansion recently announced (which includes a sports academy) is a significant bonus for any LGA.

The challenge however is the effective dominance which Panthers has as the major tourism player in the LGA and the reliance which many place on it.

This is particularly important if the LGA wishes to develop a strong adventure tourism hub and positioning for Sydney. Having Panthers as a major contributor and sector leader and also helping other complimentary businesses is equally important. Tourism works best when tourism

businesses work together to package and promote product as a cluster, rather than as standalone operators. Panthers needs to have a strong leadership role but in a way which can attract (rather than deter) new product operators.

6.3.8. Lack of Activation of Natural Assets

Unlike neighbouring LGAs (such as the Blue Mountains), Penrith stands out with the level of natural assets (available land and water). These assets however, need to be properly activated to turn them from assets to actual tourism attractions which can then generate economic returns (investment, employment and recreational value). These could include the Nepean River, Penrith Lakes (not just the regatta centre), and various forest parks and reserves.

There is a need to open up these areas adventure tourism especially, as without them the LGA may struggle to grow the economic benefits which tourism can offer and which may stifle the visitor economy potential.

The recent proposed vision plan for Penrith Lakes provides an excellent opportunity for Council and other tourism stakeholders to submit responses which facilitate tourism development and avoid the Lakes becoming a predominantly residential suburb. The Penrith Lakes could offer:

- More on water and overwater attractions and experiences;
- Glamping, overwater bungalows and potential a major hotel focused on supporting events and recreational water based amenities;
- Walking trails, cycling trails, horse trails and kayaking trails; and
- New attractions and passive and active adventure experiences.



7. The Opportunities

7. The Opportunities

The following section highlights the various opportunities which Penrith should focus on to activate and grow its visitor economy. The opportunities have deliberately been kept succinct to ensure that the focus is on those opportunities which are likely to generate the best possible returns in the shortest timeframe. They therefore represent the *lower hanging fruit* opportunities for Council and the Penrith LGA. It is also important to note that Council has a key role to play as an enabler, in facilitating and driving these projects. Without Council undertaking this role, it is unlikely many of these opportunities will come to fruition.

The opportunities have been segmented according to the following categories:

- Tourism investment and development opportunities;
- Marketing opportunities; and
- Supporting infrastructure and coordination opportunities.

Note, the opportunities are not listed in priority order.

7.1. TOURISM INVESTMENT & DEVELOPMENT OPPORTUNITIES

7.1.1. Development of New Hotel Accommodation

Whilst the Mercure (previously the Chifley) has been particularly successful in helping to build the profile of Penrith and supporting Penrith Panthers various events and activities, demand needs to be assessed for a second major hotel to build and offer more quality room stock.

An assessment has been done of the ability to grow visitor activities particularly to the various attractions and experiences beyond a day visit. This opportunity is constrained by the lack of suitable room stock, whilst there are sufficient tourism experiences to cover at least two days, if not more. However, visitors from a wider catchment area (Greater Sydney) are unlikely to be prepared to drive out to Penrith two days in a row to experience various attractions.

There is an opportunity therefore to grow the activity market and just as importantly, the business and event markets by offering more quality accommodation in Penrith itself.

To activate this opportunity there is a need to:

- Identify suitable sites;
- To ensure that the sites are zoned for commercial accommodation and for mixed use development to allow for this;

- To facilitate interest amongst major accommodation operators (and their investors) to consider Penrith as a location; and
- To highlight the opportunities for joint marketing initiatives which could support new accommodation by linking into activity operators and events.

Feedback from stakeholders has identified potential sites including:

- The current site of the Carpenter Site²³ (owned by Council) and strategically located near Council and public transport;
- Potential commercial accommodation at Penrith Lakes; and
- Panthers Group²⁴ have indicated they recognise there is a shortage of accommodation in Penrith and they are keen to develop a serviced apartment hotel on their land, overlooking the lake at Penrith Panthers and mountains beyond.

Whether these sites could be available, whether they are suitable and whether the level of interest is sufficiently strong would need to be the subject of separate analysis and a pre-feasibility assessment to test investor demand.

What is evident however, is that the success of activity tourism operators in growing visitation and from a discerning and higher spending visitor market is now quite evident. The ability to expand visitor time within Penrith will be dependent on offering attractive packages including offering commercial accommodation of an acceptable quality, packaged with various attractions and experiences or linked to specific events.

The lack of suitable and available sites for hotels and conference facilities within Greater Sydney is well recognised. If Penrith has the ability to offer possible attractive hotel sites to the market, it will be filling an investment gap unable to be satisfied in most LGAs in Greater Sydney.

7.1.2. Expanded Activity at Penrith Lakes

Currently, Council has responsibility for the Penrith Whitewater Stadium, which it leases out to a private operator. Opportunities for expanding development not only at the Stadium but utilising the Lakes generally could include:

- A variety of active and passive pursuits using the waterways;
- Potential for locating more soft and active adventure activities at or near the Penrith Whitewater Stadium such as climbing walls and other pursuits;

²³ The Carpenter Site is also referred to as the Ambulance Station site

²⁴ It is important to note that whilst the Mercure Hotel is located within the Panthers complex, it is not owned by Panthers Group.

- The introduction of a high ropes course/confidence course as a further attraction; and
- A major ski jump etc.

A Victorian company was initially interested in establishing a ski jump (for snow skiing) but which they could practice over water at Penrith Lakes. We understand that the capital required was eventually not forthcoming. If an activity such as this were available it might actually generate strong spectator interest as well as participation.

A further opportunity to be capitalised on is the strength of the Asian (particularly the Chinese) inbound market into Sydney and its growth potential is offering a number of specific development opportunities at Penrith Lakes. These potentially could include:

- A series of retail outlets ideally with a duty free facility as well;
- Overwater seafood restaurants to take advantage of the unique setting of Penrith Lakes and noting the preference for water-based locations; and
- The potential for an on water (cruise style vessel) which could take groups slowly around the lakes either as a luncheon cruise or a sightseeing cruise.

We note the significant challenge however in getting tour groups out to Penrith when there is so much product already available in the Sydney CBD which is far more accessible. However, tour companies continually look for a product point of difference so new product at Penrith Lakes could be that product.

7.1.3. Development of a Central Experience Hub

As an activity focused²⁵ destination, the opportunity exists to create a centralised experience hub which can act as a major ticketing facility as well as an information sharing outlet (in the absence of a visitor information centre). Some stakeholders who have visited Queenstown in New Zealand talked about The Station which is a major downtown booking facility which offers discounted packages for different types of adventure experiences. The Station in Queenstown is run by industry operators and is self-funded. The opportunity may exist to create a similar style of operation (although being self-funded may take some time to establish) at a location which is easily accessible to public transport.

The potential could exist to develop such a facility as a visitor experience hub and ticketing facility at or close to Penrith Railway Station. It is understood from Council that there is

²⁵ The activity focus of Penrith is both active and passive and also covers tourism and recreational pursuits. By way of example:

- Passive activity includes gallery shows and events at the Penrith Regional Gallery & The Lewers Bequest;
- Active pursuits includes iFLY, Cables and Luddenham Raceway; and
- Recreational pursuits include use of the various sports facilities and amenities for sporting events as well as the River Walk etc.

redevelopment occurring at the Railway Station and the opportunity may exist to create an attractive gateway facility (the Hub Experience) which can potentially sell not only the activity experiences but also all of the other experiences which Penrith has to offer. The ability of industry to pay for this development is unlikely so responsibility would need to be on Council (possibly with assistance through a State or Federal level funding grant) to create a “visitor experience centre”.

It is important however, to differentiate the hub experience from the traditional visitor information centre. What we are not advocating is for a visitor information centre but rather a visitor experience hub which can offer:

- Ticketing and packaging of different attractions at competitive prices;
- Information sharing ideally through multimedia displays;
- Some interactive displays possibly to tell the story of Penrith and the events on offer; and
- Offering details on events and other activity.

7.1.4. Creation of a Destination Caravan Park

Whilst there are some caravan parks scattered throughout the Penrith LGA, there is a lack of destination-style caravan parks to attract the holiday visitor market.

Over the past 15 years, the caravan, motorhome and camping industry has been the fastest growing domestic tourism sector in Australia. In this period, caravan and RV registrations have increased by more than 250%. The industry is worth \$6.5 billion nationally and currently provides for 620,000 holidays per annum.²⁶ The industry is constantly evolving with successful parks responding to consumer demand for better standards and facilities by transforming from traditional transit parks into holiday/destination parks.²⁷

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

To encourage visitors to stay in Penrith and visit for a holiday, rather than just visiting as day trippers, the opportunity exists to create a new family-centric holiday destination park.

²⁶ Caravan and Camping Industry Profile, Caravan and Camping Industry Association NSW, pages 2-4.

²⁷ More detailed trend data on caravan and destination parks can be found in Appendix 1

Feedback received from national tourism bodies emphasised the declining number of caravan parks. This decline does not appear to be as a result of lack of demand, but rather as a result of a lack of suitable land for their development and the sale of many existing coastal caravan park sites, especially for residential and mixed use commercial development.

The development of a holiday park within Penrith provides an opportunity for Council to take a role in finding appropriate sites (ideally on Council land, or land which Council can manage on behalf of State Government). With the lack of caravan parks, and more specifically, destination holiday parks, not only in Penrith, but also in and around greater Sydney, a significant amount of business could potentially be driven into the LGA.

When developing the new park, the following should be considered:

- Capacity for approximately 80 - 120 caravan and RV sites, 20 - 30 cabins and additional spaces for camping;
- The park should be focused on tourists as opposed to permanent stay campers;
- The park needs to be family friendly to encourage a greater number of families to stopover and visit the region;
- Development designed by a renowned designer who is considered to be an industry leader in holiday parks is important; and
- Consideration should be given into the provision of amenities such as a heated pool, spa, BBQ facilities, camp kitchen, tennis court, bike hire/loan, kid's playground (including a giant jumping castle), daily children's activities and a café and convenience store.

The following figure demonstrates 4 traditional caravan parks. Often these parks have very basic facilities and are often used as transit parks by travellers (i.e. overnight accommodation when travelling between two destinations, rather than being a destination in its own right).

FIGURE 11: TRADITIONAL CARAVAN PARKS



Hillston Caravan Park, NSW



Huntsville Caravan Park, QLD



Burrum Heads Beachfront Tourist Park, QLD



Batlow Caravan Park, NSW

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

FIGURE 12: DESTINATION HOLIDAY PARKS



Nambucca Beach Holiday Park, NSW



Renmark Riverfront Holiday Park, SA



Adventure Whitsunday Resort, QLD



Deniliquin Holiday Park, NSW



Howard Springs Holiday Park, NT



Pambula Beach Discovery Holiday Park, NSW

Demand for a holiday park is expected to be strong from a number of visitor markets. Importantly, there are two peak seasons for holiday park users being the peak summer period and for the grey nomad market segment, a winter season from May to August/September.

In order to determine the most appropriate site for the destination holiday park, a feasibility and site assessment would need to be undertaken.

We also note that Emu Plains Caravan Park has recently been purchased by BIG4 and rebranded “BIG4 Nepean River”. The opportunity exists for Council to liaise with BIG4 on the attractions and amenities likely to be introduced and future potential for expansion.

7.1.5. Development of a Major Caravan/Campervan Service Centre

Along with the need for more destination parks throughout NSW, research indicates that there is pent up demand for a “one stop shop” for caravan/campervan vehicle servicing.

The development of such a facility could tie in cleverly with the new destination park recommended as part of this DMP. Additionally, this could link in with the current motorhome and caravan retailer located in Emu Plains.²⁸

The facility could offer:

- Caravan/campervan, trailers and camping equipment servicing;
- Vehicle and equipment storage;
- Provisioning; and
- Sale of new caravans, campervans, RVs etc.

²⁸ Winnebago’s head office is located in Emu Plains

7.2. MARKETING OPPORTUNITIES

7.2.1. Development of a Tourism and Cultural Precinct

A number of activity operators have established in Penrith (Cables, iFLY, Penrith Whitewater Stadium etc.) with the potential to expand this cluster further. To do so however will continue to require:

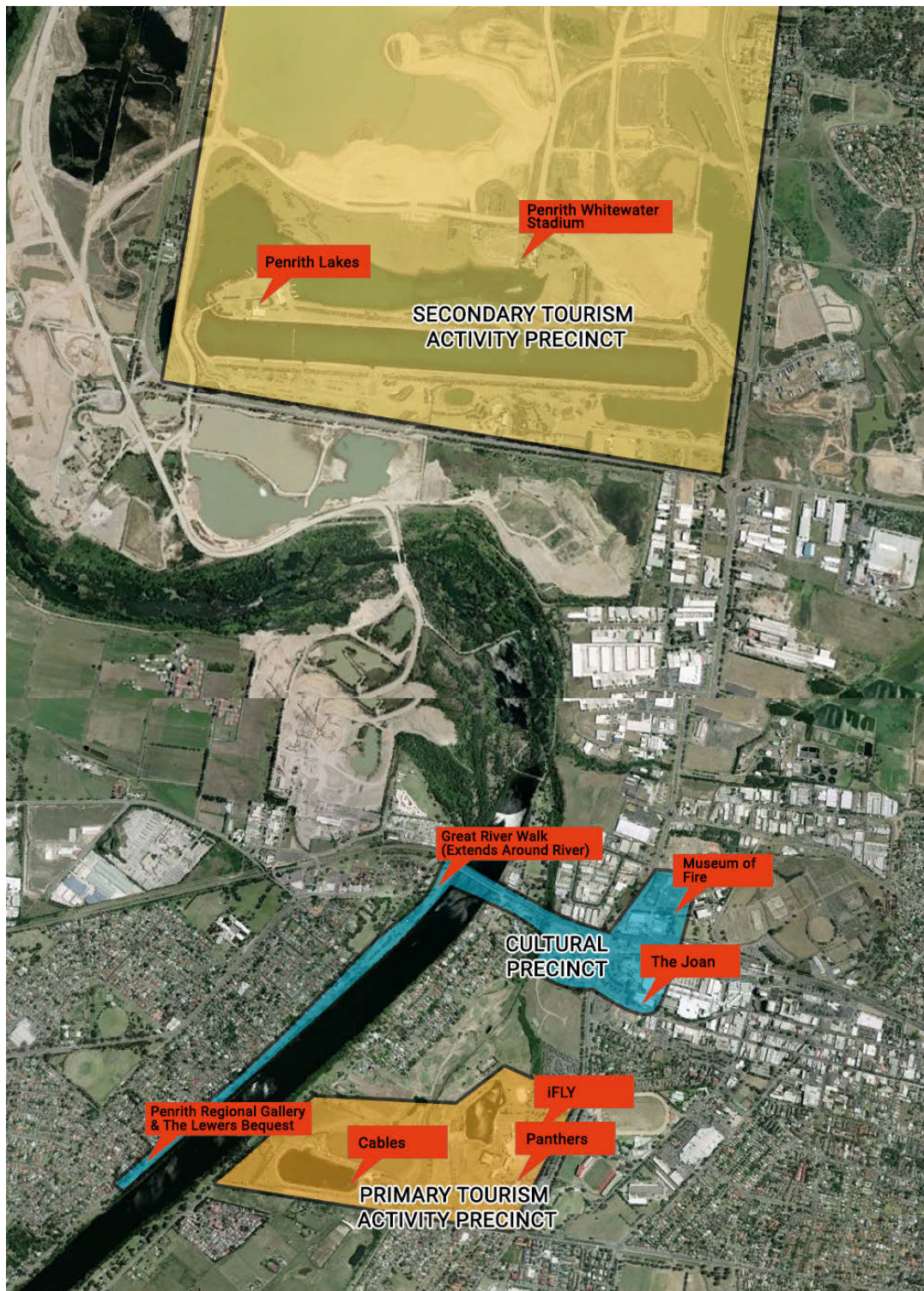
- Identification of sites where new activity operators can be located;
- Improving signage in this general area to improve accessibility and awareness;
- Looking at ways of introducing improved public transport;
- Ensuring that Council's planning documents (LEP and DCP) clearly indicate Council's desire to support activity based tourism operators to establish in this area; and
- To identify other elements of supporting infrastructure which will help grow the sector.

The area in question covers the Penrith Lakes site, the Nepean River and encompasses Penrith Panthers. The following figure provides an aerial map, overlayed with the potential tourism activity and cultural precincts.

The figure illustrates that:

- There is an existing tourism activity precinct with a cluster of well-established tourism operators;
- A secondary tourism activity precinct, encompassing Penrith Lakes, which should offer sufficient opportunity for additional tourism activity to support the Penrith Whitewater Stadium and Regatta Centre; and
- An existing cultural precinct which offers a link to the Regional Gallery from The Joan via The Great River Walk.

FIGURE 13: TOURISM AND CULTURAL PRECINCTS



7.2.2. Creation and Packaging of Semi and Active Adventure Product for Cruise Industry

Though partly a marketing initiative as well as development, the opportunity exists to capitalise on the strength of the cruise ship market into Sydney over the October-February period. The cruise ship visitors are significantly high yield and land based operators are continuously looking for new product experiences.

As many people on cruises are active 40, 50 and 60 year olds, the various activity experiences may well appeal. Whilst there is likely to be a degree of interest in staying in and around Sydney to understand the CBD better, there may be interest (if well marketed) to encourage cruise visitors to undertake activity based experiences as part of a health/lifestyle opportunity and potentially linking into trips to the Blue Mountains. There is already strong demand from cruise ship visitors to visit the Three Sisters which could be linked into some activity experience opportunities in Penrith either prior to or post a visit up to the Blue Mountains.

7.2.3. Creation of a “Selling Penrith” Campaign

A number of stakeholders have commented that there is a requirement to rebrand and reposition Penrith as a destination in its own right and to properly clarify what Penrith is as a location. Currently, many operators and stakeholders perceive Penrith as merely the gateway to the Blue Mountains rather than a destination in its own right. This is partly due to the lack of understanding of what’s actually in the LGA and mixed sentiment as to how safe and appealing the area might be.

A number of industry operators have commented that if there was one major initiative which they would strongly support Council in undertaking, it would be a major marketing campaign to help reposition Penrith:

- As an attractive place to live, work and play;
- As an interesting and exciting visitor destination; and
- As a place which acts as a hub drawing on surrounding areas such as the Hawkesbury and the Blue Mountains.

The market whose perceptions need to change reflects not only all those who reside more than 30 minutes away from the Penrith CBD but also the local community in Penrith. There is not only a need to reposition Penrith in the minds of Greater Western Sydney residents but also those who reside in the Inner West, the Eastern, Northern and Southern Suburbs of Sydney. In addition to these, there is a need to reengage with Regional NSW to encourage the visitors who often used to visit on a regular basis from Orange, Bathurst and other inland towns but whose numbers have reduced over the last 10 years.

Whilst Penrith City Council has recently developed a new community brand for the LGA (Penrith is Here²⁹), there is a need to consider a specific tourism focused campaign which aims more at the visitor markets than local community.

In addition, there is recognition from industry that the funding for such a campaign whilst being led by Council will require industry to partner as well. Further consultation is therefore required with a number of industry players throughout the LGA (and potentially the broader region) whose participation and contributions are likely to be crucial to a campaign's overall success.

7.2.4. Development of a Website and Linked Mobile App (or mobile accessible website)

A priority project for Penrith is the development of a robust and high quality tourism website. This was particularly highlighted in light of the recent closure of the Penrith VIC.

We note Council is currently planning for the development of a new website, with a scheduled release date of June 2015.

In planning for this website, consideration should be given to:

- Commissioning out the development of the website to a website developer who has specific experience in developing destination promotion and product packaging websites;
- Investigate the inclusion of a comprehensive booking system which also integrates pre-packaged deals, as well as allowing visitors to package up their own visit in the format of a shopping cart style system, allowing visitors to choose from a range of tours, accommodation, dining options, as well as experiences and events;
- A quality map of the LGA indicating the various experiences (commissionable and free), accommodation and other points of interest;
- A consistently updated and easy to read and navigate annual events calendar, with packages linked to specific events;
- Clever 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 and other famous individuals who love the Penrith region;
- Development of the platform as a content management system (CMS) which will allow the delineation and separation of backend data and user interface. The CMS will also allow approved individuals to log into the system and update information about their tourism

²⁹ <https://www.penrithcity.nsw.gov.au/Council/Our-Organisation/Brand/>

product. This would then be reviewed by a website content manager prior to publication. The CMS could also easily link in with the Australian Tourism Data Warehouse;

- The development of a mobile app for Penrith. The app could allow visitors to book accommodation, tours and activities, as well as offering a range of prebuilt packages. Additionally, the app could feature self-drive and self-walk tours (such as Vancouver's Visible City app and Adelaide City Guided GPS tours, see Figure 14) providing visitors with information on sites of significance through photos, videos, audio-guides and augmented reality tours;
- The web site and mobile app should offer augmented reality tours which will enable the history of Penrith to be brought alive in an interactive and flexible format. This will also enable visitor demand for specific products and experiences to be monitored; and
- If the budget does not exist to develop this website with all the features, a staged approach should be followed. The web designer commissioned should design the website in such a way that it is easily scalable in the future to include the abovementioned features. Additionally, if the budget does not permit for a separate mobile app to be developed, the website could be developed as a mobile enabled/accessible website which allows the website to be viewable and functional on the majority of mobile devices.

Council, should take responsibility for commissioning the development of and managing the website initially with the aim of handing this over to a suitable tourism industry organisation at a time in the future when a unified and well- structured local tourism organisation is able to operate. For the interim however, Council should take full responsibility for the development and maintenance of the website, including all regular updates.

FIGURE 14: MOBILE APP TOURS - VANCOUVER'S VISIBLE CITY AND ADELAIDE CITY GUIDED GPS APPS



7.2.5. Creation of Tourism Product Packages

There are a number of visitor experiences, attractions, transport options and accommodation etc. available throughout Penrith, however, currently there is generally very limited synergy between these operators/providers (including synergies with operators in neighbouring LGAs).

For packaging to be effective there is a need for a composite experience to be offered to the consumer, helping to extend longer visitor stay as well as greater dispersal throughout the LGA.

A good model to assess for effective packaging and promotion is the Queenstown (NZ) model. Queenstown offers a range of adventure passes to visitors, allowing them to undertake a range of experiences (such as bungee jumping, sky diving, rafting, jet boating etc.), for the one packaged price. Given the organic growth in activity product for Penrith, a similar packaging model/approach could offer significant opportunities.

There is also a need to consider packaging food and accommodation into these packages, helping to encourage visitors to stay within the LGA overnight.

The opportunity may also exist to look at cross-regional packaging, linking Penrith's experiences with the unique experiences that exist in both the Blue Mountains and the Hawkesbury. This may encourage visitors who would not have previously considered visiting Penrith during their stay in the Blue Mountains or Hawkesbury or further afield.

7.2.6. Development of an Events Calendar and Promotion Strategy

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

The following table provides a breakdown of all events and festivals that are currently held in Penrith. In total, there were 45 tourism based events, festivals and exhibitions³⁰ held in the 2014 calendar year.³¹ The Group understands that at times, events clash because there is no coordinated events calendar which event planners can use to check for event date clashes.

In order to better plan for events, as well as promote them, there is a need to develop an events calendar which should be available via the new Penrith tourism website. There are already a number of smaller event calendars (including one on Council's website) developed by individuals

³⁰ We note there are several more events held in the Penrith region, particularly gallery exhibitions etc. The events we have included are those which would appear, from online research and consultation, to be events that would attract a tourism market.

³¹ Note, events which have been cancelled for 2015 and beyond have not been included in this listing.

and tourism groups within Penrith, however, there is a need for collaboration to create one unified events calendar for the Penrith LGA.

TABLE 10: LIST OF TOURISM EVENTS AND FESTIVALS IN PENRITH

Name	Type	Suburb	Occurrence	Day	Month
NYE Carnival	Carnival	Penrith	Annually	31st	December
Penrith Pro Gift Carnival	Carnival	Penrith	n/a ³²	-	December
Mulgoa Valley Receptions - High Tea	Event	Mulgoa	Monthly	1st Sunday	-
Penrith District Nitro Racing	Event	Penrith	Weekly	Tuesday Night	-
Airing of the Quilts	Event	Emu Plains	Annually	-	April
Dragon Boats NSW State Championships	Event	Cranebrook	Annually	-	April
Annual Carols by Candlelight	Event	Penrith	Annually	-	December
Christmas Under the Stars	Event	St Clair	Annually	-	December
NYE River Cruises	Event	Penrith	Annually	-	December
Sips & Sounds	Event	Emu Plains	Annually (Summer months only)	Fridays	December
International Slalom Series	Event	Cranebrook	Annually	-	February
Schoolboy's Head of the River	Event	Cranebrook	Annually	-	February
Shakespeare by the River	Event	Emu Plains	Annually	-	February
Australia Day at the Lakes	Event	Cranebrook	Annually	-	January
Bridge to Bridge Swim Race	Event	Cranebrook	Annually	-	January
Ironkids Western Sydney	Event	Cranebrook	Annually	-	November
Ironman 70.3 Western Sydney	Event	Cranebrook	Annually	-	November
Nepean Weekend of Triathlon	Event	Cranebrook	Annually	-	October
Western Sydney Marathon	Event	Cranebrook	Annually	-	October
Defcon1	Event	Cranebrook	Annually	-	September
Doll, Bear & Craft Fair	Fair	Penrith	Annually	-	October
Penrith Valley Festival	Festival	Penrith	-	-	-
St Marys Spring Festival	Festival	St Marys	Annually	-	-
Mamre Harvest Festival	Festival	St Marys	Annually	-	April
William Cox Historical Festival	Festival	Emu Plains	Annually	-	July
Yulefest River Cruises	Festival	Penrith	Annually	-	July-August
Penrith CBD Festival	Festival	Penrith	Annually	-	March
Werrington Festival	Festival	Werrington	Annually	-	May
Indulge Food, Wine & Brewers Festival	Festival	Penrith	n/a ³³	-	October
Penrith Papercrafts Festival	Festival	Penrith	Annually	-	October-November

³² Event occurrence has not yet been confirmed

³³ It is unconfirmed whether this event will run again

Name	Type	Suburb	Occurrence	Day	Month
Glenmore Park Monthly Market	Markets	Glenmore Park	Monthly	-	-
Hubertus Country Markets	Markets	Luddenham	Monthly	Last Sunday	-
Markets at Panthers	Markets	Penrith	Monthly	3rd Sunday	-
Penrith Showground Markets	Markets	Penrith	Weekly	Wednesday	-
Twilight Markets	Markets	Penrith	Weekly	Friday	-
Harness Racing	Racing	Penrith	Weekly	Thursday	-
Penrith Working Truck Show	Show	Penrith	Annually	-	April
Penrith Show	Show	Penrith	Annually	-	August
Penrith Spring Home Show	Show	Penrith	Annually	-	August
Penrith Dolls, Bears, Craft & Collectables Show	Show	Penrith	Annually	-	June
Annual Luddenham Show	Show	Luddenham	Annually	-	March
For Eternity Bridal Expo	Show	Penrith	Annually	-	May
Sydney Antique & Classic Truck Show	Show	Penrith	Annually	-	May
Penrith Gun Show	Show	Penrith	Annually	-	November
Caravan & Camping Expo	Show	Penrith	Annually	-	September

7.2.7. Development of a Tourism Awareness Campaign

Feedback from Council indicates that tourism is perceived to be an important component of the Penrith economy, and an important sector for ensuring young people stay in the LGA, rather than relocate to Sydney or other CBDs with greater employment opportunities.

Furthermore, as is common in many other regions and LGAs, there is a lack of awareness regarding the importance of tourism with Penrith, and how the tourism dollar spreads throughout the LGA's economy (see Figure 15 on the following page). The Penrith tourism industry³⁴ is valued at \$410m and accounts for over 2.8k jobs in the LGA.³⁵

³⁴ Note this incorporates both tourism and hospitality

³⁵ <http://economy.id.com.au/penrith/tourism-value>

Council should consider developing a tourism awareness campaign which demonstrates the following:

- How the tourism dollar disperses through the local Penrith economy, showing how more businesses benefit from tourism than just tourism businesses. This would include assessing the direct and indirect impact of visitor spend;
- What kind of businesses benefit from tourism;
- How extended trading hours could provide benefits to a wide cross spectrum of the community and visitors;
- What the estimated value is of tourism via direct, indirect and induced spending impacts; and
- To help support why Council/rate payer funding is required to maximise the returns to Penrith as demonstrated via economic benefits, social and infrastructure improvements and higher quality environmental outcomes.

FIGURE 15: THE IMPORTANCE OF TOURISM



7.2.8. Development of a Coordinated Cultural Tourism Support Program

In order to create better synergy and links between Penrith's various cultural heritage and tourism products, there is a need for a coordinated cultural tourism support program to be developed. This could include:

- Cultural event development and facilitation;
- The development and introduction of banners and flags to profile and link cultural institutions and to raise awareness of cultural sites; and
- The development of a cultural attractions map and to link this to food experiences such as cafes, restaurants and food markets so gastronomy and other elements of local culture are seen to be interlinked. Culture should not just be seen as museums and galleries.

7.3. SUPPORTING INFRASTRUCTURE AND COORDINATION OPPORTUNITIES

7.3.1. Establishment of a Tourism Advisory Group

Consultation feedback and research has indicated that currently, the development of a formal Local Tourism Organisation (or LTO) for Penrith would be premature.

Until such a time that industry are ready to form and operate an LTO, a Tourism Advisory Group (TAG), comprising members of the tourism industry and Council, should be established as an interim step. The role of this TAG should be:

- To help drive DMP initiatives which require industry input;
- To gather and consolidate feedback from the tourism industry throughout the LGA;
- To provide guidance to Council on tourism sector needs and to provide assistance to Council personnel charged with implementing the DMP;
- To advocate for stronger resources and focus being applied to tourism in the LGA;
- To support Council in lobbying DNSW to strengthen the Penrith tourism brand;
- To ensure that other areas of the local economy are aware of tourism opportunities (specific TAFE tourism training programs, events and festival benefits for retailers in general, community groups supporting heritage and culture);
- To act as a conduit to community interest groups and others with various ideas for tourism development and enhancement; and
- To ensure that tourism based projects are front of mind when economic development opportunities and new investment is being considered for the LGA.

The structure and format of the TAG is explained further in Section 8 of this DMP.

7.3.2. Creation of a Signage Programme

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

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

We understand Council is currently mid-way through developing and implementing outdoor signage.

Consideration should be given to purchasing several touch screens so that they 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. They can also be used to provide community information updates.³⁶

FIGURE 16: BEST PRACTICE EXAMPLE – HIGH TECH OUTDOOR INFORMATION TOUCH SCREENS



7.3.3. Streetscaping of Gateways into the LGA

To provide a welcoming entrance into the Penrith LGA, there is a need to improve streetscaping at key entry points into the LGA through better landscaping of main roads where possible. Council needs to consider developing a landscaping strategy for its gateway points. This could

³⁶ Touch screens are currently being tested in Bundaberg (QLD) by the RTO as a joint initiative with Bundaberg Regional Council.

also include street side improvements (seating, signage etc.), street planting, as well as pathway upgrades in areas where greater pedestrianisation is possible.

7.3.4. Development of a Customer Service Program

Stakeholders indicated there is a need to improve customer service standards. Council could potentially access training initiatives and funding available via State Government or industry associations such as the NSW TIC.

Customer service training could extend to all forms of retailing, so the initiative could potentially be managed by the Chambers of Commerce.

7.3.5. Creation of an Investment Memorandum for Penrith

Tourism operators throughout Penrith indicated that there is currently a lack of understanding regarding Council's zoning requirements and there is a perception that Council is not yet sufficiently supportive of tourism (through the language used in its LEP and other strategic documents).

There is a need for Council, via the development of its updated LEP, to clearly indicate to industry and developers what tourism development it is more likely to be supportive of.

This could be supported via the development of an investment memorandum which indicates:

- The type of tourism development which Council would like to see within the LGA; and
- The areas throughout the LGA which are more suitable for the development of tourism facilities (accommodation, food and beverage, attractions, activities etc.) and more likely to get Council support.

This memorandum could be taken to industry to stimulate investment in Penrith, including investment by developers outside of the Penrith LGA and would help demonstrate that Council is pro-tourism and "open for business". Investors and developers require certainty and by indicating areas where tourism development may be viewed more positively, sends a positive signal by Council of what it is interested in seeing developed.

7.3.6. Development of a Roving Ambassador Program

The development of a roving volunteer ambassador program to promote the LGA could be particularly useful, especially given the recent closure of the Penrith VIC. Having this program will ensure that visitors are still able to get that face to face interaction (which some visitor's prefer). The roving ambassadors would not need to be available all year round, but rather, could be scheduled during periods of peak visitation such as during major events or holiday periods.

Importantly, the development of a roving ambassador program could work to encourage more semi-retired and retired locals who have a good understand of the Penrith LGA and its attributes to participate in such a program.

7.3.7. Link to Badgerys Creek Airport

The development of Badgerys Creek Airport in Liverpool LGA appears to now be supported by both Commonwealth and State Governments along with a number of Western Sydney LGAs (previously opposed to it). The strong employment growth and economic impacts expected are noted as major drivers to support industry and community development in Western Sydney.

Whilst the proposed airport site is most likely to be linked via rail (from the Sydney CBD and Kingsford Smith Airport) via an existing spur line from Glenfield to Leppington (and eventually extending on to the airport site), there is potential for a rail corridor linking west from the airport site to Penrith and looping back down to Parramatta. There are major urban release areas (Oran Park etc.) in south and north western Sydney which still have significant growth potential and which have are not yet well served by public transport.

The proposed airport is therefore likely to be a major economic catalyst to support not only air passenger needs but also the large industrial parks and warehousing which also continues to grow in Western Sydney.

Though the establishment of the airport may be in a 10-15 year time frame the opportunity exists now to plan for its establishment to capitalise on:

- Supporting infrastructure including highway upgrades and rail corridor connections to Penrith;
- Solid growth and expansion of industrial and business parks in Penrith LGA as export focussed businesses look for locations offering strategic connections and ease of access to the airport precinct via road and rail;
- Hotel and other commercial accommodation development to support new visitor routes out of Sydney towards the Blue Mountains and the Central Coast and further north which can easily bypass the Sydney CBD;
- Development of Penrith as a potential holiday and caravan park – recreational vehicle base for first or last night accommodation (or longer stays) and to service camper vans and other self-drive needs which the new airport will generate; and
- To offer a strong cluster of activity products which can be easily accessed from the airport as either same day activities or overnight (to appeal to an inbound market or even an outbound local and international market) experiences.

Whilst the airport precinct and the company charged with developing and managing the precinct will actively pursue a number of commercial and visitor related services, potential exists to link to the airport through offering tourism and related services if Penrith can establish itself as a strong hub for these in advance.

The introduction of a rail link from the airport site to Penrith and an improved road network will offer the chance for strong connectivity and reduced travel times. Penrith tourism product can then be readily available to support travellers using the airport. This could eventually include:

- Those wanting to try passive and active adventure and activity products;
- Promoting Penrith's water based future products which offer unique inland waterways which will be highly accessible;
- An accommodation hub with further hotels etc. as planned;
- The link to Panthers and the entertainment options available;
- The caravan and holiday park hub; and
- As the gateway to access the Blue Mountains and other areas to the north which are far more accessible via Penrith than via the Sydney CBD for example.

The advantage Penrith has is its ability to develop the facilities and infrastructure over the next 5-10 years to grow the various tourism products and build a strong visitor profile, prior to the airport being established. And noting that the airport is unlikely to be operational in the next 10 year period.

The potential may also exist beyond tourism, for Penrith to also become a major logistics hub for the airport through the expansion of its industrial land and business parks and the growth potential in these.

All of these opportunities to leverage off the creation of probably the most significant economic driver for Western Sydney over the next 30 years needs to be recognised in Council's LEP, DCP and other strategic and policy related planning documents. This is particularly important as major investors across many industry sectors are already starting to look for areas to expand into and which can offer relatively easy access to the proposed airport precinct for business, freight logistics, warehousing, export product production and tourism products and amenities to serve the domestic and international markets coming for leisure, business, meetings and conferences and events.

The lack of a designated tourism zone in greater Sydney provides the potential for Penrith (through its available land and existing facilities and amenities) to offer development potential for businesses to capitalise on the airports development prior to it becoming operational.

7.4. OPPORTUNITIES MATRIX

The following matrices provide a top line summary of each of the opportunities, including their priority, the visitor markets captured, possible location/sites to be considered, an estimation of the CAPEX required, the level of risk involved, potential time frames, the project type (commercial or public) as well as the lead stakeholder involved. It is important to note that the TAG (Tourism Advisory Group) is a Council and Industry driven group.

7.4.1. Investment and Development

Recommendation	Priority	Visitor Markets to Capture	Possible Location/Site	Est. CAPEX Requirement	Level of Risk	Time-frame	Commercial or Public Project	Lead Stakeholder	Link to Council's Core Strategic Documents
Development of New Hotel Accommodation	Medium	<ul style="list-style-type: none"> Domestic market Business market 	Close to Council	>\$30m+	Medium	2017 – 2020	Commercial	Economic Development Body/Council	<ul style="list-style-type: none"> Outcome 4 – “We Have Safe, Vibrant Places” Outcome 7 – “We Have Confidence In Our Council”
Expanded Activity at Penrith Lakes	Medium-High	<ul style="list-style-type: none"> Domestic Backpacker Schools Special interest 	Penrith Lakes	<\$2m	Low-Medium	2015 – 2018	Commercial and Govt.	State Govt, Council and TAG	<ul style="list-style-type: none"> Outcome 4 – “We Have Safe, Vibrant Places” Outcome 6 – “We’re Healthy And Share Strong Community Spirit”
Development of a Central Experience Hub	Medium-High	<ul style="list-style-type: none"> All visitors 	Close to Penrith Station	<\$2m	Low-Medium	2018 - 2022	Council and Industry Partners	Council and TAG	<ul style="list-style-type: none"> Outcome 4 – “We Have Safe, Vibrant Places” Outcome 6 – “We’re Healthy And Share Strong Community Spirit”
Creation of a Destination Caravan Park	Medium-High	<ul style="list-style-type: none"> Caravan & camping Family market 	Various	<\$12m	Low-Medium	2019 - 2023	Commercial	Commercial Developer with	<ul style="list-style-type: none"> Outcome 4 – “We Have Safe, Vibrant Places”

Recommendation	Priority	Visitor Markets to Capture	Possible Location/Site	Est. CAPEX Requirement	Level of Risk	Time-frame	Commercial or Public Project	Lead Stakeholder	Link to Council's Core Strategic Documents
								assistance from Economic Development Body/Council	<ul style="list-style-type: none"> Outcome 7 – “We Have Confidence In Our Council”
Development of a Major Caravan/Campervan Service Centre	Medium	<ul style="list-style-type: none"> Caravan & camping 	Various	<\$5m	Medium-High	2019 - 2023	Commercial	Commercial Developer with assistance from Economic Development Body/Council	<ul style="list-style-type: none"> Outcome 7 – “We Have Confidence In Our Council”

7.4.2. Marketing

Recommendation	Priority	Visitor Markets to Capture	Possible Location/Site	Est. CAPEX Requirement	Level of Risk	Time-frame	Commercial or Public Project	Lead Stakeholder	Link to Council's Core Strategic Documents
Development of a Tourism and Cultural Precincts	High	<ul style="list-style-type: none"> Domestic Backpacker Schools Special interest 	Penrith Lakes	>\$0.5m	Low-Medium	2015 – 2019	Commercial	Council, TAG and State Govt	<ul style="list-style-type: none"> Outcome 4 – “We Have Safe, Vibrant Places” Outcome 6 – “We’re Healthy And Share Strong Community Spirit” Outcome 7 – “We Have Confidence In Our Council”
Creation and Packaging of Semi and Active Product for Cruise Industry	Medium	<ul style="list-style-type: none"> Cruise visitors to Sydney (primarily international) 	Penrith Lakes	<\$200k	Medium	2018 – 2019	Industry	TAG with local operators and cruise	<ul style="list-style-type: none"> Outcome 6 – “We’re Healthy And Share Strong Community Spirit”

Recommendation	Priority	Visitor Markets to Capture	Possible Location/Site	Est. CAPEX Requirement	Level of Risk	Time-frame	Commercial or Public Project	Lead Stakeholder	Link to Council's Core Strategic Documents
		visitors)						operators	Spirit"
Development of a Website and Linked Mobile App (or mobile accessible website)	High	<ul style="list-style-type: none"> All visitors 	n/a	<\$75k	Low	2015 - 2016	Council	Council and TAG	<ul style="list-style-type: none"> Outcome 6 – "We're Healthy And Share Strong Community Spirit" Outcome 7 – "We Have Confidence In Our Council"
Creation of Tourism Product Packages	Medium	<ul style="list-style-type: none"> All visitors 	n/a	<\$20k	Low	2015 - 2016	Industry	TAG with local operators	<ul style="list-style-type: none"> Outcome 6 – "We're Healthy And Share Strong Community Spirit"
Development of an Events Calendar and Promotion Strategy	High	<ul style="list-style-type: none"> All visitors 	n/a	n/a	Low	2015 - 2016	Industry and Council	TAG	<ul style="list-style-type: none"> Outcome 4 – "We Have Safe, Vibrant Places" Outcome 6 – "We're Healthy And Share Strong Community Spirit"
Development of a Tourism Awareness Campaign	Medium	<ul style="list-style-type: none"> Local community 	n/a	n/a	Low	2015 - 2016 ongoing	Council	TAG	<ul style="list-style-type: none"> Outcome 6 – "We're Healthy And Share Strong Community Spirit" Outcome 7 – "We Have Confidence In Our Council"
Creation of a "Selling Penrith" Campaign	Medium-High	<ul style="list-style-type: none"> All visitors 	n/a	<\$65k	Low	2015 - 2016 ongoing	Industry and Council	TAG	<ul style="list-style-type: none"> Outcome 6 – "We're Healthy And Share Strong Community Spirit"

Recommendation	Priority	Visitor Markets to Capture	Possible Location/Site	Est. CAPEX Requirement	Level of Risk	Time-frame	Commercial or Public Project	Lead Stakeholder	Link to Council's Core Strategic Documents
Development of a Coordinated Cultural Tourism Support Program	Medium	<ul style="list-style-type: none"> Cultural visitors Family market Schools 	n/a	<\$200k (marketing) <\$500k (development)	Medium-High	2016 ongoing	Industry and Council	TAG and PP&VA ³⁷	<ul style="list-style-type: none"> Outcome 6 – “We’re Healthy And Share Strong Community Spirit”

7.4.3. Supporting Infrastructure and Coordination

Recommendation	Priority	Visitor Markets to Capture	Possible Location/Site	Est. CAPEX Requirement	Level of Risk	Time-frame	Commercial or Public Project	Lead Stakeholder	Link to Council's Core Strategic Documents
Establishment of a Tourism Advisory Group	High	<ul style="list-style-type: none"> All visitors 	Council	n/a	Low	2015/16	Partnership Council & Industry	Council	<ul style="list-style-type: none"> Outcome 7 – “We Have Confidence In Our Council”
Creation of a Signage Programme	Low-Medium	<ul style="list-style-type: none"> All visitors 	Gateway locations within the LGA	<\$200k	Low	2016 - 2020	Council and State Govt.	Council	<ul style="list-style-type: none"> Outcome 3 – “We Can Get Around The City”
Development of a Customer Service Program	Low-Medium	<ul style="list-style-type: none"> All visitors 	n/a	<\$10k	Low	2017 - 2021	Partnership Council & Industry	TAG/Chamber of Commerce	<ul style="list-style-type: none"> Outcome 6 – “We’re Healthy And Share Strong Community Spirit”
Streetscaping of Gateways into the LGA	Low	<ul style="list-style-type: none"> All visitors 	Gateway locations within the LGA	\$200k	Low	2017	Council	Council	<ul style="list-style-type: none"> Outcome 3 – “We Can Get Around The City” Outcome 5 – “We Care About Our Environment”

³⁷ Penrith Performing & Visual Arts

Recommendation	Priority	Visitor Markets to Capture	Possible Location/Site	Est. CAPEX Requirement	Level of Risk	Time-frame	Commercial or Public Project	Lead Stakeholder	Link to Council's Core Strategic Documents
Creation of an Investment Memorandum for Penrith	Medium	<ul style="list-style-type: none"> All visitors 	n/a	Various	Low-Medium	2016 – 2021 ongoing	Council & Chamber of Commerce	Council & Economic Development Body	<ul style="list-style-type: none"> Outcome 7 – “We Have Confidence In Our Council”
Development of a Roving Ambassador Program	Low	<ul style="list-style-type: none"> All visitors 	n/a	<\$10k	Low	2017 ongoing	Council	Council and TAG	<ul style="list-style-type: none"> Outcome 6 – “We’re Healthy And Share Strong Community Spirit”
Linking to planned Badgerys Creek Airport (Sydney’s 2nd major aviation gateway)	Low-medium	<ul style="list-style-type: none"> All visitors 	n/a	various	Low	2015-2030	Council & Economic Development Body	Council	<ul style="list-style-type: none"> Outcome 1 – “We Can Work Close To Home” Outcome 2 – “We Plan For Future Growth” Outcome 3 – “We Can Get Around The City”

7.5. THE IDENTIFIED ISSUES LINKED TO OPPORTUNITIES

The following table demonstrates how each of the opportunities identified links to the issues listed in Section 4.

TABLE 11: ISSUES LINKED TO OPPORTUNITIES

Issue	Opportunity
Lack of Accommodation	<ul style="list-style-type: none"> Development of New Hotel Accommodation Creation of a Destination Caravan Park Development of a Major Caravan/Campervan Service Centre Activity Tourism Precinct Expanded Activity at Penrith Lakes Creation and Packaging of Semi and Active Adventure Product for Cruise Industry Creation of Tourism Product Packages Creation of an Investment Memorandum for Penrith
Transport to Key Tourism Attractions within the LGA	<ul style="list-style-type: none"> Development of a Central Experience Hub Creation of a Signage Programme
Lack of Signage – Interpretive and Directional	<ul style="list-style-type: none"> Creation of a Signage Programme Establishment of a Tourism Advisory Group
Lack of Events and Festivals	<ul style="list-style-type: none"> Creation of Tourism Product Packages Development of an Events Calendar and Promotion Strategy Development of a Coordinated Cultural Tourism Support Program Establishment of a Tourism Advisory Group
Lack of Tourism/Destination Website	<ul style="list-style-type: none"> Development of a Website and Linked Mobile App (or mobile accessible website) Development of a Roving Ambassador Program
Inclusion within the “Greater Sydney Region”	<ul style="list-style-type: none"> Establishment of a Tourism Advisory Group Marketing partnerships with Blue Mountains and Hawkesbury LGAs Link to planned Badgerys Creek Airport
Lack of a Media Database	<ul style="list-style-type: none"> Development of a Website and Linked Mobile App (or mobile accessible website) Establishment of a Tourism Advisory Group
Lack of Understanding of the Importance of the Tourism Industry	<ul style="list-style-type: none"> Development of a Tourism Awareness Campaign Establishment of a Tourism Advisory Group
Market Perception	<ul style="list-style-type: none"> Creation of a “Selling Penrith” Campaign Development of a Tourism and Cultural Precincts Development of a Customer Service Program Streetscaping Gateways into the LGA Expanded Activity at Penrith Lakes Creation and Packaging of Semi and Active Product for Cruise Industry Creation of Tourism Product Packages

Issue	Opportunity
	<ul style="list-style-type: none"> Creation of an Investment Memorandum for Penrith Link to planned Badgerys Creek Airport to help raise the profile
Lack of Linkage with the Blue Mountains and Other Surrounding LGAs	<ul style="list-style-type: none"> Development of a Central Experience Hub Website and Linked Mobile App (or Mobile Accessible Website) Creation of Tourism Product Packages Establishment of a Tourism Advisory Group
Synergy between the CBD and River	<ul style="list-style-type: none"> Development of a Central Experience Hub Development of a Website and Linked Mobile App (or mobile accessible website) Creation of Tourism Product Packages
Retail Trading Hours	<ul style="list-style-type: none"> Development of a Tourism Awareness Campaign Development of a Customer Service Program Creation of a "Selling Penrith" Campaign Establishment of a Tourism Advisory Group
Lack of Planning Zones Designated for Tourism	<ul style="list-style-type: none"> Establishment of a Tourism Advisory Group Link to planned Badgerys Creek Airport to offer designated tourism zone
Link to Education Sector	<ul style="list-style-type: none"> Establishment of a Tourism Advisory Group
Lack of Linkage between Tourism and the Arts/Cultural Sector	<ul style="list-style-type: none"> Development of a Coordinated Cultural Tourism Support Program Development of a Central Experience Hub Development of a Website and Linked Mobile App (or mobile accessible website) Creation of Tourism Product Packages
Need for Penrith CBD Revitalisation	<ul style="list-style-type: none"> Development of a Central Experience Hub Establishment of a Tourism Advisory Group
Dominance of Penrith Panthers	<ul style="list-style-type: none"> Development of New Hotel Accommodation Development of a Tourism and Cultural Precincts
Lack of Activation of Natural Assets	<ul style="list-style-type: none"> Development of a Tourism and Cultural Precincts Development of New Hotel Accommodation Expanded Activity at Penrith Lakes Creation and Packaging of Semi and Active Product for Cruise Industry Development of a Central Experience Hub Creation of a Destination Caravan Park Development of a Major Caravan/Campervan Service Centre Establishment of a Tourism Advisory Group

7.6. VISITOR MARKETS TO CAPTURE

The following table provides an indication of target markets to focus on which correlate to the various opportunities identified.

7.6.1. Investment and Development

Recommendation	Target Audience
Development of New Hotel Accommodation	<ul style="list-style-type: none"> International visitors to Sydney using Penrith as a base for visits to attractions and also to the Blue Mountains Local, intra state and interstate special interest groups involved in sporting events etc. wanting overnight accommodation Greater Sydney and regional NSW (Orange, Bathurst, Mudgee) looking for new conference and function venues New accommodation to support the growing domestic leisure based adventure operator cluster
Expanded Activity at Penrith Lakes	<ul style="list-style-type: none"> Family market from Western Sydney International backpacker market looking for mountain biking, kayaking and other accessible pursuits Greater Sydney high schools market looking at water based activities particularly Domestic event attendees from greater Sydney and regional NSW with a focus on sports clubs, support groups, family members etc.
Development of a Central Experience Hub	<ul style="list-style-type: none"> International backpackers wanting to access ticket passes etc. which cannot be done online Domestic impulse visitors from greater Sydney Domestic leisure and special interest markets looking for more info and ideas travelling through the region
Creation of a Destination Caravan Park	<ul style="list-style-type: none"> Domestic interstate and intra state visitors looking for a base for exploring greater Sydney and an easier location for basing themselves at Caravan travellers – domestic grey nomads and family market International camper van market users
Development of a Major Caravan/Campervan Service Centre	<ul style="list-style-type: none"> Caravan travellers – domestic grey nomads and family market International camper van market users

7.6.2. Marketing

Recommendation	Target Audience
Development of Tourism and Cultural Precincts	<ul style="list-style-type: none"> Greater Sydney day tripper leisure market Western Sydney family market Orange, Bathurst, Mudgee, Central Coast day tripper and overnight leisure market Domestic special interest and event markets for cultural and sporting activities and from a greater Sydney and Orange, Bathurst, Mudgee, Central Coast
Creation and Packaging of Semi and Active Product for Cruise Industry	<ul style="list-style-type: none"> International cruise day visitors for half day excursions
Development of a Website and Linked Mobile App (or mobile accessible website)	<ul style="list-style-type: none"> International backpackers and activity seekers All Domestic markets Cruise ship day visitors
Creation of Tourism Product Packages	<ul style="list-style-type: none"> International backpackers and activity seekers All Domestic markets Cruise ship day visitors Youth market (schools and special interest) Greater Sydney cultural seekers and sports event attendees and supporters
Development of an Events Calendar and Promotion Strategy	<ul style="list-style-type: none"> International backpackers and activity seekers All Domestic markets Cruise ship day visitors Youth market (schools and special interest) Greater Sydney cultural seekers and sports event attendees and supporters
Development of a Tourism Awareness Campaign	<ul style="list-style-type: none"> Penrith residents Wider western Sydney catchment of day visitors as a flow over
Creation of a “Selling Penrith” Campaign	<ul style="list-style-type: none"> International backpackers and activity seekers All Domestic markets Cruise ship day visitors Youth market (schools and special interest) Greater Sydney cultural seekers and sports event attendees and supporters
Development of a Coordinated Cultural Tourism Support Program	<ul style="list-style-type: none"> International cultural seekers Greater Sydney and regional NSW high schools market Cruise ship day visitors Youth market (schools and special interest) Greater Sydney cultural seekers event attendees

7.6.3. Supporting Infrastructure and Coordination

Recommendation	Target Audience
Establishment of a Tourism Advisory Group	<ul style="list-style-type: none"> Local Penrith residents Tourism operators in the LGA Wider tourism activity operators with interest in establishing in Penrith
Creation of a Signage Programme	<ul style="list-style-type: none"> All visitors
Development of a Customer Service Program	<ul style="list-style-type: none"> All visitors Local residents
Streetscaping of Gateways into the LGA	<ul style="list-style-type: none"> All visitors
Creation of an Investment Memorandum for Penrith	<ul style="list-style-type: none"> Investment community locally, regionally Investment community in special interest niche areas focussed on in this DMP Key State and Commonwealth Government agencies WSROC and other economic development agencies
Development of a Roving Ambassador Program	<ul style="list-style-type: none"> All visitors Specific event attendees
Linking to planned Badgerys Creek Airport (Sydney's 2nd major aviation gateway)	<ul style="list-style-type: none"> All inbound visitors All outbound domestic and international visitors All interstate visitors All intra state visitors



8. An LTO for Penrith

8. An LTO for Penrith

8.1. THE CHALLENGE FOR PENRITH

One of the challenges which the tourism sector in Penrith faces is the ability to create a unified voice for lobbying Council and State Government for various forms of support.

An option considered by Council was the encouragement of industry to create a local tourism organisation (LTO) or tourism committee. The purpose of a LTO would be to:

- Act as the voice of the tourism industry operators within Penrith;
- Provide a forum for industry to discuss and debate issues and options;
- To meet regularly with DNSW to garner support for various marketing and promotional initiatives particularly; and
- To lobby Council generally for support for various tourism related infrastructure and development projects.

8.2. REQUIREMENTS FOR AN INDUSTRY OPERATED LTO

There are a number of criteria to be satisfied before a viable LTO is able to be created. That criteria includes:

- The ability of tourism industry stakeholders and operators within the LGA to form a peak body which is widely supported by industry (there is little point if many won't join an LTO);
- To ensure that the LTO is representative of industry and covers all aspects of tourism including retail;
- To ensure that it receives Council recognition and support;
- To ensure that it is able to operate as an independent body rather than as an arm of Council;
- That it is able to raise membership fees or other income to pay for some of its operating costs, with the balance potentially funded by local chambers of commerce and/or Council;
- That it is legally constituted as an incorporated society or other form of legal entity so that it is formally structured rather than ad hoc; and
- That it is truly representative of the various areas within Penrith.

Generally in destinations, the creation of a LTO is often part of an evolutionary process in the maturing of tourism. It requires commonality and agreement of purpose amongst competing operators and areas to recognise that their ability to lobby and leverage support from

government at various levels is dependent on playing as a “team”. It is also highly dependent on an agreed common purpose and outcome being achieved.

8.3. FORMING AN LTO IN PENRITH

Currently within Penrith, it would appear that there are different and divergent views at times between industry requirements and desires. Whilst there is likely to be agreement on some issues, it is considered too early to determine that a common single LTO could be formed to represent the views, aspirations and outcomes required by industry throughout the LGA.

8.4. THE SUGGESTED WAY FORWARD

As such, forming an industry operated LTO is currently considered premature. For the interim, and to be representative of the various tourism stakeholder groups throughout the Penrith LGA, it is therefore suggested that:

- Council establish a Tourism Advisory Group (TAG) to work alongside Council and to assist in rolling out selected DMP initiatives, where industry input is essential;
- The TAG needs to be representative of industry. To ensure this, and to guarantee a good composition of skills, Council should advertise for the positions via an expression of interest, requesting CVs from interested parties. Importantly though, the Chair of the TAG should be an industry stakeholder rather than from Council;
- The composition of the TAG could include stakeholders from the:
 - Accommodation sector;
 - Cultural and heritage sector;
 - Adventure tourism operators;
 - Events sector;
 - Penrith Lakes;
 - A representative from either the Chamber of Commerce or PBA; and
 - A representative from the investment and development community.
- For specific projects, there should be the ability to second others if specialised skills or knowledge is needed (such as IT expertise);
- The TAG should comprise 7 – 9 members, in addition to 2 - 3 Council personnel covering marketing and development and should meet 6-7 times per year;
- Each non-Council member should have a maximum serving term of 2 – 3 years to ensure continuity is achieved and other tourism industry stakeholders are given the chance to be on the TAG;
- Council should provide a secretariat and facilitate all TAG meetings;

- The TAG should liaise with Hawkesbury and Blue Mountains to find synergy for joint promotions etc;
- The TAG should have the ability to input into the new digital platform and website being developed by Council, but importantly, they should not control it; and
- To ensure the TAG is communicating with the tourism industry generally, there is a need for a quarterly industry update to be released on progress and outcomes. In addition, there should be at least 2 industry forums per annum to share ideas and gather feedback.

As Council has indicated its interest in playing a more significant role as an enabler of tourism throughout the LGA, the formation of a TAG (which comprises both Council and industry stakeholders) offers an appropriate interim step until such time in the future that a strong and vibrant LTO is able to be created for the Penrith LGA.



9. Economic Outcomes

9. Economic Outcomes

9.1. ASSESSMENT OF NET ECONOMIC BENEFIT³⁸

9.1.1. Overview

This section identifies the likely quantitative and qualitative benefits that could be generated as a result of the implementation of this DMP and the opportunities identified within it.

Currently, the tourism sector in the Penrith LGA accounts for just over 2,800 jobs, or 4% of total employment, slightly less than the comparable statistic for the whole of NSW (5.7%). Annual output from the sector is estimated at nearly \$410m and annual value added is estimated at \$184m. Value added is annual output less the cost of creating the output so it is net of all costs.

Table 12 below provides an overview of the net economic benefit of tourism in Penrith over the period 2008 – 2013.

TABLE 12: OVERVIEW OF NET ECONOMIC BENEFITS OF TOURISM IN THE PENRITH LGA

Penrith	2008/09		2009/10		2010/11		2011/12		2012/13	
Measure	Penrith	% of total industry	Penrith	% of total industry	Penrith	% of total industry	Penrith	% of total industry	Penrith	% of total industry
Employment (total)										
Direct	1,144	1.7	1,408	2.0	1,497	2.1	1,686	2.4	1,959	2.8
Indirect	496	0.7	611	0.9	649	0.9	731	1.0	850	1.2
Total Employment	1,640	2.4	2,018	2.9	2,146	3.1	2,418	3.4	2,809	4.0
Employment (FTE)										
Direct	764	1.4	879	1.6	963	1.7	1,100	1.9	1,297	2.2
Indirect	495	0.9	570	1.0	625	1.1	714	1.2	841	1.4
Total	1,259	2.2	1,449	2.6	1,587	2.8	1,814	3.1	2,138	3.6
Output/Sales (\$m)										
Direct	\$120.8m	1.0	\$140.2m	1.1	\$152.8m	1.2	\$175.2m	1.3	\$209.3m	1.5
Indirect	\$115.8m	0.9	\$134.4m	1.0	\$146.5m	1.1	\$167.9m	1.2	\$200.7m	1.4
Total	\$236.7m	1.9	\$274.6m	2.1	\$299.2m	2.3	\$343.1m	2.5	\$410.0m	3.0
Value added (\$m)										
Direct	\$54.6m	1.0	\$66.5m	1.1	\$74.3m	1.2	\$84.3m	1.4	\$98.8m	1.6
Indirect	\$46.8m	0.8	\$57.0m	1.0	\$63.8m	1.1	\$72.4m	1.2	\$84.8m	1.4
Total	\$101.4m	1.8	\$123.5m	2.1	\$138.1m	2.3	\$156.7m	2.5	\$183.6m	3.0

³⁸ <http://economy.id.com.au/penrith/tourism-value>

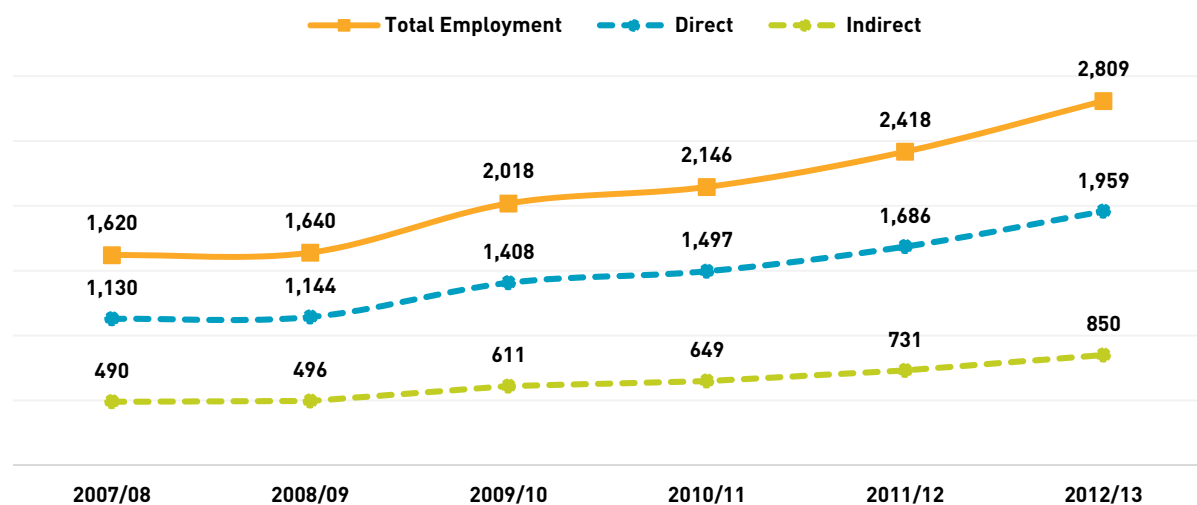
9.1.2. Employment

Tourism related employment accounts for 4% of total employment in the Penrith LGA, generating 2,809 direct³⁹ and indirect⁴⁰ jobs in the 2013 FY. Figure 9 illustrates tourism-related employment in the Penrith LGA over the period 2008 – 2013.

Over this period, direct and indirect tourism employment grew by 73%, increasing from 1,620 jobs to 2,809 jobs. Direct tourism employment, comprising those jobs directly associated with the tourism and hospitality industry, grew by 829 jobs (73%). The balance of indirect jobs reflects employment in secondary areas created through the supply of goods and services.

It is important to note that whilst this percentage would appear low (as a percentage of total employment by industry sector) it is the potential for growth which should be focused on. For example, introduction of a new major branded hotel and alternative conference venue could potentially increase tourism related employment by 30 - 40%.

FIGURE 17: EMPLOYMENT GENERATED VIA THE TOURISM INDUSTRY⁴¹



What these figures illustrate is the strong growth in jobs from a relatively low base. Tourism has the potential to significantly grow its importance in the local economy and importantly, act as a catalyst sector to stimulate employment for both younger people (which will encourage more of

³⁹ Direct employment is people who are directly employed in tourism and hospitality related jobs within the area.

⁴⁰ Indirect employment is people who are employed as a result of the flow-on effects of employment in tourism and hospitality to other related intermediate industries, as well as the increase in local consumption created by the wages and salaries of tourism and hospitality workers, which in turn creates additional employment.

⁴¹ Value of Tourism and Hospitality, Economy ID (National Economics (NIEIR) - Modelled series)

them to stay in the LGA and others to relocate to the LGA) and mature aged people who will find casual, part time and potential full time employment options which the LGA will benefit from.

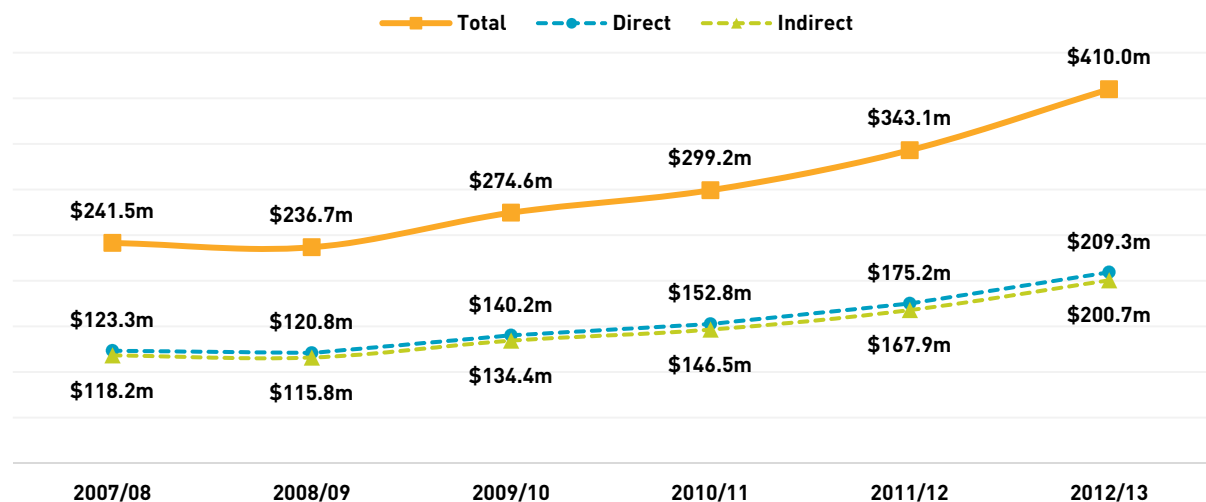
9.1.3. Output/Sales

Total output/sales is the total gross value of sales generated by the tourism industry in the Penrith LGA and comprises the sum of local sales as well as international and domestic exports.

Figure 18 below illustrates total tourism industry output over the period 2008 – 2013. Over the 6 year period, total tourism industry output grew by 70% (168.5m), increasing from \$241.5m in 2008 to \$410m in 2013. This growth was fairly evenly split between growth in direct output/sales (\$86m growth) and indirect output/sales (\$82.5m growth).

These figures reflect the contribution of gross sales to local GDP.

FIGURE 18: TOURISM INDUSTRY OUTPUT/SALES⁴²



9.1.4. Visitor Spend

The following table provides an overview of visitor spend in Penrith over the 2011 financial year, based on Destination NSW's most recent data. While international visitors had the greatest spend per trip (\$2,101), domestic overnight visitor's yield the greatest spend on a per night basis (\$226 per night). Domestic day trippers contribute the smallest amount at just \$88 per trip. This demonstrates the importance of the domestic overnight visitor market to Penrith and the need to focus on initiatives which may assist in converting domestic day trippers to domestic overnight visitors.

⁴² Value of Tourism and Hospitality, Economy ID [National Economics (NIEIR) - Modelled series]

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

TABLE 13: VISITOR SPEND BREAKDOWN (2011 DATA)⁴³

Visitor Segment	Total	Per Visitor	Per night
Domestic Day Visitors	\$88.0m	\$88	n/a
Domestic Overnight Visitors	\$109.0m	\$636	\$226
International Visitors	\$34.0m	\$2,101	\$105

9.2. GROWTH IN THE NET ECONOMIC BENEFIT

9.2.1. Visitor Forecast Scenarios

To estimate the growth in the net economic benefit of growing the Penrith tourism sector, a series of visitor growth forecasts have been developed.⁴⁴ These forecasts range from a low growth scenario to a stretch scenario. The table on the following page illustrates these growth scenarios over a 10 year period.

Key points to note include:

- Under the low growth scenario, visitation, over the 10 year period, grows from 1.3m to 1.96m, a total growth of 659k visitors (or a 51% increase). This level of growth reflects natural growth in visitation to Penrith, with little-to-no new product development;
- Under the medium growth scenario, visitation grows by 78%, increasing from 1.3m to 2.33m visitors. The majority of growth under this scenario originates from domestic day trip visitors, growing from 1m to 2.4m. To achieve this level of growth, it is assumed that it would necessitate expansion by major existing tourism operators (such as Panthers) in the Penrith LGA;
- Under the high growth scenario, visitation more than doubles, increasing from 1.3m to 2.94m, a total growth in 1.64m visitors. This growth has been based on the introduction of approximately 10-15 new tourism operators (attractors, accommodation, tours, events etc.) in Penrith; and
- Under the stretch scenario, visitation grows from 1.3m to over 3.51m. The growth estimated under this scenario is based on the addition of 15 – 30 new tourism operators (attractors, accommodation, tours, events etc.) in Penrith to facilitate and accommodate for this growth.

⁴³ Travel to Penrith Local Government Area – Four Year Average Annual to September 2011

⁴⁴ At the time of this writing, no existing visitor forecasts for the Penrith region were available.

TABLE 14: VISITOR GROWTH FORECASTS FOR PENRITH LGA

Low Growth	2014	AAGR ⁴⁵	2015	2016	2017	2018	2019	2020	2021	2022	2023	Growth 2014 - 2023	% Growth 2014 - 2023
International Visitors	18.5k	7%	19.8k	21.2k	22.6k	24.2k	25.9k	27.7k	29.7k	31.8k	34.0k	15.5k	84%
Domestic Overnight Visitors	265.0k	3%	273.0k	281.1k	289.6k	298.3k	307.2k	316.4k	325.9k	335.7k	345.8k	80.8k	30%
Domestic Daytrip Visitors	1.0m	5%	1.1m	1.1m	1.2m	1.2m	1.3m	1.4m	1.4m	1.5m	1.6m	562.4k	55%
Total	1.30m	-	1.36m	1.43m	1.49m	1.56m	1.63m	1.71m	1.79m	1.87m	1.96m	658.62k	51%

Medium Growth	2014	AAGR	2015	2016	2017	2018	2019	2020	2021	2022	2023	Growth 2014 - 2023	% Growth 2014 - 2023
International Visitors	18.5k	9%	20.1k	22.0k	23.9k	26.1k	28.4k	31.0k	33.8k	36.8k	40.1k	21.7k	117%
Domestic Overnight Visitors	265.0k	5%	278.3k	292.2k	306.8k	322.1k	338.2k	355.1k	372.9k	391.5k	411.1k	146.1k	55%
Domestic Daytrip Visitors	1.0m	7%	1.1m	1.2m	1.2m	1.3m	1.4m	1.5m	1.6m	1.8m	1.9m	855.2k	84%
Total	1.30m	-	1.39m	1.48m	1.58m	1.69m	1.80m	1.92m	2.04m	2.18m	2.33m	1.02m	78%

High Growth	2014	AAGR	2015	2016	2017	2018	2019	2020	2021	2022	2023	Growth 2014 - 2023	% Growth 2014 - 2023
International Visitors	18.5k	12%	20.7k	23.2k	26.0k	29.1k	32.6k	36.5k	40.9k	45.8k	51.3k	32.8k	177%
Domestic Overnight Visitors	265.0k	7%	283.6k	303.4k	324.6k	347.4k	371.7k	397.7k	425.5k	455.3k	487.2k	222.2k	84%
Domestic Daytrip Visitors	1.0m	10%	1.1m	1.2m	1.4m	1.5m	1.6m	1.8m	2.0m	2.2m	2.4m	1.4m	136%
Total	1.30m	-	1.43m	1.56m	1.71m	1.87m	2.05m	2.24m	2.45m	2.69m	2.94m	1.64m	126%

Stretch Growth	2014	AAGR	2015	2016	2017	2018	2019	2020	2021	2022	2023	Growth 2014 - 2023	% Growth 2014 - 2023
International Visitors	18.5k	14%	21.1k	24.0k	27.4k	31.2k	35.6k	40.6k	46.3k	52.7k	60.1k	41.6k	225%
Domestic Overnight Visitors	265.0k	10%	291.5k	320.7k	352.7k	388.0k	426.8k	469.5k	516.4k	568.1k	624.9k	359.9k	136%
Domestic Daytrip Visitors	1.0m	12%	1.1m	1.3m	1.4m	1.6m	1.8m	2.0m	2.3m	2.5m	2.8m	1.8m	177%
Total	1.30m	-	1.45m	1.62m	1.81m	2.02m	2.26m	2.52m	2.82m	3.15m	3.51m	2.21m	170%

⁴⁵ AAGR: Average Annual Growth Rate

9.2.2. Growth in Visitor Spend

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

Points to note include:

- Under the low growth scenario, spend increases from \$231m in 2011 to just under \$431m, a total growth of 86%;
- Under the medium growth scenario, visitor spend more than doubles, growing from \$231m to just under \$511m;
- Under the high growth scenario, visitor spend increases by \$398.2m, increasing from \$231m to just over \$629m; and
- Under the stretch scenario, visitor spend more than doubles, growing from \$231m to \$772.6m.

Importantly, these forecasts in visitor spend should be considered conservative as they make no provision for increases in average visitor spend per person. The introduction of new overnight accommodation facilities would result in higher visitor expenditure associated with spend on consumables, accommodation, food and beverage and other goods and services.

TABLE 15: TOTAL VISITOR SPEND FORECASTS

Low Growth	2011 Spend Per Visitor ⁴⁶	2011 Total Spend	2015	2016	2017	2018	2019	2020	2021	2022	2023	Growth 2014 - 2023	% Growth 2014 - 2023
International Visitors	\$2,101	\$34.0m	\$41.6m	\$44.5m	\$47.6m	\$50.9m	\$54.5m	\$58.3m	\$62.4m	\$66.7m	\$71.4m	\$37.4m	110%
Domestic Overnight Visitors	\$636	\$109.0m	\$173.6m	\$178.8m	\$184.2m	\$189.7m	\$195.4m	\$201.2m	\$207.3m	\$213.5m	\$219.9m	\$219.9m	202%
Domestic Daytrip Visitors	\$88	\$88.0m	\$94.2m	\$99.0m	\$103.9m	\$109.1m	\$114.6m	\$120.3m	\$126.3m	\$132.6m	\$139.2m	\$139.2m	158%
Total Spend	-	\$231.0m	\$309.4m	\$322.2m	\$335.7m	\$349.7m	\$364.4m	\$379.8m	\$396.0m	\$412.9m	\$430.6m	\$199.6m	86%

Medium Growth	2011 Spend Per Visitor	2011 Total Spend	2015	2016	2017	2018	2019	2020	2021	2022	2023	Growth 2014 - 2023	% Growth 2014 - 2023
International Visitors	\$2,101	\$34.0m	\$42.3m	\$46.1m	\$50.3m	\$54.8m	\$59.8m	\$65.1m	\$71.0m	\$77.4m	\$84.4m	\$50.4m	148%
Domestic Overnight Visitors	\$636	\$109.0m	\$177.0m	\$185.8m	\$195.1m	\$204.9m	\$215.1m	\$225.9m	\$237.2m	\$249.0m	\$261.5m	\$261.5m	240%
Domestic Daytrip Visitors	\$88	\$88.0m	\$96.0m	\$102.8m	\$110.0m	\$117.7m	\$125.9m	\$134.7m	\$144.1m	\$154.2m	\$165.0m	\$165.0m	188%
Total Spend	-	\$231.0m	\$315.3m	\$334.7m	\$355.4m	\$377.3m	\$400.8m	\$425.7m	\$452.3m	\$480.6m	\$510.8m	\$279.8m	121%

High Growth	2011 Spend Per Visitor	2011 Total Spend	2015	2016	2017	2018	2019	2020	2021	2022	2023	Growth 2014 - 2023	% Growth 2014 - 2023
International Visitors	\$2,101	\$34.0m	\$43.5m	\$48.7m	\$54.6m	\$61.1m	\$68.4m	\$76.7m	\$85.9m	\$96.2m	\$107.7m	\$73.7m	217%
Domestic Overnight Visitors	\$636	\$109.0m	\$180.3m	\$193.0m	\$206.5m	\$220.9m	\$236.4m	\$252.9m	\$270.6m	\$289.6m	\$309.9m	\$309.9m	284%
Domestic Daytrip Visitors	\$88	\$88.0m	\$98.7m	\$108.6m	\$119.5m	\$131.4m	\$144.6m	\$159.0m	\$174.9m	\$192.4m	\$211.6m	\$211.6m	241%
Total Spend	-	\$231.0m	\$322.6m	\$350.3m	\$380.5m	\$413.5m	\$449.4m	\$488.6m	\$531.4m	\$578.2m	\$629.2m	\$398.2m	172%

Stretch Growth	2011 Spend Per Visitor	2011 Total Spend	2015	2016	2017	2018	2019	2020	2021	2022	2023	Growth 2014 - 2023	% Growth 2014 - 2023
International Visitors	\$2,101	\$34.0m	\$44.3m	\$50.5m	\$57.5m	\$65.6m	\$74.8m	\$85.3m	\$97.2m	\$110.8m	\$126.3m	\$92.3m	271%
Domestic Overnight Visitors	\$636	\$109.0m	\$185.4m	\$203.9m	\$224.3m	\$246.8m	\$271.4m	\$298.6m	\$328.4m	\$361.3m	\$397.4m	\$397.4m	365%
Domestic Daytrip Visitors	\$88	\$88.0m	\$100.5m	\$112.6m	\$126.1m	\$141.2m	\$158.2m	\$177.2m	\$198.4m	\$222.2m	\$248.9m	\$248.9m	283%
Total Spend	-	\$231.0m	\$330.2m	\$367.0m	\$408.0m	\$453.6m	\$504.4m	\$561.0m	\$624.1m	\$694.3m	\$772.6m	\$541.6m	234%

⁴⁶ For this assessment, the visitor spend utilised for years 2015 – 2023 is based on 2011 spend (the most recent DNSW spend estimates for the Penrith region). This should be considered highly conservative because one should anticipate that the average daily spend should increase as more product comes online. However, as it is not possible to predict what product will occur and when, it has been decided not to increase the average expenditure per visitor because of the risk of inaccuracy.

9.3. TOURISM MULTIPLIERS

In addition to the direct expenditure from visitors, there are associated visitor expenditure multiplier effects into the local economy. These flow-on effects have been expressed as a tourism output multiplier of 0.92⁴⁷, being that for every dollar spent by visitors in Penrith, the broader local economy is estimated to benefit a further \$0.92. These flow-on benefits go beyond traditional sectors associated with the tourism industry, to include sectors such as administration and wholesale trade, thus demonstrating the interconnectedness of tourism to other parts of the economy.

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

Key points to note include:

- Applying the tourism multiplier to the total spend by visitors to Penrith of \$231m (in 2011), produces an estimated \$213m as additional annual spend in the local economy;
- Under the low visitor forecast scenario it has been estimated that cumulative visitor spend will total \$3.3b over the 10 year period assessed (2015 – 2023). Applying the tourism multiplier to this visitor spend figure produces an estimated additional \$3.04b spend in the local economy;
- Visitor spend under the medium growth scenario totals \$3.65b over the 10 year period 2015 – 2023, with a multiplier effect of \$3.36b;
- Under the high visitor growth scenario, visitor spend is estimated to total \$4.14b. Applying the multiplier to this spend figure results in an estimated additional \$3.81b being spent in the local economy over the 10 year period assessed; and
- The stretch scenario yields total estimated visitor spend of \$4.72b over the 10 year period assessed. Applying the tourism multiplier to this spend results in an additional \$4.34b spend in the local economy.

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

TABLE 16: TOURISM MULTIPLIER EFFECTS

Low Growth	2011 Total Spend	2015	2016	2017	2018	2019	2020	2021	2022	2023	Total (2015 – 2023)
Total Visitor Spend	\$231.0m	\$309.4m	\$322.2m	\$335.7m	\$349.7m	\$364.4m	\$379.8m	\$396.0m	\$412.9m	\$430.6m	\$3.30b
Multiplier Effect	\$212.5m	\$284.6m	\$296.5m	\$308.8m	\$321.7m	\$335.3m	\$349.4m	\$364.3m	\$379.8m	\$396.1m	\$3.04b

Medium Growth	2011 Total Spend	2015	2016	2017	2018	2019	2020	2021	2022	2023	Total (2015 – 2023)
Total Visitor Spend	\$231.0m	\$315.3m	\$334.7m	\$355.4m	\$377.3m	\$400.8m	\$425.7m	\$452.3m	\$480.6m	\$510.8m	\$3.65b
Multiplier Effect	\$212.5m	\$290.1m	\$307.9m	\$326.9m	\$347.2m	\$368.7m	\$391.6m	\$416.1m	\$442.2m	\$470.0m	\$3.36b

High Growth	2011 Total Spend	2015	2016	2017	2018	2019	2020	2021	2022	2023	Total (2015 – 2023)
Total Visitor Spend	\$231.0m	\$322.6m	\$350.3m	\$380.5m	\$413.5m	\$449.4m	\$488.6m	\$531.4m	\$578.2m	\$629.2m	\$4.14b
Multiplier Effect	\$212.5m	\$296.8m	\$322.3m	\$350.1m	\$380.4m	\$413.4m	\$449.5m	\$488.9m	\$531.9m	\$578.9m	\$3.81b

Stretch Growth	2011 Total Spend	2015	2016	2017	2018	2019	2020	2021	2022	2023	Total (2015 – 2023)
Total Visitor Spend	\$231.0m	\$330.2m	\$367.0m	\$408.0m	\$453.6m	\$504.4m	\$561.0m	\$624.1m	\$694.3m	\$772.6m	\$4.72b
Multiplier Effect	\$212.5m	\$303.8m	\$337.6m	\$375.3m	\$417.3m	\$464.1m	\$516.1m	\$574.1m	\$638.8m	\$710.8m	\$4.34b



10. Supporting Documentation

10. Supporting Documentation

SUPPORTING DOCUMENTATION 1: LIST OF STAKEHOLDERS CONSULTED

Stakeholders consulted with prior to the submission of this DMP include:

- Barbara Magee, PCC Corporate Communications and Marketing Manager
- Stacey Rossetto, PCC City Marketing Officer
- Jane Ewings, PCC Communications Officer
- CR Ross Fowler, PCC Mayor
- Shelley Lee, PCC Events Development Officer
- Alan Stoneham, PCC General Manager
- Barry Husking, PCC Assistant General Manager (Chief Financial Officer)
- Craig Butler, PCC Assistant General Manager
- Dean Goddard, NSW Business Chamber (Tourism Industry Division)
- Daniel Myles, CEO Blue Mountains Tourism
- Jack Hodge, Penrith Whitewater Stadium General Manager
- Simonetta Lo Po', Penrith Whitewater Stadium Marketing Officer
- Fiona Mann, Hawkesbury City Council Strategic Activities – Planner & Projects
- Belinda Mitrovich, Hawkesbury Visitor Information Centre Coordinator
- Hania Radvan, Penrith Performing & Visual Arts (The Joan Sutherland Performing Arts Centre) Chief Executive Officer
- Dr Lee-Anne Hall, Penrith Regional Gallery & Lewers Bequest Director
- Becca O'Prey, iFLY Downunder Sales and Marketing Manager
- Brett Sheridan, iFLY Downunder Chief Marketing Officer
- Karina Wally, 737 Jet Owner
- Steve Knockswell, 737 Jet Owner
- Kylie Bouwmeester and Tor, Cables Wake Park
- Beth Moore, Nepean District Historical Society (Arms of Australia Inn Museum) Secretary
- Rosemary Weaver, Nepean District Historical Society (Arms of Australia Inn Museum) Senior Vice President/Promotions Officer
- Mark White, Museum of Fire Executive Chairman
- Kellie Stapleton, Mercure Hotel (previously Chifley Hotel) Manager
- Kevin Flynn, Regatta Centre

- Gai Hawthorn, Penrith CBD Corp
- Paulette Adams, St Marys Town Centre Corporation
- Andrew Putt, Penrith Lakes
- Sasha Vukmirica, Luddenham Raceway
- Bijai, Penrith Business Alliance
- Warren Wilson and Anthony Frantzis, Penrith Panthers

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